

# Instructions for Completing the Online Survey

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If you have any question about anything in this document please contact Tina Ricketts, Associate Director and Resource Database Manager at [tina.ricketts@211nh.org](mailto:tina.ricketts@211nh.org) or 603.621.6892

The terms that we use to categorize the services that are listed in our database are collectively referred to as taxonomy and are nationally utilized. What is a Food Pantry in New Hampshire is a Food Bank in Florida, a Food Shelf in Texas, and a Food Closet in California. This is the reason for having a standardized taxonomy and why some terms may not be completely intuitive to a New Hampshire user. Not to fear though, 211NH staff are trained and certified in the use of the taxonomy and our database and can easily and quickly retrieve the necessary information for our callers. Furthermore, it is important to remember that 211NH is a phone service first and foremost.

We are definitely making a move to reduce the number of terms that are currently in use and if there is 1 term that encompasses the services of 6 then we will use the 1 term. Also of note, some organizations and services are so well known they have their own terms within the taxonomy. For example, hospitals and libraries. Everyone knows you can go to a library for books, to use the internet, and community classes. Hospitals are where you go for general surgery, x-rays, and for childbirth. Therefore, we will not list each service these institutions provide rather we will use the terms Public Libraries and Hospitals. Services outside of the norm offered at those locations will be listed. If a college runs a food pantry, for example, that would be listed.

**Definitions:** For purposes of this document the following definitions will apply.

- **Agency:** Organization providing direct services to the public. If an agency has more than one location, the Agency is the main branch or the administrative offices.
- **Site:** Branches, service locations, district offices etc.
- **Program:** The collection of services offered by the agency to the public
- **Services:** The individual needs of a person that an agency can assist with
  - Ex. DHHS is the Agency. Manchester District Office is the Site, Family Assistance Program is the Program, and TANF is the Service.
- **Service Terms:** The terms that are contained in the LA County Taxonomy to which 211NH subscribes.
- **Service Groups:** These are the titles that you see on the Section 3 title bars if there is no program name. They are used primarily for our reporting purposes.

## Survey Instructions:

Enter Username and Password:

- The best way to obtain the username and password is to contact Resource Database Manager Tina Ricketts at [tina.ricketts@211nh.org](mailto:tina.ricketts@211nh.org).

- The username will always be UWNH followed by your unique agency ID number. Ex. UWNH5555. While the username is not case-sensitive, it is sensitive to spacing; therefore no space should be entered between the letters and numbers.
- The password will be either the numbers that follow UWNH or occasionally, as is the case with a large agency with many sites, the letter S followed by a number. Ex. S3  
There is no rhyme or reason to the order of sites within an agency so it's best to simply ask for the appropriate password.

Once you have entered the username and password, the system will ask for contact information. This information will only be used to keep record of who completes the survey strictly for documentation purposes and will not be shared with the public. The required information is name, title, phone number and email address.

If your agency has more than one site, you will see a drop down bar with each site listed. Note: There is a future enhancement in the functionality of this survey that will allow programs and services to be updated across all sites at once rather than individually, but until that feature is implemented each site must be updated one-by-one. Ex. Let's say that the qualifications for food stamps have changed. Currently, a DHHS representative would have to go to each of the 13 district office sites and change the qualifications. However, we are pretty flexible and if you would like to just update one of the sites and send an email to Tina stating that the changes are agency-wide and she'll make the corrections easily enough thereby saving everyone time and effort.

In addition, currently there is no way to indicate on the survey that an agency has opened a new site. To compensate for this we have created a form which is located on our website ([www.211nh.org](http://www.211nh.org)) under the Agency Tools section. It is the form listed as Site Information.

## Buttons and Check Boxes

For each line item you will notice an "Edit" button. Click the "Edit" button and a window will pop up that will allow you to enter only the information that has changed. It is not necessary to enter information that will remain the same. Once the changes have been entered click the "Save" button. If the information is incorrect and there is nothing to replace it with simply click the "Delete" button.

There are check boxes available at the top of Section 1 and each of the program tabs that will allow you to indicate if an agency/program is closed whether it is permanently or temporarily. This can be important for seasonal programs like Christmas Baskets where the sign up deadline has passed.

## Section 1: Location

- **Agency Status:** There are check boxes available to indicate whether or not an agency has closed permanently or temporarily.
- **Agency Name:** The popup window contains 2 boxes in which to enter the name and location of the agency. The name should be the legal name of the organization and the location is strictly for agencies with multiple sites. Ex. Agency- Department of Health and Human Services; Location – Manchester. Entering the location is not necessary for those agencies with only one site.
- **Address:** This first address is the physical location where services are delivered and received. Note that Line 3 is for the building name or plaza name.
- **Mailing address:** This is most important if there is a PO Box or if all mailings should go to the administrative offices instead of the individual sites. It is not necessary to enter a mailing address if it is the same as the physical address.
- **Email Address:** If the agency has only 1 site this would be the main email address of the agency. If the agency has more than one site a different email address can be entered for each site. Any email address entered into this field will be made public and the survey email will be sent to this address.
- **Website:** The rules for this field are the same as for the email address.
- **Publish Location?:** There are 2 checkboxes on this popup. It is not necessary to address the checkbox for printed directories as we do not create printed directories. If you do not wish for your agency to be on our website please check off the appropriate box to indicate that.
- **Phone Information:** You will see the phone numbers that we currently have for your agency in this location. If the phone number has changed, please make the appropriate changes to the number. If there is a brand new additional phone number to add use the next section
- **New Phones:** For brand new phone numbers that are in addition to existing phone numbers.

## Section 2: Contact and Business Info.

- **Administrator:** This would be the agency director or president or person that is ultimately responsible for an agency. This information will not be published on the website and is strictly for my use for survey purposes.

- **Additional Contacts:**

Contact 1: This is the person that is responsible for updating the information via the survey. Once a year this person will receive an email reminder to update their information. Up to 3 reminders will be sent via email until the survey is completed. It is an automatically generated email and once the emails begin the only way to stop them is to complete the survey.

It is not necessary to complete information for Contacts 2 or 3.

- **Business Status Information:**

- **Federal Tax ID number:** This is used to verify the legitimacy of an organization
- **IRS Designation:** Enter the IRS Code such as 501© 3 etc.
- **Year Incorporated or founded:** This is just for further investigation into the legitimacy of an organization.
- **Annual Budget:** You do not need to complete this section as this is not information that 211NH collects or divulges.

## Section 3 Additional Information

- **Administrative Hours:** This is for the Agency level hours of operation. Please include the days of operation as well.
- **Overview:** A brief statement about the overall services offered by the entire agency. All statements including opinions and adjectives should be omitted. An example of an acceptable overview would be: *The Department of Health and Human Services offers assistance with Food Stamps, TANF, Medicaid, and the Child Care Subsidy.*

An unacceptable statement would be *DHHS dedicated employees are only all to happy to assist needy families obtain the services to which they are entitled in a comfortable, brightly lit environment.*

- **Site Hours:** The hours of the specific site. They may or may not be the same as the agency's hours. Please include the days of operation as well.
- **Service Summary:** This is for a site specific overview. This applies mainly for agencies that offer different services at different locations. Ex. Southern NH Services may offer applications for fuel assistance at 3 locations of the 6 they have. It is important to differentiate what services are offered at what locations.
- **Programs:** Note that between Section 3 and the programs your agency offers is the following sentence: *You may add a service if it is not listed below. Click to [add a new service for this location](#).* If you click on the blue text, a window will pop up that allows you to enter information for your new service. If this program applies to more than one site, you can simply indicate that in the Area Served section and we will attach it that way rather than have you re-enter the information for each site.

- **Program Name:** You only have to complete this section if the program has a specific name.
- **Services:** If you click on the “Edit” button the box that pops up will have a teal colored button near the top left of the box that says Add Services. Clicking that button will open up the full taxonomy library with all of the terms that are in use within our database. Please remember that the taxonomy library is constantly being changed and updated as I clean up what was entered previously. My best advice is to add the terms that you believe will fit with what your agency does and I will narrow down from there.
- **Service Contact:** It is only necessary to complete this section if there is a specific contact person for the services listed in the last section.
  - Note: The following sections are mandatory. If the category does not apply to your service use NA. A list of commonly used response statements will be included at the end of each section. It is not completely necessary to select one of the given statements but they are common answers to each question.
- **How to Apply:** Basic, brief statements for how a person accesses your services. There is no need to include phone numbers or websites in this section as that information is located elsewhere within the record. Statements in use are: Call ahead, Must complete application, Walk in only and Agency referral only.
- **Fees:** The title of this section can be a bit misleading. For the most part we don’t list actual fees since they are subject to change often. Exceptions to this would be small fees that rarely if ever change. For example, Meals on Wheels asks for a \$2 donation or Concord Area Transit costs \$1 per ride etc. Otherwise the information that we list in this section is the method of payment of the fees. Statements in use currently are: Medicare Accepted, Medicaid Accepted, Sliding Fee Scale, Private Insurance Accepted, Membership Fee, No fee (for free services), Set fee (a general term used in place of the actual fee amount), Varies, and Donation accepted/expected.
- **Eligibility:** These are the criteria that the client must meet in order to access the service. Statements in use are: No restriction (use for when service is available to everyone), Income restrictions, Resident, Men/Women only, Age restriction (specify ages), Membership, People with disabilities. Note: If the program serves senior citizens, please include the minimum age that qualifies a person for the service since for some a senior is 50 and for others it may be 65.
- **Hours:** The hours of operation for the program. These hours may or may not be the same as the site and/or agency. Please include the days of the week that the program is open.
- **Documents:** A list of all documentation that a client needs to bring with them for their initial meeting or interview. Statements in use include: Photo ID, Proof of residence,

Proof of income, Birth certificate, Social Security Card, Letter of referral, and Proof of insurance.

- **Languages:** This section only needs to be completed if there are languages spoken other than English.
- **Service Description:** A brief description of what the program does. There is no need to include information about any of the other criteria in the description. The description should be devoid of any flowery language, opinions, and adjectives, and should be written in the 3<sup>rd</sup> person (no use of I, we, our etc). It should be very straightforward and as brief as possible.

The reasons for this are twofold. Firstly, we cannot be seen to endorse one program or agency over another and the use of flowery language and opinions can do just that. Secondly, brevity is important because an information and referral specialist must be able to quickly scan the listing to verify that it meets the caller's needs. After all, we do not want to send people to your agency for services you don't provide and I'm certain you don't want to be inundated with inappropriate referrals either.

- **Area Served:** There are 3 ways that we can enter a service area—by city/town, county, or state. Unfortunately we cannot enter areas or regions such as Greater Nashua area or Monadnock Region. The main reason for this is that for one person, Milford may be in the Greater Nashua area but to another Milford is in the Souhegan Valley.

Once updates are done for this site you can click the "Save Page" button at the bottom of the page. The completed survey is then submitted to us for review. Once we have reviewed the information we will make the necessary changes to the database and the update is completed for another year.