



RTM Designs

2-1-1 AgencyInsight

Closed Loop Referral for Community Based Organizations



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2-1-1 AgencyInsight - Closed Loop Referral for Community Based Organizations

2-1-1 AgencyInsight is a web portal designed for use by Community Based Organizations. The platform has information about how a 211 organization utilizes the CBO and how 211 profiles the CBO for the public. In addition, the AgencyInsight platform allows a CBO to submit feedback on how a client is served. This is “closing the loop” on service needs.

Referral Reports in Charts and Graphs

AgencyInsight uses data visualization tools to describe how the CBO is utilized by 211. Colorful charts and graphs present referral data by service need, age, gender, city, and ZIP Code. A multi-location CBO can view referrals for the entire organization or by individual location. The referral data is real-time and can be filtered by date range.



CBO Profile

AgencyInsight allows the CBO to view its profile in the 211 system. The profile describes the CBO parent organization and the programs and services available at each CBO location. The CBO can submit profile updates to designated 211 staff via email. The CBO can go directly to the Agency Survey app for annual review or periodic data updates.

Client Referral and Outcome Feedback – Closing the Loop



AgencyInsight offers a client referral feature that is accessible to any authorized CBO. Information is displayed about a 211 client referred to the CBO within Navigate. Data points include client name, address, phone number, email, birthdate, age, gender, income amount, number in household, and head of household.

Each 211 has the option to display additional information such as contact notes, screening, or assessment.

AgencyInsight is configured to allow each 211 to decide what information should be exposed to a CBO. The

objective is to for 211 to provide information the CBO needs as it engages with the referred client, reducing the timespent on repeated client screening by each CBO.

AgencyInsight presents a list of the client’s issues assessed during the 211 contact. The issues are AIRS problem topics, such as *Food/Meals, Housing, or Transportation*. Within each issue are the specific service needs (taxonomy terms) and the name of each CBO that 211 gave to the client as a service referral. The objective is to give each CBO full view of the referred client’s needs assessment and list which community organizations the 211 considers appropriate for resolving one or more of the client’s needs.

A CBO can submit both a status and an outcome related to their interaction with the referred client. The CBO can submit free text notes. Feedback information is stored in the Navigate contact and available for viewing and reporting by the 211.

AgencyInsight has predefined values for referral status and outcome to promote a consistent closed loop feedback national dataset. Each 211 has the option to include additional questions for CBO feedback.

The 211 controls each CBO's access in AgencyInsight. CBO permissions are set using standard processes familiar to resource specialists. CBO permission settings include:

- **Login access to the secure AgencyInsight app**
- **Permission to view 211 client referrals made to the CBO**
- **Permission to view 211 notes, screening, or assessment related to the referral**
- **Permission to view names of other CBOs referred in the same contact**
- **Permission to view feedback submitted by other CBOs**
- **Permission to submit feedback**

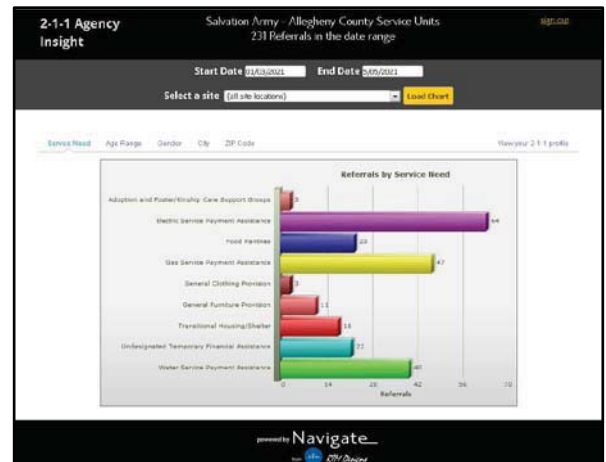


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