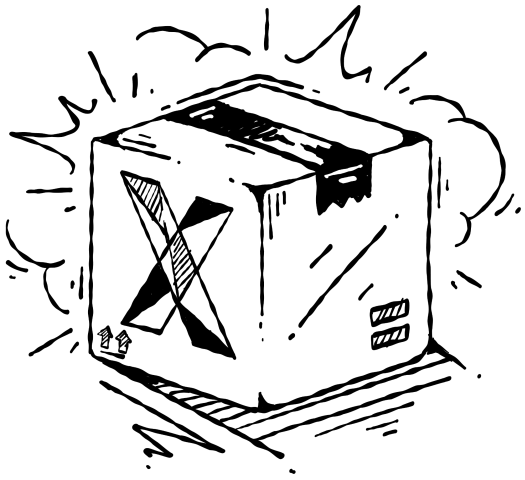

CityServeX "Box"

Resource Coordinator Manual

Section 04, ENTRY POINTS

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Entry Point

4.0 CityServeX offers 2 means by which people can enter into the service of Resource Coordination in their community. The first is a phone number, and the second is a website.

The toll-free phone number is 888-463-6227.

The website is: CityServeX.help

There is no cost to the **CityServeX Partner Site** for either of these entry points. Therefore, there is also no national campaign by **CityServeX** to promote these points of entry for local communities.

It is left up to the **Partner Site** to decide how they will want to promote the phone number and website made available to them.

The following will provide you with information on the community-facing website **CityServeX** provides.

Next will be instructions that will guide you through using the tool of the phone number. At the end of the section, there will be a Comprehension Questionnaire. Following this is the 888-INFOCARE Quick Reference. This is provided as a standalone document for you for easy reference and to consider for printing.

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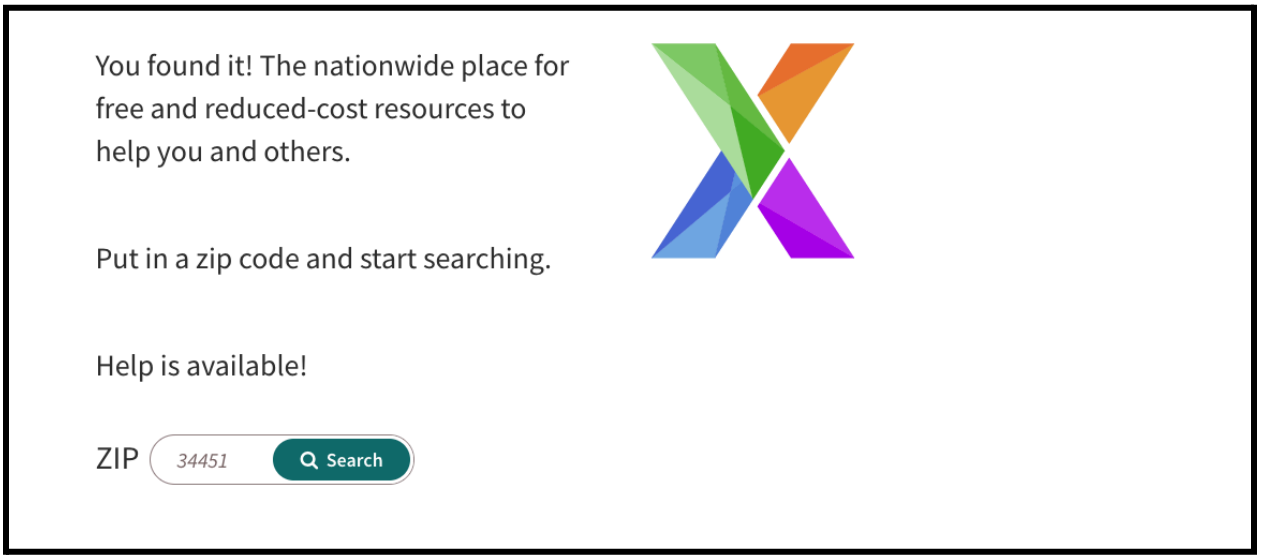
Community Website

4.1 CityServeX provides a website where people may find out about Resource Coordination in their community by visiting the **CityServeX** white-labeled site of the Findhelp platform.

The address is: **CityServeX.help**

This is a screenshot of what people will see when they access this platform.



Users are required to enter a zip code to begin searching for resources.

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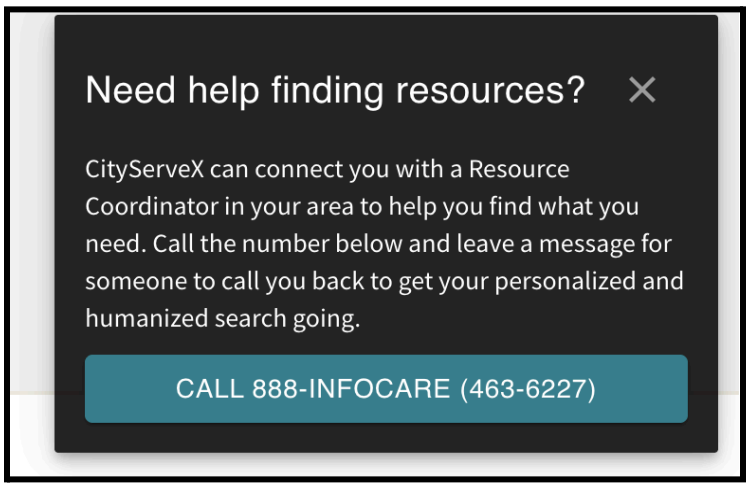
FlyOuts

4.2 This website has been pre-populated with the zip codes for the designated service areas of our **CityServeX Partner Sites**. When a pre-populated zip code is entered, a flyout will appear as shown in this screenshot.



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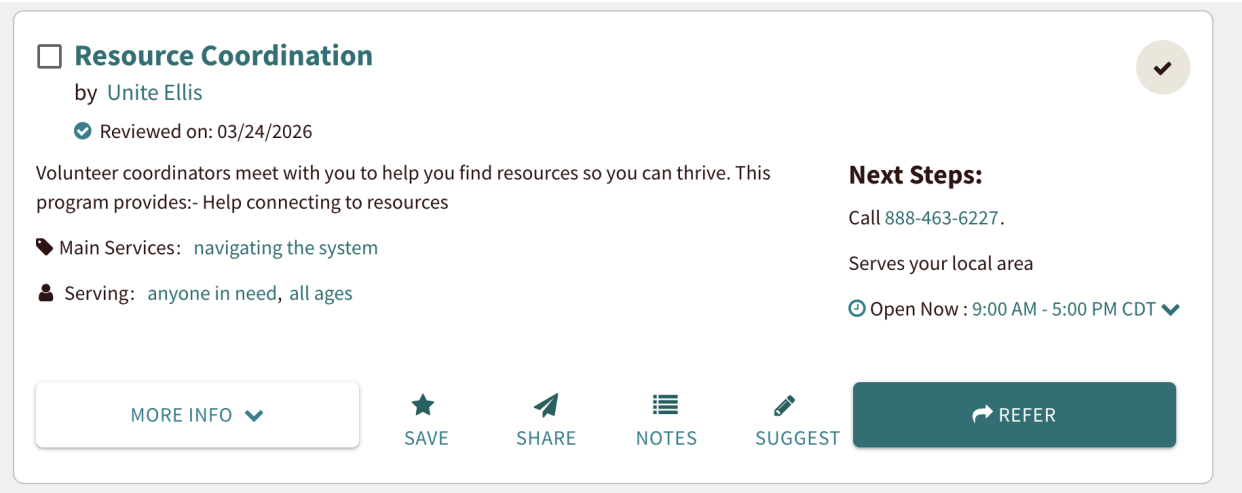
Resource Coordination Program Card

4.3 In addition to the flyouts that appear, each **CityServeX Partner Site** creates a program card for the **CSX** community website. This program card promotes the service of Resource Coordination for the local **Partner Site** in the zip code area the user is searching within. Instructions for how to make a program card can be provided through your **CityServeX Liaison.** A sample of a program card follows.



This program card may inform the user to call the 888-INFOCARE number, or to visit the **Partner Site** in person, or to take any other steps offered by the **Partner Site** for the purpose of accessing Resource Coordination.

Unlike the flyout, the program card only appears as an option in the designated zip code search when the user is searching in the Care category and the subheading of Navigating The System.

Additionally, the program card for Resource Coordination can also be found if the user knows to enter the **Partner Site** name, or program name, i.e., Unite Ellis, or Resource Coordination, or Resource Coordinator.

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Reasons to Promote the Community Website

4.4 CityServeX recommends promoting the **CityServeX.help** web address in your community for the following reasons -

- It was created to be shared with the community
- It is easily accessible and easy to use
- It does not require a login for effective use
- It contains all of the free and discounted resources listed on the national Findhelp platform
- It populates with a "fly-out" promoting the service of Resource Coordination and requesting support by calling the 888-INFOCARE number
- It was created for individuals to self-serve
- It produces analytics every time it is accessed, various features are utilized, and activities are performed

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Utilizing the 888-INFOCARE Phone Number

4.5 It's important that people in crisis be able to contact someone for the help they need. **CityServeX** provides our nationwide 888-INFOCARE number (**888-563-6227)** as a means for people to reach Resource Coordinators in their zip code area.

This helpline is the primary entry point for individuals seeking assistance through a **CityServeX Partner Site**. It is not a helpline with agents providing resources for callers.

It is a professionally managed system that enables callers to leave a message for a **CityServeX** representative from a **Partner Site** to return their call within 1 business day.

Returning calls promptly is essential to communicating how we value every person, their story, and what they are going through.

The following will provide the necessary information on how to fully utilize the 888-INFOCARE number and accompanying procedures to enable people in need to contact a **CityServeX Partner Site** and to equip **CityServeX Sites** to reach them.

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Call Flow Process

4.6 Initial Call: When someone dials 888-INFOCARE, they hear this automated message: *"Hello, you have reached **CityServeX**. We exist to uncomplicate and humanize social services for all. If this is an emergency, please hang up and dial 9-1-1. If you know your party's extension, press 9 followed by the pound key. If you are calling for resources, please enter your zip code."*

Geographic Routing: For resource requests, callers enter their zip code to connect with their local **CityServeX Site**. This geographic routing ensures individuals receive assistance from Resource Coordinators familiar with their specific community.

Correct Zip Code

4.7 Correct Zip Code Entered: Callers who enter a zip code that is serviced by a **CityServeX Site** will hear this automated message: *"We'd love to have a human call you back and help you find what you need. To have someone call you back within 1 business day, we need 5 pieces of information: your name, number, zip code, and the best day and time to reach you.*

*We will begin to record your message after the tone. When finished, you may hang up or press any key. Thank you for calling, **CityServeX**."*

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Receiving and Processing Messages

4.8 Receiving Messages from the 888 Line: All voicemail messages are sent via email to the **CityServeX Site** Care Champion. The messages will come from **Noreply@cityservex.org**. New Inquiry will be in the subject line + the number the call came from will be in the Subject.

The body of the email will contain the phone number, time, and date of the message, zip code entered, voicemail transcription, and voicemail recording URL.

To access the voicemail recording, go to:https://commandcenter.cityservex.org

- To access it the first time, use the password reset process: https://commandcenter.cityservex.org/accounts/password_reset/

- Care Champions can log into the command center and view all voicemails, transcriptions, and links to recordings.
- Care Champions can also view voicemails they've received on their **CSX** extension. The same will be true for Resource Coordinators and Community Advocates in the near future.

CARE CHAMPIONS NEED TO CHECK THEIR EMAIL DAILY TO RETRIEVE MESSAGES.

Processing Messages: Immediately upon receipt of an email message, the Care Champion enters the caller's information on an Inquiry Form. The Inquiry Form is housed in the Forms section of the CityServeXTeam.findhelp.com platform. This completed Inquiry Form creates a Participant Profile, which the Care Champion then flags as a Participant needing to be contacted. The Profile is not assigned to a Resource Coordinator.

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Retrieving Assignments

4.9 Retrieving Assignments: Resource Coordinators must check their **CSX**/Fh platform frequently during their time of service to know which Participants are unassigned and flagged. A Resource Coordinator reads the Navigation History in the Profile of any unassigned Participant to learn if a Resource Coordinator has attempted to contact them and if they were successful.

If they were successful -

- They may have forgotten to assign the Participant to themselves, in which case the RC reading the notes should assign it to that RC and notify them and the Care Champion.
    - The Profile should remain flagged until the assigned RC or the Care Champion removes it.

If they were unsuccessful -

- Or if no one has tried to contact them according to the Navigation History or lack thereof, then any RC should reach out to the Participant.

The **CSX** voicemail states that Participants will receive a return call within 1 business day, so it is important that the next available RC tries to make contact.
Participant Profiles should remain unassigned and flagged UNTIL a Resource Coordinator is able to make contact with a Participant.

Any phone call attempts, emails, or text messages sent should be noted in the Navigation History of the Participant Profile.

Resource Coordinators Unavailable: It is the responsibility of the Care Champion to monitor the People I'm Helping dashboard of the CityServeXTeam.findhelp.com platform. If a Resource Coordinator is not available to return a call within 1 business day, then the Care Champion returns the initial call and makes notes accordingly.

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Returning Calls

4.10 Returning Calls: CityServeX provides a means to return calls without identifying the phone number from which the call is being made. To activate this, follow the instructions -

Making an Outbound Call: Dial the 888-INFOCARE number (888-463-6227). The moment the greeting starts, enter 99999, and you will be instructed to enter the 10-digit number you are calling. Upon doing this, your call will go through.

The recipient will see that the call is coming from 888-463-6227. No name is given with the displayed number.

Outbound Call Answered: Let the recipient know that you are _____(CSX Rep. First Name) with **CityServeX,** or _____(organization name) and that you are calling them because you received a message from them on the 888-INFOCARE line, and you wanted to know how you could help them.

Outbound Call Unanswered: If the person you are calling doesn't answer, you should leave a message and let them know that when they see a call from **888-463-6227**, it is **CityServeX**, or _____(organization name) trying to reach them because a message was received from them on the 888-INFOCARE line. Inform them that you or another team member will try to reach them another time.

*Further information on conducting conversations with Participants is provided in Section 8: Daily Operations.

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Extensions

4.11 Giving your Extension: The 888-INFOCARE line allows callers to enter an extension. A directory of extensions is not listed on the 888-INFOCARE line. Therefore, it is intended that only those Participants who have had a previous conversation with a Resource Coordinator will have their extension. This will enable them to call their now-assigned RC directly.

***Important Note -** Resource Coordinators should provide the days and hours they are available to a Participant they have spoken with, and want to now equip them with their extension.

It is not expected that RCs will include their extension when leaving a message for a Participant who has inquired about resources.

Calls to an Extension: The 888-INFOCARE instructs callers wanting to reach an extension to *"...press 9 followed by the pound key."*

> Correct Extension Entered - Callers hear, *"Thank you. You are being transferred. One moment."*
>
> Incorrect Extension Entered - Callers hear, *"Unfortunately, we did not find that extension."* This is followed by the general greeting, *"Hello, you have reached..."*

Transferred Calls: Calls will be transferred to the phone number associated with the extension. The caller will not see the phone number it is going to, but the recipient will see the number the call is coming from, albeit they may not recognize it.

Calls Transferred, but Unanswered - Callers hear, *"I'm sorry, but the person you are trying to reach is not currently available. Please leave your name, number, and message after the tone. When finished, you may hang up or press any key."* If callers press any key, they will hear before hanging up, *"Your message has been received. Thank you for calling. Goodbye."*

Calls Transferred, but Manually Declined or Rejected as "busy" - Callers will hear the recipient's personal voicemail and will be able to leave a message in accordance with the way the recipient's personal phone operates.

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Calls Transferred, Answered - Callers should be greeted with, *"Hello. This is _____(**CSX** Rep. First Name) with **CityServeX**, or _____(organization name). How can I help you?"*

Receiving Messages from your Extension: Messages left on an extension are sent via transcript and audio to the **CityServeX** email associated with the extension. The messages will come from **Noreply@cityservex.org**. New Inquiry will be in the subject line + the number the call came from will be in the Subject.

The body of the email will contain the phone number, time, and date of the message, zip code entered, voicemail transcription, and voicemail recording URL.

To access the voicemail recording, go to:https://commandcenter.cityservex.org

- To access it the first time, use the password reset process: https://commandcenter.cityservex.org/accounts/password_reset/

- Care Champions can log into the command center and view all voicemails, transcriptions, and links to recordings, including those from extensions.
- Resource Coordinators can log into the command center and view all voicemails associated with their **CSX** extension only.

- Any callers who did not leave a message on an extension will have N/A (not answered) beside their information in the command center. This is provided in case the Care Champion or Resource Coordinator would like to know the number from which they missed a call.

RESOURCE COORDINATORS MUST MAKE A PRACTICE OF CHECKING THEIR **CSX** EMAIL DURING THEIR TIME OF SERVICE TO RETRIEVE VOICEMAIL MESSAGES TO THEIR EXTENSION.

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Incorrect Zip Code

4.12 Incorrect Zip Code Entered: The initial call greeting instructs callers to enter their zip code. A list of zip codes for service areas is not provided, so it is possible that a caller may enter an incorrect zip code. When this happens, the caller will hear this automated message: *"We're sorry, we are working hard to bring Resource Coordination to your zip code, but we are not there yet. In the meantime, please go to* cityservex.help *to search for resources in your area. That's* cityservex.help*. Thank you for calling,* ***CityServeX****. Good-bye."*

One Person at a Time

4.13 One Person at a Time Philosophy: This is the ideal that the person we are engaged with at the time gets our full attention. If we are assisting someone in person or speaking on the phone, we focus on that one person. We do not want to pause a conversation to answer another call. We encourage being fully present with the person in front of you, or on the phone, and returning any calls you see come in while you're engaged.

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888-INFOCARE - Comprehension Questionnaire

You've just read through one of the most practical sections of the "Box" Manual — the one that governs how a real person in a moment of real need finds their way to you.

The 888-INFOCARE line is more than a phone number. It is often the first point of contact between someone who is struggling and a community that is ready to help. How that call is received, how the voicemail is processed, how quickly someone calls back, and how that call is handled — all of it carries weight. All of it communicates something to the person on the other end.

This questionnaire is not a test designed to trip you up. It is a tool to help you — and your Care Champion — confirm that you have a working understanding of the system before you begin serving Participants through it. Every question draws directly from what you just read. If something stumps you, go back and look. That is exactly what the manual is for.

Read through the questions, but use the link provided to complete the questionnaire and submit your responses. Any items that need clarification are simply the starting point for a good conversation.

PART 1: THE 888-INFOCARE SYSTEM (MULTIPLE CHOICE)

Circle or highlight the best answer for each question.

1. What is the purpose of the 888-INFOCARE phone line?

A. To connect callers directly with a live agent who finds resources for them

B. To allow people to leave a message so a CityServeX Site representative can call them back

C. To provide an automated directory of social services by zip code

D. To route callers to their nearest government assistance office

Answer:

_____

2. When a caller dials 888-INFOCARE and enters a zip code that IS served by a CityServeX Site, what are they prompted to provide in their voicemail?

A. Their full address, income level, and the type of help they need

B. Their name, phone number, zip code, and the best day and time to reach them

C. Their name and a brief description of their situation

D. Their name, zip code, and whether they need emergency assistance

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Answer:

---

3. How does a Care Champion know a new voicemail has come in from the 888 line?
   A. They receive a text message alert on their personal phone
   B. The caller is automatically added to the CSX/Findhelp platform
   C. An email arrives from Noreply@cityservex.org with the subject line "New Inquiry"
   D. The Care Champion must log in to the 888 system portal to check manually

   Answer:

---

4. How long does an RC or CC have to return a call to a Participant who left a voicemail?
   A. Within 2 hours
   B. Within 4 business hours
   C. Within 1 business day
   D. Within 48 hours

   Answer:

---

5. What is the correct way to make an outbound return call through the 888-INFOCARE system so your personal number stays private?
   A. Use a CityServeX-issued cell phone provided to all RCs
   B. Dial 888-463-6227, enter 99999 when the greeting starts, then enter the Participant's 10-digit number
   C. Ask the Care Champion to make the call on your behalf
   D. Call from your personal phone; the system automatically masks your number

   Answer:

---

6. When should a Resource Coordinator give a Participant their personal extension?
   A. In every outbound voicemail they leave for a new Participant
   B. Only after the RC has had a direct conversation with that Participant
   C. During the initial email confirmation sent by the Care Champion
   D. Extensions are only given to Participants who call back more than once

   Answer:

---

7. A Participant calls a Transferred RC extension, but the RC doesn't answer, and the call is not declined. What does the caller hear?

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A. Silence, then disconnected
B. The RC's personal voicemail only
C. "I'm sorry, that person is unavailable," followed by the option to leave a callback voicemail
D. They are transferred automatically to the Care Champion

Answer:

---

8. What should a Participant Profile's assignment status be UNTIL an RC successfully makes contact with that Participant?

A. Assigned to the first RC who viewed the profile
B. Assigned to the Care Champion by default
C. Closed and archived until the Participant calls back
D. Unassigned and flagged

Answer:

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PART 2: APPLYING WHAT YOU KNOW (SHORT ANSWER)

Answer each question in your own words. Brief, clear responses are fine.

9. You open the CSX/Findhelp platform and see an unassigned, flagged Participant Profile. Before you reach out to them, what should you check first and why?

Answer:
_____
_____
_____

10. You call a Participant back using the 888 system, and they answer. Write out what you would say in your opening greeting.

Answer:
_____
_____
_____

11. You are in the middle of helping a Participant in person when your phone rings with another incoming call. What does CityServeX's "One Person at a Time" philosophy say you should do?

Answer:
_____
_____

12. In your own words, explain why returning calls promptly matters — not just as a procedure, but in terms of what it communicates to the Participant.

Answer:
_____
_____
_____

👉 Click here to submit your responses

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888-INFO-CARE
Entry Point

888-INFOCARE Fast Facts

1. Receiving a New Inquiry

- When an inquiry email comes in, the Care Champion enters the caller's information on an Inquiry Form (in the Forms section of **CityServeXTeam.findhelp.com**).
- This creates a Participant Profile, which the Care Champion flags as needing contact.
- The Profile is not yet assigned to a Resource Coordinator.

2. Checking For & Claiming Assignments

- Check the **CSX**/Fh platform often during your shift for unassigned, flagged Participants.
- Open the Profile and read the Navigation History to see if another RC already tried to make contact and whether it worked.

If contact was successful but not assigned:
Assign the Participant to that RC and notify both the RC and the Care Champion. Keep it flagged until the assigned RC or Care Champion removes the flag.

If contact was unsuccessful, or no one has tried yet:
Any available RC should reach out right away. Our voicemail tells Participants to expect a call back within 1 business day.

- Keep the Profile unassigned and flagged until an RC successfully makes contact.
- Log every call, email, or text attempt in the Navigation History.
- If an RC can't return a call within 1 business day, the Care Champion steps in to make that call.

3. Making an Outbound Call (Keeps Your Number Private)

Use this number to call a Participant without showing your personal phone number:

888-463-6227
888-INFOCARE

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1. Dial 888-463-6227.
2. As soon as the greeting starts, enter 99999.
3. Enter the 10-digit number you are calling.
4. Your call connects. The recipient sees 888-463-6227 (no name is shown).

4. Giving a Participant Your Extension

- Only give your extension to a Participant you have already spoken with.
- When you give it, also tell them the days and hours you're available.
- Do NOT include your extension in a voicemail to someone who has only inquired and not yet spoken with you.

5. When Someone Calls Your Extension

Callers reach an extension by pressing 9, then the # key.

What the caller hears:
Correct extension → "Thank you. You are being transferred. One moment."
Incorrect extension → "Unfortunately, we did not find that extension," then the general greeting.

If you answer, greet them with:

"Hello. This is [Your First Name] with CityServeX (or [organization name]). How can I help you?"

- Unanswered transfer: caller hears a prompt to leave a name, number, and message.
- Declined/busy: caller hears your personal voicemail instead.

6. Checking Your Voicemail Messages

- Messages to your extension are emailed from Noreply@cityservex.org.
- Subject line shows "New Inquiry" plus the caller's phone number.
- The email includes the phone number, date/time, zip code, a written transcript, and a link to the recording.

Access recordings and voicemail history at:

commandcenter.cityservex.org

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First time logging in? Use the password reset link on that page.

- You can only see voicemails for your own extension. Care Champions can see everyone's.
- A missed call with no message shows "N/A," so you can still see the number.

Remember:
Check your CSX email regularly during your shift so you never miss an extension voicemail.

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