

Impact Health Collective India — Field Staff SOP

Handling Beneficiary Questions (Dummy SOP for training)

1. Purpose

Provide a consistent process for answering beneficiary questions across WhatsApp and phone calls. This SOP reduces misinformation and ensures safe escalation for edge cases.

Note: Synthetic SOP for training only. Replace with your organization's real SOPs before operational use.

2. Standard intake checklist

- Confirm the question (repeat it back in simple words).
- Confirm location (city + ward/area) and preferred language.
- Determine if the question is informational (e.g., timing, location, eligibility) or medical.
- If medical or urgent: do NOT advise; escalate (see Section 6).

3. Answering common program questions

- Use the latest camp announcement message (date/time/location).
- Use the Eligibility & Documents Policy for questions about who can attend and what to bring.
- If you are unsure, say: "I'll confirm and get back to you" and check with the camp lead.

4. WhatsApp response format (recommended)

- One-line answer first (so it's scannable).
- 2–4 bullets with key details (date/time/location/documents).
- Clear call-to-action (Walk-in / Register / Call).
- Escalation line if needed (e.g., "If you have severe symptoms, please seek urgent care").

5. Translation guidelines

- Translate meaning, not word-for-word.
- Use local, simple terms; avoid clinical jargon.
- For mixed-language communities, include Hindi plus English keywords for critical terms (date/time/location).

6. Escalation

- If someone reports severe symptoms or emergency: advise them to seek urgent care immediately and contact the camp lead.
- If the answer is not covered by IHCI documents: mark as “Not found” and escalate to the camp lead for a policy decision.

7. Data privacy

- Never forward beneficiary personal details outside the approved IHCI staff channels.
- Do not paste personal identifiers or health details into AI tools.
- If a message screenshot is used for training, redact names/phone numbers first.

Appendix A — Example Q&A

Q: Do I need an Aadhaar card to attend?

A: No. ID is optional. Please come to the camp; if you have any ID or health records you can bring them, but you will not be turned away.

Q: Is the camp free?

A: Yes. IHCI camps are free of charge.