

Department of Elder Affairs Programs and Services Handbook

Appendix A: Service Descriptions and Standards

Section 1: General Information

Purpose

Appendix A, Service Descriptions and Standards, of the Department of Elder Affairs (DOEA) Programs and Services Handbook, provides the following components:

- A.** A description of each program under the auspices of DOEA.
- B.** Delivery standards and special conditions.
- C.** Provider qualifications.
- D.** Record keeping and reporting requirements.

Listed below are the program names and abbreviations referred to in this chapter. For a detailed description of each program, please refer to the specific chapters in this handbook.

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Program Abbreviations

<u>Name</u>	<u>Abbreviation</u>
Alzheimer's Disease Initiative	ADI
AmeriCorps	AC
Community Care for the Elderly	CCE
Contracted Services	CS
Home Care for the Elderly	HCE
Local Services Program	LSP
Respite for Elders Living in Everyday Families	RELIEF
Senior Companion	SC
Title I of the Older Americans Act	OAAI
Title III of the Older Americans Act	OAAIII
Title III of the Older Americans Act, Part B	OAAIIIB
Title III of the Older Americans Act, Part C	OAAIIIC
Title III of the Older Americans Act, Part C, Subpart 1, Subpart 2, Subpart 3	OAAIIIC1, OAAIIIC2, OAAIIIC3
Title III of the Older Americans Act, Part D	OAAIIID
Title III of the Older Americans Act, Part E	OAAIIIE
Title VII of the Older Americans Act	OAAVII

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Common Issues for Programs/Services

The following are characteristics common to all services and to the manner in which they should be provided:

1. All client information is confidential and shall only be disclosed with the written consent of the client or his/her guardian. Procedures shall be established to protect confidentiality of records and to obtain the individual's informed consent prior to release of confidential information.
2. Each service performed shall be recorded as specified in the Client Information Registration and Tracking System (CIRTS) guidelines. Supporting documentation of services provided must be adequate to permit fiscal and programmatic evaluation, and ensure internal management.
3. The cost for every service includes CIRTS data entry, invoicing, and other necessary administrative activities related to providing that service.
4. Unless otherwise noted, units of service for group events shall be counted as the amount of time delivering the service, regardless of the number of attendees.
5. Travel time to and from the client's home is not counted in units of service unless travel time is specifically included as part of the service. Travel time may be included for services provided by volunteers who receive a stipend or living allowance.
6. One hour of direct service with or on behalf of a client is accumulated on a daily basis. The cumulative amount of time per service is totaled for the day and minutes are rounded up to the nearest quarter of a unit as follows:

<u>Minutes</u>	<u>Units</u>	<u>Hours</u>
1-15	¼	¼
16-30	½	½
31-45	¾	¾
46-60	1	1

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7. Persons and/or agencies providing services shall meet the following criteria, as appropriate:
 - A. Have appropriate training for the program and service being delivered;
 - B. Comply with licensure requirements;
 - C. Comply with registration requirements;
 - D. Comply with background screening requirements;
 - E. Comply with continuing education requirements;
 - F. Obtain all required state or local permits;
 - G. Comply with building codes and standards; and
 - H. Obtain required insurance.
8. All persons in direct contact with clients are required to:
 - A. Handle the client's money only if permitted by the service provided;
 - B. Not disclose confidential information; and
 - C. Not accept monetary or tangible gifts from clients or their family members.
9. Providers shall incorporate volunteers and other community resources prior to accessing DOEA-funded services. The providers are responsible for ensuring coordination of services among agencies to avoid duplication of efforts.
10. Before providing services on a regular basis, paid staff and volunteers who have direct contact with clients shall receive basic orientation, covering but not limited to the following topics:
 - A. Overview of the aging process;
 - B. Overview of the aging network;

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- C.** Communication techniques with elders;
 - D.** Abuse, neglect, exploitation and unusual incident reporting;
 - E.** Local agency procedures and protocols;
 - F.** Client confidentiality; and
 - G.** Client grievance procedures.
11. Procedures shall be established to recruit, train, and schedule paid and volunteer staff. Procedures will include an annual evaluation of paid staff and documentation maintained in agency or personnel files.
 12. Providers shall update and provide in-service training as needed. Documented pre-service training may be substituted for all or part of required annual training for specified staff.
 13. Unless stated otherwise in law, rule, or in this handbook the number of hours, training methods, and training materials are determined by the provider.
 14. All services should be provided in a manner accessible to those in need.
 15. Services should be tailored to elder clients and their specific needs including hearing, vision, mobility, memory, language, cultural, and other considerations.
 16. Accurate and complete client files shall be maintained for all clients receiving case management services. When case management is not offered, the provider shall determine service needs, documents service activities and client participation, and report service activity.
 17. Procedures shall be established to respond to service complaints and objectively evaluate the quality of service and the level of client satisfaction. Service providers shall have procedures for handling recipient complaints concerning such adverse actions as service termination, suspension, or reduction in accordance with Appendix D—Minimum Guidelines for Recipient Grievance Procedures.

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18. Procedures shall be established to report to supervisory staff and the area agency on aging, as appropriate, unusual incidents related to clients and service delivery. Unusual incident reports shall be kept on file at provider agencies.
19. Direct payment is a cash reimbursement made directly to the client or caregiver for services or supplies purchased and preauthorized by the case manager or program coordinator. Services authorized and purchased from friends, family or neighbors, and arranged by clients or caregivers may not be subject to the service standards contained in this handbook. Original receipts shall be presented to the case manager or program coordinator within 60 days of purchase.
20. Procurement procedures shall be developed for all services purchased in accordance with state and federal regulations to encourage competition and promote a diversity of contractors for services for the elder consumers.

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Table of Services by Program

THE FOLLOWING 4 PAGES INCLUDE A TABLE OF SERVICES PROVIDED UNDER EACH PROGRAM. THE LEGAL AUTHORITY FOR EACH PROGRAM IS CITED SPECIFICALLY IN SECTION 2: SERVICES OF THIS APPENDIX. THE DATE OF ISSUANCE FOR ALL PAGES IS LISTED AT THE BOTTOM OF THIS PAGE.