



*"Working Harder To Make Aging Easier"*

## **Service Standards**

### **Title III-B Information & Assistance**

#### **I. Definitions (IDOA/NEIL)**

**A. Service Definition (IDOA 603.17 A):** A service for older individuals that may:

1. Provide the individuals with current information on opportunities and services available to the individuals within their communities,
2. Assess the problems and capacities of the individuals,
3. Link the individuals to the opportunities and services that are available, and
4. Establish adequate follow-up procedures based on the older individual's needs.
5. The service may be initiated by an older person, caregiver or service provider.

**B. Unit of Service (IDOA 603.17 C):** Any individual client contact made for information, referral, or assistance constitutes one unit of service. Each follow-up contact on behalf of that client also constitutes a unit of service.

1. For example: If an older person contacts the service provider requesting information on a state pharmaceutical assistance program, this contact constitutes one unit of service. If the service provider follows up with the same person to see if the application has been made to this program, this will constitute another unit.
2. The service units for information and assistance refer to individual, one-on-one contacts between an information and assistance provider and an elderly client or caregiver and any contact made on behalf of the client. An activity that involves a contact with several current or potential clients/caregivers (what is considered group services) should not be counted as a unit of information and assistance. Group services might be defined as "public education" or a similar designation.
3. Internet web site hits are to be counted only if information is requested by older individuals and family members and supplied by the provider. For example, an older person requests by e-mail on a provider's web site that they want information on pharmaceutical assistance programs. If the provider provides this information by e-mail or by traditional mail or by telephone, this is one contact (one unit of service).

4. If the older individual or family member simply reviews information on the provider's web site and does not request specific information, then this situation cannot be counted as a contact (unit of service).
5. The service does not include newsletter mailings or group presentations (NEIL).

## **II. Service Activities (IDOA/CPoE/NEIL)**

- A.** Provision of specific information about appropriate community resources which meet the immediate expressed need, including information relating to assistive technology (IDOA 603.17 B).
- B.** Provision of assistance to older persons (or their caregiver) to identify their needs and to place them in contact with appropriate community resources or service providers (IDOA 603.17 B).
- C.** Assessment of the problems and capacities of the individual (IDOA 603.17 B).
- D.** Follow-up activities conducted with older persons and/or agency(ies) to determine whether services have been received and the identified need has been met following the formal referral (IDOA 603.17 B).
- E.** Expansion of information and assistance services on a 24 hour (if needed) emergency basis during times of disaster (e.g., flooding, hot weather, tornadoes, severe weather, man-made emergencies, etc.) to assure older persons are safe and have access to services to meet their needs (IDOA 603.17 B).
- F.** Provide client advocacy to secure needed benefits (IDOA 603.17 E11).
- G.** Provide assistance in filling out applications, obtaining authorizations and follow up with clients to make sure that services are accessed (CPoE).
- H.** Use person-centered planning procedures when advising clients, caregivers or their families (CPoE).
- I.** Make referrals that are in the best interest of the client and make efforts to avoid a conflict of interest (CPoE).
- J.** Provide local transportation service information to older individuals who require such assistance (NEIL).

### **III. Service Standards (IDOA/NEIL/CPoE)**

#### **A. Intake**

- 1.** Intake procedures (standardized intake form/interview process) must be established for training staff at each office or site to identify the client's demographic information and to assess the client's needs. (NEIL)
- 2.** Use the IDoA approved, standardized intake form/process (once it is created) to identify the issues and capacities of the individual beyond the presenting problem, once it is created. (CPoE)

#### **B. Customer Service**

##### **1. Telephone/Voicemail**

- a.** Staff answering external phone calls will:
  - i. Answer the phone call promptly (within five rings), (NEIL)
  - ii. Listen and understand the nature of the requests before transferring the call to the worker assigned to Information & Assistance, (NEIL)
  - iii. Have three-way calling phone systems for "warm transfers" of callers. (CPoE)
  - iv. Inform the caller where they are being transferred to, (NEIL)
  - v. Provide the caller with the name of the person to whom they are being transferred,
  - vi. Provide the caller with the phone number of the person to whom they are being transferred in the event they are disconnected, and
- b.** When multiple calls are received, calls will be answered in order; callers will be asked if their call may be put on hold; the first caller will be returned to first; and the employee will continue to answer the lines in order of the calls received when feasible. (NEIL)
- c.** A person, not voicemail, will answer calls at each Information & Assistance answering station. There will always be telephone coverage at each answering station during business hours.
  - i. All phone calls will be answered with a consistent greeting,
  - ii. Staff will identify themselves by name on the telephone,
  - iii. Callers will be encouraged to call back if initial information was incorrect, inappropriate or insufficient,
  - iv. Staff will always inquire if assistance is needed in securing services or benefits from referred agencies,

- v. All customers will be treated equally, without regard to race, sex, age, disability, religious or political beliefs,
  - vi. .
  - d.** In the event that all I&A staff are attending to other callers needs or must refer to another specialist within the agency to address the caller's request, voicemail may be used.
    - i. Callers will receive acknowledgements of their voicemail messages within one business day.
    - ii. Voicemail messages will:
      - a) Be kept current,
      - b) Be changed on days the agency is closed,
      - c) Include a date stamp,
      - d) Give specific instructions on how to speak with another staff member (example-dialing "0" to reach a receptionist or support staff to be transferred to another case manager or I&A staff), and
      - e) State when calls will be returned.
    - iii. Include I&A staff names, phone numbers, and times available when leaving messages for customers
  - e.** In the event phone service is disrupted or the agency is closed for more than 4 hours at an Information and Assistance site, the site will notify the Area Agency on Aging when the phone service is disrupted and when the service is reinstated via phone and/or e-mail.
- 2.** Written Correspondence (includes Letters, Memoranda, E-mails & Faxes) is formatted to grantee agency standards, and:
- a.** Provides a timely response to requests, or an interim communication explaining the delay, if necessary. Requests for printed materials will be sent within 3 (three) working days of receipt.
  - b.** Provides complete, accurate, and precise information regarding inquiries.
  - c.** Includes direct dial telephone numbers so customers can contact the person they need to speak to directly.
  - d.** Includes additional informational brochures, fact sheets or tip sheets and other materials to meet customer's needs.
  - e.** Fax cover sheets must include name, telephone number, and department of the sender and the name and fax number of the receiver. Fax cover sheets should be legible.

- f.** Email correspondence must include the name, telephone number, department and email address of the sender.

### **C. Records and Documentation**

- 1.** Provider may disclose information by name about an older person only with the informed consent of the older person or his or her authorized representative. Such informed consent must be documented in the older person's case file whether it is written or verbal consent. The case file documentation must include who (older person or authorized representative) provided the written or verbal consent (IDOA 603.17 E3).
- 2.** A Data Collection System shall be developed to meet client and service needs and as a resource for meeting community needs (IDOA 603.17 E7).
- 3.** A record keeping system will be in place to maintain count of unduplicated persons and daily units of service provided (NEIL).

### **D. Resource Development (IDOA/CPoE/NEIL)**

- 1.** Information and Assistance providers must (IDOA 603.17 E 2):
  - a.** Maintain current information with respect to the services and opportunities available to older persons as well as disability issues, and
  - b.** Develop current lists of older persons in need of services and opportunities.
- 2.** The information and assistance service provider must maintain accurate, up-to-date information on resources available (IDOA 603.17 E6).
  - a.** Provide each I&A worker with desktop access to the Enhanced Services Program (ESP), Benefits Check Up (BCU), Illinoishousingsearch.org (IDHA), and other web tools as selected in the development of the statewide system (CPoE).
  - b.** To ensure accurate, up-to-date resource information is available in the Enhanced Services Program (ESP), providers will submit updated or new information to the Agency on Aging. (NEIL).
  - c.** As new resources are identified, forward updated or new resource information to Outreach and Care Coordination Unit staff. (NEIL)

### **E. Interagency Coordination (CPoE/NEIL)**

- 1.** As stated in the Northeastern Illinois Agency on Aging "General Service Requirements," providers are required to maintain linkages with other service providers and organizations in their service area. Information and Assistance providers must also:
  - a.** Coordinate and make referrals to the local Care Coordination Unit and Managed Care Organizations as appropriate (NEIL).
  - b.** Have a working relationship and a written agreement with the local Center for Independent Living.
  - c.** Have a working relationship and/or a written agreement with other community service providers to coordinate, and where possible, to co-locate services (CPoE).
    - i.** Community service providers may include: local offices of the Social Security Administration, the Illinois Department of Public Aid, the local Health Department and Mental Health Department, local Developmental Disability Services provider, the local office administering the Illinois Low Income Home Energy Assistance Program, Community Focal Points and Senior Centers, Home Health Care agencies, hospitals, and other local service providers (NEIL).
  - d.** Participate in community outreach and public awareness activities in coordination with the Senior Helpline and be full participants in statewide coordination activities (CPoE).
  - e.** Follow statewide and regional protocol for coordination between the No Wrong Door system and 211 providers, as this system is developed (CPoE).
- 2.** Care Coordination Units that also receive Title III-B Information & Assistance funding must demonstrate cooperative working relationships with Title III-C funded home delivered meal providers and follow the policies and procedures specified in the NEIL Home Delivered Meal Client Process Addendum (NEIL).

**F. Access (IDOA/CPoE/NEIL)**

- 1.** In areas with a significant number of older persons who do not speak English as their principal language, the service provider must arrange for or have the capacity to provide information and assistance services in the language spoken by the older persons (IDOA 603.17 E1).
  - a.** The provider must have staff, or contractual arrangements, to aid persons who are non-English speaking or deaf in obtaining services and demonstrate cultural competency (CPoE/NEIL).
- 2.** Provide settings to attend to each older person's questions/needs without interruption and in a confidential manner (IDOA 603.17 E4).
- 3.** The Information and Assistance provider shall seek to maximize the accessibility of other needed services (IDOA 603.17 E8).
- 4.** Facilities shall be provided in sufficient quality and quantity to insure operation of the information and assistance service (IDOA 603.17 E9).
- 5.** The information and assistance provider shall have a plan in place that addresses its operation in the event of disaster conditions. (IDOA 603.17 E10)
- 6.** Provide community and/or group presentations about available resources and services (IDOA 603.17 E12).
- 7.** Provide at least full day (at least 7 hours) M-F availability for staffing and information (CPoE).
- 8.** Have a disability-accessible environment for meeting customers and the general public (CPoE).
- 9.** Provide in home visits in order to accommodate persons who are homebound, frail or have disabilities, when feasible. (NEIL)
- 10.** Utilize the State-approved brand name and logo for the Coordinated Point of Entry system once it is completed (CPoE).
- 11.** Maintain an agency web-site that specifically references the Senior Services Information and Assistance services available from the provider and which includes a means to contact the provider by phone and e-mail in order to obtain personal assistance (NEIL).
- 12.** Provide no-cost phone access from all points within the area served. Information & Assistance providers are required to have Directory assistance listings in the phone book Yellow Pages under the heading "Senior Citizens Service Organizations", and read "Senior Services Information and Assistance" (NEIL).

- 13.** The information and assistance provider must have voicemail that is available for customers to leave messages outside of normal working hours. The voicemail will meet all the voicemail requirements in Section IIIB(d)(i) & (ii) of the I &A Service Standards and direct callers to call 911 if they have an emergency and include the IDOA APS Hotline number. (NEIL)

**G. Staffing (IDOA/CPoE)**

- 1.** The Information and Assistance provider must have staff with appropriate qualifications, education (A.A., B.S., B.A., LPN, RN, etc.) or experience to be further defined by the Department (CPoE).
- 2.** The provider must employ a specially trained staff to inform older persons of the opportunities and services which are available and to assist older persons to take advantage of the opportunities and services (IDOA 603.17 E2).
- 3.** The staff shall be competent, ethical, qualified, and sufficient in number to implement the policies of stated programs and service objectives. (IDOA 603.17 E5).
- 4.** The provider shall have at least one staff person certified by the Alliance of Information & Referral Systems (AIRS) (CPoE).