PSA 2 Area Agency on Aging

Information & Assistance Program
Standard Procedures

The following procedures have been developed for the purpose of regulating the process by which Information & Assistance inquiries are handled. These procedures are a "work in progress" and shall be updated / revised at the discretion of the PSA 2 AAA. Although not all I & A Programs operate in the same manner, it is our goal, and that of the California Department of Aging, to standardize the program as much as possible. Your patience and cooperation during this "development" period is greatly appreciated.

The National Aging Programs Information System (NAPIS) became the official reporting system for Older Americans Act Programs in 1997. The NAPIS definition for the Information & Assistance Program is defined as follows:

A service that: (a) provides individuals with information on services available within the communities; (b) links individuals to the services and opportunities that are available within the communities; and (c) to the maximum extent practicable, establishes adequate follow-up procedures. Internet web site "hits" are to be counted only if information is requested and supplied.

The Information and Assistance units of service are measured as 1 Contact.

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1. Upon receipt of an I & A contact (either by phone or walk-in), the client's information should be logged onto the Monthly Contact Report (Exhibit A).

2. ***Politely ask for the client's name and phone #.*** Be creative and clever while still using courtesy and respect in gaining this information. ("May I have your name and number in case I need to get back to you?" is just one of many for instances…) NOTE: Contacts by consumers under the age of 60 may be counted as I & A services if the inquiry is on behalf of a client 60+.

3. ***Determine to the best of your ability if the client is 60+ years old, or calling on behalf of someone who is.*** Again, while using diplomacy, we can gracefully honor their dignity. It is critical to remember that this is solely for

tracking purposes ~ don't feel you're unable to help them if they're not 60+ yrs old (it would just need to be documented under another program).

4. Don't forget to fill out the ***date*** as well as whether the client "***walked in***" or "***called in***."

5. Briefly describe the need that brought that client to your center. The column **"*Information or Assistance Needed/Requested*"** prompts and reminds us that we focus on the initial need, not the actual service delivery (again, this detail would be recorded elsewhere under other programs). Don't forget to mark the previous column "HICAP Referral" whenever there has been a Medicare or related issue that we refer to HICAP (Health Insurance Counseling & Advocacy Program).

6. This next step is very important, but often misunderstood. We must **determine if the type of request warrants a follow-up**, and if so, bring the information forward to a "**Senior Information & Assistance Follow-Up Report**" (Exhibit B). This requires a judgment call. For instance, if someone calls needing the phone # for "Meals on Wheels" that does not necessarily warrant a follow-up by itself. However, if the client adds the information that they are home-bound and have not been able to get out to get groceries, and are consequently out of food, it would be wise to refer them to a food bank or other food assistance program in your community, etc. Then follow-up with the caller a week or two later. There should never be more than a month between the initial contact date and the follow-up call.

7. **Important Reminder: on the "Monthly Contact Report" *document only those contacts initiated by the client.*** Our calls to them would fall under "follow up" but NOT counted as a service unit. Occasionally we return initial messages that are related to senior Information and Assistance. In these cases, we CAN document the contact as either the date the client left the message or the date we speak with them to get details of their need.

8. **When doing follow-up, be sure to document**:

   a) the ***follow-up date*** (this should not be more than a month from the initial contact date).
   b) The ***client's name***
   c) The ***client's phone #***
   d) The ***client's age***
   e) Indicate if the person is calling on ***behalf of a senior***
   f) The ***initial contact date***
   g) The ***initial issue/need***
   h) The I & A ***service provided***
   i) The ***Outcome*** of the call

j) Any **Unmet Need**

<u>NOTE</u>:

*Outreach performed for the I & A program should be documented on a separate report. For instance: a group presentation would be documented on an outreach tracking sheet (not on the monthly contact report). However, be prepared by taking your Monthly Contact Report with you when performing Outreach. Individuals attending the presentation may approach you afterward for Information and Assistance and this activity could be recorded as an I & A service.

* All of these documents should be double~locked (in a file box or cabinet and your office door lock).

* Always remember that <u>you</u> are a valuable resource and just being there for them makes a difference!

* When in doubt on how to handle an Information & Assistance call or whether the call should be counted as a unit of service at all, do not hesitate to ask your supervisor to contact PSA 2 AAA staff.

*Unmet Needs should be tracked on a separate report. It is requested that this information be incorporated in your agency's Year End Report following the conclusion of each fiscal year.