



PSA 2 Area Agency on Aging

TRANSPORTATION PROGRAM PROCEDURE MANUAL

**In accordance with
Older Americans Act
Title III B;**

**Title 45 Code of Federal Regulations (CFR);
and**

**Under the Guidance of the
California Department of Aging**

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Introduction

The following manual provides instruction and direction on the operation of a Title III B Transportation Program as contracted with PSA 2 Area Agency on Aging (PSA 2 AAA).

Transportation is defined by the California Department of Aging as, "Transportation from one location to another. Does not include any other activity. May include travel vouchers and transit passes." One unit of service is measured as a (1) One-Way Trip.

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Older Americans Act Requirements

The Older Americans Act, Title III, Part B, instructs that transportation services are designed to facilitate access to supportive services or nutrition services, and services provided by an area agency on aging, in conjunction with local transportation service providers, public transportation agencies, and other local government agencies, that result in increased provision of such transportation services for older individuals.

General Responsibilities of Title III B Service Providers

Service Providers shall:

- (a) Provide PSA 2 AAA, in a timely manner, with statistical and other information which PSA 2 AAA requires in order to meet its planning, coordination, evaluation and reporting requirements established
 - 1) PSA 2 AAA Reporting Timeline is incorporated in this procedure by reference
 - 2) Service Providers shall count each one-way trip as one unit of service and shall, on a monthly or quarterly basis, provide a SAMS generated Agency Summary Report which summarizes in aggregate form, the number of units of service provided to transportation program participants
- (b) Specify how the provider intends to satisfy the service needs of low-income minority individuals in the area served, including attempting to provide services to low-income minority older persons in the population serviced by the provider
- (c) Provide recipients with an opportunity to contribute to the cost of the service as provided in Sec. 1321.67 [45 CFR]
- (d) With the consent of the older person, or his or her representative, bring to the attention of the appropriate officials for follow-up, conditions or circumstances which place the older person, or the household of the older person, in imminent danger
- (e) Where feasible and appropriate, make arrangements for the availability of services to older persons in weather related emergencies
- (f) Assist participants in taking advantage of benefits under other programs; and
- (g) Assure that all services funded under this part are coordinated with other appropriate services in the community, and that these services do not constitute an unnecessary duplication of services provided by other sources.

Coordination of resources can be accomplished in a number of ways, such as partnering with community agencies that provide transportation services, pooling various transportation resources, and facilitating cost-sharing arrangements. The business community may also be engaged in these efforts since many private operators that provide shuttle, curb-to-curb, and other transportation services to older persons are sustained through fare-based payment systems. Another excellent approach is ride sharing that includes working out a financial agreement to have

a transportation operator pick up seniors living in the same neighborhoods and take them to and from destinations along the vehicle's route.

Federal cost principles allow program to share costs with other programs and organizations as long as each program pays its fair share of costs in accordance with the benefits received. Program costs must be reasonable, necessary, and allocable. Any compensation received as a result of sharing vehicles purchased with Older Americans Act funds should be reported to PSA 2 AAA as Non-Matching Contributions.

The Program is encouraged to maximize the use of its vehicles. Such creativity can help address many transportation issues that local communities face on a daily basis. It can also contribute to the building of an overall comprehensive and coordinated system of services in the service area.

Voucher Transportation Program Requirements

Title III B Transportation is a non-registered service and assessment of program participants is not required to confirm program eligibility. However, the program must maintain written procedures for the following:

- (a) Determining client eligibility
- (b) Documenting the participant's name and number of vouchers provided
- (c) Reasoning/Justification for utilizing the Dial-a-Ride transportation voucher system
- (d) Documenting how many vouchers were used; for example, the Dial-a-Ride provider could collect III B Transportation vouchers and turn them in to the service provider on a monthly basis
- (e) Meeting insurance requirements. Please keep in mind that the III B Transportation program service provider's contract with PSA 2 AAA maintains certain Auto Liability insurance requirements and they must be met by the Dial-a-Ride provider.
- (f) Developing a Memorandum of Understanding (MOU) between the III B Transportation program service provider and the Dial-a-Ride provider.
 - 1) The MOU is considered a vendor contract and should include a pricing agreement. The III B Transportation program service provider is purchasing a one-way trip from the Dial-a-Ride provider and the pricing agreement should state how many service units (vouchers) will be purchased during the term of the MOU (agreement).
 - 2) The MOU should also include requiring the Dial-a-Ride provider to furnish the III B Transportation program with a copy of its insurance certificate, naming the program as Certificate Holder and Additional Insured.
 - 3) A copy of the MOU must be submitted to PSA 2 AAA once it is finalized.

PSA 2 AAA will verify that these terms and conditions have been met during its annual monitoring.

Determining Transportation Client Eligibility

- (a) The program may check ID to verify age as the sole eligibility requirement for the transportation program is that the eligible senior is 60 years of age or older
- (b) The program should develop its own written policy to verify the age of program participants
- (c) The program may request verification of age from only those participants who do not appear to reach the age requirement to qualify for the program and to avoid potential accusations of age discrimination.
- (d) The program will not be expected to document the date of birth or any other information obtained from the ID. The request for ID is only to be used for the purpose of verifying the older adult is 60 years of age or older
- (e) The program intake form may include a check box that indicates the participant has self-identified or provided some form of identification that verifies the senior is 60 or older
- (f) The program must be respectful of the participant's reluctance to provide a copy of a photo ID or disclosing confidential information on an intake form to avoid identity theft (however, that is not to say a program cannot ask a potential participant to show their ID prior to receiving services)

Additional III B Transportation Program Requirements

In addition, the III B Transportation Program service provider shall ensure that the following requirements are met:

- (a) Insurance policies must include five hundred thousand (\$500,000) for Liability; five hundred thousand (\$500,000) Bodily Injury or Death; one hundred thousand (\$100,000) property damage, one occurrence.
- (b) Maintain an up-to-date Desk Procedures Manual set up to allow for transportation staff to complete the duties of Transportation Manager/ Coordinator, Driver, etc.
- (c) Outreach activities are conducted to promote the service
- (d) Provide publishing credit to PSA 2 AAA on outreach materials for program funding support
- (e) Ensure services are accessible to handicapped persons
- (f) Provide program participants with an opportunity to evaluate the program at least quarterly
- (g) Provide program participants the opportunity to voluntarily contribute to the program
- (h) Maintain written policy on Grievance Procedures. Program participants must be informed of the Grievance Process, whether by handout or posting in a conspicuous location.
- (i) Maintain written agreements with other agencies/services as coordinated

- (j) Ongoing training is provided to staff/volunteers and training participants are provided an opportunity to evaluate the training
- (k) Ensure staff/volunteers are trained on the process for handling emergency situations involving senior passengers, including notifying staff and emergency personnel
- (l) Maintain documentation (trip logs, etc.) to support reported Units of Service performed
- (m) Use intake forms to gather pertinent client information and ensure the information is consistently updated in the SAMS database if the program is used to capture unduplicated client counts.
- (n) Conduct Security Awareness Training with transportation program staff/volunteers to ensure client confidentiality
- (o) Secure the storage of client records to ensure client confidentiality
- (p) Be prepared to provide PSA 2 AAA with proof that each driver has a valid driver's license and insurance. Any driver complaints lodged with the service provider shall be documented and kept on file for review along with action taken to counsel the driver.
- (q) Proof of insurance and registration must be kept with vehicles
- (r) Vehicle safety checks must be done on a routine basis
- (s) Regular Maintenance shall be done as needed and records of maintenance kept on file for PSA 2 AAA review