PROGRAM FUNDING SOURCE(S): CCE, OAAIIIB

PROGRAM AUTHORITY:

<u>Program Funding</u>	<u>Specific Authority</u>
Rulemaking	**Section 430.08, F.S.**
CCE	**Sections 430.201-207, F.S.**
OAAIIIB	**Older Americans Act, Title III, Part B, Section 321, (a) (23) 42 U.S.C. 3030d**

A.   DESCRIPTION: ADRC Access is direct contact with or contact on behalf of an individual (including documented attempts to contact the individual through phone, email, or written correspondence), who is seeking assistance with accessing publicly-funded services or programs. ADRC Access involves collecting and documenting essential information about the individual who needs assistance. This information includes general demographic information as well as information about the individual's physical, mental and functional abilities, concerns, limitations or problems. Information obtained is used for screening for long-term care programs and services and helps the ADRC Access worker identify appropriate program and service referrals that include Medicaid, state, and federally funded programs and services. ADRC Access may involve the administration of the standard DOEA Screening Form 701S to gather information about an applicant or the follow-up of clients on an APCL to review any changes in their situations and ensure prioritization for services. The service also includes contacts made with or on behalf of individuals released from any publicly-funded APCL, scheduling appointments to ensure that individuals are available and have access to needed documentation for the assistance to be provided, conducting screening, application or eligibility assistance activities or any related activity that facilitates the client entry into a publicly-funded program or receipt of long-term care services.

Documentation:

All contacts and attempted contacts made with the client or on behalf of the client are documented in the REFER system. Initial and re-screens completed using the DOEA Form 701S are recorded in CIRTS. Time spent documenting REFER and CIRTS is considered part of the service.

 Non-Billable Activities:
Examples of non-service related activities include staff or group meetings or discussions not associated with a single client; supervisory duties,

recruiting/training staff and volunteers; attending training; and annual or sick leave**.**

B.   DELIVERY STANDARDS/SPECIAL CONDITIONS:

1.   All staff conducting the ADRC Access service must complete the DOEA web-based assessment training and receive a certificate of completion before being eligible to conduct a 701S. To receive a certificate of completion, a score of 90 percent or above on the multiple-choice test is required.

2.   All staff that provide Statewide Medicaid Managed Care Long-Term Care Program Education must complete the DOEA web-based SMMC LTC Program Education training and receive a score of 90 percent and above before being eligible to conduct SMMC LTC Program Education.

3.   Clients should be directed to other non-DOEA resources, as appropriate, to have their needs met.

4.   REFER is used to document all contacts/activities related to provision of ADRC Access service.

5.   Each 701S completed for a client must be recorded in CIRTS.

C.   PROVIDER QUALIFICATIONS: This service shall be provided by the AAA. Minimum education requirement for an ADRC Access worker is a high school diploma or GED. Job-related experience may be substituted for a high school diploma or GED upon approval of the AAA.

D.   RECORD KEEPING AND REPORTING REQUIREMENTS:

1.   **Unit of Service:** One hour of direct service with or on behalf of clients accumulated by worker and by Program (CCE or OAA3B) on a daily basis.
2.   Daily recording of billable worker hours by worker for the applicable program component.
3.   Backup documentation will include timesheets for staff performing ADRC Access services and other documentation that supports billable hours.
4.   Documentation must be maintained in REFER and CIRTS to support hours of direct service with or on behalf of clients.   REFER data will reflect activities performed as a result of this service. All completed 701S forms are entered into CIRTS.
5.   CIRTS reporting requirements are below. ↓

CIRTS REPORTING REQUIREMENTS				
PROGRAM	SERVICE	REPORTING OF SERVICES	OAA CLIENT REQUIREMENTS	MAX UNITS
CCE	ADRCAC	DAILY AGGREGATE REPORTING	N/A	15
OA3B	ADRCAC	DAILY AGGREGATE REPORTING	N/A	15