

Barren River Area Agency on Aging and Independent Living
Standard Operating Procedures

BARREN RIVER AGING AND DISABILITY RESOURCE CENTER

**Aging and Disability Resource Center
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BARREN RIVER AGING AND DISABILITY RESOURCE CENTER

Introduction

The Aging and Disability Resource Center (ADRC) functions as “a one-stop shop for information about, assistance with and referral to resources for older persons and person with disabilities and/or their caregivers. The goal of the ADRC is to provide individuals with all the informed that they need to make an informed choice(s), and to streamline access to the individual’s choice for long-term supports. ADRC improves the ability of state and local governments to manage resources and to monitor program quality through centralized data collection and evaluation. ADRC programs provide information and assistance to individuals needing either public or private resources, professionals seeking assistance on behalf of their clients, and individuals planning for their future long term care needs. The ADRC will have the ability to serve all individuals regardless of income by providing information about, and referrals to, agencies and providers.

Purpose

The vision is to have an ADRC in the BRADD area serving as a highly visible and trusted place where people can turn for information on the full range of long term support options. The ADRC program also serves as an entry point to publicly administered long term supports including those funded under Medicaid, the Older Americans Act, and state revenue programs.

The Barren River ADRC shall:

1. Provide Individuals and families, regardless of income, unbiased and reliable information and counseling;
2. Function as “a one-stop shop for aging and disabilities, information, programs and services”;
3. Have the ability to serve all individuals regardless of income by providing information about, and referrals to agencies and providers.

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The Barren River ADRC will serve as an entry point to publicly administered long term supports including those funded under Medicaid, the Older American's Act and state revenue programs.

Procedure

1. The Barren River Area Agency on Aging and Independent Living shall ensure ADRC staff are highly trained professionals and provide expertise to serve diverse private pay consumers;
2. ADRC staff shall:
 - a) Provide unbiased customer support;
 - b) Enter client information into the Social Assistance Management Systems (SAMS) regardless of income level;
 - c) Provide advanced counseling and decision support skills through formal assessment, interviewing, probing and exploration of alternatives;
 - d) At a minimum, be able to provide information on the following:
 - I. Costs of Services – options, service fees and rate scales, opportunity for financial assistance, existing income guidelines and criteria, criteria for spend down.
 - II. General Services and Supports – menu of services, how to locate services, range of options, availability, alternatives for waiting lists;
 - III. In-home Supportive Services – quality assurances, hiring procedures, competency and trustworthiness of homecare workers, lists of providers in the community, affordability, and how to locate;
 - IV. Quality – service selections available to older adults, the extent to which referrals in the data base are based on bonding, and policies and procedure for monitoring and accountability;
 - V. Long “Term Services and Supports Planning for the Future – long term care insurance information, guidance with estate planning and estate recover, and reverse mortgages; and
 - VI. Housing cost, options, assisted living opportunities, moving and relocations services, and financing nursing home placement.

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Definitions

ADRC means the entity funded by the Department of Aging and Independent Living to administer and provide Aging and Disability Resource Center Services.

APS means the agency designated to insure the safety and well-being of elders and adults with disabilities who are in danger of being mistreated or neglected, are unable to take care of them or protect them from harm and have no one to assist them. APS caseworkers are usually the first responders to report of abuse, neglect and exploitation of vulnerable adults.

Advocacy means a key part of information and Referral Services used to ensure that callers receive the benefits and service to which they are entitled and that organizations within the established service delivery system meet the collective needs of the community.

Benefits Counselor means a person whose primary job duties may include offering information about available benefits; providing technical assistance to consumer about how to access benefit; advocating for/ assisting with the appeal process for benefits denial; consulting with legal counsel when appropriate.

Consumer/Caller means an individual the ADRC has served and collected identifying information about.

Contact means a communication made in person or by telephone by any person (consumers, caregiver, professional, etc.)

Crisis Intervention means assessing and meeting the immediate, short-term needs of consumers who are experiencing a crisis and contacting the ADRC for assistance. Although the ADRC doesn't promote itself as a formal crisis intervention center, occasional request for assistance from consumer in crisis may occur.

DAIL means the Department of Aging and Independent Living of the Kentucky Cabinet for Health and Family Services.

Follow-up means the requirement that ADRC staff contact consumers needing additional assistance in location or using services including those consumers in endangered situations or to assess the overall quality of the services performance.

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Future Planning means the process of planning for ones future long term care needs. This may involve the provision of information, counseling and resources about retirement planning, financial planning, LTC insurance and reverse mortgages.

I & R/A Specialist or Operators means a person whose primary job duties may include answering telephones and meeting with in-person visitors; offering information, referral and assistance on a variety of topics; determining if a home visit or offices visit with a case manager is necessary; documenting calls in the client tracking database; assisting with populating and maintaining the resource database.

Information Provision means information given to a consumer in response to a direct request. Information can range from a limited response (such as an organization's name, telephone and address) to detailed data about community service systems (such as explaining how a group intake system works for a particular agency), agency policies, and procedures for application.

Inquirer means someone who approaches the ADRC either by phone, email, or in-person to receive information, assistance and/or referral to resources for older persons and Peron with disabilities and/or their caregivers.

New Contacts means the total number of telephone and in-person contacts made to the ADRC by individuals who have contact the ADRC during the current fiscal year.

Options Counseling means some combination over time of the following activities; provision of information, making referrals, counseling, assisting with applications, advocating, home visits, short term case management, and conducting needs assessments and reassessments.

ADRC Program Coordinator means an individual responsible for the overall management of the program in a given Area Development District (ADD). This person may also service as a Resource Counselor.

Referral Specialist/Aging Assistant means the person designated as the frontline ADRC staff to receive calls and requests for information and assistance.

Resource Counselor means ADRC staff that provides assistance and referral to callers with complex needs.

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Short Term Case Management means case management used to stabilize consumers and their families in times of immediate need before they have been contacted to ongoing supports and services. It often involves more than one follow up contact.

Total Contacts means the total number of telephone and in-person contacts made to the ADRC. This number includes repeat contacts.

Unit means one (1) contact for ADRC information, assistance or referral; or one (1) event for ADRC group presentation/media event.

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Responsibilities of the Area Development Districts

Barren River Area Development District shall be responsible for planning, organizing, and administering a district-wide service delivery system including the Aging Disability Resource Center. Specific terms and conditions are included in the master agreement and approved by The Kentucky Department of Aging and Independent Living.

General Requirements

Barren River Area Development District shall:

- (1) Provide a plan for meeting the requirements in their contract for the ADRC.
- (2) Permit staff of DAIL to monitor and evaluate all ADRC services.
- (3) Ensure that consumers and families are able to identify and readily locate Aging and Disability Resource Center.
- (4) Ensure that each paid staff person has received initial and ongoing training to meet training standards, if applicable, and meets staff qualification standards established for each specific service by Barren River Area Agency on Aging and Independent Living. Barren River Area Agency on Aging and Independent Living will develop training standards and provide technical assistance.
- (5) Develop and maintain a staffing plan that describes how the ADRC is staffed, including functions of various staff positions, staff qualifications, the number of full-time equivalent positions (FTEs) devoted to each function and the percent of each position's time devoted to its different responsibilities, i.e. current staff may be assigned to the ADRC on a rotating schedule. At minimum, one (1) full time staff must be established and have a staffed physical space. BRADD will develop training standards and provide technical assistance.

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General Requirements

Barren River Area Agency on Aging and Independent Living shall:

(1) Be responsible for the BRADD ten county area wide Aging and Disability Resource Center. In keeping with the mission of the program, Barren River Area Agency on Aging and Independent Living shall be responsible for administering the ADRC in the BRADD region.

(2) Establish and make available on a district wide basis, policies and procedures essential for administration of the ADRC.

Policy and Procedure Approval

Policy:

The Department of Aging and Independent Living will approve all policies and procedure including the client and resource director database.

Procedure:

(1) Policies and procedures will be submitted to DAIL prior to implementation.

(2) All changes to the database template are at the discretion of DAIL.

(3) Updates to the resource data base will be referred DAIL administrator prior to inclusion on the website.

Barren River AAAIL maintains a resource guide on the BRADD website. This resource guide is updated annually.

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Service Delivery

Policy: The service delivery functions of the Barren River Area Agency on Aging and Disability Resource Center are to provide accurate information, suitable referrals and supportive assistance for consumers in order to link the person to the appropriate service(s) either by telephone or in person.

Procedure:

Aging and Disability Resource Center staff will understand the standard elements and general flow of interaction to assure that all inquiries are consistent.

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Intake Procedure

Policy: An intake utilizing the DAIL ADRC Level 1 Screening will be completed at the time of the inquiry in order to gather information and document the need for referral and assistance.

(1) Initial contact will occur by walk-in office visit, telephone, e-mail, or TTD/TTY interactions.

(2) The Information and assistance service shall be available continuously for at least 7 ½ hours a day, Monday through Friday (except for official state holidays), including the hours from 11:00 am through 2:00 pm. The Barren River ADRC shall providing information and assistance in a manner that is convenient to the public. The Aging and Disability Resource Center shall provide a phone number, which is toll free to all callers within the BRADD service area. During information and assistance hours, a Barren River ADRC staff member will answer the phone by the third ring.

(3) Response to voicemail, E-mail, and Web based inquiries will occur within (24) twenty-four business hours of initial contact. Contact to voice mail, E-mail and Web based Inquires will be attempted (3) three times prior to closing contact with a consumer in the event of unsuccessful contact attempt. The last contact with a consumer is preferred to be a mailing composed of program resource information with a referral to the Barren River ADRC. Staff will make drop in individuals a priority.

(4) Complex issues/concerns and referral(s) will be the responsibility of the ADRC Program Coordinator or the Director of Aging and Independent Living Services.

(5) Inquirers will be encouraged to re-contact the Resource Center if they need further information and/or assistance.

(5) Barren River ADRC staff will utilize the approved DAIL standardized screening tool.

(6) Screening data will be entered into the SAMS system.

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Initial Customer Interaction Protocol

Policy:

(1) The ADRC phone will be answered as identifying the Barren River Area Agency on Aging and Disability Resource Center and will include the following elements, in no defined order:

- a) A greeting – “Hello”, “Good morning”, “Good afternoon”, etc.
- b) Announcement of the service – i.e. “Barren River Area Agency on Aging and Disability Resource Center”
- c) Identification of person talking – “This is...”; “My name is...”
- d) An invitation for the inquirer to speak – “How can I help?”; “What can I do for you?”

(2) Upon call completion:

- a) Thank the inquirer for using the ADRC services.
- b) Encourage the inquirer to contact again at any time in the future for assistance.
- c) Offer a follow up satisfaction survey by mail or email.

Customer Intake Protocol

(1) Core data will be obtained about the client and their needs during the initial contact and throughout subsequent interactions(s) as appropriate. Each interaction is recognized as unique and requiring professional skill and judgement to guide the flow in a manner that is responsive to the situation.

(2) An explanation(s) will be given as to the need for the pertinence of the question(s) to the request for the information and/or assistance.

(3) When appropriate, in-depth information will be obtained in order to identify underlying issues and/or determine additional service needs.

(4) Verbal and/or written permission will be obtained prior to making a referral, assisting with obtaining services or advocating for an individual.

(5) The ADRC will document that a referral has been made on behalf of the caller.

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Referral Protocol

(1) Referrals will be made to appropriate agencies and/or organizations on behalf of a customer upon request.

(2) Minimal information necessary to process a referral shall include but is not limited to name of person requesting services, age, address, phone number and services requested.

(3) It is the responsibility of the Referral Specialist and/or the Resource Counselor working with the customer to notify the agencies and/or organizations of the referral.

The Barren River ADRC will make the referral process simple, consistent and complete to ensure the consumers' needs are met by the referral(s).

(1) Follow-up contact will be made for all clients having presented with complex issues / concerns, to include, but not limited to, those inquirers in endangerment situations. A Resource Counselor is responsible for the follow-up contact.

(2) Staff will assist in identifying and removing whatever practical obstacles exist between the customer and identified service(s) and/or advocate for the individual when requested.

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Non-Operating Hours Protocol

Policy: The Aging and Disability Resource Center shall provide information to callers during non-operation hours regarding business hours and how to leave a message for ADRC Staff.

Procedure:

(1) The voice mailbox will be activated during non-operating hours, such as but not limited to: evenings, weekends, and holidays. Also on rare occasions during staff training. The Out of Office Assistant Message will advise that the center is currently closed normal operation business hours, and that a message can be left which will be responded to by close of the next business day.

(2) A voice message on the mailbox will advise the caller the center is currently closed and if the call is an emergency to hang up and call 911. The message will state the normal operating business hours and that a message can be left which will be responded to on the next business day in a timely manner.

(4) It is the responsibility of the ADRC staff or assigned designee to activate both systems at close of business.

(5) It is the responsibility of the ADRC staff or assigned designee to retrieve and respond to messages within both systems in the morning of the next business day.

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Call Termination Protocol

Policy:

The Aging and Disability Resource Center staff will, at all times portray professionalism and strive to provide excellent customer service by utilizing professional behavior, skills attitude.

Procedure:

Upon termination:

- Thank the inquirer for using the ADRC Services
- Encourage the inquirer to contact again at any time in the future for assistance.

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Quality Improvement, Complaints

The Resource Center staff members will perform their assigned duties to all consumers in a timely fashion according to best practices and in a professional manner.

(1) All complaints and/or concerns about any aspect of the service, including but not limited to personnel, are considered significant. These are to be routed to the Program Manager or his/her designee for effective resolution.

(2) For internal quality service improvement purposes, referrals, including but not limited to complex referrals, will be monitored annually using a simple auditing tool to assess quality of the referral. This process is the responsibility of the Program Manager or his/her designee. This process is the responsibility of the Program Coordinator or his/her designee.

(3) For quality-improvement purposes, consumers will be audited annually using a consumer satisfaction survey, developed by Barren River Area Agency on Aging and Independent Living. The survey may be given by phone, email, or by postal mail. This process is the responsibility of the Program Coordinator or his/her designee.

(4) Even if state or federal funding is not specifically designated for the ADRC but used to support the ADRC, the program will be monitored for quality and service delivery.

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Limited English Proficiency (LEP)

Policy:

The Barren River ADRC strives to provide effective and efficient language services to individuals who are Limited English Proficient (LEP). The ADRC Program Coordinator or designated staff will hold the primary responsibility of coordinating all language service activities for the ADRC Services. Barren River ADRC maintains a language line services.

Procedure:

The Program Coordinator or his/her designee will hold primary responsibility of coordinating all language service activities.

- (1) BRADD/AAAIL staff will consult with the Director of Aging Services or his/her designee when a person is identified as being LEP.
- (2) If a person primary language is any other than English, it will be identified by the BRADD/AAAIL staff and relayed to the Director of Aging Services or his/her designee in order to start the planning process.
- (3) Interpreter services will be arranged for all clients who have Limited English Proficiency. The interpreter must be a neutral party and cannot have a vested interest in the client's personal welfare.
- (4) If a family member requests that a family member interpret for them, a neutral interpreter will be present to insure that the client's best interests are being considered.
- (5) Contract providers and other community resources will be used for interpreter services, if there are no in-house interpreters available.
- (6) Determination of appropriate language services will depend on individual circumstances and plans can be modified in order to accommodate client need.
- (7) The BRADD/AAAIL has two types of interpreter services available to utilize. At anytime the BRADD/AAAIL may utilize an established language line. Also, contracts

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with the local refugee center are on file with the BRADD AAAIL to be scheduled and utilized for one on one personal contact in the homes of clients.

(8) The use of telephone interpreter services is available through “Language Line Services”. ADRC staff must receive advance approval from the AAAIL Director or his/her designee prior to use of the services.

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Staffing

Policy:

The Barren River ADRC will seek to maintain a skilled and knowledgeable staff to ensure the integrity of provided services.

Procedure:

(1) It is the responsibility of the ADRC Coordinator to assure that the staff is adequately trained in order to perform their basic assigned duties. Such trainings(s) include, but are not limited to: on the job training through shadowing; conferences; training sessions and/or literature.

(2) It is the responsibility of each staff person in conjunction with the Program Manager or his/her designee to identify any specific area(s) of training which may include, but not limited to special populations and skill sets that may be deemed necessary to successfully perform assigned duties. Such training(s)/education may include, but are not limited to seminars; conferences; training sessions and/or literature.

(3) It is the responsibility of each staff person to identify and respond appropriately to difficult inquirers/situations.

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Crisis, Emergency Inquiries

Policy:

Emergencies will be addressed by following the protocol. Staff will accept the statements as valid and will not attempt to interpret or question the inquirer's perception or intent. Emergency personnel will be contacted when possessing any doubt as to the necessity of assistance.

Crisis/Emergency Inquirer

(1) At any point in an interaction when emergency intervention is required, staff will remain calm, assert control over the conversation, and be as directive as is necessary in order obtain / verify the following information, in order of priority:

- (a) The specific location of the person(s) requiring assistance (street address, location on property – e.g. front bedroom, back yard, parking lot)
- (b) The phone number of the person needing assistance or the caller
-- **Remember: The inquirer may not be the person(s) requiring assistance.**
- (c) The chief complaint of the person requiring assistance

(2) If interaction is via a phone staff will then transfer the caller to 911 and stay on the line until the natural conclusion of the call. **Note – Staff will not tell the caller to hang up and dial 911.**

(3) Staff will not attempt to substantially diagnose or question the inquirer about the nature of a medical emergency prior to taking decisive action. The first priority will be to ensure that assistance is in route at the earliest possible opportunity. Staff may ask the inquirer about sudden or drastic changes in medical conditions in order to ascertain whether an emergency exists.

(4) If caller indicates that they do not want or need emergency assistance but staff is concerned about the caller's welfare and believes the caller may be in imminent danger then contact the appropriate police or sheriff's department identifying self as KRC staff, explain the situation and ask for a "welfare check".

(5) If interaction is during a home visit staff will first make certain that immediate environment is safe, if environment unsafe move to the closest safe place, then phone 911 with specifics.

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Suicidal Person

(1) In the event that an inquirer threatens harm to themselves or others, obtain as much information as possible in order to dispatch emergency services. Be careful not to alienate the caller. Enlist the aid of a co-worker for collateral phone calls or other assistance.

(2) Staff must be in firm control of the conversation. Ask questions related to the present suicidal crisis. Be prepared to direct each successive action to minimize imminent potential for harm.

(3) Points to keep in mind:

a) Find out what kind of self-harm the person has done / is doing:

Drugs:

When? What kind? What strength? Usual dose? Mixed with other drugs/alcohol?

Cuts:

Weapon? Where are cuts? How deep? Bleeding? How much?

Gun:

Loaded? What kind? Where is it? Anyone else nearby?

b) Talking about suicide to a troubled person will not give him/her the idea. The ideas are already there.

c) A “garden variety” depression triggers most suicide attempts, not psychosis. Staff should endeavor to look for and emphasize the individualized reason(s) a person may have to live.

d) Typical suicides are not impulsive actions; they are preceded by long deliberation. Suicide is often a choice that is contemplated for months, if not years.

e) The person who only talks vaguely or threateningly about suicide or makes “feeble gestures” is not interested only in manipulation. The person should be taken seriously. This person requires attention, without which the next suicide attempt may be lethal.

(4) Keep the person on the phone and talking if possible until help arrives.

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Angry Person

In the event of an inquirer who expresses anger toward the staff member, the Resource Center, or a referral source, the staff member will:

- (1) Remain calm and patient and not engage in argument.
- (2) Work to defuse the inquirer's anger by active listening and by responding empathetically.
- (3) Help the inquirer to identify the source of his/her anger and define it.
- (4) Endeavor to understand the cause of the anger as the inquirer defines it.
- (5) Remain positive and offer assistance in resolving (if possible) the cause of the inquirer's anger.
- (6) Explain how the ADRC is able (and unable) to assist its customers.
- (7) Offer help wherever possible.
- (8) Assist the inquirer in problem-solving.
- (9) Follow through with commitments made to the inquirer.
- (10) Offer future assistance.
- (11) Follow up.

Profane/Offensive Person

In the event of an inquirer who uses language that the staff member perceives as profane or offensive, the staff member will:

- (1) Be explicit about what the inquirer is saying that the staff member finds offensive or profane.
- (2) Inform the inquirer that the staff member will be unable to continue the conversation until the specific profane or offensive language ceases.
- (3) Offer the inquirer other word choice/language options to express him/herself that the staff member would not find offensive or profane.
- (4) Emphasize willingness to be of assistance.
- (5) Set limits and stick to them.
- (6) Terminate the interaction once the above conditions are met and the offensive/profane language continues.

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Threatening Person

In the event an inquirer uses threatening language or issues specific threats to the Barren River Area Agency on Aging and Independent Living staff member, the staff member will:

- (1) Be explicit about the staff member's perception of an issued threat.
- (2) Inquire about the nature and motivation of the perceived threat.
- (3) Emphasize that the staff member will not accept threats and will take appropriate action to nullify the threat, up to and including police intervention, if required.
- (4) Offer positive options.
- (5) Offer future assistance.
- (6) Offer positive avenues for conflict resolution.
- (7) Attempt to preserve the relationship with the inquirer.
- (8) Set limits and stick to them.
- (9) Terminate the interaction if the above conditions are met and the treats continue.
- (10) Take appropriate protective action, depending on the nature of the treat including a report to and/or calling law enforcement, if indicated.

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Home Visit

Policy:

Staff safety always comes before performance of job duties / responsibilities.

Staff members should never hesitate to leave a location or terminate a visit if there is any question that they may be at risk. Attentiveness is the first line of defense.

Procedure:

Staff should plan all visits using the following guidelines:

- (1) Schedule an appointment and call ahead to confirm visit.
- (2) Know the location of the visit. Be aware of the community and possible areas of concern. Map out the safest and most direct route.
- (3) Staff should wear shoes and clothes you can run in, wear minimal jewelry, and do not carry a purse unless absolutely necessary. Keep valuables out of sight. Purses and items of value should be locked in a concealed location prior to leaving for visit.
- (4) Carry identification and car keys.
- (5) Always leave an itinerary at the primary location and notify the Program Manager or his/her designee of any changes.
- (6) Keep vehicle well maintained and gas tank at least half full.
- (7) Be aware of and carefully observe the surroundings. Avoid people and groups that seem to be hostile or unruly. Be aware of animals and avoid them if possible.
- (8) Choose open parking places so that the car cannot be blocked in if at all possible.
- (9) Be aware of one-way and dead-end streets. Try to park in the direction of departure.
- (10) Lock all car doors and keep windows rolled up.

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(11) Trust your instincts at all times. Be aware of potentially dangerous situations. Do not enter or remain in any environment, such as but not limited to buildings, apartments, or houses, if you suspect an unsafe situation.

(12) If an emergency/criminal situation arises, be aware of the following:

- a) Type of incident
- b) Time of incident
- c) Location of incident; be as specific as possible.
- d) Description of the individuals involved and names if known.
- e) Any weapons involved.
- f) Vehicles involved.
- g) Direction of flight

(13) Develop and use a distress word or phrase if you feel your safety is in jeopardy while on a visit. The Program Manager or his/her designee is to be advised of this word/phrase.

(14) Document carefully the course of such interactions, from greeting to termination, with specific attention to the nature of the interaction, the staff member's statements and/or directives, the inquirer's responses, and the outcome of the interaction. Additionally, the staff person will notify the Program Manager or his/her designee of the event.

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Privacy Policy

Policy:

The ADRC staff will maintain each inquirer's right to privacy and confidentiality of protected health information.

Procedures:

(1) It is the responsibility of each staff member to adhere to the Workplace Privacy and Security Procedures of the Area Development District as written.

(2) When the inquirer is not the person for whom services are requested, generalized referral information about community services may be given to a third party without a release of information.

(3) An inquirer who has not knowingly given his/her phone number may not be contacted or identified by using the caller identification function of the phone system. **The only exception** to this is in the event of an emergency, when the caller ID is the only available method of identifying the caller or the caller's location.

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Resource Database

Policy:

The Barren River Area Agency on Aging and Independent Living database shall be a collection of local community information as comprehensive as possible that identifies resources, services and providers in areas relevant to the long-term care needs and issues of older adults, adults with disabilities, and their caregivers. The following disclaimer applies:

Disclaimer: No recommendation or endorsement is intended or made of any product, service, or information by its either inclusion or exclusion. While all attempts are made to insure the correctness and suitability of information under our control and to correct any errors brought to our attention, no representation or guarantee can be made as to the correctness or suitability of that information or service presented, referenced, or implied. The Kentucky Resource Center is not responsible for any decisions made or actions taken by inquirers as a result of the information obtained.

Procedure:

(1) The Barren River Area Agency on Aging and Independent Living will maintain a database of local community information as comprehensive as possible about resources, services and providers relevant to long term care needs and issues of older adults, adults with disabilities, and their caregivers. The database will be used by the staff to provide information and/or referrals to inquirers on available options within the community. Although inclusion in the database is deemed a privilege, not a right, and remains at the sole discretion of the Resource Center, inclusion does not imply endorsement nor does omission indicate disapproval.

- a) General guidelines for inclusion may include, but are not limited to such things as adequately addresses the needs of the target population, provides critical services for the target population, provides services within the region of the local Area Development District, and provides timely updates on information.
- b) General guidelines for exclusion may include, but are not limited to such things as illegal activities, deceptive business practices, misrepresentation of services, discrimination, patterns of complaints, and violation of federal, state, or local laws or regulations.
- c) The general guidelines will be reviewed by the Program Manager or his/her designee at a minimum of every three years.

Barren River Area Agency on Aging and Independent Living Standard Operating Procedures

BARREN RIVER AGING AND DISABILITY RESOURCE CENTER

Resource Data Base Maintenance

Policy:

The Barren River Area Agency on Aging and Independent Living will maintain a current standardized profile of agencies and organizations listed in the resource database.

Procedure:

- a) To ensure the integrity and accuracy of the database it is the responsibility of the Program Coordinator or designated staff to enter all descriptive information into the database.
- b) The Program Coordinator or designated staff will formally update the resource database annually.
- c) The Program Coordinator will make revisions and additions to the database throughout the year whenever feasible.
- d) The agencies and organizations profile shall at a minimum when appropriate the name, both legal commonly used name, as well as acronym; main address and branch sites; contact information; hours of operation; and type of services.
- e) The agencies and organizations profile will include at a minimum the organization's name and geographic location by county and zip code as well as type of services provided and specific target population when possible.
- f) The Program Coordinator and/or his designee is responsible for entering the agency/ organization profile into the electronic database.

Barren River Area Agency on Aging and Independent Living Standard Operating Procedures

BARREN RIVER AGING AND DISABILITY RESOURCE CENTER

Reports

Policy:

The Barren River Area Agency on Aging and Independent Living will collect aggregate data to build a profile of community needs to assist in community wide planning to fill identified gaps in order to serve individuals with appropriate service(s).

Procedure:

(1) The Barren River Area Agency on Aging and Disability Resource Center will use, conduct and analyze aggregate data in order to develop and create reports to identify gaps in services, document insufficient resources, and monitor trends within the community.

(2) It is the responsibility of the AAA to develop all aggregate reports requested by the DAIL.

(3) ADRC Staff are required to obtain as much information as possible regarding the callers, with particular attention to the type of caller (consumer, caregiver, professional, other and unknown), callers age, disability type associated with physical MRDD, mental illness, multiple, other or unknowns, and callers income level. Each individual contact is to be recorded in the SAMS Database.

Barren River Area Agency on Aging and Independent Living Standard Operating Procedures

BARREN RIVER AGING AND DISABILITY RESOURCE CENTER

Marketing

All marketing materials will be compliant with the state selected and approved branding and will include the **state 877-telephone number and web address**. In addition to the state 877-telephone number, AAAs may add local numbers if they choose to do so.

Procedure:

- (1) Barren River Area Agency on Aging and Disability Resource Center will develop and print the brochure for distribution to the district.
- (2) Locally developed marketing materials must be approved by DAIL and the Cabinet's Department for Communications
- (3) Exhibit display will comply with Barren River Area Agency on Aging and Independent Living standard design

Barren River Area Agency on Aging and Independent Living Standard Operating Procedures

BARREN RIVER AGING AND DISABILITY RESOURCE CENTER

Technology

All AAAs will have a technology system that is compatible with Harmony SAMS for the resource database and client recording.

Procedure:

Barren River Area Agency on Aging and Independent Living will use Harmony SAMS System.

Barren River Area Agency on Aging and Independent Living Standard Operating Procedures

BARREN RIVER AGING AND DISABILITY RESOURCE CENTER

Private Pay Callers

Policy Statement

Individuals and families regardless of income need unbiased and reliable information and counseling. Barren River Area Agency on Aging and Independent Living will service private pay individuals by providing information about, and referrals to, appropriate agencies.

Definition

- Private Pay consumers are individuals who: Have some level of financial resources to devote to long term care services and supports,
- Have incomes above poverty threshold; and,
- May not be currently eligible for public long term care programs.

Procedure

(1) The Barren River Area Agency on Aging and Independent Living shall ensure that staff members are highly trained professionals and provide expertise to serve diverse private pay consumers.

(2) The ADRC staff shall:

- a) Provide unbiased customer support.
- b) Enter client information into the Social Assistance Management Systems (SAMS) regardless of income level.
- c) Provide an advanced counseling and decision support skills through formal assessment, interviewing, probing, and exploration of alternatives.
- d) At a minimum, be able to provide information on the following:
 - I. Costs of Services – options, service fees and rate scales, opportunity for financial assistance, existing income guidelines and criteria, and criteria for spend down.
 - II. General Services and Supports – menu of services, how to locate services, range of options, availability, and alternatives for waiting lists.
 - III. In-home Supportive Services – quality assurances, hiring procedures, competency and trustworthiness of homecare workers, lists of providers in the community, affordability, and how to locate.

Barren River Area Agency on Aging and Independent Living Standard Operating Procedures

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- IV. Quality – service selections available to older adults, the extent to which referrals in the data base are based on bonding, and the policies and procedures for monitoring and accountability.
- V. Long Term Services and Supports Planning for the Future – long term care insurance information, guidance with estate planning and estate recover, and reverse mortgages.
- VI. Housing cost, options, assisted living opportunities, moving and relocation services, and financing nursing home placement.