

Par. 1. **Material Transmitted and Purpose** – Transmitted with this Manual Letter are changes to Service Chapter 525-05, Home and Community Based Services. New language is in red and underlined and old language is in red and has been struck through.

Par. 2. **Effective Date** – March 1, 2024

Purpose 650-50-01

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

~~To provide current information on known opportunities and services available statewide and connect people to services to help them maintain or improve their quality of life.~~

~~To maintain a statewide and nationwide toll-free phone service (1-855-462-5465) for the provision of services. Services are also provided using e-mail (carechoice@nd.gov) and the Internet (<https://carechoice.nd.assistguide.net/>).~~

The North Dakota Department of Health and Human Services, Adult & Aging Services, Aging and Disability Resource – LINK (ADRL) provides current information on opportunities and services available statewide and nationwide and connects older individuals, individuals with disabilities, their family, health professionals, and the public to information and to public and private long-term services and supports (LTSS) to help them maintain or improve quality of life.

Many services offered through the ADRL are free of charge and available to individuals with all levels of income. There are three (3) ways to contact the ADRL which are free and confidential:

- Toll Free: 1-855-462-5465
- Email: carechoice@nd.gov
- Website: carechoice.nd.assistguide.net

Legal Reference and Authority 650-50-05

(Revised ~~10/17/2018~~ 03/01/2024 ML #~~3540~~ 3813)

- Public Law 114-144, Older Americans Act of 1965, as amended in ~~2016-2020~~
- North Dakota Century Code Chapter 50-06 (Department of **Health and Human Services**)

- ~~45 Code of Federal Regulations Part 1321 (Grants for State and Community Programs)~~ 45 CFR Part 1321, Grants for State and Community Programs

Definitions 650-50-10

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

Definitions in this manual include descriptions of Older Americans Act (OAA) programs and services that must be used in the completion of required Federal reporting. Please refer to Service Chapter 650-25 for a complete list of definitions.

“Disability” means a condition attributed to mental or physical impairment, or a combination of mental and physical impairments that results in substantial functional limitations in one or more of the following areas of major life activity: (1) self-care, (2) receptive and expressive language, (3) learning, (4) mobility, (5) self-direction, (6) capacity of independent living, (7) economic self-sufficiency, (8) cognitive functioning, and (9) emotional adjustment.

“~~Inform USA Standards f/k/a Alliance~~ Information and ~~Assistance/Referral (I & R)~~ (AIRS)” is the art, science, and practices of bringing individuals and services together. Often, it is referred to as community or resource navigation. This is a one-on-one service that (a) ~~assesses problems and capabilities of the individuals~~ provides individuals with current information on opportunity and services available within their communities, including information relating to assistive technology; (b) ~~provides consumers with information on opportunities and services available within their communities~~ assesses the problems and capacities of the individuals; (c) links ~~the consumers~~ individuals to ~~the~~ services and opportunities that are available; ~~and~~ (d) to the maximum extent practicable, ensures that the individuals receive the services needed, and are aware of the opportunities available by ~~establishing~~ adequate follow-up procedures; and (e) serves the entire community of individuals: (i) individuals with greatest economic and social need; and (ii) individuals at risk for institutional placement.

“Older Individual (Person)” means an individual who is 60 years of age and older.

Staffing Requirements 650-50-15

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

~~The ADRL is available Hours of service will be~~ Monday through Friday 8:00 AM to 5:00 PM (CST). ~~The ADRL is closed for all approved State holidays and A~~an answering system is in place during the hours ~~ADRL Intake I & R~~ staff is not available. Individuals can still put in a request for a call back and/or services during non-business hours through email: carechoice@nd.gov, leaving a voicemail, or via the website: carechoice.nd.assistguide.net

~~I & R staff will complete an orientation session with the I & R Program Administrator to discuss job responsibilities and expectations. Staff will be required to read the policy and procedure manual for Aging and Disability Resource LINK, "ABC's of I & R" manual, and user guide for the Department's designated web-based data collection system.~~

The ADRL Intake Specialist(s) is a member of the Adult & Aging Services team and assist in community in-reach and outreach. The Intake Specialist's primary role is to foster independent decision-making by providing access to quality LTSS.

The ADRL Intake is staff with six (6) Specialists and are the centralized intake to streamline access to LTSS. The Intake Specialist(s), will assess, educate, provide information, referral, and assistance to individuals of all ages, their caregivers, and representatives via telephone, email, and online applications. To create a positive experience, the Intake Specialist(s) have excellent skills in the following areas: customer service, communication (oral and written), telephone etiquette, and interviewing.

The Intake Specialist(s) will facilitate a person-centered conversation to gather information utilizing a uniform screening and assessment tool to determine programmatic eligibility, empower self-advocacy, independent living, and promote the highest quality of life.

The Intake Specialist(s) will collect, document in a web-based data collection site, update, and share information on public and private community resources according to program guidelines.

~~Staff will have the communication skills to meet the needs of special populations; i.e., caregivers including caregivers of children with special needs, older adults and persons with disabilities. Communication skills include establishing a rapport or connection with the consumer, assessing~~

~~the situation, clarifying to ensure an understanding of the situation, providing appropriate information and referrals, and closing the call.~~

~~ADRL Staff will be~~ are required to ~~seek~~ be Certified Community Resource Specialist Aging/Disabilities (CRS-AD) status through the ~~Inform USA Standards~~ formally known as Alliance Information and ~~Assistance/Referral Systems (I & R)~~ (AIRS) Certification Program after one (1) year of employment. AIRS Inform USA is a national organization to deliver quality resource referral, navigation, and connection services and is the sole source for standards, program accreditation, and practitioners' certification. ~~AIRS is a national organization created to improve access to human services.~~

~~I & R staff are eligible for initial CIRS A/D certification if they are currently engaged in the provision of I & R services. According to the AIRS standards, eligibility requirements for staff to take the CIRS A/D exam are:~~

- ~~• At least 1 year of employment in I & R for applicants with a Bachelors or higher degree~~
- ~~• 2 years of employment in I & R for applicants with an Associates or Community College degree~~
- ~~• 3 years of employment in I & R for applicants with a High School diploma or GED.~~
- ~~• 5 years of I & R employment with no educational qualifications~~

Provision of Information & Referral Services 650-50-20

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

~~When calls are received on the Aging and Disability Resource LINK, I & R staff will:~~

- ~~1. Answer the phone by identifying self and division.~~
- ~~2. Establish rapport with the consumer and use active listening skills to discern the presenting problem.~~
- ~~3. Ask the consumer how they learned about the Aging & Disability Resource LINK and document the response in the call log as outlined in the manual.~~
- ~~4. Respond to each consumer in a professional, non judgmental manner.~~

- ~~5. Listen sensitively to what the consumer is saying, while also being attuned to what the consumer does not say.~~
- ~~6. Assess the consumer's problems and needs by asking relevant questions to obtain information necessary for an accurate referral.~~
- ~~7. Not assume the responsibility of diagnosing the consumer's problem but will listen intuitively.~~
- ~~8. Reflect back to the consumer their understanding of the concerns the consumer has verbalized.~~
- ~~9. Remain patient during calls, speak slowly and clearly, and be prepared to repeat the information as often as needed to insure the consumer obtains the correct information.~~
- ~~10. Transfer consumer to appropriate entity if attempting to make a report of abuse.~~

Duties/Responsibilities:

The ADRL Intake Specialist position requires:

- Comprehensive interviewing, active listening, screening, and problem-solving skills.
- Conducting intake and needs assessment for all individuals to provide information, assistance and referrals to LTSS including but not limited to:
 - Service Payments to the Elderly and Disabled (SPED)
 - Expanded-Service Payments to the Elderly and Disabled (EX-SPED)
 - Medicaid State Plan – Personal Care (MSP-PC)
 - Home and Community-Based Services (HCBS) Medicaid waiver
 - Technology Dependent Medicaid waiver
 - Older American Act Programs including but not limited to:
 - Health Maintenance
 - Nutrition
 - Family Caregiver Support Program (FCSP)
 - Options Counseling (OC)/Local Contact Agency (LCA)
 - Other service options
- Receiving and documenting referrals, complete data entry and submit monthly reports as requested.
- Establishing and maintaining effective working relationships with community partners and individuals.

- Conducting in-reach, outreach, and public education to individuals and community partners.
- Complying with all State/Federal laws, policies and procedures.
- Assisting with intake screening, written instructions, and procedures.
- Maintaining knowledge of options, funding sources, services, and resources.
- Demonstration of proficient computer and organizational skills.
- Ability to work independently and within a team, with efficiency and flexibility.
- Participation in training opportunities.

Provision of Referral Information 650-50-25

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

The ~~ADRL I&R~~ staff will provide telephone, e-mail, and/or online information and referral services ~~in which to the consumer individuals seeking information and referral services has one to one, human contact with I & R staff.~~

Once the needs of the ~~consumer individual~~ have been identified, ~~I&R the intake~~ staff will:

1. Assure the ~~consumer individual that~~ all requests for assistance are handled confidentially, and no information will be released ~~to the Department of Human Services and its contractors~~ without the ~~consumer's individual's~~ verbal and/or written permission, as allowed by federal and state consent regulations.
2. Inform the ~~consumer individual certain~~ information ~~may be is~~ kept on file for the Aging and Disability Resource-LINK records.
3. ~~If consumer agrees,~~ The intake staff will obtain as much information on the call summary as the caller is willing to provide. If ~~consumer the individual~~ refuses to provide information, staff will affirm the ~~consumer individual~~ has that option.
4. Explore what other resources and services the ~~consumer individual~~ is currently receiving and/or if they have received information from any other source.
5. ~~Where possible,~~ Provide a minimum of three appropriate referrals to give the ~~consumer individual~~ a choice. ~~Consumers Individuals~~ will be responsible for choosing which, if any, resources they wish to access.

6. Refrain from recommending any one service over another.
7. Explore with the ~~consumer~~ individual if they will be able to follow up on referral information provided without further assistance.
8. If the situation requires, complete the referral(s) on behalf of the ~~consumer~~ individual:
 - ~~I&R Intake~~ staff will explain what information will need to be released and to whom the information will be released to complete the referral.
 - ~~I&R Intake~~ staff will ask for the ~~consumer's individual's~~ verbal permission to release the information to make the referral to each specified agency or program.
 - ~~I&R Intake~~ staff will document the ~~consumer's individual's~~ verbal agreement in the call summary. Access to the call log is restricted to ~~licensed Aging Services staff Program Administrators and I&R staff within the Aging Services Division.~~
9. Respect ~~consumer the individual's~~ confidentiality at all times. Information shared must be kept within the limits agreed upon with the ~~consumer~~ individual:
 - An exception to this would be a situation where the ~~consumer individual~~ may be in danger of self-harm, staff will release information as needed to obtain emergency services for the ~~consumer-individual~~.
10. Before terminating communication with ~~consumers individuals, I&R intake~~ staff will inquire if the ~~consumer~~ individual has any further questions about the information provided; and thank the ~~consumer individual~~ for using the Aging and Disability Resource-LINK.
11. Staff will inform ~~consumer the individual that~~ they may receive a follow-up call from ~~I&R-intake~~ staff to determine if the ~~consumer individual~~ was linked to the services ~~he or she needed~~.
12. A "warm transfer" of the call will be completed when staff determines that a direct transfer would be appropriate; i.e. ~~consumer individual~~ deemed unable to make the call themselves or is having difficulty understanding the referral and service process. "Warm transfer" is when ~~intake~~ staff connects the ~~consumer individual~~ to another party or agency and stays on the line until connection is made. When a warm

transfer is deemed appropriate. ~~I&R~~ The intake staff will obtain the ~~consumer's individual's~~ verbal permission to transfer the call ~~to the appropriate agency~~. ~~I&R~~ When appropriate the intake staff will announce the ~~consumer individual~~ to the agency and remain on the line until assured parties have been connected.

13. When completing referrals, ~~I&R~~ the intake staff will approach agencies in a courteous manner, speak with the appropriate personnel, and have all known relevant information for the referral at hand. Relevant information may include the ~~consumer's individual's~~ name, phone number, address, age, as well as their identified needs.

~~14.~~ When ~~a referral has been~~ completed, the ~~Aging and Disability Resource LINK~~ ADRL Intake staff will document ~~completion of the referral on the~~ call in the call summary, along with noting the date, and the name of the ~~person~~ individual calling, the individual's telephone number, and the individual providing the LTSS. ~~who received the referral information to complete follow-up calls.~~

Consumer Individual Confidentiality 650-50-30

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

Adults & Aging Services ~~Division~~ is governed by the written confidentiality policies of the Department of Health and Human Services, Service Chapter 110-01, and federal, state, and local laws. No ~~consumer individual~~ information will be shared outside of the Department of Health and Human Services, Adults & Aging Services, and its contractors without first obtaining the ~~consumer's individual's~~ verbal permission.

If the ADRL intake ~~I&R~~ staff make a referral on behalf of the ~~consumer individual~~, staff must explain the information that would need to be released and to whom it will be released to complete the referral. The intake staff ~~I&R-staff~~ will ask for verbal permission to release that information to each specified agency and/or program. The ~~consumer's individual's~~ verbal agreement to release the information will be recorded in the call summary.

An exception to this would be in situations where the ~~consumer individual~~, may be in danger of self-harm or hurting someone else. In these situations, the intake ~~I&R~~ staff will release information as needed to obtain emergency services for the ~~consumer individual~~.

Emergency/Crisis Calls 650-50-35

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

~~Consumers Individuals~~ who appear to be in a situation where it seems likely to result in harm to themselves or others are considered Emergency or Crisis calls. To handle such calls, ~~the ADRL Intake Aging and Disability Resource-LINK staff has access to behavioral health professionals at the Regional Human Services Centers~~ will contact the Human Service Centers Crisis Unit, 911, 211, Law Enforcement, etc. ~~I & R staff will provide empathy and support to the consumer, while also informing the consumer that they will have the opportunity to talk with a behavioral health professional.~~ The intake ~~s~~Staff will obtain the ~~consumer's individual's~~ name, address, and phone number ~~as quickly as possible~~ and will transfer the ~~consumer individual~~ to the appropriate area. ~~respective regional Human Service Center Crisis Line.~~ I & R staff will stay on the line until the call is answered by crisis line staff. ~~In cases of immediate physical danger to the consumer, staff may find it necessary to notify emergency services in the consumer's home area.~~

Relay North Dakota Calls 650-50-40

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

Relay North Dakota provides full telephone accessibility to individuals who are deaf, hearing impaired, ~~and/or~~ speech impaired. Specially trained communications assistants' complete calls and stay on-line to "relay" messages between individuals with impairments and the parties they are calling. Relay North Dakota is available 24 hours a day, 365 days a year. There are no restrictions on the length of calls, or the number of calls individuals may place. Relay North Dakota is a confidential service. No records are kept of calls.

The service is free within the ~~consumer's individual's~~ local area. Long distance calls are billed at a reduced rate. Direct dial, collect calls, third-party calls, credit card, and calling cards can be used through the service.

Both voice and TTY users may use Relay North Dakota to place calls by using these numbers:

TTY: 800-366-6888 or 711

Voice: 800-366-6889 or 711

Translators 650-50-45

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

In the event an ~~consumer individual~~ speaks a language other than English, the intake I&R staff will ~~attempt to~~ explain to the ~~consumer individual~~ a translator will be contacted ~~that can converse with the consumer~~. If possible, staff will elicit the ~~consumer's individual's~~ native language and phone number so an appropriate translator can be contacted. The Department of Health and Human Services has a contract with CTS LanguageLink to provide telephone-based interpretation services for the state of North Dakota. This service can be accessed by calling 888-338-7394 and providing the Call Center Service Representative with the following information:

- Account #16194
- Staff person's full name
- Department number
- Language needed.

Voice Mail Consumers- Response 650-50-50

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

For ~~consumers individuals~~ who reach the ~~Adults & Aging Services, ADRL the Aging and Disability Resource LINK~~ after hours or when staff is on another call, a voice mail system is in place that allows the ~~consumer individual~~ to leave their name and phone number, as well as a brief message. Calls left on the voice mail system will be returned within a maximum of ~~one~~ **three (3)** business days. ~~The intake I&R~~ staff should respond to voice mail calls using the following steps:

1. Record the ~~consumer's date, individual's~~ name, and phone number in the call summary. ~~Record the time of the voice message.~~
2. ~~The intake sStaff should~~ **must** return the call(s) **within three (3) business days**, working only with the individual who placed the original call. If that individual is not home or ~~not~~ available, staff will

inquire when the individual might be available. ~~In keeping with the ADRL intake staff Aging and Disability Resource LINK policy on confidentiality, no~~ will leave a message ~~will be left;~~ with the ~~person~~ individual answering the phone or on the individual's voicemail. ~~will be thanked and the call will be ended.~~

- ~~The intake staff will Every~~ make two (2) attempts to return the call and it will be documented in the call summary. After ~~three two (2)~~ unsuccessful attempts within a ~~five(5)two-business~~ day timespan, staff will discontinue calling.

Internet and E-Mail Request for Information - Response 650-50-55

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

The ADRL intake ~~I&R~~ staff will address all emails and web intakes ~~have access to the Internet and the use of e-mail to facilitate the provision of quality services~~ to individuals seeking LTSS information or services. All e-mail requests and web intakes ~~through the Aging & Disability Resource LINK e-mail account~~ will receive a response within three (3) business days ~~by the end of the next business day at a minimum.~~ E-mail and web intake inquiries are subject to the same guidelines regarding confidentiality as inquiries received via telephone.

The intake staff will make two (2) attempts to return the call and it will be documented in the call summary. After two (2) unsuccessful attempts within a five(5)-business day timespan, staff will discontinue calling.

~~The intake staff Every attempt to return the call will be documented in the call summary. After three unsuccessful attempts within a two-business day timespan, staff will discontinue calling.~~

Inquiries for Services in Other States - Response 650-50-60

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

For ~~consumers~~ individuals seeking information on services for individuals, caregivers, and/or ~~persons~~ individuals with physical disabilities in other states, staff will refer the ~~consumer~~ individual to the national the local Aging and Disability Resource Center or entity best able to provide information and resources. If the ~~consumer~~ individual is asking for

information that is readily available, staff may use their discretion to supply the requested information.

Eldercare Locator is a nationwide public service of the U.S. Administration on Aging providing state-by-state information on services available for older adults and their families. Eldercare Locator can be reached toll-free at 800-677-1116 or online at <https://eldercare.acl.gov/Public/Index.aspx>. ~~I&R~~ The intake staff should inform ~~consumer~~ the individual they will need to provide the zip code ~~or city/state~~ for the area in which they are seeking services when they use the Eldercare Locator.

The National Council on Independent Living (NCIL) is a national organization that advances independent living and the rights of people with disabilities through ~~consumer~~ individual -driven advocacy. Statewide information on disability services is available by calling toll-free 844-778-7961 or online at <https://www.ncil.org/>.

~~The Child Welfare Information Gateway is a national organization that promotes the safety, permanency, and well-being of children, youth, and families by connecting child welfare, adoption, and related professionals as well as the public to information, resources, and tools covering topics on child welfare, child abuse and neglect, out-of-home care, adoption, and more. Information is available toll-free at 1-800-394-3366 or online at <https://www.childwelfare.gov/>.~~

~~Autism Speaks is a national organization that promotes solutions, across the spectrum and throughout the life span, for the needs of individuals with autism and their families through advocacy and support; increasing understanding and acceptance of people with autism spectrum disorder; and advancing research into causes and better interventions for autism spectrum disorder and related conditions. Information is available toll-free at 1-888-288-4762 or online at <https://www.autismspeaks.org/>.~~

Ageing and Disability Resource - ~~Link~~ LINK Marketing 650-50-65

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

Public awareness of the ~~ADRL Ageing and Disability Resource~~ LINK is of primary importance to ensure individual access to services. Promotional activities will be conducted on a consistent basis throughout the year.

Promotional activities may include but not be limited to: television, **social media**, **and** radio **interviews**, newspaper articles, presentations, mailings, health fair exhibits, and use of promotional materials.

~~Resource-LINK staff is responsible to research and purchase promotional items within the Division budget and with prior approval from the Division Director.~~

~~Resource-LINK staff will follow the procedures set by the State Procurement Office when ordering promotional items and brochures.~~

~~Resource-LINK staff is responsible to maintain an inventory of promotional items in stock and keep a record of promotional materials being provided for dissemination by the Regional Aging Services Program Administrators, other Department staff or as requested by community service agencies.~~

~~Resource-LINK ADRL intake~~ staff will participate in statewide **senior** events whenever possible. ~~Resource-LINK The intake~~ staff will keep a record of the events attended.

~~The Resource-LINK All marketing fliers and brochures is meet the Department of Health and Human Services branding guidelines. updated, reviewed, and submitted for printing on an as needed basis and within the Division budget and with prior approval from the Division Director.~~

~~I & R staff will provide informational demonstrations of the Resource-LINK website upon request.~~

Advocacy Services 650-50-70

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

At times **ADRL Intake** staff may need to provide advocacy services for **consumers individuals**. Providing advocacy services means ~~a Resource-LINK the intake~~ staff will take an active role in assisting the **consumer individual** with obtaining services. ~~The intake s~~Staff may need to make phone calls, write letters, or speak to other agencies or programs on behalf of **consumers individuals**. Situations where advocacy may be **required needed** include but are not limited to:

1. ~~Consumers Individuals~~ who may lack assertiveness in pressing for needed services.
2. ~~Consumers Individuals~~ who may lack awareness or knowledge of their rights.
3. ~~Consumers Individuals~~ who may lack knowledge of, or who are confused about, existing services and application processes.
4. ~~Consumers Individuals~~ who may have a difficult time communicating their needs or concerns.
5. ~~Consumers Individuals~~ who may find it difficult to ask for help, who perceive asking for help as a weakness or dependency.
6. ~~Consumers Individuals~~ who may experience language difficulties in dealing with agencies or programs.
7. Agencies that may have rigid or confusing screening processes or policies.
- ~~8. Agencies that may have financial limitations.~~
8. Agencies that ~~consumers individuals~~ identify as not being respectful or helpful.
9. When advocating for ~~consumers individuals~~, ~~I&R the intake~~ staff must obtain verbal permission from the ~~consumer individual~~ to release information. If the ~~consumer individual~~ does not approve the release of information, ~~intake~~ staff may still complete advocacy attempts, but will proceed in a "generic" manner without providing identifying information about the ~~consumer individual~~.
10. If ~~I&R the intake~~ staff have questions or concerns regarding the provision of advocacy services, they will consult the ~~ADRL Aging and Disability Resource LINK~~ Program Administrator to develop a plan for appropriate advocacy services.

Referrals for ~~Options Counseling Services Adult & Aging Services Programs~~ 650-50-75

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

~~Aging and Disability Resource LINK~~ The ADRL intake staff will make referrals to the Home and Community-Base Services (HCBS) case

managers and Community Service Coordinators (CSC) for ~~options counseling~~ services whenever appropriate. Situations where a referral for options counseling might be appropriate are, but not limited to:

- When information on ~~LTSS long-term supports and services~~ is requested and individual would be best served by more individual staff time and attention
- When an individual has unmet care needs.
- When the ~~consumer~~ individual needs assistance with futures planning or benefits counseling
- When an individual needs assistance in their home.
- When a long-distance caregiver has concerns about the increased frailty or care needs of a family member
- ~~When it becomes evident the consumer would be best served by more individual staff time and attention~~

~~It is the policy of the Aging and Disability Resource LINK to make all possible referrals to options counseling staff to assist consumers in their local community.~~

~~Aging and Disability Resource LINK staff maintains a list of the options counseling staff for each region to access options counseling services.~~

Follow-up Calls 650-50-80

(Revised ~~10/17/2018 ML #3540~~ 03/01/2024 ML #3813)

Follow-up calls provide a second opportunity to assist ~~consumers~~ individuals with obtaining needed services. Additional assistance in locating or using service may be necessary. ~~I & R Intake~~ staff ~~may will~~ conduct a follow-up within ~~two weeks~~ five (5) business days after the first initial contact. ~~of the call with consumers in situations where I & R staff believe the consumer does not have the necessary capacity to follow through and resolve their problem.~~

For quality assurance purposes, ~~I&R~~ Adults & Aging Services staff will conduct follow-up calls on 10% of other inquiries monthly to the extent possible.

Follow-up shall consist of contacting the ~~consumer~~ individual and/or organization to which a referral has been made to find out if service is being provided and the need is being met, and if the service is not being provided, why not.

Follow-up may also be used to determine if the ~~consumer~~ individual is satisfied with the ~~ADRL I&R~~ service as a means of determining the effectiveness of the ~~ADRL I&R~~ services provided.

If applicable, changes in agencies or services gathered during follow-up calls will be verified by ~~Adults & Aging Services I&R~~ staff and the resource database information will be updated.

If the inquirer has not received services, or the need has not been met, ~~Adults & Aging Services I&R~~ staff shall determine whether there is still a need and make additional appropriate referrals and consider a referral for options counseling services. ~~Adults & Aging Services I&R~~ staff will document follow-up results in the ~~Department's designated~~ web-based data collection system ~~(that the service was not received)~~ for future reference.

Information gathered during the follow up process may be used as a further means of evaluating the effectiveness of existing community service providers and for identifying gaps and overlaps in community services.