

FISCAL YEAR 2022 -2023
SCOPE OF SERVICE

**ANSWERING SERVICE AND AFTER-HOURS INTAKE / REFERRAL AND
INFORMATION AND ASSISTANCE**

I. PURPOSE

To accept calls from the public during non-business hours, and act as the overflow backup for Protective Service, Information and Assistance, and the front desk during business hours.

II. DEFINITIONS

- A. **After-Hours Intake/Referral** refers to a system of accountability and availability including documentation of intake Reports of Need and referral to Protective Services agencies for the protection of consumers within Allegheny County. The system operates during non-regular business hours including weekends, holidays, and evenings.
- B. **Aging and Disability Resource Center (ADRC)** Aging and Disability Resource Centers (ADRC) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans, and families. ADRC's seek to link individuals with needed services and supports.
- C. **The Allegheny County Department of Human Services/Area Agency on Aging (ACDHS/AAA)** provides services to adults age sixty (60) and over to help them maintain their independence.
- D. **Alliance for Information and Referral Systems (AIRS) Certification**: AIRS Certification is a professional credentialing program for individuals working within the Information & Resource/Assistance (I&R/A) sector of human services. Certification is a measurement of documented knowledge in the

field of I&R/A reflecting specific competencies and related performance criteria, which describe the knowledge, skills, attitudes and work-related behaviors needed by I&R/A practitioners to successfully execute their responsibilities. The AIRS Certification Program is operated in alignment with national standards for credentialing organizations. The Certification required for the Information and Assistance Coordinator staff member at a Focal Point Senior Community Center is CRS-A/D (Community Resource Specialist Aging/Disability) Certification for I&R Specialists in Aging.

- E. **Answering Service** refers to a system which is designed to take calls during non-business hours.
- F. **Daytime Backup** accepts overflow calls from the Protective Services Intake Unit, Information and Assistance and Front Desk during business hours.
- G. **DHS** Allegheny County Department of Human Services
- H. **Information and Assistance (I&A):** Consists of the direct provision of information about and assistance in accessing services and resources to older adult consumers, their families and caregivers; this includes screening for needs, providing appropriate current referrals and follow-up if needed and may involve more extensive support to the client which may extend over multiple contacts. I&A services may be provided in person, including in the consumers' place of residence, in writing, electronically/e-mail, over the telephone or TDD machine.
- I. **Master Provider Enterprise Repository (MPER)** A repository of key CONTRACTORS' demographic data for all CONTRACTORS who provide services for DHS. DHS applications use MPER to validate AGREEMENT, services, facilities, rate information and document program funded budgets and invoices to facilitate documentation of services rendered and claims information by

CONTRACTORS. CONTRACTORS are required to keep all agency information including but not limited to contacts, facilities and service offering information up to date.

- J. **Service Unit**: An I&A Service Unit represents one call/contact, provided by a CONTRACTOR for a consumer and documented in WellSky Aging & Disability IR, the Pennsylvania State database for Aging I&R/A services. Protective Services service units represent one service documented in WellSky.

III. AGING PROGRAM DIRECTIVE (APD) / FEDERAL / STATE REGULATORY REFERENCE AND COMPLIANCE

Organizations providing services outlined in this Scope of Service shall comply with all federal and state directives listed below:

Aging Program Directives

- **Protective Services Intake and Investigation**

- 18-24-01 Revised Report of Need and Instructions (PDF)
- 16-24-01 RON Notifications for Department of Health (DOH) Licensed Facilities (PDF)
- 15-24-01 RON Intake and Payment for Ages 18-59 (PDF)
- 10-24-01 Protective Service Reports of Abuse, Neglect, Exploitation and Abandonment for Individuals Under Age 60 (PDF)

- **Information and Assistance**

- 85-11-01 Policies and Procedures for the Provision of Information and Referral Services by AAAs (PDF)

Laws

- **Older Americans Act**

- [Pa. Statute Title 35 \(Older Adults Protective Services Act\)](#)

Regulations

- [6 PA Code Chapter 15](#)

This Scope of Service is subject to change based on changes to the above directives.

IV. PERFORMANCE EVALUATION

Each contract year the ACDHS/AAA will outline clear standards of acceptable performance to which the CONTRACTOR will be held. These standards relate to compliance with applicable policies, regulatory guidelines, Scopes of Service, Contract Workstatements, and Performance Based Contracting (PBC), where applicable. Standards are set to support quality service that meets or exceeds the needs of the consumer, and to optimize the impact of the service provided. The CONTRACTOR is responsible for adhering to the timelines in reporting its compliance to the Scopes of Service and using findings to build on its strengths and develop strategies on opportunities, through a continuous quality improvement process.

Monitoring tools outlining acceptable evidence are used in evaluating compliance with regulatory requirements, service standards, documentation, and reporting requirements. The monitoring tool applicable to this Scope of Service is:

Pennsylvania Department of Aging
Protective Services Monitoring Tool

V. SERVICE STANDARDS, REPORTING AND DOCUMENTATION REQUIREMENTS

- A. The CONTRACTOR will have the capacity to retrieve and submit data, information, reports and other communications through electronic internet communications within one business week. Failure to receive or read Area Agency on Aging

communications sent to the CONTRACTOR MPER e-mail address the same day does not absolve CONTRACTOR from knowing, responding to or complying with the content of that communication.

B. The CONTRACTOR is responsible for accurately recording all consumer service and program data into the appropriate information management system, by the seventh (7th) working day of the month for the prior month's transactions or state regulations and standards whichever is less. The CONTRACTOR is responsible for coordinating appropriate information management system training and the transfer of knowledge & information to existing and new staff.

C. Answering Service units:

One (1) call equals one (1) unit of service

D. Call reporting process:

Protective Services:

CONTRACTOR will attach a report to the MPER monthly invoice; the report will identify the number of units in three categories:

1. all calls that do not result in a Report of Need,
2. all calls that result in a Report of Need for consumers 60 years of age and older, and
3. all calls that result in a Report of Need for consumers under 60 years of age.

E. The following services are provided by the Answering Service:

Protective Service:

1. The answering service operator will take calls made to the Allegheny County Department of Human Services/Area Agency on Aging's number on:
 - a. Weekdays from 4:00 p.m. to 8:30 a.m.
 - b. Weekends from 4:00 p.m. on Friday until 8:30 a.m. on Monday.
 - c. Holidays from 4:00 p.m. on the day before the holiday until 8:30 a.m. the day after the holiday.

The answering service operator will also provide daytime back up weekdays from 8:30 a.m. to 4:00 p.m. for overflow calls.

2. The operator will screen the calls to determine the immediacy of the caller's situation.
 - a. The operator will take call back information from calls that do not meet the criteria as an extreme emergency or for a report and send the information to Protective Services via email. Information to be collected and emailed is:
 - i. The first and last name of the caller
 - ii. The name of the organization for the caller, if applicable
 - iii. A return call number
 - iv. The name and SAMS ID number of the consumer
 - v. The reason for the call
 - b. If an extreme emergency exists (caller distressed, incoherent, agitated or in a life-threatening situation), the operator will direct the caller to the

police, fire or paramedic department in their area and email the contents of the call to Protective Services at AgingOAPSIntake@AlleghenyCounty.US .

- c. If the call meets Protective Services criteria, the operator will inform the caller that a Report of Need will be taken.
 - i. Complete all Wellsky Aging and Disability (formerly SAMS) entries
 - A. Care Enrollment
 - B. Care Manager
 - C. Service Delivery
 - D. Care Plan
 - E. Journal Entry
 - ii. Complete necessary notifications to licensing entities
 - iii. Refer the completed Report of Need and notifications to the appropriate agency via email and verbally.
3. Documentation of all calls based on agreed procedures between ACDHS/AAA and Answering Service.
4. The CONTRACTOR completes a screening function but does not provide any advice to callers.
5. Receiving, screening and documenting reports of need for Protective Services according to specified procedures included in the ACDHS/AAA On-Call Manual and all Pennsylvania Department of Aging (PDA) standards and requirements.
6. Referrals to the appropriate Protective Services worker, Supervisor, ACDHS/AAA Administrator or other resources

according to specified procedures and within specified time frames.

7. Provider will make identified data entry corrections within 5 business days of notification.

Information and Assistance:

1. The answering service operator takes calls
 - a. Weekdays from 4:30 p.m. to 8:30 a.m.
 - b. Weekends from 4:30 p.m. Friday until 8:30 a.m. Monday.
 - c. Holidays from 4:30 p.m. on the day before the holiday until 8:30 a.m. on the day after the holiday.
 - d. Providing daytime back up weekdays from 8:30 a.m. to 4:30 p.m. for overflow calls
 - e. Three hours per month on prescheduled days. A minimum of 48 hours notice will be provided.
 - f. Providing backup when AAA unable to take calls.
2. Live call center I&A service to 100% of callers who contact the AAA SeniorLine during non-business hours.
3. Accurate service data documentation in WellSky Aging & Disability (formerly SAMS) and Aging & Disability IR (formerly SAMS IR), which is used to track all services provided to consumers.

4. Enter the following Pennsylvania Department of Aging (PDA) and AAA required fields into Aging & Disability IR:
 - a. Caller (the Default 'Anonymous' is only used if consumer does not want to provide name)
 - b. Call Type
 - c. Caller type
 - d. Consumer
 - e. Referred By
 - f. Age Group (range) of consumer
 - g. Topic
 - h. ADRC Outcomes
 - i. Referrals
5. Develop and maintain working knowledge of WellSky Aging & Disability.
6. Effectively assess and provide available information to 100% of callers for presenting needs, including basic needs; health care; mental health; financial needs; substance abuse; adult/older adult protective services and other safety-related concerns, including imminent danger, shelter, housing, or a mental health-related crisis.
7. Complete and provide required referral information for consumers in need of ongoing services using the Intake Referral Form. Electronically submit these forms to the ACDHS/AAA by noon of the following business day at seniorline@alleghenycounty.us .
8. Track all calls for the ACDHS/AAA including call volume, call patterns and other relevant data.
9. Submit reports on Provider call activity to ACDHS/AAA by the 7th working day of the following month.

10. Meet face-to-face with the ACDHS/AAA as needed, but no less than annually to address processes, procedures and ensure coordination of services.

F. Personnel

1. The minimum qualifications for staff performing Protective Services Intake functions are:
 - a. Completion of the Pennsylvania Department of Aging (PDA) Protective Services Intake curriculum for staff completing Protective Services Reports of Need.
 - b. At least annually satisfactory work performance evaluations are completed, in writing.
 - c. All persons providing services under the contract shall have signed the PDA Confidentiality Statement and been made aware of all confidentiality requirements and the penalties for violation of the requirements.
2. Staff performing Information and Assistance functions:
 - a. shall attend all appropriate training, as required by ACDHS/AAA.
 - b. Maintain AIRS certification

VI. RESPONSIBILITIES / EXPECTATIONS OF THE PROGRAM OFFICE (ACDHS/AAA)

ACDHS/AAA will support the CONTRACTOR in meeting service standards and requirements by providing the following:

- A. Developing program policies and procedures to meet all Pennsylvania Department of Aging and local requirements during the life of this contract.

- B. Program Monitoring and ongoing evaluation to assure compliance with the specifications and terms of this contract.
- C. Providing training to CONTRACTOR staff to meet Protective Services Report of Need Intake requirements under Protective Services Regulations and develop all forms to be used for this contract.
- D. Specifying procedures for initiation and termination of service.
- E. Providing technical assistance as needed regarding program requirements.
- F. Providing technical assistance, direction, and cooperation to assist the CONTRACTOR in satisfactorily recording program and service data into the appropriate information management system.