



COMMONWEALTH of VIRGINIA
Department for the Aging

[Click here to go to the Virginia Department for the Aging Home Page](#)

TABLE OF CONTENTS
AAA TUESDAY E-MAILING
October 12, 2011

SUBJECT	VDA ID NUMBER
<u>Director and Board Notes - Board Recruitment</u> (Tim Catherman)	12-10
<u>CMS Consumer Alert</u> (Kathy Miller)	12-11
<u>SCAM Alert: Scammers Offer Phony Snap Application Assistance</u> (Kathy Miller)	12-12
<u>VICAP Recognition Awards</u> (Kathy Miller)	12-13
<u>Project 2025 Legal Assistance Meeting Date Change and Upcoming Events</u> (Janet James)	12-14
<u>Revision of the Communication, Referral and Information and Assistance (CRIA) Service Standard</u> (Kathy Miller)	12-15

Note: The web addresses (links) in this document may change over time. The Department for the Aging does not attempt to refresh the links once the week has passed. However, this document is maintained on the web for a period of time as a reference. Some links may require registration.



12-10

COMMONWEALTH of VIRGINIA
Department for the Aging

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Tim Catherman, Director of Administrative Services

DATE: October 12, 2011

SUBJECT: Director and Board Notes – Board Recruitment

I was impressed with the community representation I recently saw on one AAA board. A lot of thought went into who was recruited. The agency had a dynamic cast of representative from the community. Representation not only included local citizens but they looked at their business needs and actively sought individuals who would help guide the agency.

The board composition included a local bank vice president, owners of various construction firms, an assistant county administrator, a real estate agency, a legislative aid either state or congressional, a retired physician, an assistant Commonwealth's attorney, etc. Others that readily came to mind include an investment banker, someone who worked in the media (newspapers, magazine, radio, TV), the owner of several service stations, an architect, the director of development for a large agency, a known philanthropist, an insurance broker, a lawyer, and an individual with recognized notoriety.

There are many more you can readily identify. A frank discussion with your current membership or executive committee may be helpful. If you have a unique or interesting process of identifying board members, please share it.



12-11

COMMONWEALTH of VIRGINIA
Department for the Aging

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Kathy Miller, Director of Programs

DATE: October 12, 2011

SUBJECT: CMS Consumer Alert

The Centers for Medicare and Medicaid Services (CMS) has recently become aware of a website that has the appearance of being an official government website for the **Pre-Existing Condition Insurance Plan (PCIP)**.

This new website - <http://preexistingconditioninsuranceplan.com> - is not maintained by any government programs and consumers are strongly urged not to submit any personal information requested by this website under the assumption that it is a government website.

CMS is taking the appropriate steps to protect consumers from being misled.

The Pre-Existing Condition Insurance Plan made available through the Affordable Care Act makes health insurance available to people who have had a problem getting insurance due to a pre-existing condition.

The Pre-Existing Condition Insurance Plan:

- Covers a broad range of health benefits, including primary and specialty care, hospital care, and prescription drugs.
- Does not charge you a higher premium just because of your medical condition.
- Does not base eligibility on income.

Individuals interested in the new federally backed pre-existing condition insurance program should visit: www.pcip.gov or call 866-717-5826.



12-12

COMMONWEALTH of VIRGINIA
Department for the Aging

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Kathy Miller, Director of Programs

DATE: October 12, 2011

SUBJECT: SCAM Alert: SCAMMERS OFFER PHONY SNAP APPLICATION ASSISTANCE

The Food and Nutrition Service has noted the recent rise in online scams related to applications for the Supplemental Nutrition Assistance Program (SNAP). These scams involve ads on the internet, sometimes beside legitimate articles, that offer assistance filling out SNAP applications after submitting credit card information.

The links to these ads will take individuals to another website where they may be asked to provide personal information, including credit card information. Benefits counselors should warn their clients that SNAP officials never seek credit card details and not to provide this information. It can be used by identity thieves to make unauthorized purchases on their credit card, or gain access to their bank accounts.

If they see any ad on the internet offering SNAP application assistance with a corresponding link, they should be warned not to click on it. If they have already fallen victim to this or a similar scam, they should contact their credit card company immediately. They may also choose to file a police report.

For more information on identity theft, please visit:
<http://www.ftc.gov/bcp/edu/microsites/idtheft/>



12-13

COMMONWEALTH of VIRGINIA
Department for the Aging

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Kathy Miller, Director of Programs

DATE: October 12, 2011

SUBJECT: VICAP Recognition Awards

The 4th Annual VICAP Coordinators' Conference was held in Charlottesville on September 20-22, 2011. The following VICAP Coordinators and their programs were recognized at the conference for their accomplishments.

Linda Barnhart (Senior Connections) – received the **Innovation Award** for consistently “thinking outside the box” to find new ways to improve her program, such as utilizing existing Peer Place records to identify other potential client needs for which VICAP could provide assistance. Once identified, Mrs. Barnhart crafted a letter highlighting specific services (i.e., LIS potential), provided appropriate applications and contact information. As a result of her efforts, Mrs. Barnhart was able to greatly improve her client contact numbers. Further, during a monthly teleconference, Mrs. Barnhart shared her methodology so that others might benefit as well.

Howard Houghton (Fairfax) – received the **Volunteer Program Recognition Award**. Mr. Houghton's volunteer program is excellent in that it effectively provides for a diverse community by enlisting a diverse group of volunteers, including the Fairfax-Falls Church Community Services Board, the Korean Community Service Center, the Silver Lights Chinese Association, and Boat People SOS. Moreover, his volunteer management skills ensure a high rate of retention.

Jim Hutchinson (Senior Services of Southeastern VA) – received the **Outreach Award** based on the number of events his program participated in since the last coordinators' conference. SSSEVA participated in 127 events and activities providing Medicare beneficiaries with much needed information and assistance on topics such as

Medicare Parts A & B, Prescription Drug Coverage, Low Income Assistance, Medicare Advantage, Medigap, Long Term Care, Preventive Services and Fraud and Abuse.

Shannon Abell (LOA) – received the **LIS Application Assistance Award** based on the number of clients provided with Low Income Subsidy (LIS) and Medicare Savings Program (MSP) application assistance since the last coordinators' conference. LIS/MSP Assistance is a crucial part of our program ensuring that Medicare beneficiaries with low income receive help paying for their prescription medications and Medicare premiums. LIS/MSP assistance is the primary focus of the MIPPA Grant (Medicare Improvements for Patients and Providers Act).

Recipients of one award were not eligible to receive any of the other 3 awards.



12-14

COMMONWEALTH of VIRGINIA
Department for the Aging

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Janet James, Esq. – State Legal Services Developer, Public Guardian
Program Coordinator

DATE: October 12, 2011

**SUBJECT: Project 2025 Legal Assistance Meeting Date Change and Upcoming
Events**

NEXT MEETING DATE

The next Stakeholder meeting date is Monday December 12, 2011.

With approval from Project 2025 Stakeholders, the 10/19/11 Stakeholders' meeting is postponed until Monday 12/12/11. The time remains the same, 10:00 a.m. until 1:30 p.m. and a modest lunch will be provided. All AAA Directors and/or Title III-B legal assistance point persons are encouraged to attend and participate. For more information, please visit the Project 2025 webpage at www.Project2025Virginia.org.

UPCOMING EVENTS

10/12/11 -

Joani Latimer-Fergusson Honored by Senior Connections – (From Richmond Times Dispatch News Article) “Joani Latimer, Director of the state’s Long-Term Care Ombudsman Program, is the recipient of a new award created in honor of Mary C. Payne, one of the founding leaders of the Capital Area Agency on Aging”. Joani will be recognized this week on 10/12/11 at the Empty-Plate fundraiser luncheon in Richmond. For additional information, please call (804) 343-3023.

10/23/11 –

National Pro Bono Week Celebration 10/23/11 thru 10/29/2011. For more information, please see <http://www.probono.net/celebrateprobono/> or access from the Virginia State Bar web page at www.vsb.org.

10/24/11 –

Free Elder Law-Guardianship CLE, Richmond (Sponsors include *Project 2025*, Greater Richmond Bar Foundation, Central Virginia Legal Aid Society and the Virginia Poverty Law Center). In return for Continuing Legal Education (CLE) credit, attorneys agree to handle one guardianship case through a local legal aid program. For more information, please see:

[http://www.probono.net/celebrateprobono/events/event.395355-Free Elder Law Continuing Education Seminar On Guardianship.](http://www.probono.net/celebrateprobono/events/event.395355-Free%20Elder%20Law%20Continuing%20Education%20Seminar%20On%20Guardianship)

10/24/11 –

Ethical Considerations in Pro Bono Representation, Law Over Lunch CLE at University of Richmond Downtown. For more information, please see the attached flyer and [http://www.probono.net/celebrateprobono/events/event.391684-Ethical Considerations in Pro Bono Representation.](http://www.probono.net/celebrateprobono/events/event.391684-Ethical%20Considerations%20in%20Pro%20Bono%20Representation)

10/26/11 –

Statewide Legal Aid Conference, 10/26 thru 10/28/11, in Virginia Beach, VA. Please see www.vplc.org for additional details.

12/1/11 –

Hoarding: Life Style Choice or Hidden Danger? 1:00 PM to 4:30 PM in Harrisonburg, VA. The cost is \$10 for individuals and an entire group can attend for only \$20. Please see <http://fs21.formsite.com/ascott/form5/index.html> for additional details and registration. You may also contact Anne See at 1-800-237-0141 or asee@brls.org for more information.

Thank you.

Free Elder Law Continuing Education Seminar On Guardianship



Sponsored by Project 2025 on Legal Assistance to Older Virginians and the Greater Richmond Bar Foundation, with the Virginia Poverty Law Center and Central Virginia Legal Aid Society

**October 24, 2011 -- 9:00 a.m. to 4:15 p.m.
Williams Mullen, 200 South 10th Street, Richmond**

Mission: To Enhance Legal Assistance Services for Older Virginians

What You Get: 4 Hours of Approved VCLE/GAL Credit including One Hour of Ethics Credit FREE

What You Give: Commitment to Take One Pro Bono Guardianship Case from Legal Aid

Topics:

- * Roles of an Attorney in Establishing a Guardianship/Conservatorship (2 CLE's)
- * Alternatives to Establishing a Guardianship/Conservatorship (1 CLE)
- * Ethics in Guardianship/Conservatorship Practice (1 CLE)
- * Working with Central Virginia Legal Aid Society Pro Bono Department to Fulfill Commitments
- * "Law Over Lunch" Additional Free Ethics CLE Option by University of Richmond's Harry Carrico Center for Pro Bono

How to Register: For more information and registration, please contact:

Carol Deitrick
Greater Richmond Bar Foundation
cdeitrick@grbf.org
804-780-2600



12-15

COMMONWEALTH of VIRGINIA
Department for the Aging

MEMORANDUM

TO: Executive Directors, Area Agencies on Aging

FROM: Kathy Miller, Director of Programs

DATE: October 12, 2011

SUBJECT: Revision of the Communication, Referral, and Information and Assistance (CRIA) Service Standard

At the request of several AAAs, VDA has reviewed and revised the CRIA Service Standard requirement that Part A (pages 1-4) of the UAI be completed for any individual who receives *Information and Assistance*. This requirement has been changed to recognize that many direct services provided by the AAAs, such as transportation and disease prevention, require only the Virginia Service – Quick Form. These changes are reflected on pages 2 and 6 of the revised CRIA Service Standard.

Page 2: “Assessment: The process of identifying, analyzing, and prioritizing the needs of older persons, utilizing the required minimum assessment tool for the service to which the individual is being transferred, and any other client assessment documents as determined by the AAA. (Refer to the Information Systems Service Guide or applicable service standard.)...

Page 6: “Client Records: ... For **information and assistance**, the required minimum assessment tool for the service to which the individual is being transferred must be completed for clients requiring direct services. (Refer to the Information Systems Service Guide or applicable service standard.)

An additional change was made on Page 5 under Quality Assurance, Staff Training. The in-service training requirement was changed from ten (10) to eight (8) hours per year to be consistent with the new requirement in the Service Coordination Level One and Two Service Standards.

NOTE: The decision to collect additional assessment information continues to be at the discretion of the AAA. Completing Part A (pages 1-4) of the UAI may help to identify additional needs of the individual that may be overlooked when only completing the Virginia Service – Quick Form.

COMMUNICATION, REFERRAL AND INFORMATION AND ASSISTANCE
VIRGINIA DEPARTMENT FOR THE AGING
SERVICE STANDARD

Definitions

Communication—The process of offering general information to a client, caregiver, professional or other individual. [Ex. A caller asks for the number of the local DSS and the intake coordinator provides the number.]

Referral—The process of informing a client, caregiver, professional or other individual about appropriate choices and linking them with external entities providing opportunities, services, supports and/or resources to meet their needs. A referral does not involve direct services provided by the referring agency (AAA). [Ex. A caller inquires about how to apply for financial assistance. After asking several questions, the intake coordinator determines that the individual may be eligible for Medicaid and refers the caller to the local DSS office.]

Information and Assistance—The process of assessing a client or caregiver and transferring them to a service provided directly by the agency (AAA) or through a subcontractor and paid by the agency, or directly assisting them with obtaining needed services, supports and/or resources and, if necessary, advocating with entities on their behalf. [Ex. A caller inquires about financial assistance. The intake coordinator determines that the individual may be eligible for Medicaid, but is homebound and needs assistance with the application. The caller is assigned a care coordinator who will do a home visit to assess the individual, assist with the Medicaid application process, and determine if there are other services, such as home delivered meals, that could be beneficial.]

Follow-Up—A process of contacting individuals and the organizations to which they were referred to determine the outcome of the referral. Determining the quality and effectiveness of the referral and the service provided to the person referred. Additional assistance to the individual in locating or using needed services may be a part of the follow-up.

Planning and Evaluation—The process of aggregating and analyzing information collected through the provision of the service; collecting and reporting data on unmet needs for other services; and evaluating the overall effectiveness of the Communication, Referral, and Information and Assistance service.

Eligible Population

Communication and **Referral** services are targeted to persons who are 60 years of age or older, persons with disabilities aged 18 and over, and their families and caregivers.

Individuals are eligible for **Information and Assistance** services if they are 60 years of age or older. Priority shall be given to older individuals who are in the greatest economic and social need, and older individuals at risk for institutional placement, with preference given to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas.¹ Families and caregivers of older adults may also receive information and assistance for needed services.

¹ Older Americans Act of 1965, as amended, Section 306(a)(4)(A)(i)

Service Delivery Elements

If an agency provides **Communication**, no further action is required. The agency may opt to document communications in PeerPlace or some other format.

Agencies providing **Referral** services are required to complete the Virginia Service – Quick Form.

Agencies providing **Information and Assistance** services must perform all of the following components:

Assessment: The process of identifying, analyzing, and prioritizing the needs of older persons, utilizing the required minimum assessment tool for the service to which the individual is being transferred, and any other client assessment documents as determined by the AAA. (Refer to the Information Systems Service Guide or applicable service standard.) Federal Poverty/VDA Sliding Fee Scale is required, unless all information needed to determine federal poverty is documented on the UAI (self-declaration only; no income verification is required).

See “Client Records” for the required documentation.

Administrative Elements

Staff Qualifications:

- Knowledge: Communication, Referral and Information and Assistance service staff should have an awareness of the biological, psychological, and social aspects of aging and caregiving; the impact of disabilities and illnesses on individuals; interviewing principles; community resources; and public benefits eligibility requirements.
- Skills: Communication, Referral, and Information and Assistance service staff should have skills in establishing and sustaining interpersonal relationships; problem-solving; advocacy; and use of computer office software.
- Ability: Communication, Referral, and Information and Assistance service staff should have the ability to: communicate with persons of different socio-economic backgrounds; conduct an effective interview; complete an assessment; arrange and negotiate service referrals; and work independently.

Job Descriptions: For each paid and volunteer position funded by Title III of the Older Americans Act, an Area Agency on Aging shall maintain:

- A current and complete job description which shall cover the scope of duties and responsibilities of Communication, Referral, and Information and Assistance service staff; and
- A current description of the minimum entry-level standards of performance for each job.²

Agency Data Requirements

Referral and Information and Assistance services will collect data to support community needs assessment and community planning activities.

² 22 VAC 5-20-250, Grants To Area Agencies On Aging, Department for the Aging Regulations, Virginia Administrative Code

AIM System Agency Data Requirements for Recording Referrals and Information and Assistance

Units of Service: Units of service must be reported in AIM for each client receiving services. Service units can be reported for client on a daily basis, but not aggregated (summarized) more than beyond one calendar month.

- **Contacts:** count the number of interactions with the client and with agencies, caregivers, professionals and others related to establishing services, and when a Quick Form or Part A of the UAI is completed.
- **Persons served (unduplicated):** the individual who is receiving a direct service(s).

Optional Units (Not Entered into AIM but may be reported on AMR for AAA use)

- Number of **communication** calls (**i.e., tick marks or call log**)

Program Reports:

- Aging Monthly Report (AMR) is due to VDA by the twelfth (12th) of the following month. If the Area Agency on Aging provides this service, this report must be updated and submitted even if no expenditures or units of service occurred.
- AIM client level data must be transmitted to VDA by the last day of the following month.

NWD Tools / PeerPlace System Agency Data Requirements for Recording Referrals and Information and Assistance

Note: Each field described below must be asked of an individual for Referral and Information and Assistance services in order to properly coordinate their services and to meet NAPIS and other federal reporting requirements. These fields include all data elements from the Virginia Service – Quick Form, as well as some additional fields now needed to coordinate services across agencies.

*Virginia Service – Quick Form data elements have been noted by an asterisk.

Date: date service need established.

First Name:*

Last Name:*

Street Address: where individual resides*

City: where individual resides*

State: where individual resides*

Zip: where individual resides*

Phone Number: include area code*

Required Fields for ADRC Reporting:

DOB: Individual needing service.*

Contact Type: Received request for service information from

- Consumer/Individual
- Caregiver/Supporter
- Professional
- Other

Service Type: Service Requested.

Disability Type: Record disability category of the individual needing service as either:

- Physical
- MR/DD/ID
- Mental Illness
- Dementia Disorders (includes Alzheimer's Disease)
- Traumatic Brain Injury
- Sensory Disabilities
- Multiple Disabilities
- Unspecified
- No Disability

Federal Poverty: Answered as 'Yes', 'No', or 'Refused to Answer'*

Federal Poverty/VDA Sliding Fee Scale Level A through G*

Assistance Type: Individual needing service was provided:

- Options Counseling
 - Benefits Counseling (as part of options counseling)
 - Long Term Care Futures Planning (as part of options counseling)

Race:*

- American Indian/Alaskan Native
- Asian
- Black / African American
- Native Hawaiian or Other Pacific Islander
- Other
- White
- 2 or More Races
- Refused to Answer

Ethnicity*

- Hispanic
- Non Hispanic
- Refused to Answer

Does the Individual Requesting Service Live Alone: 'Yes' or 'No'*

Gender:*

- Male
- Female

Veteran: 'Yes' or 'No'

FIPS Code:*(often referred to as county code) refers to Federal Information Processing Standards codes of jurisdiction of where the individual resides.

Referral Data Elements for the NWD Tools Application

Referral agency type: category or type of agency, including but not limited to:

- CIL
- CSB
- DRS
- DSS

Units of Service: Units of service must be reported in PeerPlace for each client receiving services.

- Contacts: count the number of interactions with the client and with agencies, caregivers, professionals and others related to establishing services, and when the required fields in the IA record are completed.
- Persons served (unduplicated): the individual who is establishing the need for service(s).

Contributions/Program Income

The Area Agency on Aging shall formally adopt written policies and procedures, approved by the governing board, regarding the collection, disposition, and accounting for program income.³

- Cost Sharing/Fee for Service: An Area Agency on Aging is **not** permitted to implement cost sharing/fee for service for recipients of communication, referral or information and assistance services.⁴
- Voluntary Contributions: Voluntary contributions shall be allowed and may be solicited provided that the method of solicitation is non-coercive.⁵

Quality Assurance

Staff Training:

- Staff should receive orientation on agency policies and procedures, computer database (PeerPlace or AIM), client rights, client confidentiality, community characteristics and resources, and procedures for conducting the allowable activities under this service.
- Staff should receive a minimum of eight (8) hours of in-service training per year based on the need for professional growth and upgrading of knowledge, skills, and abilities.

³ 22 VAC 5-20-410, Grants To Area Agencies On Aging, Department for the Aging Regulations, Virginia Administrative Code

⁴ Older Americans Act of 1965, as amended, Section 315(a)

⁵ Older Americans Act of 1965, as amended, Section 315(b)

Follow-up: Follow-up is required in 10% of the referrals. Individuals and the organizations to which they were referred should be contacted to determine the quality and effectiveness of the referral and the service provided to the individual referred.

Supervision/Case Review: Consultation, supervision and case review shall be available to all staff providing the service.

Program Evaluation: The agency should conduct regular (at least annual) systematic analysis of the persons served and the impact of the service.

Client Records: Service providers must maintain specific program records that include the following information:

- For **referral** purposes only, the Virginia Service - Quick Form is required.
- For **information and assistance**, the required minimum assessment tool for the service to which the individual is being transferred must be completed for clients requiring direct services. (Refer to the Information Systems Service Guide or applicable service standard.)
- Federal Poverty should be determined and documented. The Federal Poverty/VDA Sliding Fee Scale form should be used. (Self-declaration only; no income verification is required.)
- Progress notes or contact logs to document case activity.