

INFORMATION AND REFERRAL/ASSISTANCE
VIRGINIA DEPARTMENT FOR THE AGING
SERVICE STANDARD

Definition

Information and Referral/Assistance service is a service designed to support older persons and their caregivers in assessing their needs, identifying the most appropriate services to meet their needs and linking the older person and caregivers to the agencies providing needed services. The objectives of information and referral/assistance are to enable older persons to locate and use services and resources, which promote their well-being, independence, and self-determination, and to protect their interests and rights. It is an integral component for the development and implementation of service plans for case management services. In addition, information and referral/assistance services will collect and make available data to support community needs assessment and community planning activities. Outreach activity can be coordinated under this service definition.

Eligible Population

Individuals are eligible for Information and Referral/Assistance service 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, with preference given to low-income minority individuals and to those older persons residing in rural or geographically isolated areas.¹ Families and caregivers of elderly persons may also receive information and referral/assistance for needed services.

Service Delivery Elements²

Agencies providing Information and Referral/Assistance service must perform all of the following components:

Resource File: The development and maintenance of accurate, up-to-date, and well-organized information on opportunities, services, and resources available in the community, include detailed data on service providers.

Information: The process of informing an older person of available opportunities, services, and resources.

Electronic Media: The process of receiving and soliciting information via the Internet and e-mail.

Assessment: The process of identifying, analyzing, and prioritizing the needs of older persons, utilizing the Uniform Assessment Instrument Part A and other client assessment documents. Federal Poverty/VDA Sliding Fee Scale is required, unless all information needed to determine federal poverty is documented on the UAI. Cost sharing does not apply to this service.

Referral/Assistance: The process of initiating an arrangement between the older person or caregiver and the service provider; advising older persons and their caregivers: providing information to older persons to link them with the opportunities, services, and resources

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

² *Implementation Guide for Older American Information and Referral Services*, NASUA, September 1993.

available to meet their needs; assisting the person or caregiver to contact the appropriate community resource; and if necessary, advocating with agencies on behalf of older persons. See "Client Records" for the required documentation.

Outreach: The process of identifying older persons who may be in need of service.

Strategies for outreach include, but are not limited to:

- **Direct Mail** - Offers a low cost, high contact rate and distribution of information with personalized content. It can be very selective about who is receiving the outreach message.
- **Telephone Contact** - Offers a low cost personalized way of contacting older persons. It allows immediate feedback and home visits may be determined as necessary.

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. Follow-up is required in 10% of the referrals to the program.³

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 Information and Referral/Assistance service.

Administrative Elements

Staff Qualifications:

- **Knowledge:** Information and Referral/Assistance service staff should have an awareness of the biological, psychological, and social aspects of aging; the impact of disabilities and illnesses on aging; interviewing principles; community resources; and public benefits eligibility requirements.
- **Skills:** Information and Referral/Assistance service staff should have skills in establishing and sustaining interpersonal relationships; problem-solving; and advocacy.
- **Ability:** Information and Referral/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 Information and Referral/Assistance service staff; and
- A current description of the minimum entry-level standards of each job.⁴

³ *Implementation Guide for Older American Information and Referral Services*, NASUA, September, 1993.

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

Units of Service:

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

- **Contacts:** count those contacts with the client and collateral contacts with agencies/caregivers related to establishing services.
- **Persons served (unduplicated):** the client/caregiver who is to receive a direct service(s) or who generates the Virginia Service - Quick Form.

Optional Group Units (Not Entered into AIM)

- Number of Web Hits
- Number of calls (**put tick marks here**)

Group Units - These activities cannot be entered into the AIM system.

Program Reports:

- Aging Monthly Report (AMR) 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 transmitted to VDA by the last day of the following month.

Consumer 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.⁵

- Cost Sharing/Fee for Service: An Area Agency on Aging is not permitted to implement cost sharing/fee for service for recipients of this service.⁶

And/or

- Voluntary Contributions: Voluntary contributions shall be allowed and may be solicited provided that the method of solicitation is non-coercive.⁷

Quality Assurance

Staff Training:

- Staff should receive orientation on agency policies and procedures, client rights, community characteristics and resources, and procedures for conducting the allowable activities under this service.
- Staff should receive a minimum of 10 hours of in-service training per year based on the need for professional growth and upgrading of knowledge, skills, and abilities.

Supervision/Case Review:

Consultation, supervision and case review shall be available to all staff providing the service.

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

⁶ Older Americans Act of 1965, as amended, Section 315(a)

⁷ Older Americans Act of 1965, as amended, Section 315(b)

Program Evaluation:

The agency should conduct regular systematic analysis of the persons served and the impact of the service. Subcontractors shall be monitored annually.

Client Records:

Service providers must maintain specific program records that include:

- Virginia Service - Quick Form for information purposes only. Suggested guideline: Complete the form on cases requiring more than 3 calls to the caller and/or 3 collateral calls for the purpose of resource identification/facilitation. At a minimum, this form must be updated annually.
- Part "A" Uniform Assessment Instrument (pages 1-4) for information and referral/assistance cases requiring direct services such as a home visit for assessment of service needs or multiple collateral contacts to facilitate services.
- Federal Poverty should be determined and documented. The Federal Poverty/VDA form may be used.
- Progress notes or contact logs to document case activity.

It is the responsibility of the agency to develop a written policy on when to use the appropriate form.