

<b>Short-Term Service Coordination Policy</b>		
<b>Policy #:</b> 37	<b>Date of Approval:</b> 8-3-2012	<b>Date Policy is Effective:</b> 8-3-2012
<b>Responsible Person:</b> ADRC Managers		<b>Authors:</b> Becky Dahl
<b>Reference:</b> Exhibit 1, Scope of Services, Section III, K		<b>Approved By:</b> Reg Mgrs 7-25-2012 Governing Board 8-3-2012
<b>Cross Reference:</b> State Template		

**Purpose:**

This policy will assure that individuals receive appropriate short term service coordination. Customers who are unable to coordinate services for themselves due to multiple complex and diverse needs, and have no one else to assist, will receive help in arranging and coordinating services. SHORT TERM SERVICE COORDINATION PROVIDED BY THE AGING AND DISABILITY RESOURCE CENTER (ADRC) STAFF WILL NOT EXCEED 90 DAYS.

**Objective:**

Short term service coordination can be provided to assist individuals and their families in managing complex and immediate needs. This can be provided when other ADRC services are insufficient, there is no one else to assist, and the person cannot be enrolled in a managed long term care program. In addition, a reasonable expectation that short term service coordination will be effective in stabilizing the individual's situation.

**Out of Scope:**

Short term service coordination will be time limited and will not exceed 90 days duration for any one customer. Agencies may not provide short term service coordination for persons with mental illness unless that person is also elderly or has a physical or intellectual disability.

**Policy:**

The ADRC will provide short term service coordination to the extent that existing financial and personnel resources allow. The ADRC may not charge individuals for families for short term service coordination. Short term service coordination is to address an immediate concern and stabilize an individual's situation, allowing the person time to either manage on his/her own or develop supports. This policy is not to provide ongoing services or comprehensive case management for the individual.

Short term service coordination is a less formal and abbreviated form of care management. It may include some or all of the following: evaluating the individual's needs, resources and ability to handle the situation; planning, arranging and coordinating multiple services; recruiting natural supports; involving a variety of people and resources; continued contact, reinforcement and encouragement

**Responsibilities:**

*Management/Director responsibilities.* The ADRC Director or designee will train staff to recognize the difference between short term service coordination and the assistance that is provided as part of information and assistance and options counseling. This training will be documented and ongoing. The Director or designee will monitor and ensure that the short term service coordination ends within the time limit unless there is cause for extension. The ADRC Director or designee will ensure documentation is recorded in the ADRC client tracking system. The Director or designee will have a plan in place to establish how he/she

will prioritize short term service coordination. Plans will include discussion at staff meetings and will be changed and/or updated as necessary to keep this service to a minimum. The Director or designee will discuss with staff the number of times a person may return for these services, procedures for requesting an extension and approving extensions.

*Employee responsibilities.* ADRC staff must inform customers that short term service coordination is time limited and which actions will be taken to resolve the immediate crisis. The staff will have a plan for closure at the onset of the service. These plans may be best documented in the ADRC of Eagle Country Action Plan. The goal is to refer the individual to a community provider and/or adult protective services or alternate crisis resource to ensure their needs are met and safety is assured. ADRC staff will provide full documentation which includes key information about what services are needed, who is providing these services, and the frequency of service provision. All contacts with the customer and resulting outcomes will be documented. Staff must keep their Director or designee informed of the services provided and progress. When requesting an extension from one's Director or designee to exceed the 90 day time limit, the staff will provide a written exit plan to explain how the service will come to closure before their Director or designee will grant the extension.

**Procedure:**

Information and Assistance Specialists will work with their local office Manager to determine:

- Step 1. If Short Term Service Coordination is appropriate
- Step 2. If personnel and financial resources are available to provide the service
- Step 3. If providing Short Term Service Coordination will interfere with the office's ability to provide all other ADRC services required under contract

Services will address the immediate concern, stabilize the individual's situation, allowing the person time to either manage on his/her own or develop needed support. Services can include providing instruction or guidance on how the individual or his/her designee can learn to coordinate services.

**Criteria for providing short term service coordination. Customers may meet one or more of the following:**

- The customer is not currently enrolled in a publicly funded managed long term care program.
- There is no family member, friend, neighbor or other person willing and capable of providing the coordination of the needed services.
- The customer has complex and immediate needs for services.
- The customer uses multiple services and is in need of coordination of these services.
- There is a reasonable expectation that short-term coordination can make a difference.
- The customer has a physical and/or developmental/ intellectual disability or is elderly.

**Parameters:**

- The customer receiving short-term service coordination and/or their guardian must be informed, before service coordination begins, that the service coordination will not exceed 90 days.
- Short-term service coordination shall not exceed 90 days unless an extension is approved.
- The customer receiving short-term service coordination and the selected service providers recognize a specific Information and Assistance Specialist (I&A) as providing the service coordination.

**Documentation:**

Documentation on short term service coordination will be reviewed with one's Director or designee and/or at staff meetings assistance with strategies to keep services within the 90 day time period.

All customers receiving short term service coordination will have a need from the list above documented in his/her individual record. Documentation will include:

- Justification for short term service coordination
- Action taken by the ADRC
- Services provided by the ADRC
- Responsibilities of the various parties involved
- Referral(s) made for private pay services
- Dates of services provided
- Review dates and estimated end date of short term service coordination
- Involvement of APS or crisis intervention
- Identification of any unmet needs.

**Factors to consider when extending short term service coordination:**

In situations where short term service coordination may last longer than 90 days, or the individual cannot manage with the services provided through short term service coordination, or it appears the situation is unending, the ADRC staff will consult with the Director or designee for potential solutions. If the ADRC has a Dementia Care Specialist (DCS) position and the person has participated in the Memory Care Connections program the DCS may provide short term service coordination beyond the 90 day period. If any extension is required the I&A Specialist will:

- Document in the customer's file the reason the extension is required.
- Establish a new end date for short term service coordination services.
- Inform the customer and/or guardian of the continuation of service and new end date.

**Ending short term service coordination:**

Short term service coordination will end when:

- The immediate crisis or concern has been addressed.
- The individual's situation has been stabilized.
- The person has been connected with others who can provide the needed assistance and support on an ongoing basis.

- The person understands what resources are available and is able to manage independently.

When the ADRC is unable to meet an individual's needs for short-term service coordination, or the person needs ongoing care management services, the Aging and Disability Resource Center shall refer people for private pay care management services, including those that may be offered by the managed care organization(s) in its service area.

Form: Action Plan

History:

*Reviewed by Information and Assistance Function Team 11/18/2011, Reviewed by Joint Managers 1/13/2012.*

*Approved by Eagle Counties Governing Board 8-3-2012*

**10/2012 ADRC Name Change: ADRC of Eagle Country**

*9/2013 Include "intellectual" in definition of target group, take language out customer needs to sign the plan, 5/2016 Term updates, included more direction on referral. Adopted State policy 3/31/2017. Added action plan language 7/14/2017. Reviewed 5/5/2020 Eagle Country policy is fully compliant with state policy*

Annual Review Dates

September 2013

November 2014

August 2015

May 2016

May 2020