

**FY 2024-2025  
SCOPE OF SERVICE**

**OLDER ADULT SAFETY BUREAU  
TARGETED INFORMATION AND ASSISTANCE – FAITH-BASED**

**I. PURPOSE**

The purpose of Information and Assistance services is to facilitate older adults' access and entry to needed services. The goal is to provide an essential link between the older adult population and appropriate needed services by identifying Allegheny County Department of Human Services Area Agency on Aging (ACDHS/AAA) and public and private community resources to meet varied needs of older adults.

**II. DEFINITIONS**

In addition to the definitions in Pennsylvania Department of Aging (PDA) Program Directives (APD) referenced in this Scope of Service, and the definitions in the COUNTY AGREEMENT, the following definitions will be used:

- A. **ACCESS 65 PLUS:** A shared ride paratransit program for individuals aged 65+. ACCESS 65 PLUS meets the need of nearly unlimited Shared Ride Transportation to Allegheny County Residents, sponsored by Port Authority of Allegheny County, coordinated through the Transportation Broker, Transdev Services, Inc. and provided by private for profit and nonprofit transportation companies under contract to Transdev. A Transportation Broker manages and coordinates a wide range of transportation funding options for eligible older adults and organizes this county wide. ACCESS 65 PLUS meets the need of transportation for a wide range of destinations for eligible consumers.
  
- B. **ACDHS/ACDHS/AAA: – Allegheny County Department of Human Services/Area Agency on Aging:** Provides services to adults aged sixty (60) and over to help them maintain their independence.
  
- C. **Aging & Disability:** See WellSky Aging & Disability
  
- D. **Alliance for Information and Referral Systems (Inform USA, formerly AIRS) Certification:** Inform USA 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 Inform USA Certification Program is operated in alignment with national standards for credentialing organizations. The Certification required for at least one staff member at a Targeted Information and Assistance CONTRACTOR is the Certification for Community Resource Specialists - Aging/Disabilities (CRS-A/D) for the designated I&A staff.

- E. **Annual OA Safety Bureau Provider Planning Document:** An ACDHS/AAA document completed by each OA Safety Bureau CONTRACTOR on an annual basis that informs the ACDHS/AAA of the CONTRACTOR's organizational and programmatic changes for the next contract year.
- F. **Consumer:** Any adult, age 60 or older who is in contact with ACDHS/AAA or an ACDHS/AAA CONTRACTOR to participate in services offered through the CONTRACTOR. CONTRACTOR's particular attention should be given to engaging low income, minorities, isolated, and/or those with disabilities.
- G. **CONTRACTOR:** An agency, government entity or organization under an AGREEMENT with the ACDHS/AAA which provides services to older adults in the community.
- H. **CONTRACTOR Annual Service Emergency Preparedness Plan:** An annually updated plan outlining emergency operation and emergency closure procedures as specified by ACDHS/AAA.
- I. **CONTRACTOR Annual Validation Process:** An ACDHS/AAA monitoring activity undertaken by the CONTRACTOR and content reviewed by ACDHS/AAA to determine the extent to which the program complies with applicable aging program policies (Pennsylvania Department of Aging, ACDHS/AAA.)
- J. **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.

- K. **Informational Events:** Refers to public speaking engagements or informational fairs held or attended, used to promote information about services and/or resources.
- L. **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.
- M. **Older Persons Transportation (OPT):** A shared ride program supported and administered by Allegheny County DHS/ACDHS/AAA, providing Shared Ride Services to eligible Allegheny County residents. Rides are provided through the Transportation Broker Transdev Services Inc. OPT meets the need of transportation for medical, shopping, Community Senior Center Socialization, and Center-sponsored Social Program trips at a competitive shared-ride rate.
- N. **OPTIONS Care Management (CM) Program:** OPTIONS Care Management offers a broad range of CM services tailored to the specific care needs and preferences of older adults who choose to live in their own homes and communities. CM may be offered as either part of a continuum of services or a separate social work service. CM can also be provided to support caregivers of older adults, regardless of program.
- O. **Report of Need/RON:** A RON is a formal assessment document developed by Pennsylvania Department of Aging (PDA) which summarizes the who, what, where, when, and how concerning an allegation of ANEA (abuse, neglect, exploitation, or abandonment). At a minimum, contents should contain the name, age, address, phone number, if statement available, and problem statement, as well as reporter information if given.
- P. **Resource Diversification:** A method of obtaining funding or resources from non-ACDHS/AAA funding.

- Q. **Service Unit:** A Service Unit represents one service, provided by an OA Safety Bureau CONTRACTOR for a consumer and documented in WellSky Aging & Disability IR, the Pennsylvania State database for Aging I&R/A services.
- R. **Transportation Coordination:** The work performed by CONTRACTORS to support consumer access to transportation options. The work includes education to our constituents on the transportation resources available to them, including training on OPT policies, procedures, and authorizations.
- S. **WellSky Aging & Disability (A&D):** The Pennsylvania Department of Aging's mandated information system used by ACDHS/ACDHS/AAA and CONTRACTORS to document and track specific services provided to consumers with ACDHS/ACDHS/AAA funding and demographics. The application is also known as Aging & Disability.
- T. **WellSky Aging & Disability Compliance Process:** An ongoing monitoring activity undertaken by the CONTRACTOR and ACDHS/AAA and reviewed for compliance by ACDHS/AAA to determine the extent to which the CONTRACTOR is entering accurate and thorough information into the WellSky software system.
- U. **WellSky Aging & Disability IR (A&D IR):** An Information and Referral data collection system that is a part of the integrated WellSky social services software system. This application is also known as Aging & Disability IR.

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

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

The primary source of requirements for the OA Safety Bureau Services – Program Scope of Services are established by the Pennsylvania Department of Aging and may be accessed by visiting the [Pennsylvania Department of Aging / Aging Program Directives webpage](#). From this webpage, select the desired Aging Program Directive (APD).

#### **APD for Information and Referral Services**

Under [Program Area 11 – Information and Referral](#), select the desired Aging Program Directive (APD).

85-11-01 Policies and Procedures for the Provision of Information and Referral Services by ACDHS/AAAs

Under [Program Area 01 – Area Agency on Aging Administration](#), select the desired Aging Program Directive (APD).

97-01-02 Accounting Manual for Area Agency on Aging Programs and Updates to Accounting Manual 7/21/2005

### **Laws**

- [Older Americans Act](#)
- [Section 504 of the Rehabilitation Act of 1973 \(29 U.S.C. § 794\)](#)
- [Americans with Disabilities Act of 1990 \(42 U.S.C. § 12101-12213\)](#)

### **Additional Information on Transportation**

<http://www.alleghenycounty.us/dhs/transportation/index.aspx>

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:

Allegheny County Department of Human Services  
Area Agency on Aging  
OA Safety Bureau – Targeted I&A Monitoring Tool

Monitoring and Reporting: The ACDHS/AAA reserves the right to monitor all services and related information. Providers must comply with the standards outlined in the Volunteer Risk and Program Management Policies.

The ACDHS/AAA requires Providers to participate in and incorporate the results of Quality Management and Program Evaluation initiatives led by the ACDHS/AAA with the Provider. The provider has a designated representative who regularly serves on ACDHS/AAA performance / quality teams. The Provider maintains their own quality assurance program.

ACDHS/AAA will develop and work with CM provider network to implement procedures for measuring compliance with standard of 90% or better consumer satisfaction with services.

## V. SERVICE STANDARDS, REPORTING AND DOCUMENTATION REQUIREMENTS

### OA Safety Bureau Targeted Information and Assistance Provider

#### 1) Schedule

1. Pre-scheduled closings for holidays or other reasons are listed on the schedule presented in the Provider Planning Document to the ACDHS/AAA OA Safety Bureau prior to the start of the AGREEMENT year. The schedule is reviewed and approved by the OA Safety Bureau in a written notification from the ACDHS/AAA to the CONTRACTOR.
2. All unscheduled closures throughout the year are reported to the OA Safety Bureau by the CONTRACTOR via e-mail or by phone call.
  - a. For weather related closures, the CONTRACTOR notifies the OA Safety Bureau via e-mail to the SeniorLine e-mail at [SeniorLine@AlleghenyCounty.US](mailto:SeniorLine@AlleghenyCounty.US) as soon as the decision to close is made.
  - b. For other unplanned closures, the CONTRACTOR notifies the OA Safety Bureau contacts the same day as the closure.

- c. For other administrative closures during the contract year the CONTRACTOR notifies the OA Safety Bureau contacts as soon as the decision to close is made.
- 2) Information and Assistance: Each OA Safety Bureau -Targeted Information and Assistance CONTRACTOR shall have at least one AIRS certified staff member dedicated specifically to providing Information and Assistance at that agency.
  - (1) Information and Assistance is offered on site, face to face, and/or by telephone and/or by internet/e-mail by AIRS certified staff who utilize Aging & Disability IR and attend ACDHS/AAA Aging & Disability IR training and/or are trained by CONTRACTOR staff that has been formally trained.
  - (2) Backup I&A staff have access to and utilize Aging & Disability IR and attend ACDHS/AAA Aging & Disability IR training and/or are trained by CONTRACTOR staff that has been formally trained.
  - (3) CONTRACTOR uses the Aging & Disability IR database to offer consumers the fullest range of programs, services, information and benefit assistance. Targeted Information and Assistance CONTRACTORS provide access to a variety of services if available within the ACDHS/AAA Planning and Service area. These services can be provided directly, through contracts, collaborations or through referrals to other CONTRACTORS. In using Aging & Disability IR the CONTRACTOR will document all Information and Assistance in Aging & Disability IR.
    - (a) CONTRACTORS must enter all information provided by the consumer.
    - (b) At a minimum, CONTRACTOR is required to enter the following PDA required fields into Aging & Disability IR:
      - i. Caller (the Default 'Anonymous' is only used if the consumer does not want to provide name)
      - ii. Call Type
      - iii. Caller Type \*
      - iv. Consumer
      - v. Referred By \*
      - vi. Topic

- vii. Aging Disability Resource Center (ADRC) Outcomes
- viii. Referrals (self-referrals are acceptable if all services requested are available through the site)
- ix. Age (range) of consumer \*  
\* This an Allegheny County requirement

NOTE: Documentation in the Notes section is strongly encouraged as it assists others in the network that may have occasion to work with the consumer as well. ACDHS/AAA and the CONTRACTORS will more clearly define Aging & Disability IR documentation expectations during this contract year.

- (c) Documentation: CONTRACTORS are responsible for entering and updating all consumer data, on an ongoing basis, into WellSky Aging & Disability.
- (4) CONTRACTORS are responsible for coordinating appropriate information management system training (WellSky Aging & Disability), and the transfer of knowledge and information to current and new staff.
- (5) All consumer documentation must be entered into WellSky Aging & Disability within three business days after a consumer contact or transaction.
- (6) CONTRACTORS are required to generate quarterly reports on the data and its impact on consumers for submission to the ACDHS/AAA.
- (7) CONTRACTORS must have the capacity to retrieve and submit data, information, reports, and other communication through electronic Internet capabilities within one business day of receipt. Failure to receive or read ACDHS/AAA communications the same day does not absolve Service Providers from knowing, responding to or complying with the directives in the communication.
- (8) Service Deliveries shall be entered using the WellSky Aging & Disability for each contact with or related to the CONSUMER.

NOTE: During AGREEMENT year ACDHS/AAA uses the following to determine compliance to this contract requirement:

- ACDHS/AAA will use existing Aging & Disability and Aging & Disability IR reports and verification processes in place.
- (9) Conduct public or group speaking engagements, at a minimum, quarterly.



(10) ACDHS/AAA will send a service unit report to CONTRACTORS by the 15<sup>th</sup> day of each month (or the following business day if the 15<sup>th</sup> is on a weekend or holiday) containing Service Units entered in Aging & Disability IR for the prior month. CONTRACTORS are accountable for correcting errors and/or discrepancies in their agency's data by the 20<sup>th</sup> (or next business day) of the month. ACDHS/AAA can offer technical assistance when requested. ACDHS/AAA will record and store the Service Units data entered in Aging & Disability IR on the 20<sup>th</sup> day of each month (or the next business day) for the prior months' data. This record will be the basis for determining each CONTRACTOR'S service units.

(11) Consumer Service Intake Referrals

Upon identifying an older adult's need for ongoing, in-home services, staff documents the identifying information in Aging & Disability/Aging & Disability IR. The CONTRACTOR staff member receives approval from the older adult to make a referral. If such approval is granted, staff e-mail a completed ACDHS/AAA Intake Referral Form (Attachment A or submitting form electronically following hyperlink) to the SeniorLine e-mailbox at [SeniorLine@allegHENYcounty.us](mailto:SeniorLine@allegHENYcounty.us) or fax it to 412-350-3091.

(12) Reports of Protective Services Need

Upon Identifying possible cases of abuse, neglect, exploitation and abandonment, CONTRACTOR staff contacts ACDHS/AAA Protective Services by calling 412-350-6905 and initiating a Report of Need.

(13) Transportation Coordination

- a. Assure that interested consumers are aware of their transportation options.
- b. Referrals are to be made to the local senior center.

Additional information regarding the transportation system can be found at:

[Human Services/Basic Needs/Transportation](#)

9. ACDHS/AAA OPTIONS Care Management Coordination:

CONTRACTOR will work with the ACDHS/AAA during 2024-2025 to develop a collaborative effort with Care Management agencies to assure consumer access to services and information.

10. Aging Network and CONTRACTOR specific Information / Print and or Electronic Formats

Print and / or distribute information on Aging Services through electronic / print media to local agencies, organizations, religious organizations, and other groups; collect and display informational pamphlets / brochures of interest and use to older adults, their families and care givers. Provide aging network and CONTRACTOR specific information on the agency website.

- 3) Cooperate with ACDHS/AAA and other community entities and organizations in participating / developing initiatives, collaborations, quality standards, pilots, and / or programs.

4) AGREEMENT Compliance:

CONTRACTOR complies with the requirements of the COUNTY AGREEMENT and this Scope of Service. On an annual basis, the CONTRACTOR submits a Provider Planning Document to the ACDHS/AAA. This document presents the CONTRACTOR'S organizational and programmatic intentions for a contract year. The ACDHS/AAA reviews the Provider Planning Document, meets with the CONTRACTOR as needed and issues a written acceptance of all or part of the Provider Planning Document as submitted by the CONTRACTOR, either in the original or revised version.

On a quarterly basis, CONTRACTORS will update the ACDHS/AAA on any organizational and programmatic changes and information using the Quarterly Reporting Document.

Organizational Changes

In cases where CM agency changes ownership or undergoes a major restructuring, including major changes to the submitted organizational chart or acquisition of another entity, such change must be reported in writing to the ACDHS/AAA 30 days prior to the change or in urgent circumstances within 48 hours of confirmation of the change. Major organizational changes may result in the ACDHS/AAA conducting a full on-site review to assess continued adherence to the terms of the contract for CM services under the CM Providers new structure. Continuation of the contract with ACDHS/AAA is contingent on a

finding of the on-site review that the terms of the contract will be adhered to under the change or restructuring.

5) Electronic Information Management

1. CONTRACTOR has the capacity to enter and retrieve data into and from Aging & Disability IR. Failure to receive or read ACDHS/AAA communications sent to CONTRACTOR MPER e-mail address in a timely manner does not absolve the CONTRACTOR from knowing, responding to or complying with the content of the communication.
2. CONTRACTOR refers consumers requiring TDD/TTY equipment to the ACDHS/AAA SeniorLine TDD/TTY at 412.350.2727.
3. CONTRACTOR staff use the current OA Safety Bureau Aging & Disability IR Manual as a part of their ongoing reference in working in Aging & Disability IR.
4. The Information and Assistance CONTRACTOR is responsible for validating consumer service and program data in the appropriate information management system (Aging & Disability, Aging & Disability IR, etc.) by the 20<sup>th</sup> (or next business day) of the month for the prior month's transactions.

6) Annual Information and Assistance Validation: The CONTRACTOR submits all required documentation, satisfactorily completes validation criteria, on-site monitoring, and any corrective actions noted per ACDHS/AAA process and timeline.

7) Annual Service Emergency Preparedness Plan: CONTRACTOR has and uses a Service Emergency Preparedness Plan that meets the current ACDHS/AAA Criteria.

8) Quality Improvement Initiatives: CONTRACTOR participates in quality initiatives, such as customer satisfaction and program evaluation.

9) Meeting Attendance: CONTRACTOR attends and/or participates in applicable ACDHS/AAA meetings (face to face, conference call, or video conferencing.) CONTRACTOR is responsible for content if not able to attend.

10) Resource Diversification

CONTRACTOR develops collaborative and current working relationships with other agencies and shares resources and information with other community agencies both within their designated service area and with the ACDHS/AAA CONTRACTOR network as documented in the annual Validation process.

ACDHS/AAA uses the following to determine compliance to this contract requirement:

- Documentation of two (2) collaborative and current working relationships.

11) CONTRACTOR Staff Training: CONTRACTOR encourages staff to participate in professional development activities and the ACDHS/AAA continues to offer an array of training and educational opportunities through conferences, Community Services Meetings, webinars and other activities for the CONTRACTOR network. In support of this, CONTRACTOR encourages staff the opportunity to participate in annual training as time and resources allow in the areas of:

- a) Health and Safety
- b) Customer Service
- c) Special needs of consumers with physical and mental disabilities
- d) Marketing strategies to reach diverse and / or isolated older adult populations within communities.
- e) Diversity
- f) Confidentiality
- g) Community Resources
- h) Aging & Disability/Aging & Disability IR
- i) Normal and abnormal aging issues
- j) Emergency Plan Preparedness
- k) Other aging related training

These training opportunities can also include ACDHS/AAA training, workshops and conferences.

12) Quarterly Report: The CONTRACTOR submits a report to ACDHS/AAA for the previous quarter by the end of the second work week of October, January, April and July. The report includes:

- a) Number of Speaking Engagements or events and Older Adult Consumers seen during that Quarter.
- b) Organizational and/or program (days, times of operation, emergency closures, etc.) changes during the quarter.

- c) Key staff changes- CEOs, Program Directors, I&A staff, Fiscal contacts.
- d) Other critical organizational and programmatic changes that alter the CONTRACTOR'S approved Annual Provider Planning Document.

## VI. RESPONSIBILITIES / EXPECTATIONS OF THE PROGRAM OFFICE (AREA AGENCY ON AGING)

- A. The ACDHS/AAA works in a collaborative manner with CONTRACTORS to develop the AGREEMENT Scopes of Services. The ACDHS/AAA provides the interpretation of the Scopes and related technical assistance regarding implementation, performance and accountability.
- B. The ACDHS/AAA reviews and approves CONTRACTOR budgets and budget revisions.
- C. The ACDHS/AAA serves as a conduit for new or revised local, state or federal policy.
- D. The ACDHS/AAA runs and sends the Aging & Disability IR Reports to CONTRACTORS on a monthly basis.
- E. The ACDHS/AAA reviews the following reports / information as indicated:
  - 1. Aging & Disability IR Services by Provider Agency (Quarterly)
  - 2. CONTRACTOR Quarterly Reports (Quarterly) – Information and Assistance
- F. On an annual basis, ACDHS/AAA distributes a Provider Planning Document to collect CONTRACTOR'S organizational and programmatic intentions for the following AGREEMENT year. The ACDHS/AAA reviews and approves the CONTRACTOR planning intentions on an annual and as needed basis.
- G. The ACDHS/AAA reviews the record of CONTRACTOR participation in developing initiatives, collaborations, quality standards, pilots and / or programs.
- H. CONTRACTOR Validation: ACDHS/AAA distributes an Annual Validation Process E-Packet; completes content review of all CONTRACTOR submitted Validation Documentation, schedules on-site Monitoring(s); distributes a summary of best practices and / or corrective actions and informs CONTRACTOR agencies of their final status.

- I. ACDHS/AAA offers technical assistance / education as appropriate in the CONTRACTOR Quality Improvement Process and the CONTRACTOR Validation Process.
- J. ACDHS/AAA hosts meetings, conferences calls, trainings, orientations, conferences, and webinars involving CONTRACTORS.
- K. ACDHS/AAA monitors core services by site visits, Aging & Disability data validation process, and CONTRACTOR reports.
- L. The ACDHS/AAA uses data entered in Aging & Disability and Aging & Disability IR to validate services were provided in a given month and quarter to approve or reject invoices for payment.
- M. ACDHS/AAA monitors CONTRACTOR attendance and / or involvement at trainings
- N. ACDHS/AAA offers support in resolving functional issues related to the Aging & Disability system.
- O. ACDHS/AAA meets upon request of the CONTRACTOR to evaluate and plan innovative and creative approaches to OA Safety Bureau Targeted Information and Assistance.
- P. ACDHS/AAA is responsible for developing interim policies and procedures that meet Pennsylvania Department of Aging and local requirements arising during the term of the AGREEMENT.
- Q. The ACDHS/AAA retains the ability to hold the CONTRACTOR accountable to comply with reporting requests when and however they may emerge.



*Figure 1 Current Intake Referral Form*