

**SERVICE DEFINITIONS
FOR
OLDER AMERICANS ACT
AND
OREGON PROJECT INDEPENDENCE
SERVICES**

Revised January 2005

SERVICE DEFINITIONS FOR OAA AND OPI SERVICES

CLUSTER 1 REGISTERED SERVICES

#1 PERSONAL CARE (1 unit = 1 Hour of service)

Personal assistance, stand-by assistance, cueing, or supervision for persons having difficulty with one or more of the following activities of daily living; eating, dressing/grooming, bathing/hygiene, toileting, and mobility/transferring. (SPDS definition of Personal Care takes precedence over the OAA definition)

#1a PERSONAL CARE (1 Hour of service)

Personal care services, as described in #1 above, provided by Homecare Workers through the Client Employed Provider Program

#2 HOMEMAKER (HOME CARE) (1 unit = 1 Hour of service)

Assistance to persons having difficulty with one or more of the following instrumental activities of daily living; preparing meals, shopping for personal items, managing money, accessing available transportation services, medication management, using the telephone, or housekeeping. (SPD definition of Home Care takes precedence.)

#2a HOMEMAKER (HOME CARE) (1 unit = 1 Hour of service)

Homemaker services, as described in #2 above, provided by Homecare Workers through the Client Employed Provider Program

#3 CHORE (1 unit = 1 Hour of service)

Assistance to persons having difficulty with one or more of the following activities: heavy housework, yard work or sidewalk maintenance.

#3a CHORE (1 unit = 1 Hour of service)

Chore services, as described in #3 above, provided by Homecare Workers through the Client Employed Provider Program

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#4 HOME DELIVERED MEALS (1 unit = 1 Meal delivered)

A meal provided to a qualified individual in his/her place of residence. The meal must comply with the Dietary Guidelines for Americans and provides a minimum of 33 and 1/3 percent of the current daily Recommended Dietary Allowances as established by the Food and Nutrition Board of the National Research Council of the National Academy of Sciences.

#5 ADULT DAY CARE / ADULT DAY HEALTH (1 unit = 1 Hour of service)

Personal care for dependent elders in a supervised, protective, and congregate setting during some portion of a twenty-four hour day. For the purposes of the Older Americans Act program, an “elder” is a person age 60 or over. Services typically include social and recreational activities, training, counseling, meals, other services such as rehabilitation, medications assistance and home health aid services for adult day health.

#6 CASE MANAGEMENT (1 unit = 1 Hour) (OAA IIIB and OPI only)

Assistance in the form of either access or care coordination in circumstances where the older person is experiencing diminished functioning capacities, personal conditions, or other characteristics which require the provision of services by formal service providers or family caregivers. Typical activities include assessing needs, developing care plans, authorizing services, arranging services, coordinating the provision of services among providers, follow-up and reassessment, as required. (NOTE: Case Management Services for FCSP funded by IIIIE should be recorded using matrix #16).

CLUSTER 2 REGISTERED SERVICES

#7 CONGREGATE MEALS (1 unit = 1 Meal)

A meal provided to an eligible participant at a nutrition site, senior center or some other congregate setting which complies with the Dietary Guidelines for Americans and provides a minimum of 33 and 1/3 percent of the current daily Recommended Dietary Allowances (RDA) established by the Food and Nutrition Board of the National Research Council of the National Academy of Sciences.

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#8 NUTRITION COUNSELING (1 unit = 1 Session per participant)

Individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, chronic illness, or medication use. This advice and guidance can also be provided to caregivers who are caring for persons at nutritional risk. Counseling is provided one-on-one by a registered dietician and addresses the options and methods for improving nutrition status.

#9 ASSISTED TRANSPORTATION (1 unit = 1 One-way trip)

Assistance and transportation, including escort, to a person who has difficulty (physical or cognitive) using regular vehicular transportation.

CLUSTER 3 NON-REGISTERED SERVICES

#10 TRANSPORTATION (1 unit = 1 One-way trip)

A means of transportation from one location to another. Does not include any other activity.

#11 LEGAL ASSISTANCE (1 unit = 1 Hour)

Legal advice, counseling, and representation by an attorney or other person acting under the supervision of an attorney.

#12 NUTRITION EDUCATION (1 unit = 1 Session per participant)

A program to promote better health by providing accurate and culturally sensitive nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants or participants and caregivers in a group or individual setting overseen by a dietitian or individual of comparable expertise.

#13 INFORMATION AND ASSISTANCE (1 unit = 1 Contact)

A service for older individuals that provides current information on opportunities and services available within their communities; assesses the problems and capacities of the individuals; links individuals to the opportunities and services; to the maximum extent feasible, ensures the individual receives the services needed and is aware of the opportunities available by establishing adequate follow-up procedures. Internet web site “hits” are to be counted only if information is requested and supplied.

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#14 OUTREACH (1 unit = 1 Contact)

Intervention initiated by an agency or organization for the purpose of identifying potential clients and encouraging their use of existing services and benefits.

Outreach services provided under this service is restricted to services provided to individuals on a one-on-one basis. (See 70-10 for public/group outreach/presentation activities.)

#15 INFORMATION FOR CAREGIVERS (1 unit = 1 Activity)

A service for caregivers that provides the public and individuals with information on resources and services available to individuals within their communities. This may include group services, public education, provision of information at health fairs and other similar functions. (NOTE: Service units for information for caregivers are for activities directed to large audiences of current or potential caregivers such as disseminating publications, conducting media campaigns, and other similar activities.)

#16 ASSISTANCE IN GAINING ACCESS TO CAREGIVER SERVICES

(1 unit = 1 Contact)

A service that assists caregivers, on a one-on-one basis, in obtaining access to the services and resources that are available within their communities. To the maximum extent practicable, it ensures that the individuals receive services needed by establishing adequate follow-up procedures. Assistance can be provided either in the form of Information & Assistance or Case Management.

OTHER SERVICES:

ADMINISTRATIVE FUNCTIONS

#20-1 AREA PLAN ADMINISTRATION (OAA and OPI only)

Area Agency administrative functions required to implement the planned services, maintain required records, fulfill the requirements of Federal regulation, State rules, and State Unit Policies and Procedures; and support the Advisory Committee. Includes such responsibilities as bidding, contract negotiation, reporting, reimbursement, accounting, auditing, monitoring, and quality assurance.

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#20-2 AAA ADVOCACY

Monitor, evaluate and comment on issues related to community actions affecting older persons; conduct or attend public hearings; represent older persons' interests at the local, state and national level; support Long Term Care Ombudsman program and coordinate planning with other agencies and organizations.

#20-3 PROGRAM COORDINATION

The functions of Area Agency staff directed toward the coordination of programs funded by OAA funds with other supportive federal, state, local, or private programs. It presumes a continuing activity that links together, in support of common service objectives, existing planning and service resources on a cyclical and ongoing basis.

#20-4 PROGRAM PLANNING AND DEVELOPMENT

Functions of the Area Agency staff directed toward the development of specific service(s), goals or objectives. Includes such functions as needs assessment, plan development, budgeting/resource analysis, inventory, standards development, policy analysis, public education, resource development, training and education, research and development and legislative activities.

#20-9 MEDICAID AAA SERVICES (Optional)

Functions or services of AAAs that are funded with Medicaid and/or Local match funds only, i.e. case management, screening, outreach, etc.

SERVICES THAT ADDRESS FUNCTIONAL LIMITATIONS

#30-1 HOME REPAIR/MODIFICATION (1 unit = 1 Activity)

Minor modification of homes that is necessary to facilitate the ability of older individuals to remain at home, and that is not available under other programs, except that not more than \$150 per client may be expended under OAA Title III-D for such modification.

#30-2 HOME HEALTH (1 unit = 1 Home visit)

Services furnished to an individual by a Home Health Agency, or by others under arrangement with such agency, on a visiting basis in client's temporary or permanent home.

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#30-3 IN-HOME VOLUNTEERS (1 unit = 1 Hour of service)

Services provided by volunteers in a client's home that will enable the client to remain at home (i.e. shopping assistance, meal preparation, respite, etc.) This service can include the development and maintenance of a "central registry" to match qualified providers with elderly clients not eligible for Medicaid nor OPI services. For the purposes of the Older Americans Act program, an "elder" is a person age 60 or over. Services can include recruitment, screening and training of qualified volunteer in-home providers to effectively maintain a central registry.

#30-4 RESPITE (1 unit = 1 Hour of service)

Paid temporary services to provide relief for families or other caregivers. This service should be used ONLY when no other service is provided in conjunction with respite.

NOTE: *Respite {30-4} should be used to record those respite services funded through OPI and IIIB. Respite provided using IIIIE funds should be recorded under Caregiver Respite {30-5}.*

#30-5 CAREGIVER RESPITE (1 unit = 1 Hour of service)

Services that offer temporary, substitute supports or living arrangements for care recipients in order to provide a brief period of relief or rest for unpaid caregivers served under the Family Caregiver Support Program. Respite care includes: (1) in-home respite (personal care, home care, and other in-home respite); (2) respite provided by attendance of the care recipient at a senior center or other non-residential program; (3) institutional respite provided by placing the care recipient in an institutional setting such as a nursing home for a short period of time as a respite service to the caregiver; and (for grandparents caring for children) summer camps. To be eligible for caregiver respite, the care recipient must either: (1) be unable to perform at least two activities of daily living (ADL's) without substantial human assistance, including verbal reminding, physical cueing OR (2) due to a cognitive or other mental impairment, require substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or another individual.

NOTE: *Any caregiver respite services that are paid at a daily or weekly rate need to be converted to an hourly unit before entry into the database. E.g. Adult Day Care paid at a daily rate = 8 hours; one week at summer camp = 168 hours (24 hrs x 7 days).*

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#30-6 ORGANIZATION and MAINTENANCE OF SUPPORT GROUPS FOR CAREGIVERS (1 unit = 1 Session per participant)

Activities that organize and maintain support groups that provide assistance to caregivers and their families in making decisions and solving problems related to their caregiving roles. (One session is equivalent to one meeting of a support group).

#30-7 SUPPLEMENTAL SERVICES TO CAREGIVERS (1 unit = 1 Activity)

Those services that will provide assistance with Activities of Daily Living or Instrumental Activities of Daily Living, are to be provided on a limited basis to complement the care provided by caregivers. Examples of supplemental services include, but are not limited to, home repair/modifications, assistive technologies, emergency response systems, home delivered meals, and incontinence supplies. To be eligible for supplemental services, the care recipient must either: (1) be unable to perform at least two activities of daily living (ADL's) without substantial human assistance, including verbal reminding, physical cueing OR (2) due to a cognitive or other mental impairment, require substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or another individual.

SERVICES THAT MAINTAIN HEALTH

#40-1 HEALTH/NUTRITION SCREENING (1 unit = 1 Screening per participant)

Screening activities that determine a client's physical or mental health or nutritional status.

#40-2 EXERCISE OR PHYSICAL FITNESS (1 unit = 1 Session per participant)

Programs regarding physical fitness, group exercise, and music, art, and dance-movement therapy, including programs for multi-generational participation that are provided through local educational institutions or community-based organizations.

#40-3 WELLNESS EDUCATION (1 unit = 1 Session per participant)

Health promotion programs, including programs relating to chronic disabling conditions (prevention and reduction of effects), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management and providing information about the availability of, benefits and appropriate use of other preventive health services or programs.

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#40-4 MENTAL HEALTH SERVICES (1 unit = 1 Hour of service)

Mental health services can include any of the following services: Screening for the prevention of depression, coordination of community mental health services, provision of information to seniors about mental health services, development of "peer" gerontological counseling programs, therapeutic mental health counseling (provided by qualified, licensed mental health professionals or others trained and supervised by another qualified professional) and referral to psychiatric and psychological services.

#40-5 HEALTH EQUIPMENT LOANS (1 unit = 1 Loan)

Assist clients in obtaining usable health care equipment on a temporary basis.

#40-6a MEDICAL ALERT INSTALLATION (1 unit = 1 Installation per Client)

A service provided to frail seniors that includes installation of an electronic device that a client can activate to alert a monitored system when help is needed.

#40-6b MEDICAL ALERT RENTAL (1 unit = 1 Payment for service per client)

A service provided to frail seniors that includes the monthly rental of an electronic device that a client can activate to alert a monitored system when help is needed.

#40-7 MEDICAL EQUIPMENT (1 unit = 1 Client Served)

Purchase of health care equipment for clients when loaned equipment is unavailable or not feasible.

#40-8 REGISTERED NURSE SERVICES (1 unit = 1 Hour of Service)

Non-Medicaid services provided by a Registered Nurse on a short-term or intermittent basis which include, but are not limited to: interviewing the client, assessing the client's ability to perform tasks; preparing a care plan which includes treatment needed by the client; monitoring medication; training and educating care providers; and setting realistic goals and outcomes for the client.

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#40-9 MEDICATION MANAGEMENT (1 unit = 1 Session per Client)

Services that provide information, counseling, or education on issues related to prescription drugs and over the counter medications. Services include such activities as: public education activities related to medication management problems; assisting seniors in applying for low cost or no cost prescription programs through pharmaceutical and community resources; training programs on medication management skills for consumers and caregivers; screening programs with public health and health practitioners to identify persons at high risk of medication interactions and adverse reactions; and provision of client specific medication review and consultations by pharmacists, nurse practitioners or physicians.

SERVICES THAT PROTECT ELDER RIGHTS

#50-1 GUARDIANSHIP/CONSERVATORSHIP (1 unit = 1 Contact)

Performing legal and financial transactions on behalf of a client based upon a legal transfer of responsibility (e.g., as part of protective services when appointed by court order) including establishing the guardianship/conservatorship.

#50-2 PROTECTIVE SERVICE (1 unit = 1 Contact)

Protective services for vulnerable elders who are at risk as a result of harm or neglect and who have been evaluated to be incapable of making competent decisions about their well-being. This harm or neglect may be self-imposed or may be perpetuated by another person. For the purposes of the Older Americans Act program, an “elder” is a person age 60 or over.

#50-3 ELDER ABUSE AWARENESS (1 unit = 1 Activity)

Activities that promote understanding and increase public awareness of elder abuse. For the purposes of the Older Americans Act program, an “elder” is a person age 60 or over. (For example, one activity could include securing a local public service announcement; provide a local training for nursing facility staff, or law enforcement agencies, or district attorney staff or other local agencies; local training for a multi-disciplinary team; producing a specific brochure or other publication, etc.)

#50-4 CRIME PREVENTION/HOME SAFETY (1 unit = 1 Activity)

Activities that educate elders regarding crime prevention or that provide home safety. For the purposes of the Older Americans Act program, an “elder” is a person age 60 or over.

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#50-5 LTC OMBUDSMAN (1 unit = 1 Activity)

Functions of the Ombudsman program are to receive, investigate, and act on complaints by individuals age 60 or over, who are residents of long-term care facilities and to advocate for the well-being of such individuals. Activities may include: direct support to certified Ombudsman volunteers and administrative support to local committees engaged in recruiting, screening and supporting the Ombudsman program (e.g. mileage reimbursements, support for monthly meetings, etc.).

SERVICES THAT PROMOTE SOCIALIZATION AND PARTICIPATION

#60-1 RECREATION (1 unit = 1 Activity per Participant)

Activities that promote socialization, such as sports, performing arts, games, and crafts, either as a spectator or as a participant.

#60-2 FRIENDLY VISITING (1 unit = 1 Visit)

Visits to physically, geographically or socially isolated individuals.

#60-3 TELEPHONE REASSURANCE (1 unit = 1 Contact)

Providing regular telephone calls to individuals to determine if they are safe and well, if they require assistance, and to provide psychological reassurance.

#60-4 VOLUNTEER RECRUITMENT (1 unit = 1 placement)

Providing staff support, recruitment, coordination, and training/educational opportunities for volunteers. (One placement means one volunteer identified, trained and assigned to a volunteer position.)

#60-5 INTERPRETING/TRANSLATION (1 unit = 1 Hour)

Providing assistance to clients with limited English speaking ability to access needed services.

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SERVICES THAT ASSURE ACCESS AND COORDINATION

#70-1 CASE MONITORING (1 unit = 1 Hour)

Documented ongoing follow-up activity (telephone contact, Senior Center contact or home visit) of individuals with a case plan. Case Monitoring includes: a) Providing early identification of current or potential problem areas; b) Assessing the needs for changes in service; and c) Reviewing intervention results to determine if what was done achieved desired results.

#70-2 COUNSELING (1 unit = 1 Hour)

Providing guidance and/or suggestions to a client to enable the client and/or family to resolve problems including insurance, tax or employment issues.

#70-2a Individual Counseling for Caregivers (1 unit = Hour)

Providing one-on-one counseling for caregivers to assist in making decisions and resolving problems related to their caregiving roles. Individual counseling includes, but is not limited to: grief counseling, mental health counseling, etc. Note: Case management services for FCSP should not be counted as Individual Counseling. Case management for FCSP should be listed under Access Services {16}.

#70-3 SCREENING (1 unit = 1 Screening)

Initial contact with a client to identify potential service needs and/or eligibility for services.

#70-4 GERIATRIC ASSESSMENT (1 unit = 1 Assessment)

An in-depth interview with a client to determine needs and potential intervention strategies, and includes when appropriate, developing a goal oriented service plan and informing clients of available services.

#70-5 NEWSLETTER (1 unit = 1 Newsletter Distributed)

Preparation and regular distribution of publications that inform seniors and the community of available services and activities.

#70-6 GATEKEEPER TRAINING (1 unit = 1 Activity)

Training sessions to educate utility employees, postal employees and other local organizations about visible indicators that may suggest need for assistance by an elderly person. For the purposes of the Older Americans Act program, an “elder” is a person age 60 or over.

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#70-7 PLACEMENT SERVICES (1 unit = 1 Referral)

Providing clients with direct access to a pool of screened, qualified in-home service workers.

#70-8 PRIVATE CASE MANAGEMENT (1 unit = 1 Hour)

A service provided to an employer on behalf of its employees who have caregiver responsibilities for elderly relatives. (For the purposes of the Older Americans Act program, an “elder” is a person age 60 or over). It is a service with several components, which collectively make up case management. Components of private case management include a combination of some or all of the following: access, intake and/or screening; assessment; care planning; care plan implementation and/or coordination, and continued care management. Further definitions of these components are included in the policy issued as IM 90-28.

#70-9 CAREGIVER TRAINING (1 unit = 1 Session per participant)

Training provided to caregivers and their families that supports and enhances the caregiving role. For example: Powerful Tools training; Communicating Effectively with Health Care Professionals; conferences, etc.. Note: This does not include training to paid providers. (A session for conferences would be equal to one day’s attendance at the conference).

#70-10 PUBLIC OUTREACH/EDUCATION (1 unit = 1 Activity)

Services or activities targeted to provide information to groups of current or potential clients and/or to aging network partners and other community partners regarding available services for the elderly (For the purposes of the Older Americans Act program, an “elderly” is defined as a person age 60 or over) and to encourage use of existing services and benefits. (Examples of this type of service would be participation in a community senior fair, publications, publicity campaigns, other mass media campaigns, presentations at local senior centers where information on OAA services is shared, etc.)

SERVICES THAT SUPPORT OTHER GOALS/OUTCOMES

#80-1 SENIOR CENTER ASSISTANCE (1 unit = 1 Center Served)

Financial support for the operation of a senior center. However, if the operation cost is to pay for services, it must be spread in the plan among the approved services, i.e., Outreach, I and R, Friendly Visitation. Otherwise, the monies for general operation (not specific services) would be listed as Senior Center

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Operations. Costs attributed to Senior Center Operations are considered administrative costs.

#80-2 EMPLOYMENT ASSISTANCE (1 unit = 1 Contact)

Counseling and assistance provided to older persons who want to seek employment.

#80-3 UTILITY ASSISTANCE (1 unit = 1 Contact)

Financial assistance to help low-income clients meet the cost of heat, electricity, water/sewer service or basic telephone service.

#80-4 FINANCIAL ASSISTANCE/MATERIAL AID (1 unit = 1 Contact)

Limited financial assistance for low-income clients to cover costs of prescription, medical, dental, vision care or other health care needs not covered under other programs.

#80-5 MONEY MANAGEMENT (1 unit = 1 Contact)

Assistance with financial tasks for seniors who are unable to handle their personal finances. (i.e. banking transactions, paying bills, taxes, etc.).

#80-6 CENTER RENOVATION/ACQUISITION (1 unit = 1 Center acquired or renovated)

The use of Older Americans Act funds to acquire or renovate buildings that will be used as senior activity centers.

#80-7 HOUSING ASSISTANCE (1 unit = 1 Contact)

Assistance to seniors who need emergency financial assistance in order to obtain or maintain housing.

#90-1 VOLUNTEER SERVICES (1 unit = 1 Hour of service)

Volunteer services provided to OAA clients. This includes meal site volunteers and volunteers doing home care, housekeeping, and chore services.

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