Summary of Services

Service	Training/ certification requirements	Required meetings	Unit for payment	Data recording & Monthly reporting requirements	Data Collection Tools & Technology
Community Focal Point for Older Adults (includes Recreation, Volunteer Services, Reassurance, FCGS support groups)		Monthly partner meetings	Monthly allocation	Depends on type of service: Generally minimum is list of activities with -Unduplicated client count (estimate) -# units (unit=1 session per participant) OR # & dates of events (for Outreach)	Reported in Excel
Information, Referral & Assistance (I&A)	I&A staff must have Alliance of Information & Referral Systems (AIRS) certification within one year. We prefer the Aging/Disabilities designation http://www.airs.org/i4a/pages/index.cfm?pageID=3309 Monthly ADRC database training meetings hosted by Multnomah County Resource Specialist	Quarterly ADVSD I&A meetings	Unit = 1 Call* * Call = Referral or Assistance call Rate for Info-only calls is ½ I&R rate	Demographic data & service data per AIRS standards Completed within 3 days* Monthly report of # of Calls: - Information - Assistance - Referral (per AIRS definitions)	ADRC (RTZ) database Call Module Technology Expectation for Contractor: I&A specialist will have access to computer (ideally with two monitors), consistent internet connection, telephone with reliable call quality & ability to transfer and conference calls, as well as a headset allowing for hands free call taking.

Service	Training or certification	Required meetings	Unit for payment	Data recording & Monthly reporting requirements	Data Collection Tools & Technology
Senior Health Insurance Benefits Assistance (SHIBA) Screening & Scheduling	Done by I&A staff (see above) ADVSD SHIBA staff provide training to contractors I&A staff.	See I&A	Unit = Appointment scheduled SHIBA appointment = ½ I&R rate	Included in Information calls	- Oregon Access to screen clients - ADRC (RTZ) database Call module to record calls
Transportation Scheduling & Coordination	ADVSD staff provide training	Monthly ADVSD Transportation meetings	Monthly Allocation	Client info entered in UCR: Rides authorized Tickets or pass provided Demographic & assessment data*	Web-based UCR + Oregon Access to determine Medicaid status
Case Management (CM) & Related Services **OAA CM FCGS CM**	Basic CM skills & knowledge; cultural responsiveness; State Oregon Access training	Quarterly ADVSD Case Manager/Options Counselor meetings	Unit = 1 hour of Case Manager's time, billed in 15-minute increments	Demographic data, assessment/enrollment, on-going service data Entered within 3 days Monthly by program type: Case Mgr & # hours for each client	Oregon Access plus State Mainframe for HCW Voucher payment process
Oregon Project Independence CM	Training provided by ADVSD + SUA: 2-day for CMs +1-day for CM Supervisors; HCW Voucher processors training from State DHS				

Service	Training/ certification requirements	Required meetings	Unit for payment	Data Recording & Monthly reporting requirements	Data Collection Tools & Technology
Options Counseling	State training series of 3 trainings	Same as CM	Same as CM	Demographic & service data entered within 3 days Monthly for each client: # units, Options Counselor, encounter dates	ADRC (RTZ) database Care Tool
Family Caregiver Support (FCGS) program **Star Care-giver**	Star CG: Certification by University of Washington	Same as CM	Training Unit = 1 hr (billed under CM)	Activities reported under Focal Point	Oregon Access
FCGS support groups	Peer support	n/a	Part of Focal Point	Activities reported under Focal Point.	Reported in Excel
Evidence Based Health Promotion (EBHP)	Depends on the program – see Program Model for details	Regular Meetings TBD	Unit = 1 full program completed	Client demographic data and participation dates; other data depending on the program	Oregon Access and Compass Portal Data Base

Nutrition Program					
Service	**Training/ certification requirements**	**Required meetings**	**Unit for payment**	**Monthly reporting requirements**	**Database**
Congregate Meals **Home Delivered Meals**	Menus must meet Federal OAA nutrition standards and be approved by certified dietician	Quarterly ADVSD contractor meetings	Unit = 1 meal	Demographic data - Consumer names and number of meals for each consumer - Initial/Annual nutritional risk assessments completed -Nutrition education provided: Quarterly for Congregate meals Annually for Home Delivered meals	TBD - current contractor gives ADVSD Data Analyst access to contractor database