Transportation Scheduling & Coordination – one (1) unit of service is equal to one (1) hour of service; and

Information & Assistance – one (1) unit of service is equal to one (1) contact or problem

Proposer’s unit rate for Transportation Scheduling and Coordination should be the same as for the proposed unit rate for Information and Assistance.

*(the following are projected, estimated units of service for year one to help proposers develop a unit rate within the allocated resources for each service).*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| District CenterService Area | Case ManagementService LevelsService Year One1 | Information & AssistanceService LevelsService Year One2 | Family Caregiver Support Case Management Service Levels Service Year One1 | Transportation Scheduling & Coordination Service Levels Service Year One2 |
| **East** | 6,410 | 2,491 | 761 | 600 |
| **Mid-County** | 9,898 | 5,813 | 1,755 | 3,320 |
| **North / Northeast** | 11,085 | 4,764 | 1,147 | 887 |
| **Southeast** | 8,966 | 2,290 | 768 | 2,113 |
| **Southwest** | 7,417 | 3,887 | 637 | 2,478 |

**2.3.5.1 Description**

District Centers will assist older adult consumers and others acting on behalf of older adults with Transportation Scheduling and Coordination. This service includes activities such as screening for eligibility for transportation services, assessing transportation needs, verification of eligibility for transportation, assisting in the completion of forms and applications for transportation, advocacy on behalf of older adults requesting transportation services, authorizing agency rides, scheduling and coordinating rides with transportation providers, and the distribution of bus passes and tickets.

Agency rides, which include bus passes and tickets are transportation services that ADSD purchases through contracts with local transportation providers for its clients to access services that help them maintain their independence in the community for as long as possible.

**2.3.5.2 Administrative Standards And Program Requirements**

1. Transportation Scheduling and Coordination will be available Monday through Friday during normal business hours of 8:00 am to 5:00 pm, or hours justified on the basis of recognized community norms.

2. Transportation Scheduling and Coordination must be performed by I&A staff or skilled staff like Case Managers and supervisors.

3. Have clear policies in place that delineate duties and responsibilities of reception services separate from Transportation Scheduling and Coordination services.

4. One staff member will be designated as the Transportation Specialist and will work collaboratively with other skilled staff to ensure consistency.

5. District Centers must have clear policies in place that delineate duties and responsibilities of reception services separate from Transportation Scheduling and Coordination services.

6. Ensure that Transportation Specialists are trained in handling calls/walk-ins for individuals with limited English speaking proficiency and have the current list of interpreters and translators, or internal resources.

7. Designated staff will be assigned and available as back-up to the Transportation Specialist.

8. Maintain confidential client information and transit client information by secure electronic format.

9. A quality assurance plan for monitoring the Transportation Scheduling and Coordination service will be developed by the District Center.

10. A unit of service will be one (1) hour of Transportation Scheduling and Coordination service that relates to specific transportation clients.

**2.3.5.3 Staff Qualifications**

The Transportation Specialist (or Case Manager or Supervisor filling in as back up) will have the following skills and qualifications:

1. A warm and personable manner in person and on the telephone;
2. Good listening skills;
3. Good interviewing skills;
4. Good oral communication skills;
5. Knowledge of all the different types of transportation services available in the community including Ride Connection rides, Ride Wise Program, Shuttles, TriMet Lift etc.;
6. Ability to keep up-to-date on the transportation services available in the community;
7. Knowledge of program eligibility requirements and the ability to screen for eligibility, verify and assess the most appropriate transportation needs for the client;
8. Ability to accurately document the Transportation Scheduling and Coordinating transaction;
9. Ability to use the ADRC electronic resource directory;
10. Active participation in training and evaluation as required by ADSD as needed;
11. Knowledge of the aging process;
12. Knowledge of the aging network and service delivery system;
13. Knowledge of the purpose of the District Center’s information and assistance and case management programs and the services they provide; and
14. The ability to work as part of a team with co-workers on behalf of client.

**2.3.5.4 Staff Responsibilities**

Staff responsibilities include the following:

1. Responding to requests for transportation scheduling and coordination;
2. Documenting calls daily;
3. Preparing and submitting monthly reports on ADSD approved forms and reporting formats required by ADSD;
4. Attending meetings and trainings as needed or required by ADSD; and
5. Maintaining password access to the State Mainframe and Oregon Access database.

**2.3.5.5 Supervision**

All District Center staff providing Transportation Scheduling and Coordination must receive at least one hour a month of supervision in which calls and their disposition are reviewed.

Supervision will include the following:

* Ensuring complete and accurate documentation and reporting of transportation transactions; and
* Analyzing how Transportation Scheduling and Coordination service can be improved.

**2.3.5.6** **Training**

Transportation Scheduling and Coordination will be performed by staff that have training and skills to perform the necessary duties. Depending on the District Center’s staffing plan, Transportation Scheduling and Coordination may be performed by an I&A Specialist, Case Manager, or Transportation Specialist.

District Center staff assigned to provide Transportation Scheduling and Coordination will participate in ADSD sponsored training and other training(s) as required or needed.

Transportation Scheduling and Coordination staff are to receive a minimum of three (3) hours of in-service training twice a year and twenty-four (24) hours of formal training for each FTE equivalent. Formal training may be through college courses, workshops, seminars, or conferences, or other agency staff or professionals in the community may provide structured training. ADSD offers a quarterly meeting and training opportunities for Transportation Specialists, and other skilled staff, as well as updates for community-based training.

1. New staff will receive an orientation which covers the following subjects before they begin providing services to older persons:

1. Introduction to the Aging Network;
2. Introduction to the ADSD Mission and Values;
3. Philosophy of the single entry access system through information and assistance and case management services;
4. Agency policies and procedures;
5. Introduction to other community resources that serve older persons;
6. Content of working agreements with other agencies;
7. Protocol for working with other agencies, including how to make referrals;
8. How to use the State main frame and Oregon Access Database;
9. How to work as part of a team;
10. How to complete required forms;
11. How to use the telephone to provide the services for which they are responsible; and
12. The documentation of calls.

2. Training must also include the following:

* 1. Interviewing skills;
  2. Knowledge of the case management intake process;
  3. Assessment procedures; and
  4. Services authorized under the OAA, OPI, and other programs serving older people.

3. Additional training may include the following:

a. Cross-training with Case Managers;

b. Customer service techniques;

c. How to discern a potentially complex situation from an apparent simple request for services; and

d. Using software to submit Transportation Scheduling and Coordination data Transportation.

4. Seasoned Transportation Specialists are encouraged to share knowledge and expertise with new Transportation Specialists from other centers.

5. Neighboring District Centers are encouraged to collaborate in transportation outreach venues to reach underserved communities.

**2.3.5.7 Procedures**

District Centers will use the following procedures when scheduling and coordinating transportation:

1. Utilize standardized procedures, screening tools, narrative tools, forms and formats approved by ADSD;
2. Utilize standardized coordination activities with ride providers;
3. Agency rides can only be authorized and scheduled by ADSD staff or ADSD contractors;
4. Assess client needs and develop a personal transportation plan using a standardized format approved by ADSD;
5. Register client using a standardized format approved by ADSD;
6. Coordinate transportation resources and service that are most appropriate for the client;
7. Facilitate ride schedule for clients as needed;
8. Ensure that staff are trained in handling calls/walk-ins for clients with limited English-speaking proficiency and have an up-to-date list of ADSD interpreters and translators, or internal resources available; and
9. Provide technical, cultural, and other supports to client, as well as transportation providers, to ensure that service is promptly and effectively delivered.

Clients needing agency rides will be prioritized according to the following ADSD criteria:

1. Medical trips (doctors, therapists, hospital, test, or health-related treatment) for non-Medicaid clients;
2. Congregate nutrition; and
3. Multiple supportive services (i.e. Multicultural Centers, etc.).

ADSD‘s priority target populations for agency rides include:

1. Frail, elderly clients based on activities of daily living (ADL) who have limited endurance, stamina, and are advanced old age;
2. People with disabilities that need to travel with equipment such as walkers, oxygen, etc.;
3. Non-English speaking elders that have difficulty accessing fixed route transportation due to language barriers; and
4. Volunteers who work in Aging and Disability Services programs and activities.

Whenever feasible, Transportation Scheduling and Coordination will promote the use of fixed route public transportation through the distribution of bus passes and tickets, and the utilization of community transportation resources to support client independence and choice.

**2.3.5.8 Documentation**

Logging, narrating, tracking, and reporting Transportation Scheduling and Coordination services will be completed on forms and formats approved by ADSD.

A complete record of transportation scheduling and coordination calls received, including at minimum who called, the service request, and the disposition of call will be documented. In addition, records of services that were requested or needed, but not available, will be maintained.

Count as Transportation Scheduling and Coordination services activities such as screening for and verifying eligibility, assisting with the completion of forms, research transportation resources, authorizing agency rides, advocacy with other agencies or service providers, coordination of transportation services, scheduling transportation services, and the distribution of bus passes and tickets.

**2.3.5.9 Payment**

#### Transportation Scheduling and Coordination will be paid on a fee-for-service basis and will be based on complete and accurate documentation submitted each month to ADSD. If these criteria are not met, payment may be delayed or not authorized.