**TRANSPORTATION SCHEDULING & COORDINATION**

ADVSD purchases a limited number of rides via bus tickets and passes, and through contracts with local transportation providers for older adults who are not eligible for transportation services through Medicaid. Only agencies contracted to provide Information and Referral will have access to these rides and transportation services.

Each organization selected to provide Transportation Scheduling and Coordination will be given access to a specific allocation for transportation services. Trained staff provide Transportation Scheduling & Coordination services for the ADVSD Transportation program, including distribution of bus tickets and passes, coordination of cab rides, determining level of service based on assessment outcome, and authorization of rides according to priorities determined by ADVSD to help older adults maintain their independence for as long as possible.

 Using input from ADVSD’s Fare Assistance Workgroup, we recommend that agencies focus transportation funding on addressing the major transportation needs of fewer people, rather than providing a larger number of people with a small number of rides. The allocation for coordination is based on that recommendation. A contractor that chooses a different approach will need to find other funding for the increased costs of coordination. In the event that funding does not meet demand, Transportation Coordinators are responsible for managing a wait list – this includes conducting an annual review to prioritize consumers based on need.

Each selected organization will receive funds to coordinate the program. These funds will be provided by a monthly allocation and will be commensurate with the amount of consumers expected to receive fare assistance and rides through the program.

The **Fare Assistance** program is in line with all other services and support offered by Aging, Disability and Services (ADVSD) in that it is approached and administered with a focus on being person centered and consumer driven allowing for consumer self-direction and meaningful input throughout the process.

* All transportation clients are pre-screened and reassessed annually by I & R staff, using the Transportation Assessment form. The outcome of the screening will determine eligibility for fare assistance and level of assistance received.
* The level of fare assistance the client qualifies for should provide adequate and effective support for the client’s personal transportation plan. Keep in mind, current funding amount is limited and does not meet the full need of the community.
* The Transportation Assessment form will also help to identify all transportation resources (including natural resources i.e. family, friends and neighbors who can provide transportation, eligibility for honored citizen downtown Portland pass, etc.) available to the client.
* This tool may be used to create an individualized transportation plan for the client that may or may not include fare assistance from the DC.

Agency rides, which include bus passes and tickets, are transportation services that ADVSD purchases from local transportation providers that help participants maintain their independence in the community. Contractors selected to receive access to an allocation for transportation services will assist older adult participants and others acting on behalf of older adults with Transportation Scheduling and Coordination for organization rides.

This service includes activities such as:

1. Authorizing ADVSD funded organization rides;
2. Scheduling and coordinating organization rides with ADVSD funded transportation providers; and
3. Distribution of bus passes and tickets purchased by ADVSD through contracts with local transportation providers - currently TriMet.

*Note that assessment of need, eligibility screening, verification, and assistance with forms/applications, for all transportation services would be eligible for I & R payment, as long as the activity meets the required standards.*

**Administrative Standards and Program Requirements**

1. Transportation Scheduling and Coordination will be available during the same hours as I & R services.
2. Transportation Scheduling and Coordination must be performed by Transportation Specialist staff or skilled staff such as Case Managers and supervisors.
3. Contractors must have clear policies in place that delineate duties and responsibilities of reception services separately 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. Contractors must 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.
6. Designated, trained staff will be assigned and available as back up to the Transportation Specialist.
7. The Contractor will maintain confidential participant information, enter participant and service information in the ADVS Universal Client Registry (UCR) database, and transmit participant information (when necessary) by secure electronic format.
8. Designated staff will refer participants for guaranteed door-to-door rides using WiseGuide database.
9. A quality assurance plan for monitoring the Transportation Scheduling and Coordination service will be developed by the Contractor.

10. In addition to the Transportation Scheduling and Coordination described in the body of this program model, Contractors are expected to adhere to ADVSD service standards and policies.

**Staff Qualifications**

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

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

**Staff Responsibilities**

Staff responsibilities include the following:

1. Responding to requests for transportation scheduling and coordination;
2. Record transportation and coordination services in Ride Connection WiseGuide web-based participant database and in the Multnomah County Universal Client Registry (UCR) database;
3. Billing accurately, and staying within budget;
4. Preparing and submitting monthly reports on ADVSD approved forms and reporting formats required by ADVSD;
5. Attending meetings and trainings as needed or required by ADVSD; and
6. Maintaining password access to the State Mainframe and Oregon Access database.

**Supervision**

All District Center staff providing Transportation Scheduling and Coordination must receive at least one hour a month of supervision for reviewing calls and their disposition. Supervision will include:

1. Ensuring complete and accurate billing, documentation and reporting of transportation transactions;
2. Work with ADVSD and other transportation providers to analyze and improve Transportation Scheduling and Coordination services.

**Training**

Staff that has the training and skills necessary will perform Transportation Scheduling and Coordination. Depending on the Contractor’s staffing plan, Transportation Scheduling and Coordination may be performed by an I & R Specialist, Case Manager, or Transportation Specialist.

ADVSD offers monthly meeting and training opportunities for Transportation Specialists and other skilled staff, as well as updates for community-based training. Contractor staff assigned to provide Transportation Scheduling and Coordination will participate in ADVSD sponsored meetings and training, and other training(s) as required or needed.

Training for Transportation Scheduling and Coordination staff must include the following elements:

1. **Orientation:** 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 ADVSD Mission and Values;
	3. Philosophy of the single entry access system through information and assistance and case management services;
	4. Organization 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 mainframe, Oregon Access Database to determine eligibility, and ADVSD UCR to enter participant and service data;
	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.
	13. How to accurately bill for transportation services.
2. **Initial Training to include the following:**
	1. Interviewing skills;
	2. Knowledge of the case management intake process;
	3. Assessment procedures;
	4. Services authorized under the OAA, OPI, and other programs serving older adults and people with disabilities.
3. **Additional training** may include the following best practices:
	1. Cross-training with Case Managers;
	2. Customer service techniques;
	3. How to discern a potentially complex situation from an apparent simple request for services; and
	4. Using software to submit Transportation Scheduling and Coordination data.
4. Seasoned Transportation Specialists are encouraged to share knowledge and expertise with new Transportation Specialists from other centers.
5. Neighboring Contractors are encouraged to collaborate in transportation outreach venues to reach underserved communities.

**Procedures**

Contractors will use the following procedures when scheduling and coordinating transportation:

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

Participants needing organization rides will be prioritized according to the following ADVSD criteria:

1. Medical trips (doctors, therapists, hospital, test, or health-related treatment) for non-Medicaid participants;
2. Congregate nutrition sites; and
3. Sites where the participant is receiving multiple services (such as Senior Centers, etc.)

ADVSD‘s priority target populations for organization rides include:

1. Frail, elderly participants based on activities of daily living (ADL) who have limited endurance, stamina, and are advanced old age;
2. People with disabilities who need to travel with equipment such as walkers, oxygen, etc.;
3. Non-English speaking older adults who have difficulty accessing fixed route transportation due to language barriers; and
4. Volunteers who work in Aging, Disability, and Veterans 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 through the utilization of community transportation resources to support participant independence and choice.

**Documentation**

1. Logging, tracking, and reporting Transportation Scheduling and Coordination services will be completed in the ADVSD UCR or by other methods approved by ADVSD.
2. A transportation assessment to determine eligibility for fare assistance must be completed annually for each transportation participant; copy must be maintained by the Contractor.
3. The Contractor will document a complete record of transportation scheduling and coordination calls received, including at minimum who called, the service request, and the disposition of the call. In addition, the Contractor will maintain records of services that were requested or needed, but not available.

**Payment**

Each organization’s allocation for Transportation Scheduling and Coordination will equal to 25% of the organization’s allocation for direct transportation services, and will be paid on a monthly allocation basis and will be based on complete and accurate documentation entered each month in the ADVSD UCR.

**Quality Assurance for Transportation Scheduling & Coordination**

* Assessments: Fare Assistance Assessments completed at enrollment and updated annually
* Attendance at TSC monthly meetings
* ADVSD Customer satisfaction TBD
* Monthly Ticket/Pass invoice reconciles with Public Transportation Log and Surplus Ticket Tracker