

POLICY 304

SERVICE TAXONOMY

The Agency has developed the following standard Service Taxonomy with which Service Providers receiving Title III, Senior Community Services (SCS) and Alzheimer's Respite funds must comply. By agreement with the Lucas County Commissioners, these same requirements apply to the Lucas County Senior Services Levy funds administered by the Agency.

PROCEDURE A BASIC SERVICE DEFINITIONS AND GUIDELINES

The following basic service definitions and guidelines apply to all services contracted for by the Agency, regardless of funding source.

SERVICE CODE 1: PERSONAL CARE - Community Based Care

- a. Definition: Providing basic health maintenance or personal hygiene assistance to individuals in their homes. The basic purpose of the program is to offer a household-oriented alternative to institutional care, where appropriate. This program may include care by trained paramedical personnel.
- b. Service Activities May Include:
 - bedside nursing care,
 - therapy (i.e., occupational, physical or speech),
 - personal hygiene, and
 - assistance with self-administered medication (reminders to client)
- c. Unit of Service Definition: One hour of staff time expended on behalf of a client (face-to-face).
- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
 - Client Information Sheet containing:
 - Date of service delivery
 - Client's name
 - Client's address
 - Client's phone number
 - Specific service(s) provided
 - Length of time spent with client (specify arrival and departure times)
 - Signature of client or authorized representative (not service provider)
 - Signature of personal care Service Provider

SERVICE CODE 2: HOMEMAKER – Community Based Care

- a. Definition: Providing assistance to persons with the inability to perform one or more instrumental activities of daily living and general support by trained and professionally supervised homemakers to maintain, strengthen, and safeguard the functioning of individuals in their own homes, when no responsible or capable person is available for this purpose. Such support may include teaching of and assistance with household management and self-care.

- b. Service Activities May Include:
 - Teaching meal planning and preparation, household skills, money management and budgeting, shopping skills and home cleaning/maintenance
 - assistance with self-administered medication (i.e., remind client to take his/her medications, read instructions for utilization or uncap medication containers)
 - supervision and assistance with and/or performance of instrumental activities of daily living in the items listed above and the items indicated below
 - observation of client functioning and notification of changes in functioning to staff member's supervisor, as required
 - housekeeping tasks (cleaning, shopping, meal preparation, etc.)

- c. Unit of Service Definition: One hour of staff time expended on behalf of a client (face-to-face).

- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.

- e. Minimum Required Supporting Documentation:
 - Client Information Sheet containing:
 - Date of service delivery
 - Client's name
 - Client's address
 - Client's phone number
 - Specific service(s) provided
 - Length of time spent with client (specify arrival and departure times)
 - Signature of client or authorized representative (not service provider)
 - Signature of personal care Service Provider

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SERVICE CODE 3: CHORE – Community Based Care

- a. Definition: Providing assistance for household chores and other light work to enable the older person to remain independent. This service does not require professionals/paraprofessionals.
- b. Service Activities May Include:
- Light home repairs (leaky faucet, broken window, torn screen, etc.)
 - Lawn care/snow removal
 - Cleaning gutters
 - Removing/installing screens and storm windows
 - Essential shopping
 - Other similar tasks
- c. Unit of Service Definition: One hour of staff time expended on behalf of a client (face-to-face).
- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Client Information Sheet containing:
 - Date of service delivery
 - Client's name
 - Client's address
 - Client's phone number
 - Specific service(s) provided
 - Length of time spent with client (specify arrival and departure times)
 - Signature of client or authorized representative (not service provider)
 - Signature of personal care Service Provider

SERVICE CODE 5: ADULT DAY SERVICES – Community Based Care

- a. Definition: Services provided in a protective setting for adults who do not require 24-hour institutional care, but due to physical and/or mental impairment are not capable of full-time independent living. This service may require professionals/paraprofessionals.
- b. Service Activities May Include:
- provision of a protective environment
 - one meal
 - social activities
 - rest periods (as needed)
 - emergency medical arrangements and contact with caregivers

 - Additional Services May Include:
 - Personal care,
 - Special diet,
 - Health examination,
 - Family and individual counseling,
 - Training in activities of daily living
- c. Unit of Service Definition: One person-day (5 or more hours of care)
- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Client Information Sheet containing:
 - Date of service delivery
 - Client's name
 - Signature or initials of client, family member or driver on day client attends
 - Arrival and departure times

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SERVICE CODE 6: **CASE MANAGEMENT/CARE COORDINATION –
Community Based Care**

- a. Definition: Assistance either in the form of access or care coordination in circumstances where the older person and/or their caregivers are experiencing diminished functioning capacities, personal conditions or other characteristics which require the provision of services by formal service providers so that they can continue to live independently, in their own homes.

- b. Service Activities May Include:
 - Case/Client finding activities
 - Intake and assessment
 - Care Plan Development and implementation
 - Regular review, reassessment and follow-up of client status
 - Client transfer and/or discharge
 - Case closure

- c. Unit of Service Definition: One hour of staff time expended on behalf of a client constitutes one unit of service.

- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.

- e. Minimum Required Supporting Documentation:
 - Agency-approved intake and screening form

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SERVICE CODE 9: ESCORT/ASSISTED TRANSPORTATION

- a. Definition: Accompanying older persons to assist them in using essential transportation. Trips should not be recreational. A single escort may assist more than one individual. If the agency provides door-to-door and/or through-the-door service, the driver may also provide escort services.
- b. Service Activities May Include:
 - Activities that support the direct provision of transportation service to a person who has difficulties (physical or cognitive) using that transportation service without such assistance, and are related to the provision of trips to and/or from community resources.
- c. Unit of Service Definition: One-way trip
- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
 - Client Information Sheet containing:
 - Date of service delivery
 - Client's name
 - Client's address
 - Destination
 - Number of miles traveled
 - Name of escort
 - Signature or initials of client or authorized representative (escort)
 - Signature of driver

SERVICE CODE 10: TRANSPORTATION

- a. Definition: Transporting older persons to and from community facilities and resources for purposes of receiving/acquiring services, to participate in activities or attend events in order to reduce isolation and promote successful independent living. Recreational trips should be self-supporting through project income and should be counted under Recreation (Service Code 25).

- b. Service Activities May Include:
 - Door to door, scheduled route or on-demand transportation

- c. Unit of Service Definition: One-way trip

- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.

- e. Minimum Required Supporting Documentation:
 - Transportation Log containing:
 - Date of service
 - Number of miles traveled
 - Pick up location
 - Destination
 - Names of clients
 - Signatures or printed names and initials of clients (or their escort) transported
 - Signature of driver

SERVICE CODE 11: LEGAL ASSISTANCE

- a. Definition: Includes arranging for and providing assistance in resolving civil legal matters and the protection of legal rights, including legal advice, research and education concerning legal rights and representation by an attorney at law, a trained paralegal professional (supervised by an attorney), and/or a law student (supervised by an attorney) for an older person (or his/her representative).
- b. Service Activities May Include:
- Provision of legal advice and information
 - Legal research on behalf of client(s)
 - Education concerning legal rights
 - Representation by an attorney at law, a trained paralegal, and/or a law student; and
 - Provision of client advocacy to secure needed and entitled benefits.
- c. Unit of Service Definition: One hour of time spent by a qualified person working on behalf of an older person.
- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Client Information Sheet containing:
 - Date of service delivery
 - Client's name
 - Client's address
 - Client's telephone number
 - Specific service(s) provided
 - Signature of client or authorized representative
 - Name/Signature of service provider

SERVICE CODE 14: CLIENT FINDING/OUTREACH

- a. **Definition:** Contacts initiated by an agency or organization for the purpose of identifying potential clients and encouraging their use of available services and benefits.
- b. **Service Activities May Include:**
 - Conducting search and find activities (e.g., canvassing door to door and personal contact with older persons whose names have been solicited from community resources) which seek out and identify hard to reach older persons and targeted populations (“hidden senior populations” and those with the greatest need
 - Informing persons of benefits and activities available
 - Encouraging older persons to participate in senior programs
- c. **Unit of Service Definition:** One contact between a service provider and an elderly client. Units are based on an initial contact by a service provider and may be counted only once in any program year.
- d. **Unit of Service Counts:** Unit of service counts should be equal to the number of clients contacted.
- e. **Minimum Required Supporting Documentation:**
 - Client Information Sheet containing:
 - Date of service delivery
 - Client’s name
 - Client’s address
 - How contacted
 - Results
 - Name/Signature of service provider conducting outreach

SERVICE CODE 16: COUNSELING

- a. Definition: Counseling services provided by a properly credentialed individual to help older individuals and/or their families cope with personal problems and/or develop and strengthen capacities for more adequate social and personal adjustment.
- b. Service Activities May Include:
 - Personal counseling
 - Formal and informal group sessions
- c. Unit of Service Definition: One hour of time spent by a qualified counselor expended on behalf of an older person.
- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
 - Client Information Sheet containing:
 - Date of service delivery
 - Client's name
 - Client's address
 - Specific service(s) provided
 - Signature of client or authorized representative
 - Name of counselor
 - Signature of counselor

SERVICE CODE 17: EDUCATION/INSTRUCTION

- a. Definition: Services which provide individuals with opportunities to acquire knowledge and skills suited to their interests and capabilities through formally structured, group oriented lectures or classes. Such programming should be provided by a qualified individual. Subject areas for education/instruction may include health, mental health, personal care, consumerism, crime prevention, legal rights/entitlements, retirement orientation and life enrichment.
- b. Service Activities May Include:
- Scheduling and providing academic courses, classes, seminars, lectures and other presentations
 - Developing teaching aids and/or informational materials
 - Arranging/conducting site visits directly related to the program
- c. Unit of Service Definition: One hour of time spent by a qualified person providing education/instruction (does not include preparation time).
- d. Unit of Service Counts: Unit of service counts should be less than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Client Information Sheet containing:
 - Date of service delivery
 - Specific title of the instruction/education activity
 - Names of attendees
 - Signatures of attendees
 - Name of instructor
 - Signature of instructor

SERVICE CODE 19: HOME MAINTENANCE/REPAIRS

- a. Definition: Assistance to older persons to maintain their homes in a habitable and safe condition or to install adaptive equipment to meet the needs of seniors with physical limitations. All repairs, renovations and equipment installations must be in compliance with appropriate local codes and ordinances. Specific documentation outlining the nature and scope of work allowable under this service code and the means for determining client eligibility for this service are contained in the Agency's Home Repair Manual maintained by the Housing Coordinator.
- b. Service Activities May Include:
- Client screening for eligibility
 - Site visit to determine nature and scope of required work
 - Roof, window, door, etc., repair or replacement
 - Weatherproofing, if not available from another community resource
 - Other minor repairs to maintain the integrity or safety of the client's home
- c. Unit of Service Definition: One home repair work order completed by a qualified individual.
- d. Unit of Service Counts: Unit of service counts should be equal to the number of clients served.
- e. Minimum Required Supporting Documentation:
- Completed client application and intake forms
 - Work order for required repairs
 - Authorization for completion of repairs
 - Name and signature of individual/company completing repairs
 - Signature of client indicating satisfaction with completed repairs
 - Agency Housing Department site evaluation to certify completed repairs

SERVICE CODE 20: INFORMATION AND ASSISTANCE/REFERRAL

- a. Definition: A service for older individuals that: a) Provides individuals with current information on opportunities and services available to them within their communities, including information relating to assistive devices/technology; b) Assesses the problems and capacities of the individual; c) links the individual to the opportunities and services that are available; and, d) ensures, insofar as possible, that the individual receive the needed services and opportunities, through follow-up contact with the individual.
- b. Service Activities May Include:
- Provision of specific information about appropriate community resources which will meet the immediate expressed need of the individual, including information regarding assistive technology
 - Provision of assistance to older persons to identify their needs and place them in direct contact with appropriate community resources or service providers
 - Assessment of the problems and capacities of the individual
 - Follow-up activities conducted with older persons and/or agencies to determine whether the services have been received and the identified need met following the formal referral
 - Expansion of information and assistance services to a 24 hour a day basis in times of disaster or emergency (flooding, snow or heat emergency, tornado, etc.) to assure older persons are safe and have access to services to meet their current needs
- c. Unit of Service Definition: An individual client contact (one on one) made for information, referral, or assistance. This unit includes all referral and follow-up on behalf of that client. If the same client contacts the I&A service provider again about the same issue, no additional units of service may be counted.
- d. Unit of Service Counts: Unit of service counts should be equal to the number of clients served.
- e. Minimum Required Supporting Documentation:
- Information & Assistance/Referral Log containing, where possible:
 - Date
 - Client's name or notation of anonymous client
 - Resource information requested
 - Name of agency or resource client was referred to
 - Follow-up information for client and/or resource
 - Signature of person providing service

SERVICE CODE 21: MASS OUTREACH

- a. Definition: Includes outreach to the community at large to familiarize seniors and others with programs and services offered by individual service providers. Includes outreach to seniors and others through general mailings, newsletters, speaking engagements, and public service announcements made on radio and television.
- b. Service Activities May Include:
- Newsletters to non-members and direct mailings
 - Speaking engagements
 - Promotion of programs and services at fairs, special events, and other public venues
- c. Unit of Service Definition: One event/ mailing/ group contact. Mailings to booster groups and others who receive newsletters as a result of membership at a senior center and newspaper articles, television and radio interviews may not be counted.
- d. Unit of Service Counts: Unit of service counts should be less than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Outreach Service Log containing:
 - Date of service delivery
 - Activity conducted
 - Location of activity
 - Number of seniors/others contacted or in attendance
 - Copy of mailing list (if mail delivery utilized)
 - Names/signatures of persons conducting the activity

SERVICE CODE 22: HEALTH SCREENING/MEDICAL ASSESSMENT

- a. Definition: Services provided to assist individuals in achieving and maintaining a favorable health status by assisting them in identifying and understanding their physical and mental needs and the need to seek out medical assistance, when indicated. The focus of this service is on identifying and evaluating the health needs of older persons and linking them to health care systems/providers, not on diagnosis, treatment and monitoring. Service must be provided by appropriately qualified and credentialed individuals.
- b. Service Activities May Include:
- Blood pressure and blood sugar testing
 - Vision screening/glaucoma testing
 - Podiatry evaluation
 - Hearing evaluations
 - Anemia Screenings
 - Coordinating the provision of vaccinations (flu, pneumonia, etc.)
 - Other activities directly related to health/medical screenings, including individual health consultation and education
- c. Unit of Service Definition: One individual screening of an older person by a properly qualified and credentialed individual. Do not count screenings and evaluations conducted by outside agencies being reimbursed by the Agency who are using the service provider's facilities.
- d. Unit of Service Counts: Unit of service counts should be equal to the number of clients served.
- e. Minimum Required Supporting Documentation:
- Client Sign-Up Sheet containing:
 - Date of service delivery
 - Client's name
 - Type of screening/evaluation
 - Specific service(s) provided
 - Signature of client or authorized representative
 - Signature of service provider

SERVICE CODE 23: HEALTH TREATMENT/MEDICAL TREATMENT

- a. Definition: Providing medical treatment services by skilled medical personnel for individuals suffering from or at risk of illness, injury, or other physical or mental conditions. Programs primarily engaged in locating such treatment for individuals, as well preventative immunization opportunities, are to be included in this service category. (For services providing only diagnostic care, see “Health Screening/Medical Assessment”). Service must be provided by appropriately qualified and credentialed individuals.
- b. Service Activities May Include:
- Providing vaccinations (flu, pneumonia, etc.) and other medical treatments for seniors
 - Other activities approved by the Agency
- c. Unit of Service Definition: One individual treatment of an older person by a properly qualified and credentialed individual. Do not count treatments and procedures conducted by outside agencies being reimbursed by the Agency who are using the service provider’s facilities.
- d. Unit of Service Counts: Unit of service counts should be equal to the number of clients served.
- e. Minimum Required Supporting Documentation:
- Client Sign-Up Sheet containing:
 - Date of service delivery
 - Client’s name
 - Type of treatment/procedure
 - Specific service(s) provided
 - Signature of client or authorized representative
 - Signature of clinician providing service

SERVICE CODE 25: **SOCIALIZATION/RECREATION**

- a. Definition: Activities that foster the health and social well-being of individuals through social interaction and constructive use of time. In determining and developing recreational activities, the needs and interests of the seniors should be the primary consideration.
- b. Service Activities May Include:
- Instruction in dance, games, crafts and hobbies
 - Organized games, sports and other physical activities
 - Group tours and outings to points of interest
- c. Unit of Service Definition: One scheduled activity
- d. Unit of Service Counts: Unit of service counts should be less than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Individual Client Information Sheet containing:
 - Date of service delivery
 - Identification of activity
 - Names of participating clients
 - Signatures of participating clients
 - Name of person facilitating the activity
 - Signature of person facilitating the activity

SERVICE CODE 26: SOCIALIZATION/TELEPHONING

- a. Definition: Telephone calls at specified times to or from individuals who live alone, to determine if they require special assistance and to provide psychological reassurance and reduce isolation. Calls should be made to client at least three times per week.
- b. Service Activities May Include:
- Identifying and reporting a client's need for services
 - Establishment of an emergency plan for clients if telephone call is not answered
 - Activities planned for each telephone call relative to the individual's needs
 - Telephone calls to each client at regularly scheduled times
 - Telephone calls to determine that older persons are safe and/or have access to services to meet their immediate needs during disasters and emergency situations (hot weather, snow emergencies, flooding, etc.)
 - Follow-up notification to family, physician, police, etc., in the event the senior needs assistance
- c. Unit of Service Definition: One telephone reassurance call placed or received from a client.
- d. Unit of Service Counts: Unit of service counts should be equal to or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Socialization/Telephoning Log containing:
 - Date of service delivery
 - Client's name
 - Client's telephone number
 - Name of person placing/receiving call
 - Signature person placing/receiving call

SERVICE CODE 27: SOCIALIZATION/VISITING

- a. Definition: Regular visits by staff or volunteers to socially and/or geographically isolated individuals for the purpose of providing companionship and social contact with the community. The program is for the older person who is often unable to leave his/her residence and who has few or no friends, family or neighbors who can visit regularly. Should be carried out at least once per week.
- b. Service Activities May Include:
- Visiting seniors at their homes
 - Visiting to determine that older persons are safe and/or have access to services to meet their immediate needs during disasters and emergency situations (hot weather, snow emergencies, flooding, etc.) Education concerning legal rights
- c. Unit of Service Definition: One hour of time spent visiting with the older person.
- d. Unit of Service Counts: Unit of service counts should be equal to the number of clients served.
- e. Minimum Required Supporting Documentation:
- Socialization/Visiting Log containing:
 - Date of service delivery
 - Client's name
 - Client's address
 - Signature of client or authorized representative
 - Signature of visitor

SERVICE CODE 28: VOLUNTEER PLACEMENT

- a. Definition: Providing opportunities for older persons to enrich their lives by volunteering at community agencies and institutions. This service is generally coordinated by an RSVP program.
- b. Service Activities May Include:
 - Recruitment of volunteers
 - Completing background checks
 - Coordination activities
 - Matching the volunteer to an appropriate program
- c. Unit of Service Definition: One placement.
- d. Unit of Service Counts: Unit of service counts should be equal to the number of clients served.
- e. Minimum Required Supporting Documentation:
 - Volunteer Placement Log containing:
 - Date of placement
 - Name of client placed
 - Name of agency or institution where volunteer placed
 - Signature of person making placement

SERVICE CODE 34: SUPPORTIVE SERVICES

- a. Definition: Activities that foster the independence and well-being of seniors by providing individual assistance, education, and advocacy. Note that preparing and submitting Golden Buckeye Card applications and sorting, staging and distribution of federal/state food commodities are not authorized under this service and these services cannot be paid for with federal or state funds. *(The exception to this provision is that in Lucas County, Service Providers participating in commodities programs may apply for Lucas County Senior Services Levy funding to provide this monthly service.)* Services may be provided by professionals, trained volunteers, or service provider staff.
- b. Service Activities May Include:
- Assistance in preparing forms and responding to official inquiries (income tax returns, HEAP applications, etc., and translation services for seniors with limited or no English-speaking ability
 - Assistance in responding to Medicare/Medicaid inquiries, applying for prescription drug discount programs and other state and federal programs
- c. Unit of Service Definition: One contact with client.
- d. Unit of Service Counts: Unit of service counts should be the same as or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Supportive Service Sign Up Sheet containing:
 - Date of service delivery
 - Identification of service provided
 - Name of client
 - Signature of client
 - Client's address
 - Name of person providing the service
 - Signature of person providing the service

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SERVICE CODE 39: BENEFITS COUNSELING/MANAGED CARE ADVOCACY

- a. Definition: Specialized assistance by professionals or trained volunteers to assist seniors in navigating, assessing and applying for benefits such as Medicare/Medicaid, other managed care programs, pension benefits, social security, supplemental health insurance, life insurance, etc.
- b. Service Activities May Include:
- Assisting the client in preparing and submitting forms and documentation
 - Advocacy on behalf of the client in such matters
 - Referral to other service providers for additional assistance in such matters
- c. Unit of Service Definition: One hour of contact with the client or one hour of service on behalf of the client.
- d. Unit of Service Counts: Unit of service counts should be the same as or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Client Information Sheet containing:
 - Date of service delivery
 - Identification of service provided
 - Name of client
 - Signature of client
 - Client's address
 - Name of person providing the service
 - Signature of person providing the service

SERVICE CODE 41: HOME INJURY CONTROL/ASSESSMENT

- a. Definition: Services designed to promote home safety for older persons. Generally provided by occupational or physical therapists and other properly trained and credentialed individuals.
- b. Service Activities May Include:
 - Assessing high risk home environments as they affect the safety and well-being of the client
 - Provision of information on, or referral to sources of information, on home injury prevention (e.g., fall and fracture prevention, cooking safety, water temperature control)
- c. Unit of Service Definition: One individual assessment.
- d. Unit of Service Counts: Unit of service counts should be the same as or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
 - Home Injury Control Client Assessment Information Sheet containing:
 - Date of service delivery
 - Type of assessment conducted
 - Name of client
 - Signature of client
 - Client's address
 - Name of person conducting the assessment
 - Signature of person conducting the assessment

SERVICE CODE 46: HEALTH EDUCATION

- a. Definition: The provision of age-specific information to seniors that increase their awareness of and interest in the need for their participation in maintaining their own state of health. Such education is presented by credentialed professionals.
- b. Service Activities May Include:
- Health education provided to seniors by clinicians (physicians, pharmacists, etc.)
 - Interaction with seniors on an individual or group level to respond to specific concerns or requests for information, before, during or after the presentation
- c. Unit of Service Definition: One hour of service to clients.
- d. Unit of Service Counts: Unit of service counts should be the same as or greater than the number of clients served.
- e. Minimum Required Supporting Documentation:
- Health Education Sign Up Sheet containing:
 - Date of service delivery
 - Identification of information presented
 - Name of client
 - Signature of client
 - Name of person providing the service
 - Signature of person providing the service