

## Metrowest Aging and Disability Resource Consortium

<b>Program</b>	Long Term Care Options Counseling
<b>Subject</b>	Intakes for LTCOC
<b>References</b>	Resources/Technological section of the LTCOC Program Manual Eligibility for LTCOC section of the LTCOC Program Manual
<b>Forms</b>	Mutual Intake Form
<b>Abbreviations</b>	ASAP = Aging Service Access Point(s) EOEA = Executive Office of Elder Affairs IDMS = ILC based consumer database ILC = Independent Living Center I&R = Information/Intake and Referral LTCOC = Long Term Care Options Counseling MRC = Massachusetts Rehabilitation Commission MWADRC = Metrowest Aging & Disability Resource Consortium MWCIL = Metrowest Center for Independent Living OC = Options Counselor SAMS = ASAP based consumer database
<b>Date:</b>	12/15/2008
<b>Revision Dates:</b>	02/11/2009 <b>07/07/2010</b>
<b>Policy:</b>	It is the policy of the MWADRC that callers to all Consortium member agencies will be able to make a referral (have an intake completed) for LTCOC through each member agency's I&R.
<b>Purpose:</b>	The purpose of this policy is to: -ensure "no wrong door" for consumers, so that fragmentation and confusion for callers (consumers) is minimized; -prevent callers (consumers) from having to make more than one contact to make a referral for LTCOC; -ensure a timely response to all referrals for LTCOC services.

## Procedures:

1. Anyone wishing to make a referral for LTCOC can:
  - a. Contact the ADRC's 800#, or
  - b. Contact the ADRC's email address, or
  - c. Contact the I&R department/staff at any MWADRC member agency
  - d. Contact the "dedicated" Options Counselors directly.
2. The 800 number and e-mail address listed on LTCOC literature are responded to by Springwell's I&R staff. The phone number and e-mail are for public inquiries and referrals for LTCOC.
3. The MWADRC has a 'no wrong door' policy, so referral calls (i.e., requests for intakes for LTCOC) to MWADRC member agencies **should be handled directly by that agency** and **not be redirected** to the 800 number or to the OC staff.
4. Referrals for LTCOC will be accepted from:
  - a. consumers who are seeking this service for themselves, and
  - b. professionals and informal supports (caregivers) who want to make a referral on behalf of someone else, and
  - c. caregivers who want to receive LTCOC directly.
5. All ADRC member agencies, including Springwell's I&R Department responding to the ADRC 800# and email, are to handle **all** requests for referrals (intakes) for LTCOC in the following manner:
  - a. **Electronically complete the Mutual Intake Form.**
    - i. Use the tab key to move from field to field within the Form. Use arrow keys and the enter key on the drop down fields.
    - ii. Complete the Form in full, including:
      1. entering "unknown" if a question is asked and the answer is unknown by the referral source
      2. entering a complete address (street, town, unit number, zip code)
      3. MWADRC referrals are based on location, not residence, so it is important that the **current location** of the consumer is clearly documented.
      4. If the consumer is in a **transitional period** (moving from one location to another) it is important that the gathered information include any available details about the expected time frames for each location

5. manually enter Intake Worker name in the Additional Comments Section, if their name is not available in the drop-down option
  6. manually enter the phrase: "LTCOC referral sent to OC's" in the Additional Comments Section
  7. manually enter clarifying details about current, temporary, or soon-to-be-at address/contact information for consumer, and timeframes for remaining or arriving at those locations.
- b. **Send the completed Mutual Intake Form by e-mail to**  
[jjames@mwciil.org](mailto:jjames@mwciil.org)  
[ksiemionko@springwell.com](mailto:ksiemionko@springwell.com)
- c. **Log the call in their software (IDMS or SAMS) as an I&R call.**
- i. For the I&R staff at the ASAPs, (including when Springwell is responding to the 800# or ADRC email) these calls should be recorded in the following manner in SAMS:
    1. Document the call as a "new call"
    2. Complete the following fields in the Call Summary screen in SAMS:
      1. Caller (search in SAMS to see if record already exists for this person)
      2. Caller Type
      3. Referred by
      4. Consumer (search in SAMS to see if record already exists for this person)
      5. Age Group
      6. Disabilities (select as many as apply, based on the intake information you've received)
      7. Call type
      8. Start Date, Start Time, End Date, End Time fill in automatically
      9. Notes Section - enter "LTCOC Referral forwarded to OC staff"
      10. Topic – choose "LTCOC – I&R Only – Referral"
        - a. Do **not** choose any other topics
        - b. Do **not** complete any other fields on the add Call Topics screen
      11. Do **not** enter any information in the following fields:
        - a. Call Priority

- b. Complete?
- c. Outcomes
- d. Referrals
- e. Activities
- f. Assessments
- g. Service deliveries

- b. For the ILC intake staff, these calls should be recorded in IDMS as an I&R unit of service