



STATE OF MICHIGAN  
OFFICE OF SERVICES TO THE AGING  
LANSING

RICK SNYDER  
GOVERNOR

KARI SEDERBURG  
DIRECTOR

**MEMORANDUM**

**DATE:** April 4, 2014  
**TO:** Michigan Commission on Services to the Aging  
**FROM:** Kari Sederburg, Director *KS*  
**SUBJECT:** Proposed Statewide Minimum Standards for Aging and Disability Resource Collaborations (ADRC) Information and Assistance (I&A)/Referral Services

The Michigan Office of Services to the Aging (OSA) is requesting your approval of the attached proposed service definition for I&A/referral services to be provided through ACRCs. This definition is intended to govern the provision of I&A/referral services by ADRC partners, and was developed by OSA in cooperation with the ADRC Standards and Definitions Workgroup.

The definition was presented for public review and comment. Three individuals submitted comments; two from area agencies, and one from a disability network organization. Two commentators had no concerns or suggestions. A summary of the comments received is attached, including OSA's response.

It is my recommendation that you approve the attached document.

If you have questions as you consider the ADRC I&A/referral services definition, please contact Wendi Middleton at (517) 373-4071, or via e-mail at [middletonw@michigan.gov](mailto:middletonw@michigan.gov). OSA staff will be prepared to discuss the proposed service definition and answer any questions you may have at the April meeting.

Attachments



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**MEMORANDUM**

**DATE:** February 24, 2014

**TO:** Centers for Independent Living, Area Agency on Aging Directors, and Michigan Directors of Services to the Aging

**FROM:** Kari Sederburg, Director *KS*

**SUBJECT:** Proposed Statewide Minimum Standards for Aging and Disability Resource Collaborations (ADRC) Information and Assistance/Referrals

Please find attached, for your review and comment, a proposed service definition for providing information and assistance (I&A/referrals) through ADRCs. This definition is intended to govern the provision of I&A/referral services by ADRC partners. It was developed by the Michigan Office of Services to the Aging (OSA) in cooperation with the ADRC Standards and Definitions Workgroup.

Please submit in writing any comments you may have to my attention by no later than March 28, 2014. Questions on the proposed I&A/Referral Service Definition may be addressed to Wendi Middleton at (517) 373-4071, or via e-mail to [middletonw@michigan.gov](mailto:middletonw@michigan.gov). Questions on the revisions to the standards and/or questions on the adoption process may be addressed to Eric Berke at (231) 796-8876, or via email at [berkee@michigan.gov](mailto:berkee@michigan.gov).

After completion of the review and comment period, OSA staff will prepare a summary of comments and suggested edits. The final proposed revisions will be presented to the Michigan Commission on Services to the Aging for their review.

KS/eb

Attachment

Proposed Statewide Minimum Standards for Aging and Disability Resource Collaborations  
(ADRC) Information and Assistance/Referrals

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<b>SERVICE NAME</b>	Aging and Disability Resource Collaborations (ADRCs) Information and Assistance or Referrals (I&A/Referrals)
<b>SERVICE NUMBER</b>	A-2
<b>SERVICE CATEGORY</b>	ADRC ACCESS <span style="float: right;">2/24/14</span>
<b>SERVICE DEFINITION</b>	<p>I&amp;A/referrals connect individuals, families and others to requested human service resources using a person-centered process. I&amp;A/referrals may include:</p> <ul style="list-style-type: none"> <li>• Information giving;</li> <li>• Making referrals;</li> <li>• Advocacy;</li> <li>• Crisis intervention; and/or</li> <li>• Follow-up to assure the connection has been made.</li> </ul> <p>I&amp;A/referrals move to Options Counseling when a person identifies any of the following:</p> <ul style="list-style-type: none"> <li>• Issues on the Options Counseling Triggers List found in the Options Counseling Service Definition and Standards;</li> <li>• The need for assistance in analyzing the options in order to make a decision (decision support);</li> <li>• The need for assistance in developing a plan of action or a futures plan; and/or</li> <li>• A need for assistance in working with a support system such as informal or formal providers.</li> </ul>
<b>UNIT OF SERVICE</b>	<ul style="list-style-type: none"> <li>• Number of individuals served; or</li> <li>• Time spent providing OC counseling to clients (minutes).</li> </ul>

### Minimum Standards

1. Each ADRC partner providing I&A/referral services will ensure that services will be person-centered. Staff (and their supervisors) who provide I&A/referral services must attend and successfully complete OSA-approved person-centered training within specific timeframes of employment or assignment to perform I&A/referral services for the ADRC, as listed below:
  - a) Person-Centered Planning (PCP) Online Training – within 30 days of employment or assignment of I&A/referral duties; and
  - b) Two-Day Integrating Person-Centered Thinking into Practice (PCT) – within six months of employment or assignment of I&A/referral duties.

Training can be obtained through local OSA-authorized trainers who can be found at Centers for Independent Living (CILs), Area Agencies on Aging and other ADRC partner agencies, or by attending statewide or regional sessions offered by OSA. See the attached list of authorized trainers and their contact information and guidance on how to access the PCP Online Training. Employees who perform I&A/referrals for the ADRC must receive training in a private and confidential setting, including, but not limited to, the Health Insurance Portability and Accountability Act (HIPAA), which can be obtained locally.

2. Each ADRC partner providing I&A/referral services shall use an ADRC resource database (either local or the state-level ADRC database) that includes a listing of human service agencies, services available and other pertinent information.
3. Each ADRC I&A/referrals provider must be able to provide information about ADRC partner agencies, community resources and other agencies in written, verbal or electronic form to all persons seeking supports and services so they can contact providers themselves, if desired.
4. Each ADRC partner providing I&A/referral services shall identify whether a person seeking long term supports and services might benefit from options counseling by utilizing the following criteria:
  - a) A request for options counseling; or
  - b) The triggers listed in the options counseling service definition.

Once identified, persons seeking long term supports and services who would benefit from, or who request, options counseling must be referred to the ADRC partner(s) responsible for providing options counseling.

5. Each ADRC partner providing I&A/referral services will negotiate whether follow-up contact will take place with each participant seeking supports and services. The purpose of

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(ADRC) Information and Assistance/Referrals

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follow-up contact is to determine whether services were received, identified needs were met and participants were satisfied. If follow-up contact is agreed to by the participant, the frequency will also be negotiated with and agreed to by the participant. Follow-up contact is not required for information-giving contacts only. ADRC partners providing I&A/referral services will use an OSA provided protocol to conduct follow-up (attached).

6. Each ADRC partner providing I&A/referral services must have the capacity, either internally or within their ADRC partnership, to:
  - a. Provide private, confidential phone, and face-to-face I&A/referrals, if requested by persons seeking supports and services;
  - b. Respond to persons seeking supports and services using methods and accommodations which are in compliance with the Americans with Disabilities Act and which include, but are not limited to:
    - i. For face-to-face I&A/referrals, adequate, accessible, barrier-free, comfortable and confidential space;
    - ii. Website requests;
    - iii. E-mail requests;
    - iv. Language interpreter;
    - v. Alternative material formats;
    - vi. The Michigan Relay Center;
    - vii. Requests via independent facilitators (someone designated by the individual to speak/obtain information on their behalf); and/or
    - viii. Other assistive technology.
  - c. Ensure a standard of promptness for returning calls, e-mails, or other forms of communication within three business days, unless the request for information is urgent and requires an immediate response.
7. Each ADRC partner providing I&A/referral services must be free from unresolved conflicts of interest, must provide unbiased information and must offer persons seeking supports and services choices in service providers.
8. Each ADRC partner providing I&A/referral services must provide no-wrong door, comprehensive I&A/referrals, demonstrate effective linkages, through partnership agreements, memoranda of understanding or other written documents with ADRC partner agencies providing long term supports and services within the area geographically served by the ADRC. These documents will spell out how in-service training between ADRC partner agencies will be conducted, how crisis situations will be handled, how referrals will be made, how follow-up will be accomplished, and how feedback to the referring agency on issues, process, and most importantly, how measuring participant satisfaction will take place.

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9. Each ADRC partner providing I&A/referral services must use a standardized set of satisfaction survey questions provided by OSA and must formally demonstrate the quality of I&A/referral services provided through a sampling of no less than ten percent of participants annually. Collection of satisfaction information will be part of the ADRC Quality Assurance Plan.
10. Each ADRC I&A/referrals partner providing I&A/referral services is encouraged, but not required, to seek Certified Information and Assistance Referral Specialist status for their staff from the Alliance for Information and Assistance Referral Systems (AIRS).
11. Each ADRC partner providing I&A/referral services will collect data required by OSA and submit ADRC partnership reports to OSA as described in a formal agreement between OSA and the ADRC.

Summary of Comments Received – Proposed ADRC Information & Assistance or Referrals

STANDARD                      COMMENT/NUMBER OF COMMENTORS                      OSA RESPONSE

4.                      Without additional funding for options counseling, it will be difficult to serve everyone who would benefit from, or requests options counseling.

OSA continues to seek funding for ADRC development and operations. Technical assistance can be provided for methods to utilize existing funding for ADRC development and operations.
  
5.                      We don't believe that follow-up contact should be mandatory to be negotiated with each caller. It should be at the discretion of the I & A staff.

Disagree. OSA believes this is the most person-centered approach. Follow-up is not required for information-giving contacts only.