

I&A/Outreach Procedures for Senior Centers

Definitions of Information & Assistance and Outreach

Information and Assistance services assist with identification of appropriate resources to meet the specific needs of each individual. The CDA data dictionary defines Information & Assistance as:

A service that:

- *Provides individuals with information on services available within the communities;*
- *Links individuals to the services and opportunities that are available within the communities;*
- *To the maximum extent practicable, establishes adequate follow-up procedures. (Maximum extent practicable includes offering a follow-up call to all individuals who were linked to a service. Individuals can remain anonymous and refuse a follow-up call.)*

Outreach initiates contacts with potential clients or their caregivers to encourage their use of existing services. The CDA data dictionary defines Outreach as:

- *Interventions (one-on-one contacts) with individuals initiated by an agency or provider for the purpose of identifying potential clients (or their age 60+ caregivers) and encouraging their use of existing services and benefits.*

Generally, I&A is a three step process (presenting issue, action taken, and outcome) usually taking place at the center and recorded on the I&A log. Outreach is normally contacts made outside the senior center to identify and bring the senior clients into the service system.

Both of these services are non-registered. Non-registered services are those where it is not practical to collect client specific information or where requiring the client to register may serve as a barrier to receiving a service. Service units are entered aggregately for I&A and Outreach on a periodic (monthly) basis.

AREA AGENCY ON AGING
OF LAKE & MENDOCINO COUNTIES
FSA 26

LONG-TERM CARE OMBUDSMAN PROGRAM

809 S. Main St.
Lakeport, CA 95453
(707) 262-4517
(707) 263-3112 FAX
aaa@dss.co.lake.ca.us

Logging I&A/Outreach Activities

I&A Log		Senior Center	TYPE CENTER NAME	Month/Year	Worker:		
CLIENT	PRESENTING ISSUE	ACTION TAKEN			OUTCOMES		
Date	Senior's Initials	Transported Senior	Housing & Utilities	Health Screening	Assistance: In-Home or Center	Phone Call	S.C. Participation Increased Need Met Situation Improved Needs On-Going Help Unable to Meet Need Comments
Senior Referred Client?	APS Referred Client?	Comments					
65+ Med-Cal, Disabled, or Low Income?	Transportation						
Self Neglect/Isolation/Hoarding	Medical Need: MH, PH, D&A						
Financial: Abuse or Misuse	Housing/Utility Issues						
Hunger/Food	In-Home or In-Office Assistance						
Legal Issues	Protection/Safety						

Senior Center: Your Center
 Month/Year: November, 2012

Total # of I&A Contacts: 0 Enter these as aggregate units in Q "Information and Assistance"

Total # of Outreach Contacts: 0 Enter these as aggregate units in Q "Outreach"

Date	Senior's Initials	Outreach Activity (Describe)
Total Outreach Contacts		0

Date	Community Education Activity	Number of Minutes/Hour

The Area Agency on Aging provides each I&A/Outreach contractor with form "AAA 101 I&A-Outreach Log", an electronic "fill-in" form in Excel format. This form consists of three pages for recording I&A, Outreach and Community Education activities.

- I&A Log (above)
- I&A Log Summary-for AAA use only (left)
- Outreach & CE Log (right)

Recording I&A Contacts

Information & Assistance contacts are entered on the I&A Log (formerly know as the Outreach log). Each I&A contact should include:

- Date and Senior Initials
- a Presenting Issue
- an Action Taken
- an Outcome

Multiple presenting issues and actions taken are allowable. Only one outcome should be indicated per contact.

Recording Outreach Contacts

Outreach contacts are recorded on the *Outreach Log* (a new form). Outreach contacts should include:

- Date
- Senior Initials
- Brief narrative description of the outreach activity

A completed "AAA 101 I&A-Outreach Log" should be submitted monthly to the AAA by email.

Date	Senior's Initials	Outreach Activity (Describe)

Q System Aggregate Data Entry

I&A and Outreach service units should be entered monthly in the Q data reporting system as an aggregate entry. The total number of I&A contacts and Outreach contacts are found on the *Outreach & CE Log* page. These totals are automatically calculated by the number of entries on the I&A log and the Outreach log.

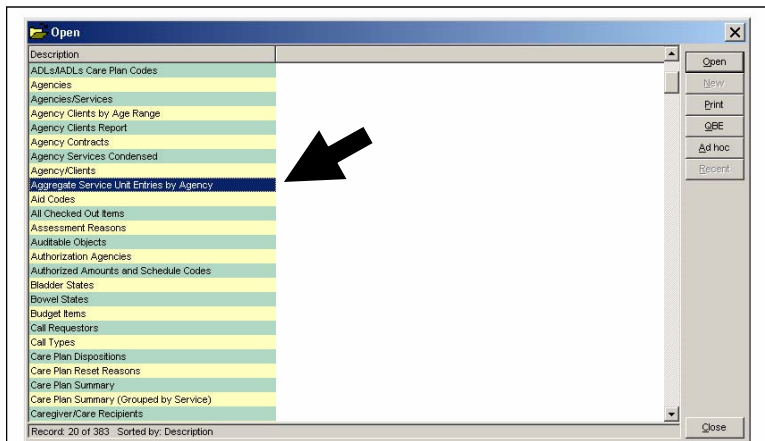
- 1) Log into the Q system. From the Launcher, open "Aggregate Service Unit Entries by Agency".

Senior Center: Your Center
 Month/Year: October 2012

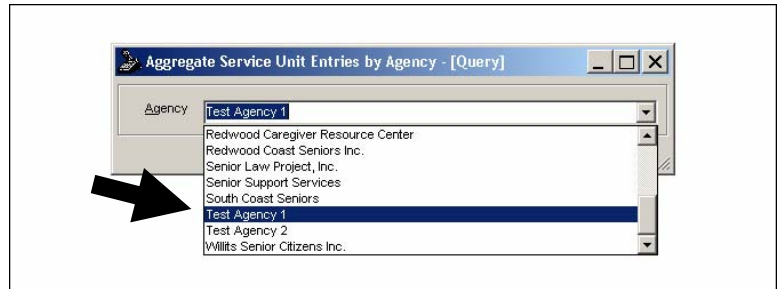
Total # of I&A Contacts: 125 Enter these as aggregate units in Q "Information and Assistance"

Total # of Outreach Contacts: 3 Enter these as aggregate units in Q "Outreach"

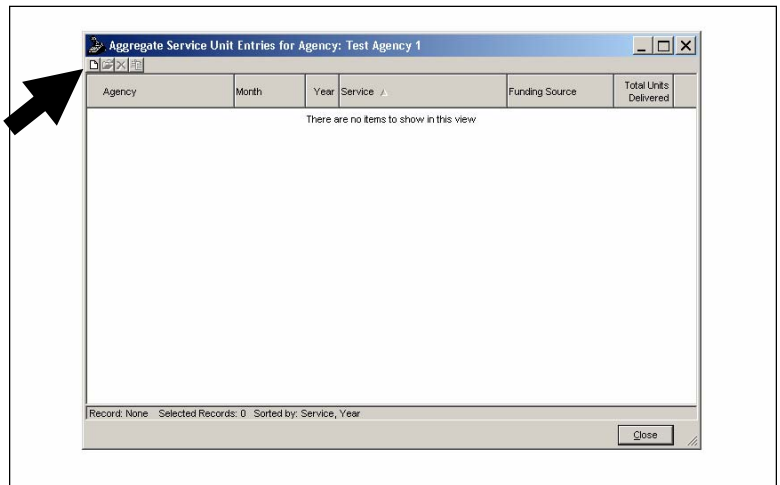
Date	Senior's Initials	Outreach Activity (Describe)
10/1/12	AB	Visited senior in home and explained services offered at center.
10/2/12	CD	Met with caregiver. Connected client with HDM program.
10/2/12	EF	Called isolated senior referred by friend. Will use center van to attend C1 mea



- 2) Select your agency from the drop-down list., then click “Query”.



- 3) Click on “Start a New Entry” icon (□).



- 4) Fill in the “New Aggregate Service Unit Entry” information:

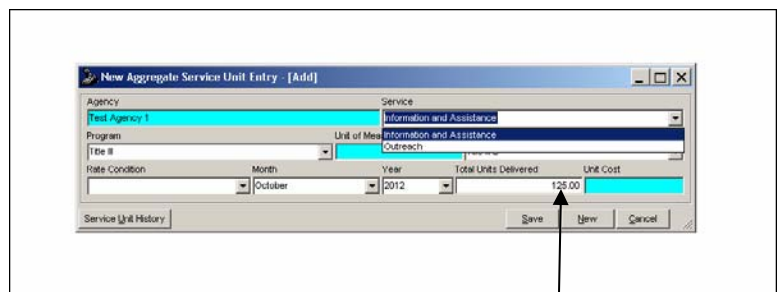
Service: “Outreach” or “Information and Assistance”

Program: “Title III”

Funding: “Title IIIB”

Month: Enter the month services were performed in.

Service Units of Measure: Enter the service units from the *Outreach & CE Log*.



Total # of I&A Contacts: Enter the
and Assist

Total # of Outreach Contacts: Enter the

- 5) Click “Save” and the aggregate entry is complete.

I&A Log		Senior Center		TYPE CENTER NAME		Month/Year		Worker:	
		PRESENTING ISSUE		ACTION TAKEN		OUTCOMES			
CLIENT	Date	Senior Initials	APS Referred Client?	65+, Medi-Cal, Disabled, or Low Income?	Transportation				
					Self Neglect/Isolation/Hoarding				
					Medical Need: MH, PH, D&A				
					Financial: Abuse or Misuse				
					Housing/Utility Issues				
					Hunger/Food				
					In-Home or In-Office Assistance				
					Legal Issues				
					Protection/Safety				
					Comments				
					Transported Senior				
					Housing & Utilities				
					Health Screening				
					Assistance: In-Home or Center				
					Phone Call				
					Medical Related Services				
					Refer to Another Agency				
					Informational Program				
					In Support of Rep Payee				
					Comments				
					S.C Participation Increased				
					Need Met				
					Situation Improved				
					Needs On-Going Help				
					Unable to Meet Need				
					Comments				

SENIOR CENTER NAME

I&A LOG SUMMARY

HEALTH RELATED ACTIONS

PLACE MONTH/YEAR HERE

Monthly Total

Total All Monthly Contacts	0
Total Individuals	Pivot Table
Total APS Contacts	0
Total APS Individuals	Pivot Table
Total MediCal or Eligible Contacts	0
Total Medical or Eligible Individuals	Pivot Table

PRESENTING NEEDS 0

Transportation	0
Self Neglect	0
Medical Need	0
Financial: Abuse or Misuse	0
Housing/Utilities	0
Hunger/Food	0
In-Home Assitance/Office Assistance	0
Legal Issues	0
Protection/Safety	0

ACTION TAKEN 0

Transported Senior 0

Shopping	0
Medical Appt	0
Legal	0
Errands	0
Senior Center	0

Housing/Utilities 0

Housing Rebate	0
House/Utility Advocacy	0

Health Screening 0

Mental Health	0
Physical Health	0
D&A	0
Suicide	0
Nutrition	0

In-Home Assistance or Office 0

Clean & Organize	0
Caregiver	0
Assist with Paper Work	0
Meal Preparation	0
Visit	0
Errands for Senior	0

Phone Calls 0

Assess Need	0
Meds Reminder	0
Safety Check	0
Comfort	0

Medical 0

Meds & Equip: Sort, PU, Provide	0
Hospital Visit	0
Medical Advocacy	0
MediCal/MediCare Paperwork	0

Referred to Other Agency 0

In-Home Support: Public or Private	0
Health Related: Mental etc.	0
Socialization	0
Housing/Utilities	0
Food & Nutrition: Food Bank, MOW	0
Legal Assistance	0
APS	0

In Support of Rep Payee 0

In Support of Rep Payee	0
Refer to Rep Payee Services	0

OUTCOMES

Senior Center Participation Increased	0
Need Met	0
Situation Improved	0
Needs On-Going Help	0
Unable to Meet Need	0

Transported Senior 0

Medical Appt	0
--------------	---

Health Screening 0

Mental Health	0
Physical Health	0
D&A	0
Suicide	0
Nutrition	0

Medical 0

Meds & Equip: Sort, PU, Provide	0
Hospital Visit	0
Medical Advocacy	0
MediCal/MediCare Paperwork	0

Referred to Other Agency 0

In-Home Support: Public or Private	0
Health Related: Mental etc.	0
APS	0

Health Related Actions Taken 0

Total All Actions Taken 0

Percentage of Total #DIV/0!

Medi-Cal Eligible Actions 0

Total Actions Taken 0

Percentage of Total Actions #DIV/0!

