

**Publicly Funded Programs
Consumer Program Activation Protocols**

**Area Agency on Aging of Palm Beach/Treasure Coast
Consumer Program Activation Protocols**

These protocols pertain to activating qualified individuals in Community Care for the Elderly, Home Care for the Elderly, Alzheimer's Disease Initiative programs and Older Americans Act registered program services except Screening/Assessment and all O3C1 services.

I. General Provisions

1. The Area Agency on Aging Helpline will maintain wait lists for all programs with the exception of O3C1, and non-registered OAA program services.
OAA registered services include:

Adult Day Care	Home Health Aide
Adult Day Health Care	Homemaker
Chore	Nutrition Counseling
Enhanced Chore	Personal Care
Escort	Respite, (In-Home)
Home Delivered Meals	Respite (Facility-Based)
2. All e-mail communications between the Provider and Helpline regarding consumers shall be encrypted and shall use the consumer's first and last initials and their eCIRTS ID number, if applicable. The subject line of the email shall not contain any PHI or client information such as initials or eCIRTS ID number.
3. Referral communications regarding consumers who do not yet have an eCIRTS ID number can take place in any of following methods:
 1. e-mail to helpline@aaapbtc.org
 2. Fax to (561)214-8670
 3. Telephone: (866)684-5885
 4. Website Submission through <https://www.aaapbtc.org/referral-intake-form>
4. Providers are not permitted to activate APCL consumers until authorized by the Intake Supervisor for all OAA registered services, CCE, HCE or ADI.
5. For the OAA program, providers may deliver non-registered services such as companionship, counseling, material aid, etc. (see contract for complete list) to individuals in need. This may include individuals on the wait list for services or individuals not waitlisted by the Agency. Individuals not waitlisted can be referred to the Helpline for additional assistance.
6. Clients who are receiving non-registered OAA services cannot be made ACTV for other OAA registered services without being released by the Intake Supervisor. (i.e. opening companion service, a non-registered service, does not allow provider to open a registered service.)

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7. Provider shall refer all consumers to the Helpline who are seeking information and referral about resources available to seniors and their caregivers.

II. Program Intake

1. The Provider shall refer to the Helpline by e-mail, fax, telephone or website submission the names and contact information of all new consumers seeking access to publicly funded services.
 - Helpline email: helpline@aaapbtc.org
 - Helpline Fax: (561) 214-8670
 - Helpline Voice: (866)684-5885
 - Website Submission through <https://www.aaapbtc.org/referral-intake-form>
2. The Helpline is responsible for completing 701S Priority Screening for all new consumers seeking access to OAA registered services (except O3C1), CCE, HCE and ADI programs.
3. If program funding is not available, the Helpline will place the consumer on appropriate Assessed Priority Consumer Lists (APCL).
4. The Helpline will conduct reassessments for all APCL Consumers as required by the Handbook.
5. Providers are required to identify potential Medicaid eligible CCE clients through the assessment instrument and refer them to the Helpline Manager to apply for the Statewide Medicaid Managed Care Long-Term Care (SMMC LTC) Program if they are not yet APCL for MLTC. Providers should make best efforts to refer active CCE clients who are potential Medicaid eligible within 30 days following an initial assessment or reassessment.
6. The Lead Agency will make the referral to the Helpline Manager by Email, writing "Potentially **Medicaid Eligible**" in the subject line of the email. The Helpline will investigate and add the MLTC APCL enrollment if appropriate. The Helpline will follow up with the Lead Agency via email with the outcome of the referral.

III. Program Activation When No Wait List Exists for the Program

1. When the Provider's budgets permit, the Intake Supervisor will notify the Provider that eCIRTS registration is complete, and that the Provider may begin program enrollment and service activation for the newly registered consumers.

IV. Program Activation for APCL

1. When Providers determine that funds are available in a program to serve additional new consumers, they will request a release for a specific number of clients from the Program Compliance/Quality Assurance Monitor with a copy to the Intake Supervisor. The Program Compliance/Quality Assurance Monitor will review the request and verify budgeted funds are available to accommodate the request.

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2. The request must include justification for adding new clients including, at a minimum, the
 - a) contract program for which activation is sought
 - b) number of clients requested,
 - c) current required monthly expenditures for the program,
 - d) current number of active clients in the program, and
 - e) calculations of the average cost per client.
3. Once justification is received from the Provider, the Program Compliance/Quality Assurance Monitor will decline or approve the request within 48 hours and advise the Provider and the Intake Supervisor accordingly.
4. If the request is approved, the Intake Supervisor will
 - a. Begin triaging appropriate OAA, CCE, HCE and ADI consumers in order of highest to lowest ranking and priority scores by retrieving program report and releasing lists to provider.
 - b. OAA consumer selection is based on priority score with additional consideration given to OAA targeting criteria for consumer enrollments as outlined on page 2-12 of the DOEA Programs and Services Handbook and to family caregivers who provide care for individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction and to grandparents or older individuals who are relative caregivers who provide care for children with severe disabilities.
 - c. The Intake Supervisor shall release 120% of the requested clients within 72 hours. The release shall include a greater number of individuals to account for replacements. The provider is authorized to only activate up to the number approved by the Program Compliance/Quality Assurance Monitor.
 - d. Repeat this process until the referral request is satisfied.
5. The Provider will
 - a. Prescreen clients for program readiness
 - b. For clients going active within 10 working days, update eCIRTS with the ACTV code. For clients who are not going ACTV within 10 days, indicate the closure code in eCIRTS. If necessary, the Agency will issue replacement names. When making a replacement request, the Provider shall indicate the number of replacements needed.
 - c. Where required, develop a care plan that provides services needed to maintain a client safely in the community in the least restrictive, cost-effective manner.
 - d. Assure that all relevant eCIRTS information is updated as required by contract.
 - e. Close all APCL enrollments for consumers who are deceased, relocated, placed into a nursing home or otherwise are no longer eligible for DOEA programs. Notify the Agency to close the MLTC enrollment.

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V. Serving an Active Consumer in a Different Funded Program

- If an active consumer in one program is in need of another DOEA funded program, the Provider shall refer the consumer to the Agency. This provision does not apply to OAA nonregistered services.

VI. Serving eCIRTS Registered Consumers Under Non-DOEA Programs

When Provider's DOEA funded program budgets cannot support adding services for active consumers or beginning services for new consumers, they may choose to use their own Non-DOEA Program funds (NDP). The following describes the procedures that must be followed for providing such services to consumers registered in eCIRTS

1. For consumers actively receiving DOEA program services
The Provider will
 - a. Update the consumer's care plan.
 - b. Record consumer NDP activation in eCIRTS.
 - c. Record service provision under NDP in eCIRTS monthly.
 - d. Maintain service provision throughout the remaining contract term.
 - e. Adhere to procedures described in Section III above when seeking to transfer services to a DOEA program.
2. For consumers **Not** actively receiving DOEA program services:
 - a. The Provider will request the Waitlist Manager to select names from the APCL to begin services under NDP.
 - b. The Agency will retrieve APCL Consumer report and sending by email to the Provider and the consumer will maintain existing APCL statuses.
 - c. The Provider will
 - i. Prescreen client for program readiness.
 - ii. Follow its policies and procedures for enrolling NDP consumers selected by the Agency;
 - i. Eligible consumers should have their NDP enrollment recorded in eCIRTS;
 - ii. Follow procedures described in Section IV above when seeking to transfer the consumer's services to a GR program.

The Agency may modify these procedures as needed and notify Providers of the changes by way of Notice of Instruction.