

# STANDARD DEFINITIONS OF SERVICE

## Naturally Occurring Retirement Community Program

(Note units measured in hours can be reported in quarter hour increments.)

<b>Priority Services</b>	
Priority Services are required to be provided by all NORC programs	
<b>SERVICE NAME</b>	<b>Case Management</b>
<b>SERVICE DEFINITION</b>	<p>A comprehensive process that helps older persons with diminished functioning capacity, and/or their caregivers, gain access to and coordinate appropriate services, benefits and entitlements. Case management consists of assessment and reassessment, care planning, arranging for services, follow-up and monitoring at least every two months and discharge. These activities must be provided by or under the direction of the designated case manager or case manager supervisor.</p> <p>Case Management activities for NORC clients receiving services:</p> <ul style="list-style-type: none"> <li>• A comprehensive assessment is the collection of information about a person's situation and functioning, and that of his/her caregivers, which allows identification of the person's specific strengths and needs in the major functional areas.</li> <li>• A care plan is a formal agreement between the client and case manager and, if appropriate, the client's caregivers regarding client strengths and problems, goals and the services to be pursued in support of goals.</li> <li>• Implementation of the care plan (arranging and authorizing services) includes contacting service providers, conducting case conferences and negotiating with providers for the delivery of needed services to the client as stated in the care plan.</li> <li>• <b><u>Follow-up and monitoring of the care plan every two months at a minimum,</u></b> ensures that service delivery is meeting the client's needs and being delivered at the appropriate levels and quality. <b><u>Contact with the service providers is regular and ongoing.</u></b> Reassessment is the formal re-examination of the client's situation and functioning and that of his/her caregivers to identify changes which occurred since the initial assessment/last reassessment and to measure progress toward goals outlined in the care plan. It is done at least annually and more frequently if needed. Changes are made to the care plan as necessary.</li> <li>• Discharge is the termination of case management services. Reasons for discharge may include the client requesting discharge, the attainment of goals described in the care plan, the client needing a type of service other than case management or ineligibility for the service.</li> </ul> <p>Case managers may also be functioning in the role of a support coordinator or consultant to informal caregivers. In this role, the case manager may be acting as a teacher, networker, counselor and/or family guide.</p> <p><u>Counting Clients:</u> For a <i>client</i> to be reported as a case management client, he/she must be receiving or expected to receive all the components summarized above.</p> <p><u>Counting Units of Service:</u></p>

	<p><i>Time</i> spent in any of the following is appropriately reported as case management <i>units</i> (one hour = one unit): traveling to a NORC client's home and conducting an assessment, telephoning clients to follow-up on service delivery, discussing services for a specific client with the service provider, and organizing and conducting a case conference concerning a specific client and the case manager inputting client data into the computerized system.</p> <p>While a case manager typically works a seven and a half or eight hour day, this does not imply that each day he/she will generate seven and a half or eight hours of case management units. Time spent in administrative, educational or general activities cannot be counted as units of service. For example, time spent in such activities is <u>not</u> appropriate to report as case management units:</p> <ul style="list-style-type: none"> <li>• traveling to and participating in trainings or conferences</li> <li>• participating in a video conference on conducting client assessments;</li> <li>• developing a new form for monitoring in-home service providers;</li> <li>• comparing the in-home service provider's bill for the month to the number of hours authorized for each client and the number of hours actually provided for each client;</li> <li>• participating in the monthly meetings of the NORC's staff and partners which feature general discussions of aging network issues, implementation of the NORC budget and personnel procedures.</li> </ul>
<b>UNIT OF SERVICE</b>	One hour of service including travel time.
<b>SERVICE NAME</b>	<b>Information and Assistance</b>
<b>SERVICE DEFINITION</b>	<p>Provided to older persons to align them with appropriate services, entitlements or other resources. Provides assistance with personal crises or problems of daily living as appropriate to individual needs. This is a short-term intervention that usually addresses a specific issue; it does not involve ongoing care or monitoring.</p> <p>Information and Assistance activities include:</p> <ul style="list-style-type: none"> <li>• The provision of information on services, benefits, entitlements and other areas of concern to consumers or their representatives which enables them to locate and obtain needed resources on their own.</li> <li>• Assistance to consumers in obtaining access to the services and resources available within their community. An individual is provided with information on a one-to-one basis about available services and opportunities in the community, assisted in defining problems/needs and capacities, receives direction or guidance relative to those identified issues and is linked to services and opportunities to meet the problems/needs. When appropriate, case assistance may also involve worker intervention, negotiation and advocacy with providers on the client's behalf to ensure the delivery of needed services and benefits. To the extent possible, follow-up is provided to check to see if the consumer received the service(s) or is in need of further assistance.</li> <li>• Referral is a two-step process involving the initiation of a linkage between a client and a service provider, and follow-up to determine whether the service has been or is being provided.</li> </ul>

<b>UNIT OF SERVICE</b>	One contact
<b>SERVICE NAME</b>	<b>Healthcare Management</b>
<b>SERVICE DEFINITION</b>	A comprehensive process provided by a qualified health professional that helps older persons with diminished functioning capacity, and/or their caregivers by targeting individuals who have immediate and ongoing medical needs, as well as addressing their overall health and well-being. Provides non-reimbursable, individual healthcare consultation and helps identified clients manage chronic conditions, responds to acute episodes, and helps them access the healthcare system. Involves an assessment, care planning, arranging and coordinating services, follow-up and monitoring at least every two months.
<b>UNIT OF SERVICE</b>	One hour of service including travel time.
<b>SERVICE NAME</b>	<b>Healthcare Assistance/Monitoring</b>
<b>SERVICE DEFINITION</b>	Health screening, consultation, and regular monitoring of blood pressure and other health indicators for residents who have been identified to be at risk. Includes services provided by a healthcare professional to residents with specific health-related issues or needs on a short-term or episodic basis. Assistance on health-related matters, such as the scheduling of appointments and contacts with pharmacies, provided by casework staff, should also be included.
<b>UNIT OF SERVICE</b>	One contact
<b>Optional Services</b>	
NORC programs should provide a wide range of other services that match the varied needs and interests of all older adults in the community.	
<b>Individual Services</b>	
<b>SERVICE NAME</b>	<b>Assisted Transportation (Escort)</b>
<b>SERVICE DEFINITION</b>	Assistance and transportation, including escort, to a person who has difficulties (physical or cognitive) using regular vehicular transportation.  Please note, services reported in the assisted transportation/escort category must involve the personal accompaniment of the older person throughout an outing or trip. Thus, assistance offered by a van driver in operating a wheelchair lift or walking with an older person from the van to his/her front door is not considered assisted transportation/escort—the driver is simply being helpful to the older person as part of regular transportation activities.
<b>UNIT OF SERVICE</b>	Each one-way trip
<b>SERVICE NAME</b>	<b>Personal Care Level I (Housekeeping/Chore)</b>
<b>SERVICE DEFINITION</b>	<u>A service that includes some or total assistance with the following tasks on behalf of or to assist a person commensurate with the person's limitations in IADLs:</u>

	<ul style="list-style-type: none"> <li>• Making and changing beds</li> <li>• Dusting and vacuuming the rooms which the person uses</li> <li>• Light cleaning of the kitchen, bedroom and bathroom</li> <li>• Dishwashing</li> <li>• Listing needed supplies</li> <li>• Shopping for the person</li> <li>• The person's laundering, including necessary ironing and mending</li> <li>• Preparing meals, including simple modified diets</li> <li>• Paying bills and other essential errands</li> <li>• Escorting to appointments and community activities</li> </ul>
<b>UNIT OF SERVICE</b>	One hour of service
<b>SERVICE NAME</b>	<b>Personal Care Level II (Home Care)</b>
<b>SERVICE DEFINITION</b>	<p>A service that includes assistance with the following tasks on behalf of or to assist a client commensurate with the person's limitations in ADLs or limitations in both ADLs and IADLs:</p> <p>Some or total assistance with:</p> <ul style="list-style-type: none"> <li>• All the tasks listed under Personal Care Level I;</li> <li>• Bathing of the person in the bed, tub or shower;</li> <li>• Dressing;</li> <li>• Grooming, including care of hair, shaving and ordinary care of nails, teeth and mouth;</li> <li>• Toileting, including assisting the person on and off the bedpan, commode or toilet;</li> <li>• Walking, beyond that provided by durable medical equipment, within the home and outside the home;</li> <li>• Transferring from bed to chair or wheelchair;</li> <li>• Preparation of meals in accordance with modified diets, including low sugar, low fat, low salt and low residue diet;</li> <li>• Feeding;</li> <li>• Administration of medication by the client, including prompting the client of time, identifying the medication for the client, bringing the medication and any necessary supplies or equipment to the client, opening the container for the client, positioning the client for the medication and administration, disposing of used supplies and materials and storing the medication properly;</li> <li>• Providing routine skin care;</li> <li>• Using medical supplies and equipment such as walkers and wheelchairs;</li> <li>• Changing simple dressings.</li> </ul>
<b>UNIT OF SERVICE</b>	One hour of service
<b>SERVICE NAME</b>	<b>Counseling</b>
<b>SERVICE DEFINITION</b>	A one-to-one relationship between an older person and a worker trained in counseling techniques. The service is designed to help an individual cope with the

	problems and stress which interfere with normal health and social functioning by alleviating stress or anxiety and to help the client make appropriate choices and plans.
<b>UNIT OF SERVICE</b>	One hour of service
<b>SERVICE NAME</b>	<b>Telephone Reassurance</b>
<b>SERVICE DEFINITION</b>	An organized service providing supportive contact and monitoring on an on-going basis via regularly scheduled telephone calls to older persons who live or are temporarily alone, and have limited ability to leave their homes in order to reduce isolation and help ensure the health and safety of the older adult.
<b>UNIT OF SERVICE</b>	One contact
<b>SERVICE NAME</b>	<b>Shopping Assistance</b>
<b>SERVICE DEFINITION</b>	Shopping on behalf of an older person; must include personal assistance. Do not include if the program provides only transportation to stores.
<b>UNIT OF SERVICE</b>	One contact
<b>SERVICE NAME</b>	<b>Friendly Visiting</b>
<b>SERVICE DEFINITION</b>	An organized visit to homebound older persons providing socialization, recreation, and the opportunity to observe and report the client's condition and circumstances.
<b>UNIT OF SERVICE</b>	One contact
<b>SERVICE NAME</b>	<b>Residential Repair and Maintenance</b>
<b>SERVICE DEFINITION</b>	Repairs and activities to upgrade and/ or maintain housing for the elderly, including heavy cleaning.
<b>UNIT OF SERVICE</b>	One hour of service
<b>SERVICE NAME</b>	<b>Personal Emergency Response System (PERS)</b>
<b>SERVICE DEFINITION</b>	A service which utilizes an electronic device to alert appropriate people of the need for immediate assistance in the event of an emergency situation in an older person's home.
<b>UNIT OF SERVICE</b>	One unit for each month or part of a calendar month that the device is in the person's home.
<b>Group Services</b>	
<b>SERVICE NAME</b>	<b>Education/Recreation Groups</b>

<b>SERVICE DEFINITION</b>	<p>Activities organized and scheduled through the NORC program which involve older persons in courses, workshops, other learning activities and satisfying use of free time.</p> <p><b>Examples of education/recreation groups include, but are not limited to:</b></p> <ul style="list-style-type: none"> <li>• A yoga demonstration held at the NORC (since this is a one-time demonstration, it is counted as a unit of education/recreation groups. If this was a formal class given on a regular basis, it would be counted as health promotion.);</li> <li>• Sports lessons and events;</li> <li>• Performing arts;</li> <li>• Games;</li> <li>• Crafts lessons and events;</li> <li>• Performing arts;</li> <li>• A nature walk conducted each spring at a senior center;</li> </ul> <p>A day bus trip organized by the center, to Citi Field to see a baseball game. (The bus trip constitutes one unit/session of education/recreation groups. The related units of transportation would be recorded in the transportation category.)</p>
<b>UNIT OF SERVICE</b>	<p>One group session Total attendance is not an unduplicated count. Include each participant every time s/he attends a group session.</p>
<b>SERVICE NAME</b>	<b>Health Promotion</b>
<b>SERVICE DEFINITION</b>	<p>Consists of services and activities that promote good health and quality of life, increase awareness and understanding of health lifestyles, promote chronic disease prevention and management and promote physical and mental health. Includes physical fitness programs and health screening tests or activities that encourage early detection of health problems (e.g., blood pressure screening, glaucoma testing, hearing test, etc).</p> <p>Services and activities that <b><u>promote chronic disease prevention and management</u></b>, promote physical and mental health, improve or maintain <b><u>quality of life</u></b>, and increase awareness and understanding of healthy lifestyles. These include but are not limited to:</p> <ul style="list-style-type: none"> <li>• Evidence-based health promotion programs</li> <li>• Medication management to prevent incorrect medication and adverse drug reactions</li> <li>• Routine health screenings such as vision, diabetes, bone density and nutrition</li> <li>• Medicare preventive services such as education programs on the availability, benefits, and appropriate use of preventive health services</li> <li>• Preventive nutrition services such as nutrition counseling and education</li> <li>• Physical fitness programs</li> <li>• Home injury control services such as screening home environments and education programs on injury and falls prevention at home</li> <li>• Mental Health services such as screening for depression, provision of educational activities</li> </ul>
<b>UNIT OF SERVICE</b>	<p>One group session/event Total attendance is not an unduplicated count. Include each participant every time</p>

	s/he attends a group session.
<b>SERVICE NAME</b>	<b>Support Groups</b>
<b>SERVICE DEFINITION</b>	Consists of groups that meet on a regular basis to address common issues and provide mutual support (e.g., caregiver support, separation and loss, grief, etc.). Groups may be facilitated by a professional or peer leadership.
<b>UNIT OF SERVICE</b>	One group session Total attendance is not an unduplicated count. Include each participant every time s/he attends a group session.
<b>Transportation</b>	
<b>SERVICE NAME</b>	<b>Individual or Group Transportation</b>
<b>SERVICE DEFINITION</b>	<p>Transportation from one location to another. Does not include any other activity. Escort service involving transportation gets reported under Escort only.</p> <p><b>Example 1:</b> The provider takes five people to and from the store. This is reported as ten units of transportation (five people x two trips each).</p> <p><b>Example 2:</b> The NORC organizes a day bus trip to Yankee Stadium to see a baseball game. Forty-three older individuals participate. This is reported as eighty-six units of transportation service (forty-three individuals x two trips each). Additionally, one unit of education/recreation groups is generated and reported.</p> <p><b>Example 3:</b> The provider takes an older individual to the senior center. After lunch, the provider drives the older individual to a local shopping center to pick up medications and groceries. The older individual is then picked up and transported home. This generates three units of transportation service (one individual x three separate trips/locations).</p>
<b>UNIT OF SERVICE</b>	One unit for each one way trip per person
<b>Outreach Activities</b>	
<b>SERVICE NAME</b>	<b>Outreach</b>
<b>SERVICE DEFINITION</b>	<p>Activities initiated by the NORC for the purpose of identifying potential clients (or their care givers) and encouraging their use of existing services and benefits. This includes face-to-face or telephone contact between a worker and an individual.</p> <p><b>Example 1:</b> Staff visits to a building within the NORC to locate isolated individuals who have never used NORC services. This contact must be conducted one-on-one and not done as a group presentation.</p> <p><b>Example 2:</b> The NORC has a table at a health event where providers conduct face-to-face identification of isolated individuals by discussing the individual's needs and available NORC programs one-on-one.</p> <p><b>Example 3:</b> A third party such as a police officer contacts the NORC and says there is an older person they see when on patrol that appears to be in need of services and asks that NORC staff do an Outreach visit.</p>

	<b>Reporting Clarification:</b> Outreach is when the NORC finds an isolated older person who has no prior knowledge of the NORC, <u>not</u> when an older person finds the NORC.
<b>UNIT OF SERVICE</b>	Each initial first contact made to a client or their care giver(s).
<b>SERVICE NAME</b>	<b>Public Information</b>
<b>SERVICE DEFINITION</b>	<p>A planned effort to provide consumers information about NORC programs and services. Activities include:</p> <ul style="list-style-type: none"> <li>• Printed materials – the distribution of newsletters, flyers, pamphlets, and brochures;</li> <li>• Mass communication – the use radio, newspaper, television, web pages, and billboards for news and features; and</li> <li>• Presentations – planned events which involve public speaking by staff or partners.</li> </ul>
<b>UNIT OF SERVICE</b>	Unit: Each activity or event or each distribution of printed Information.