

What activities occur during I&A?

Identifying consumer needs and linking to appropriate services at this time, explaining levels of assistance available through AAA programs and follow-up when appropriate and necessary. All I&A activities should support and empower client choice. Lists of agencies, facilities, etc. provided to others *on behalf of an individual*, are allowed.

Who do we collect information about -- caller or person being called about?

The caller. Those age 60+, 18-59 w/disabilities, veteran, caregiver, or anyone calling on their behalf. Demographic information is *not* required for professionals, such as social worker, MCO, home care agency and will *not* be counted against missing data for I&A.

Can I&A be done only on the telephone?

I&A can occur via telephone, walk-in, e-mail or home visit. There may be instances when AAA staff meet with a consumer believing the visit will lead to Options Counseling. After consultation with consumer and no assessment is completed (consumer changed their mind/declined or more information was provided), this should be coded as I&A.

Scenario: The Options Counselor confirms the appointment and travels to client's home. The client refuses the home visit or after some discussion does not want Options Counseling. The Options Counselor should record the prep/planning and travel activities as a unit of I&A.

At what point does an I&A become Options Counseling or EAPA Consultation become EAPA Assessment & Intervention?

Both Options Counseling and EAPA Assessment & Intervention begin when a face-to-face visit occurs *and* the appropriate assessment is conducted.

Do staff need to be AIRS certified in order to enter I&A units prior to an OC visit?

No, currently the only requirement for AIRS certification is for Family Caregiver Specialists.

When is a call Caregiver Assistance: I&A?

Caregiver Assistance is provided when the person calling is an "informal provider of in-home or community care." Through thoroughly identifying the caller's need and AAA staff have determined the caller provides established a caregiving activity, the call can be recorded as Caregiver Assistance.

At what point does an Information & Assistance become Options Counseling or EAPA Consultation become EAPA Assessment & Intervention?

Both Options Counseling and EAPA Assessment & Intervention begin when a face-to-face visit occurs *and* the appropriate assessment is conducted. EAPA consultation is a subcategory of I&A. Likewise, EAPA Assessment & Intervention is a sub-category of case management. If a visit does not result in a face-to-face assessment, the activity is EAPA Consultation. Likewise, if the visit does result in a face-to-face assessment and intervention plan, the activity is EAPA Assessment & Intervention.

How do we document staff time in Wellsky?

This training is designed to provide information on Services, Definitions, and Unit Measure and the tracking and recording units for service delivery. IDA does not have a policy regarding the tracking and recording of activities and time not associated with units of service delivery. For issues related to Wellsky, please continue to work with the AAA System Administrator.

Where can we find this presentation?

This and all service definition trainings will be placed on the IDA Website, under the Area Agencies on Aging tab for future reference and training purposes. See our Area Agency on Aging Professionals web page at <https://www.iowaaging.gov/area-agencies-aging/area-agency-aging-professionals>. You can direct any additional questions to julie.bergeson@iowa.gov.