



## **Service Standards**

### **Title III-B Friendly Visiting**

The service provider must adhere to the AgeGuide General Service Requirements in addition to service-specific requirements listed below.

#### **I. Definitions**

- A. Service Definition (IDOA 603.11 A):** Regular visits by staff or volunteers to socially and/or geographically isolated individuals for purposes of providing companionship and social contact with the community. The program is for the older adult who is often unable to leave his/her residence, if at all, and who may have few to no friends, family, or neighbors who can visit them.
- B. Unit of Service (IDOA 603.11 C):** One hour of staff/volunteer time expended on behalf of a participant constitutes one unit of service.
1. Units of service based upon one hour of staff/volunteer time expended on behalf of a participant include the time necessary for preparation, travel and case documentation.
  2. Preparation of reports and grant applications are considered as administrative activities, not activities directly on behalf of a participant.
  3. Units should be measured to the nearest quarter hour (e.g. 0.25).
  4. Units of service can vary depending on the needs of the client and the available resources. Examples of units of service can include:
    - a. One hour of friendly visiting in the client's home.
    - b. Engaging in a phone conversation or virtual meeting (e.g. Zoom) with the client for one hour.
- C. Participant Eligibility:** In addition to serving the target populations identified in the General Service Requirements, participants must meet the following requirements:
1. Be aged 60 years or older.

## **II. Service Activities**

- A.** Utilize staff or volunteers to provide in person visits, phone calls, or virtual visits (e.g. Zoom) to individuals in their residences (IDOA 603.11 B/AgeGuide).
- B.** Arrange for and maintain the friendly visiting service (IDOA 603.11 B).
- C.** Provide training to ensure competent, ethical and qualified staff and volunteers (IDOA 603.11 B).
- D.** Assist older persons during times of disaster (e.g. flooding, hot weather, tornadoes, severe weather, man-made emergencies, etc.) by conducting special visits to assure older persons are safe and have access to services to meet their needs (IDOA 603.11 B)

## **III. Service Standards**

### **A. Records and Documentation**

- 1.** Intake procedures (including a standardized intake form and interview process) must be established to collect the participant's demographic information and to assess their preferences and needs (AgeGuide).
- 2.** Providers should maintain accurate records of client interactions, including visit dates, duration, and activities performed (AgeGuide).
- 3.** Provider has implemented policies to ensure the privacy, confidentiality, and security of participant information (AgeGuide).
  - a.** Provider may disclose information by name about a participant only with the informed consent of the participant or his or her authorized representative. Such informed consent must be documented in the participant's record whether it is written or verbal consent. The documentation must include who (participant or authorized representative) provided the written or verbal consent (IDOA 603.17 E3).
- 4.** A record keeping system will be in place to maintain count of unduplicated persons and daily units of service provided (AgeGuide).
- 5.** Required demographic information, units of service provided, and outcomes data as specified by IDOA and/or AgeGuide for each participant will be submitted to the software system determined by IDOA/AgeGuide (AgeGuide).

## **B. Access**

1. Friendly visits (in person or virtual visits, phone calls) must be scheduled on a regular or specified basis to alleviate loneliness and promote social interaction (AgeGuide).
2. Provider will develop procedures to address emergency situations encountered by staff/volunteers during contact with participants (AgeGuide).

## **C. Staffing**

1. Provider will utilize a staff person and/or volunteer dedicated to overseeing service delivery (AgeGuide).
2. Volunteers: The service must have procedures for recruiting, training, and supervising volunteers. As stated in the AgeGuide General Service Requirements, this includes procedures for conducting and evaluating criminal background checks. Each volunteer should have a job description, orientation, schedule of work, and a record kept of hours served (AgeGuide).
  - a. Training should minimally include information regarding services and opportunities available for older persons, mandated reporting procedures, and a process to ensure volunteers contact the Provider in case of emergency and when needs of their participants arise.

## **D. Coordination**

1. As stated in the AgeGuide General Service Requirements, providers are required to maintain linkages with other service providers and organizations in their service area. Provider must minimally:
  - a. Coordinate and make referrals to the local Aging and Disability Resource Network (ADRN) provider as appropriate (AgeGuide).