

**Applies to:
ADRC Specialists
Tribal ADRS**

Short-Term Service Coordination Policy

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This policy applies to aging and disability resource centers specialists (ADRC Specialists) and Tribal aging and disability resource specialists (Tribal ADRSs), herein referred to as “agency” or “staff.”

Purpose

When customers are unable to coordinate services for themselves due to multiple, complex, and diverse needs, the agency may provide short-term service coordination.

This policy will ensure the appropriate provision of short-term service coordination to customers and their families. It defines the service and describes the criteria for determining whether an agency may provide it. The policy also establishes a time limit for the provision of the service. It describes the procedure for extending the service beyond the standard time limit and for ending the service. It also specifies how to appropriately document the provision of the service.



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Definition

Short-term service coordination is an abbreviated and less formal form of case management. Short-term service coordination occurs over several customer encounters and entails active assistance. At times, it may be difficult to distinguish between options counseling and short-term service coordination. The most significant difference is the continuous, ongoing nature of support being provided for planning, processing, and monitoring of services.

Policy

Customers who are unable to coordinate services for themselves due to multiple, complex, and diverse needs and who would like the assistance of the agency in arranging and coordinating services may receive short-term service coordination. This service can be provided when other agency services outside of the ADRC of Tribal ADRS are insufficient, there is no one else available or willing to assist, and the customer is not enrolled in a publicly funded long-term care program.

The agency may provide short-term service coordination to the extent that existing financial and personnel resources allow. The agency may not charge customers or families for short-term service coordination. Short-term service coordination is intended to address an immediate concern and stabilize an individual's situation, allowing the person time to either manage on their own or develop supports. The agency may not provide ongoing services or comprehensive case management for the individual. Comprehensive case management services are not part of the agency's ADRC contract and expected expertise. Short-term service coordination provided by staff will not exceed 90 days, there is cause for extension, see [Factors to consider when extending short-term service coordination](#).

Agencies may not provide short-term service coordination to a customer whose needs are primarily due to a mental health disorder unless that customer is also over the age of 60 or has a physical or intellectual disability.

Director and/or management responsibilities

The agency director or their designee (hereto by referred to as "the director") will train staff to recognize the differences between short-term service coordination, information and assistance,

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and options counseling. This training will be documented and ongoing. The director will monitor and ensure that the short-term service coordination ends within 90 days unless there is cause for extension, see [Factors to consider when extending short-term service coordination](#). The director will ensure staff document services in the client tracking system. The director will have a plan in place to establish how they will prioritize short-term service coordination. The plan will include discussion at staff meetings, and it will be updated as necessary to keep this service to a minimum. The plan should include:

- The criteria for how short-term service coordination will be prioritized.
- The number of times a customer may return for short-term service coordination.
- The criteria for approving extensions to short-term service coordination.

Employee responsibilities

- Staff must inform customers that short-term service coordination is time-limited and explain what actions they intend to take to resolve the immediate crisis.
- Staff will establish a plan for closure at the onset of the service and communicate this plan with the customer. The goal is to ensure that the customer is safe, and their needs are met. This may be done through referrals to a community provider, adult protective services, or alternative crisis resource. They may also be done by establishing a plan with natural supports or a combination of both.
- Staff will provide full documentation that includes key information about what services are needed, who is providing these services, and the frequency of service provision. Staff will document all contacts with the customer and resulting outcomes.
- Staff will keep their director informed of the services provided and progress. The director will not approve an extension of services beyond the 90-day time limit without a documented plan for closure.

Procedure

Short-term service coordination will address the immediate concern to stabilize the customer's situation, allowing the customer time to resume managing on their own or obtain needed support. The services can include guidance to the customer about how to coordinate their own services.

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Criteria for providing short-term service coordination

Customers must meet one or more of the following:

- The customer is not currently enrolled in a publicly funded long-term care program.
- The customer's preference is to have the ADRC assist and the ADRC has the personnel resources available to do so.
- The customer has complex and immediate needs for services.
- The customer uses multiple services and needs help to coordinate these services.
- The customer has a physical or intellectual disability or is over the age of 60.

Documentation

Staff will review documentation on short-term service coordination with the agency director (or designee) and/or at staff meetings for assistance with strategies to keep services within the 90-day period.

Documentation will include:

- The customer need(s) that justify short-term service coordination, including one or more of the criteria listed in the previous section.
- Action taken by the agency.
- Services provided by the agency.
- Responsibilities of the various parties involved.
- Referral(s) made for private pay services.
- Dates of services provided.
- Review dates and estimated end date of short-term service coordination.
- Involvement of adult protective services (APS) or crisis intervention.
- Identification of any unmet needs.

Factors to consider when extending short-term service coordination

In situations where it appears that short-term service coordination may last longer than 90 days; the customer cannot manage with the services provided through short-term service coordination; or the situation is unending, the staff will consult with the director (or designee) for potential

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solutions. If an extension is required, staff will document the reason for the extension in the customer's file.

Ending short-term service coordination

Short-term service coordination will end when:

- The immediate crisis or concern has been addressed.
- The customer's situation has been stabilized.
- The customer has been connected with others who can provide the needed assistance and support.
- The customer understands what resources are available and can manage them independently.

When the agency is unable to meet a customer's needs for short-term service coordination or a customer needs ongoing care management services, the agency will refer the customer to private-pay care management services, including those offered by the managed care organization(s) in its service area, or reassess eligibility for publicly funded long term care services.