

Area Agency on Aging District 7, Inc.  
**OLDER AMERICANS ACT PROGRAMS**  
**Policy and Procedures**

**Division:** Planning & Program Development

**Policy Name:** Consumer Assessments

**Policy #:** OAA-023

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**Created:** 11/22/2010

**Revised:**

**Policy:** Providers of Older American Act services will conduct initial and yearly reassessments on all consumers.

**Procedures:**

1. Providers will complete initial face-to-face assessments for all consumers enrolled in Older Americans Act Title III services within two months of consumer enrollment.
2. Providers will complete reassessments on an annual basis for all consumers enrolled in Older Americans Act Title III services.
3. Providers will make referrals to community-based resources arising from answers received from either the initial assessment or any annual reassessment. These referrals will be documented in the consumer file.
4. Providers will utilize the "Basic NAPIS Intake" as the assessment tool for all consumer assessments. Provider will also provide HIPPA information to the consumer, and obtain the signed release of information form for the consumer file.
5. The "Basic NAPIS Intake" will be completed in its entirety and entered into the SAMS client registry database if the provider has access to the database. If the provider does not have access to the database, the assessment tool will be mailed or faxed to AAA7 for data entry.
6. A reassessment must be conducted 11-12 months from the date of initial assessment, and every year thereafter that the consumer remains on the program. Each reassessment must take place within 11-12 months after the previous one.
7. Reassessments only can be conducted via a telephone call using the following procedures:

- a) Upon initial face-to-face assessment, provider will inform consumer, in writing, that they will receive yearly reassessments and that these reassessments may be conducted via telephone or via another face-to-face assessment.
- b) Provider will contact consumer when it is time for the reassessment and schedule a time to complete the assessment.
- c) Provider will utilize the "Basic NAPIS Intake" form to complete the reassessment.
- d) The information from the "Basic NAPIS Intake" form will be entered in the SAMS client registry database as an additionally-dated assessment, or provided to AAA7 for data entry per #3 above.
- e) Provider will document in the consumer file the date of each assessment and whether it was conducted face-to-face or via telephone.
- f) Provider will document in the consumer file any referrals made to community-based resources arising from the answers received during the reassessment process.