Instructions for Questionnaire

The State of Montana's Senior & Long-Term Care Division requires all Area Agency and Aging and Disability Resource Center offices document all relevant resource information about an organization listed as a resource. The information we collect follows the national standards established by the *Alliance of Information and Referral Systems* and is designed to provide seniors and adults with disabilities with the most comprehensive information about a resource. The accompanying questionnaire follows these recommendations.

- **Program/Agency Contact Information:** The first part of the questionnaire is self-explanatory regarding name, address, phone, etc.

Licensing or certification information is important to clarify the professional status of a business and/or to clarify the level of services they can provide. For instance, a home health agency needs a C.O.N. (Certificate of Need) in order to provide skilled care reimbursed by Medicaid and/or Medicare. Local businesses need at least a city business license to be considered.

- **Administrative (operating) Agency:** This section is to clarify if a program is under the authority of a larger entity. For instance, a hospice program may be run by a local hospital or a food distribution program may be run by a local food bank. In these examples the operating agencies are the hospital or the food bank respectively.

The contact person is the person who either coordinates the program or is the contact for an individual to talk to for more information or to sign-up for services.

- **Hours of Operation:** In this section related to Office Hours, the 'other' hours are in regards to situations where it is imperative for the individual to know how to get a hold of the business outside of regular business hours. For instance, an oxygen company may have a 24-hour contact line or a home health agency may have an on-call person that could help the client in the case of a personal care attendant not showing up for a shift.

The service delivery is important information as our users will often search using zip codes for the search areas. Please list county areas served and our system will match them to their zips. If the service area only includes a town, please indicate this clearly.

As part of our directory, it is important that we distinguish if a business is a nonprofit, a for-profit, a government agency, etc. Some businesses may have programs that fit more than one of these categories. For instance, a nonprofit may also have a volunteer program.

Program accessibility is specific to programs that provide services at their building or establishment. This information is important to protect seniors and people with disabilities from showing up at a business that cannot serve them because of the lack of physical accessibility.

- The fees area is another very important part of the resource information. This clarifies for a client if the service is free or if there is a cost. Options may include if there is a sliding scale; if it can be reimbursed by other entities such as Medicare, Medicaid, and Veteran's Administration; or if a payment plan is available. We want to provide all service costs to the client prior to them contacting the provider if possible.

- Please disregard the Assisted Living and Long-Term Care Facility sections if this does not apply to your organization.

- **Narrative Questions:** This is where you record the description of the services your business or organization provides. This area will be transferred to the "essay" portion of the database and can be, at times, the most important information. It tells us about your business and the services provided. It can be printed out as part of the resource information for potential referrals to help them understand the services provided. This becomes important information for your potential clients.

- For our staff to make good referrals, it is important to share any eligibility requirements for your programs. Please include age, income, disability, etc. that relate to program eligibility.

- Information about the intake process and any required documents is important information for clients. These two questions collect information on the process for your agency/business. Some organizations have more stringent intake procedures than others. We collect information to clarify for clients exactly what is required of them in order to receive services. For instance, if a client is pursuing LIEAP what do they need to make an appointment to sign-up? If they are pursuing Section 8 housing, what type of income information do they need to provide? Do they need personal identification? What are the orientation times? Is there is a waiting list and what is the application process?

- **Contact Information:** The last part of the questionnaire will help us keep your information up-to-date. We need the contact information in order to annually update your resource information. With annual updates we can continue to include your organization and services it provides to our seniors and people with disabilities in our database.

Let me know if you have any questions.

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