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**SENIORS & PEOPLE WITH DISABILITIES**  
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**INFORMATION MEMORANDUM**  
SPD-IM-01-101  
Date: December 10, 2001

**TO:** SPD District and Unit Managers  
Area Agency on Aging Directors

**SUBJECT:** Revised Service Definitions for Older Americans Act and OPI Services

**INFORMATION:**

Attached are revised service definitions for Older Americans Act (OAA) and Oregon Project Independence (OPI) services. These revisions should be adopted immediately. Please share this information with fiscal, program and field staff working with OAA and OPI programs. Following is a summary of the revisions:

- ◆ Changes #13a Information for Caregivers to #15 to agree with numbering requirements in Oregon ACCESS. Also clarifies the definition.
- ◆ Changes #13b Assistance in Gaining Access to Caregiver Services to #16 to agree with numbering requirements in Oregon ACCESS. Also clarifies the definition.
- ◆ Clarifies the definition for #30-7 Supplemental Services to Caregivers.
- ◆ Changes the service unit for #40-3 Wellness Education from 1 session to 1 client served to agree with NAPIS.
- ◆ Adds #70-10 Public Outreach/Education as an OAA service.
- ◆ Adds #90-1 Volunteer Services as an OAA service.

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**SERVICE DEFINITIONS  
FOR OLDER AMERICANS ACT  
AND OPI SERVICES**

**December 12, 1998**

**(Amended December, 2001)**

**Department of Human Services  
Seniors and People with Disabilities  
500 Summer St NE, 2nd Floor  
Salem OR 97301-1015**

# **SERVICE DEFINITIONS FOR OAA AND OPI SERVICES**

## ***CLUSTER 1 REGISTERED SERVICES***

### **#1 PERSONAL CARE (1 hour of service)**

**Personal assistance, stand-by assistance, supervision or care for persons having difficulties with one or more of the following activities of daily living; eating, dressing, bathing, toileting, and transferring. (SPDS definition of Personal Care takes precedence over the OAA definition)**

### **#1a PERSONAL CARE (1 hour of service)**

**Provided by Client Employed Providers**

### **#2 HOMEMAKER (HOME CARE) (1 hour of service)**

**Assistance to persons having difficulty with one or more of the following instrumental activities of daily living; preparing meals, shopping for personal items, managing money, using the telephone or doing light housework. (SPDS definition of Home Care takes precedence.)**

### **#2a HOMEMAKER (HOME CARE) (1 hour of service)**

**Provided by Client Employed Providers**

### **#3 CHORE (1 hour of service)**

**Assistance to persons having difficulty with one or more of the following activities of daily living: heavy housework, yard work or sidewalk maintenance.**

### **#3a CHORE (1 hour of service)**

**Provided by Client Employed Providers**

### **#4 HOME DELIVERED MEALS (1 meal delivered)**

**A meal provided to an eligible client which complies with the Dietary Guidelines for Americans and provides a minimum of 33 and 1/3 percent of the current daily Recommended Dietary Allowances as established by the Food and Nutrition Board of the National Research Council of the National Academy of Sciences.**

**#5 ADULT DAY CARE / ADULT DAY HEALTH (1 hour of service)**

**Personal care for dependent adults in a supervised, protective, congregate setting during some portion of a twenty-four hour day. Services typically include social and recreational activities, training, counseling, meals, other services such as rehabilitation, medications assistance and home health aid services for adult day health.**

**#6 CASE MANAGEMENT (1 hour) (OAA and OPI only)**

**Assistance in the form of either access or care coordination. Typical activities include assessing needs, developing care plans, authorizing services, arranging services, coordinating the provision of services among providers, follow-up and reassessment, as required.**

***CLUSTER 2 REGISTERED SERVICES***

**#7 CONGREGATE MEALS (1 meal)**

**A meal provided to an eligible participant at a nutrition site, senior center or some other congregate setting which complies with the Dietary Guidelines for Americans and provides a minimum of 33 and 1/3 percent of the current daily Recommended Dietary Allowances (RDA) established by the Food and Nutrition Board of the National Research Council of the National Academy of Sciences.**

**#8 NUTRITION COUNSELING (1 hour)**

**Individualized advice and guidance to individuals who are at nutritional risk, because of their health or nutritional history, dietary intake, use of medications, chronic illnesses, about options and methods for improving their nutritional status, performed by a health professional in accordance with state law and policy.**

**#9 ASSISTED TRANSPORTATION (1 one-way trip)**

**Assistance, including escort, to a person who has difficulties (physical or cognitive) using regular vehicular transportation.**

### ***CLUSTER 3 NON-REGISTERED SERVICES***

#### **#10 TRANSPORTATION (1 one-way trip)**

**A means of transportation for a person who requires help in going from one location to another, using a vehicle. Does not include any other activity.**

#### **#11 LEGAL ASSISTANCE (1 hour)**

**Legal advice, counseling and representation by an attorney or other person acting under the supervision of an attorney.**

#### **#12 NUTRITION EDUCATION (1 session)**

**A program to promote better health by providing accurate and culturally sensitive nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants or participants and caregivers in a group or individual setting overseen by a dietitian or individual of comparable expertise.**

#### **#13 INFORMATION AND ASSISTANCE (1 contact)**

**A service for older individuals that provides current information on opportunities and services available within their communities; assesses the problems and capacities of the individuals; links individuals to the opportunities and services; to the maximum extent feasible, ensures the individual receives the services needed and is aware of the opportunities available by establishing adequate follow-up procedures.**

#### **#14 OUTREACH (1 contact)**

**Intervention initiated by an agency or organization for the purpose of identifying potential clients and encouraging their use of existing services and benefits.**

#### **#15 INFORMATION FOR CAREGIVERS (1 contact)**

**A service that provides information about availability of support services for caregivers and their families. *This may include group services, public education, provision of information at health fairs and other similar functions.***

## **#16 ASSISTANCE IN GAINING ACCESS TO CAREGIVER SERVICES**

**(1 contact)**

**A service that provides one-on-one assistance in gaining access to services available for caregivers and their families. *Assistance can be provided either in the form of Information & Assistance or Case Management.***

### ***OTHER SERVICES:***

## ***ADMINISTRATIVE FUNCTIONS***

### **#20-1 AREA PLAN ADMINISTRATION (OAA and OPI only)**

**Area Agency administrative functions required to implement the planned services, maintain required records, fulfill the requirements of Federal regulation, State rules, and State Unit Policies and Procedures; and support the Advisory Committee. Includes such responsibilities as bidding, contract negotiation, reporting, reimbursement, accounting, auditing, monitoring, and quality assurance.**

### **#20-1a ADULT CARE HOME LICENSING (optional)**

### **#20-2 AAA ADVOCACY**

**Monitor, evaluate and comment on issues related to community actions affecting older persons; conduct or attend public hearings; represent older persons' interests at the local, state and national level; support Long Term Care Ombudsman program and coordinate planning with other agencies and organizations.**

### **#20-3 PROGRAM COORDINATION**

**The functions of Area Agency staff directed toward the coordination of programs funded by AoA funds with other supportive federal, state, local, or private programs. It presumes a continuing activity which links together, in support of common service objectives, existing planning and service resources on a cyclical and ongoing basis.**

### **#20-4 PROGRAM PLANNING AND DEVELOPMENT**

**Functions of the Area Agency staff directed toward the development of specific service(s), goals or objectives. Includes such functions as needs assessment, plan development, budgeting/resource analysis, inventory, standards development, policy analysis, public education, resource**

development, training and education, research and development and legislative activities.

**#20-5 TRAINING**

Training activities funded with OAA or OPI funds.

**#20-9 MEDICAID AAA SERVICES (Optional)**

Functions or services of AAAs which are funded with Medicaid and/or Local match funds only, i.e. case management, screening, outreach, etc.

***SERVICES WHICH ADDRESS FUNCTIONAL LIMITATIONS***

**#30-1 HOME REPAIR/MODIFICATION (1 client served)**

Minor modification of homes that is necessary to facilitate the ability of older individuals to remain at home, and that is not available under other programs, except that not more than \$150 per client may be expended under OAA Title III-D for such modification.

**#30-2 HOME HEALTH (1 home visit)**

Services furnished to an individual by a Home Health Agency, or by others under arrangement with such agency, on a visiting basis in client's temporary or permanent home.

**#30-3 IN-HOME VOLUNTEERS (1 hour of service)**

Services provided by volunteers in a client's home which will enable the client to remain at home. (i.e. shopping assistance, meal preparation, respite, etc.) (1 hour of service.) This service can include the development and maintenance of a "central registry" to match qualified providers with elderly clients not eligible for Medicaid nor OPI services. It can include recruitment, screening and training of qualified volunteer in-home providers to effectively maintain a central registry.

**#30-4 RESPITE (1 hour of service)**

Paid temporary services to provide relief for families or other caregivers. This service should be used **ONLY** when no other service is provided in conjunction with respite.

**NOTE: Respite services to caregivers will need a separate report every 6 months with the units of service and number of persons served with III E**

money.

**#30-5 RESPITE (1 hour of service)**

**Provided with Client Employed Providers**

**#30-6 ORGANIZATION and MAINTENANCE OF SUPPORT GROUPS FOR CAREGIVERS (1 Caregiver Served)**

**Activities which organize and maintain support groups that provide assistance to caregivers and their families in making decisions and solving problems related to their caregiving roles.**

**#30-7 Supplemental Services to Caregivers (1 client served)**

**These services, which will provide assistance with Activities of Daily Living or Instrumental Activities of Daily Living, are to be provided on a limited basis to complement the care provided by caregivers. *Care recipients must be unable to perform at least two activities of daily living without substantial assistance or due to a cognitive or mental impairment require substantial assistance.***

***SERVICES THAT MAINTAIN HEALTH***

**#40-1 HEALTH/NUTRITION SCREENING (1 screening)**

**Screening activities which determine a client's physical or mental health or nutritional status.**

**#40-2 EXERCISE OR PHYSICAL FITNESS (1 session)**

**Programs regarding physical fitness, group exercise, and music, art, and dance-movement therapy, including programs for multi-generational participation that are provided through local educational institutions or community-based organizations.**

**#40-3 WELLNESS EDUCATION (1 Client Served)**

**Health promotion programs, including programs relating to chronic disabling conditions (prevention and reduction of effects), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management and providing information about the availability of, benefits and appropriate use of other preventive health services or programs.**

**#40-4 MENTAL HEALTH SERVICES (1 hour of service)**

**Mental health services can include any of the following services: Screening for the prevention of depression, coordination of community mental health services, provision of information to seniors about mental health services, development of "peer" gerontological counseling programs, therapeutic mental health counseling (provided by qualified, licensed mental health professionals or others trained and supervised by another qualified professional) and referral to psychiatric and psychological services.**

**#40-5 HEALTH EQUIPMENT LOANS (1 loan)**

**Assist clients in obtaining usable health care equipment on a temporary basis.**

**#40-6 MEDICAL ALERT (1 Client Served)**

**A service provided to frail seniors which includes an electronic device which a client can activate to alert a monitored system when help is needed.**

**#40-7 MEDICAL EQUIPMENT (1 Client Served)**

**Purchase of health care equipment for clients when loaned equipment is unavailable or not feasible.**

**#40-8 REGISTERED NURSE SERVICES (1 Hour of Service)**

**Non-Medicaid services provided by a Registered Nurse on a short-term or intermittent basis which include, but are not limited to: interviewing the client, assessing the client's ability to perform tasks; preparing a care plan which includes treatment needed by the client; monitoring medication; training and educating care providers; and setting realistic goals and outcomes for the client.**

**#40-9 MEDICATION MANAGEMENT (1 Contact)**

**Any of the following activities: public education activities related to medication management problems; training programs on medication management skills for consumers and caregivers; screening programs with public health and health practitioners to identify persons at high risk of medication interactions and adverse reactions; and provision of client specific medication review and consultations by pharmacists, nurse practitioners or physicians.**

## ***SERVICES THAT PROTECT ELDER RIGHTS***

### **#50-1 GUARDIANSHIP/CONSERVATORSHIP (1 Client Served)**

**Performing legal and financial transactions on behalf of a client based upon a legal transfer of responsibility (e.g., as part of protective services when appointed by court order) including establishing the guardianship/conservatorship.**

### **#50-2 PROTECTIVE SERVICE (1 Client Served)**

**Protective services for vulnerable elders who are at risk as a result of harm or neglect and who have been evaluated to be incapable of making competent decisions about their well-being. This harm or neglect may be self-imposed or may be perpetuated by another person.**

### **#50-3 ELDER ABUSE AWARENESS (1 Activity)**

**Activities which promote understanding and increase public awareness of elder abuse. (For example, one activity could include securing a local public service announcement; provide a local training for nursing facility staff, or law enforcement agencies, or district attorney staff or other local agencies; local training for a multi-disciplinary team; producing a specific brochure or other publication, etc.)**

### **#50-4 CRIME PREVENTION/HOME SAFETY (1 Activity/Visit)**

**Activities which educate elders regarding crime prevention or which provide home safety.**

### **#50-5 LTC OMBUDSMAN (1 Volunteer)**

**Functions of the Ombudsman program are to receive, investigate, and act on complaints by older individuals who are residents of long-term care facilities and to advocate for the well-being of such individuals. Activities may include: direct support to certified Ombudsman volunteers and administrative support to local committees engaged in recruiting, screening and supporting the Ombudsman program.**

## ***SERVICES THAT PROMOTE SOCIALIZATION AND PARTICIPATION***

### **#60-1 RECREATION (1 Activity)**

**Activities which promote socialization, such as sports, performing arts, games, and crafts, either as a spectator or as a participant.**

**#60-2 FRIENDLY VISITING (1 visit)**

**Visits to physically, geographically or socially isolated individuals.**

**#60-3 TELEPHONE REASSURANCE (1 call)**

**Providing regular telephone calls to individuals to determine if they are safe and well, if they require assistance, and to provide psychological reassurance.**

**#60-4 VOLUNTEER OPPORTUNITIES (1 placement)**

**Providing staff support, coordination, and training/educational opportunities for volunteers involved in the provision of services to elderly who do not need nor are eligible for OPI or Title XIX services. (One placement means one volunteer identified, trained and assigned to a volunteer position.)**

**#60-5 INTERPRETING/TRANSLATION (1 session)**

**Providing assistance to clients with limited English speaking ability to access needed services.**

***SERVICES THAT ASSURE ACCESS AND COORDINATION***

**#70-1 CASE MONITORING (1 hour of service)**

**Documented ongoing follow-up activity (telephone contact, Senior Center contact or home visit) of individuals with a case plan. Case Monitoring includes: a) Providing early identification of current or potential problem areas; b) Assessing the needs for changes in service; and c) Reviewing intervention results to determine if what was done achieved desired results.**

**#70-2 COUNSELING (1 Hour of service)**

**Providing guidance and/or suggestions to a client to enable the client and/or family to resolve problems including insurance, tax or employment issues.**

**#70-2a Individual Counseling for Caregivers**

**Providing one-on-one counseling for caregivers to assist in making decisions and resolving problems related to their caregiving roles.**

**#70-3 SCREENING (1 Screening)**

**Initial contact with a client to identify potential service needs and/or eligibility for services.**

**#70-4 GERIATRIC ASSESSMENT (1 Assessment)**

**An in-depth interview with a client to determine needs and potential intervention strategies, and includes when appropriate, developing a goal oriented service plan and informing clients of available services.**

**#70-5 NEWSLETTER (Number distributed)**

**Preparation and regular distribution of a publication which informs seniors and the community of available services and activities.**

**#70-6 GATEKEEPER TRAINING (1 session)**

**Training sessions to educate utility employees, postal employees and other local organizations about visible indicators which may suggest need for assistance by an elderly person.**

**#70-7 PLACEMENT SERVICES (1 referral)**

**Providing clients with direct access to a pool of screened, qualified in-home service workers.**

**#70-8 PRIVATE CASE MANAGEMENT (1 case)**

**A service provided to an employer on behalf of its employees who have caregiver responsibilities for elderly relatives. It is a service with several components, which collectively make up case management. Components of private case management include a combination of some or all of the following: access, intake and/or screening; assessment; care planning; care plan implementation and/or coordination, and continued care management. Further definitions of these components are included in the policy issued as IM 90-28.**

**#70-9 CAREGIVER TRAINING (1 client)**

**Training provided to caregivers and their families that would provide information about caregiving resources, and information to assist caregivers in making decisions and solving problems related to their caregiver roles.**

**#70-10 PUBLIC OUTREACH/EDUCATION (1 contact)**

**Programs and activities targeted towards groups of current or potential clients, caregivers or family members with the purpose of encouraging the use of OAA services and benefits. Examples of this type of service would be participation in a community senior fair or presentations at local senior centers where information on OAA services is shared.**

## ***SERVICES THAT SUPPORT OTHER GOALS/OUTCOMES***

### **#80-1 SENIOR CENTER ASSISTANCE (1 center served)**

**Financial support for the operation of a senior center.**

**However, if the operation cost is to pay for services, it must be spread in the plan among the approved services, i.e., Outreach, I and R, Friendly Visitation. Otherwise, the monies for general operation (not specific services) would be listed as Senior Center Operations. Costs attributed to Senior Center Operations are considered administrative costs.**

### **#80-2 EMPLOYMENT ASSISTANCE (1 Client Served)**

**Counseling and assistance provided to older persons who want to seek employment.**

### **#80-3 UTILITY ASSISTANCE (1 Client Served)**

**Financial assistance to help low-income clients meet the cost of heat, electricity, water/sewer service or basic telephone service.**

### **#80-4 FINANCIAL ASSISTANCE/MATERIAL AID (1 Client Served)**

**Limited financial assistance for low-income clients to cover costs of prescription, medical, dental, vision care or other health care needs not covered under other programs.**

### **#80-5 MONEY MANAGEMENT (1 Client Served)**

**Assistance to seniors who are unable to handle their personal finances with financial tasks such as banking transactions, paying bills, taxes, etc.**

### **#80-6 CENTER RENOVATION/ACQUISITION (1 Center acquired or renovated)**

**The use of Older Americans Act funds to acquire or renovate buildings which are to be used as senior activity centers.**

### **#80-7 HOUSING ASSISTANCE (1 client served)**

**Assistance to seniors who need emergency financial assistance that would obtain or maintain permanent house.**

### **#90-1 VOLUNTEER SERVICES (1 hour of service)**

**Volunteer services provided to OAA clients.**