IL-NET

IL-NET National Training and Technical Assistance Center for Independent Living

Consumer Information Files and Program Policies

June 11, 2024

Program Managers/Associate Directors Peer Call

Facilitator:

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IL-NET Partners

Today’s presentation is brought to you by the Administration for Community Living at the US Department of Health and Human Services in conjunction with the IL-NET. The IL-NET is operated by ILRU and collaborates with NCIL, APRIL, the University of Montana, and and a consultant network of subject-matter experts. The IL-NET T&TA Center provides training and technical assistance to centers for independent living, statewide independent living councils, and designated state entities.

Image Descriptions: Logos of Independent Living Research Utilization, Association of Programs for Rural Independent Living, National Council on Independent Living, and University of Montana.

What You Will Discuss Today

- When and how do you provide Information and Referral Services?
- When do you move to an intake process and what is required?
- How do you handle consumer signatures?
- What things are required in a Consumer Information File?
- How much freedom do you have in program policies and procedures?

What is Information and Referral and when do you provide it?

- Information and Referral are defined in the PPR as **<u>Information and Referral Services</u> – Identify all individuals who requested this type of assistance. This is the only service (other than services to family members) that may be provided to all individuals, whether or not the individual has a disability. Some entities record this service using strokes on an answering pad without opening a CSR, others create a CSR or other such file for future contact and outreach.**
- In the Rehab Act (law) and regs 45 CFR 1329 it is listed as a core service but not further defined.
- Don’t forget your responsibility to COMMUNITY OPTIONS.—The center shall work to increase the availability and improve the quality of community options for independent living in order to facilitate the development and achievement of independent living goals by individuals with significant disabilities.

(Rehabilitation Act Assurances Section 725(b)(4))

When do you move to an intake process?

- To some extent you and the consumer get to decide.
- Ideally information and referral is only that – you provide information and refer folks to another provider.
- If you provide further services you are typically expected to move to an intake process and begin to plan with the individual on what they want to accomplish.
- However, there are CILs that remain pre-intake for as long as they feel they can so that the consumer doesn’t feel they must set one or more goals. (Even with a waiver a goal is required.)
- Recently ACL has told us that Peer Support and Advocacy can accompany other goals, and not have their own goal.

What do you include in intake? This can be one page…

- Some CILs have an extensive intake process and even require some kind of evaluation or self-evaluation. That can be offered but is not required.
- You are required to verify the individual is eligible for services. This is as simple as asking them if they have a significant disability. Typically they sign to agree that is the case.
- Sometimes you collect demographics for your PPR or other reporting but they are not required to provide it.
- They verify they received required information – the Client Assistance Program for complaints, voter registration information, your own rights policies including offering alternative formats, right to waive ILP. Again, a signature is sufficient.
- The consumer identifies one or more goals they want to meet.

How do you handle signatures?

- Your policies completely determine how signatures are handled in your center.
- Electronic signatures are allowed as long as you follow your policies.
- Docusign, signature stamps, witness signatures, etc. have been used.
- Other methods out there?
- NOTE that the state may attempt to weigh in on this. The CILs in your state may have to advocate for acceptance of electronic signatures if you receive state funds.

What things are required in the consumer information file?

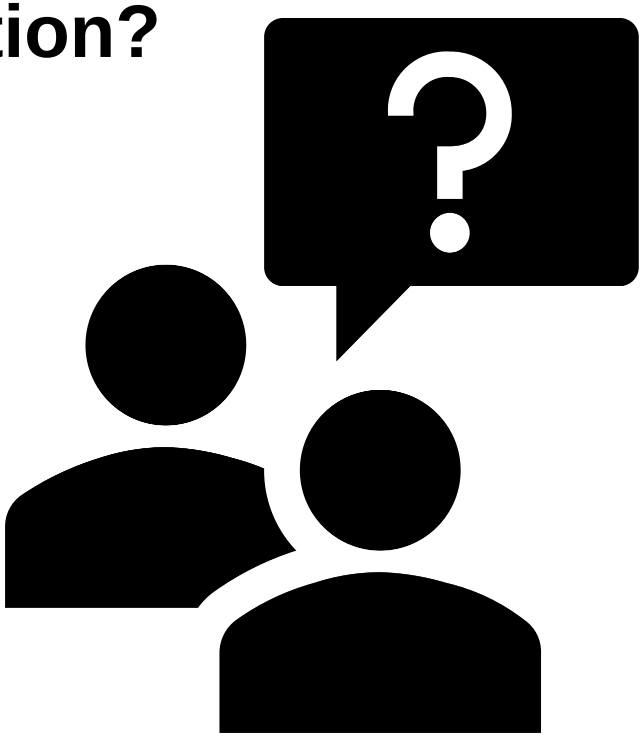
- Documentation that individual is eligible (or ineligible if you accept applications) and that are only served if eligible. (Intake.)
- Documentation that consumer was notified of the (meaningless) right to waive the development of an ILP. (Intake.)
- Written plan or (if waived) goals.
- Notes related to services requested by, provided to or arranged for/with the consumer.
- Notes indicating development and achievement of IL goals selected by the individual.
- Notes indicating when the consumer believes they have achieved the goals or objectives.
- Releases of information?

How much freedom do you have in program policies?

Questions & Discussion

What else are you curious about?

What needs clarification or more explanation?



Contact Information

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Evaluation Survey

Thank you for joining us today! To view today's presentation and previously recorded CIL Assistant Directors, Program Managers, and Middle Managers Peer Discussion presentations, please visit the following link:
https://www.ilru.org/training/cil-assistant-directors-program-managers-middle-managers-peer-discussion-0
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The IL-NET is supported by grant numbers 90ILTA0002 and 90ISTA0002 from the U.S. Administration for Community Living, Department of Health and Human Services, Washington, D.C. 20201. Grantees undertaking projects under government sponsorship are encouraged to express freely their findings and conclusions. Points of view or opinions do not, therefore, necessarily represent official Administration for Community Living policy.