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**PROGRAM INSTRUCTION (PI)**

**EOEA PI-23-01**

**TO:** Aging Service Access Point (ASAP) Executive Directors

**CC:** ASAP Program Managers, ASAP Contract Managers, ASAP Quality Managers

**FROM:** Lynn C. Vidler, Director of Home and Community Programs, MBA, BSW

**DATE:** May 1, 2023

**RE:** Pending Services Referral and Provider Search Process

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**Purpose:**

This Program Instruction (PI) requires all Aging Services Access Points (ASAPs) to utilize the Executive Office of Elder Affairs (EOEA) Pending Services Referral and Provider Search Process for Home Care consumers.

**Background and Program Implications:**

ASAPs are responsible for developing a Comprehensive Plan of Care (POC) in accordance with Section 4.4 of the ASAP Contract. The POC, once entered in A & D, will include documentation for service referrals to meet assessed needs.

An A & D statewide data entry process for service referral management, which leverages a similar data entry process as A & D POC authorized services, was officially deployed in September 2021 for ASAP utilization with an accompanying Business Rule for Provider Search Processes.

The service referral management system allows ASAPs to record and track the details of certain pending in-home service referrals for consumers within A & D. Services identified in the POC are interventions specific to a consumer's assessed need, authorized service plan and service

schedule, and the corresponding person-centered care plan. The service referral management process provides ASAPs the ability to generate a pending referral report through Harmony Advanced Reporting (HAR) which is then sent to ASAP contracted providers for the providers to determine which referrals they can fill.

The statewide service referral management process establishes a consistent operational practice and enables quantification of pending referrals for in-home service interventions for consumers and includes the length of time service referrals have been pending. The service referral management process and associated reporting incorporates pending service referrals by service, region, program, and key consumer factors for service provision.

**Required Actions:**

ASAPs are required to utilize the Pending Services Referral and Provider Search Process through A & D in accordance with EOEa guidance. Specifically, ASAPs should:

- Utilize service referral management process when ASAPs are searching to fill service request(s) for each Home Care consumer for in-home service referrals.
- Complete pending referrals for in-home services in A & D as required by EOEa Business Rule *Pending Service Referral and Provider Search Process*.
- Create ASAP specific procedures and train staff in accordance with the EOEa Business Rule *Pending Service Referral and Provider Search Process*.
- Train ASAP contracted provider staff on the HAR ASAP pending service referral report to accurately identify pending consumers based on area, equity, service need, and considerations.
- Utilize sampling methodology provided by EOEa for quality assurance monitoring.
- Establish standardization at the ASAP for quality review in accordance with EOEa timeframes.
- Monitor volume of pending services and service requests.
- Monitor provider communication, ensure data accuracy, review for process improvement and remediation, and identify areas of opportunity for timely service provision monthly.

**Effective Date:**

This Program Instruction shall be effective June 1, 2023.

**Contact:**

If you have any questions regarding this PI, please contact Joel Bartlett, Home Care Provider Coordinator at [Joel.D.Bartlett@mass.gov](mailto:Joel.D.Bartlett@mass.gov) or Nicholas Roberts, Home Care Data Analyst at [Nicholas.P.Roberts@mass.gov](mailto:Nicholas.P.Roberts@mass.gov).