



SERVICE GUIDELINES

TITLE III-B SERVICE: TELEPHONE REASSURANCE

December 2022

DEFINITION

Telephone Reassurance: Telephone calls at specified times to or from individuals who live alone, to determine if they require special assistance, to provide psychological reassurance and reduce isolation.

ELIGIBILITY

Individuals, aged 60 or older.

UNIT OF SERVICE

Each telephone reassurance call placed or received by a client constitutes one unit of service.

SERVICE ACTIVITIES

Include, but are not limited to:

- Procedures for supervising calls and for the caller to report a client's need for services;
- Establishment of an emergency plan for client(s) if a telephone call is unanswered;
- Activities planned for each telephone call relative to the individual's needs;
- Telephone calls to each client at specified times; and

- Telephone calls to assure that older persons are safe and have access to services to meet their immediate needs during disaster situations (e.g., flooding, tornadoes, hot weather, severe spring and winter weather, man-made emergencies, etc.).

SERVICE REQUIREMENTS

- Grantee is required to complete and retain a file for each client. The file should contain a **NAPIS Client Registration Form** along with other forms as necessary.
- Grantee is required to administer **UCLA Loneliness Scale** to Telephone Reassurance program participants. For the individuals who scored 5 or greater, Grantee will administer 3-month and 6-month post-survey. Data must be recorded into AgingIS.
- Grantee is required to publicize the program targeting older adults who may be socially isolated. This effort must include a means by which the grantee may be contacted. Public notice efforts can include mass media notices or presentations, public displays, brochure distribution in public places, or other such means of reaching the general public.
- Grantee shall conduct pre-employment criminal background checks for all employees of AgeSmart-funded programs. The Grantee shall also conduct criminal background checks on volunteers participating in AgeSmart-funded programs with access to confidential client information including, but not limited to, addresses, social security numbers, financial information, etc.
- Grantees will use the AgeSmart logo on facilities, webpages, newsletters and brochures. All logo and branding standards will be made available Grantees. Along with branding, the following statement must be used by Grantees:

Funding for Grantee is received from the United States Administration for Community Living, the Illinois Department on Aging and AgeSmart Community Resources. Grantee does not discriminate in admission to programs or activities or treatment of employment in programs or activities in compliance with appropriate State and Federal Statutes. If you feel you have been discriminated against, you have the right to file a complaint with AgeSmart Community Resources by calling 618-222-2561.

NAPIS REPORTING

- All participants will be entered into Aging IS.
- Grantees must keep detailed, legible and accurate daily logs of the service.

- Telephone calls that are not answered by a client will not be counted as a unit.
- Grantees must complete client demographics information in Client Registration that is required by the State.
- Age, Gender, Ethnicity, Race, Number in Household, and Low-Income data must be completed. Grantees may use their best professional judgment and enter the best possible data.
- Number in Household (Living Alone Status):

Enter the number of person(s) in household. Living Alone status is a one-person household where the householder lives by himself/herself in an owned or rented place of residence in a non-institutional setting including assisted living units and group homes.

- Poverty (Low Income):

A person whose income is at or below the federal poverty guidelines is considered to be in poverty or low income.

- The Grantee will complete **monthly data audit** to ensure that client demographic information is accurate and complete.

REIMBURSEMENT

The Grantee may receive 1/12th of the grant amount up front and then be reimbursed monthly for units served the previous month. **Should reporting be late, reimbursement may be withheld.**

Fiscal Guidelines for all Title-III Programs

Program Income

Program Income is defined as contributions made by recipients of service and interest on such contributions.

A. Program income includes, but is not limited to:

1. Contributions of recipients of service and interest on such contributions.
2. Income from service fees obtained through the use of a sliding fee scale or suggested fee schedule.
3. Proceeds from the sale of personal or real property with an acquisition cost of less than \$5,000.
4. Usage or rental fees.
5. Sale of assets purchased with grant funds with an acquisition cost of less than \$5,000.
6. Royalties on patents and copyrights.

B. The following specific revenues shall **not** be included as program income:

1. Interest income on State funds whether earned on advances or the "float." This does not include interest on contributions made by recipients of service under a project which is considered program income.
2. Rebates, discounts, and recoveries.
3. Income earned by individuals or a group of project participants, when such income accrues directly to the participants.
4. Revenues raised by a grantee or contractor which is a government under its governing powers, such as taxes, special assessments, etc.
5. Tuition and related fees received by an institution of higher education for a regularly offered course taught by an employee performing under a grant or contract.
6. Proceeds from the sale of personal or real property with an acquisition cost of more than \$5,000.

7. Sale of assets purchased with grant funds where the acquisition cost was more than \$5,000.
8. Contributions made by representatives of service recipients, relatives, non-related individuals or entities, on behalf of service recipients are not program income, but are considered to be local cash.
9. Organized fund-raising activities carried out by Title III grantee agencies.

Allowable Uses of Program Income

A. Additional Costs Alternative

Under this alternative, the income is used for costs which are in addition to the allowable costs of the project or program, but which, nevertheless, further the objectives of the Federal statute under which the grant was made.

Examples of purposes for which the income may be used are:

1. Expanding the program.
2. Continuing the program after grant ends.
3. Supporting other programs that further the broad objectives of the statute.
4. Obtaining equipment or other assets needed for the program or for other activities that further the statute's objectives.

Award recipients under an Area Plan must receive prior approval by the Area Agency on Aging for costs borne with program income under this alternative.

B. Additional Requirements

1. All program income earned under Title III must stay with the service provider who earns it.
2. All program income earned under Title III, Part B, Part C-1, Part C-2 and Part E must be used only for services allowable under the part from which it was earned except as provided in (6) below.
3. All program income must be expended prior to requesting federal funds from the Department on Aging and must be expended within the fiscal year in which it was earned.
4. All program income received in the form of "cash" must be expended as it is earned to minimize cash draw down.

5. Program income earned as a result of services provided with Title III, Part B or Part E assistance may be used for any service which that contractor is authorized to provide with Title III-B or Title III-E funds.
6. Program income earned as a result of services provided with Title III C-1 or III C-2 must be used:
 - a. To increase the number of meals served by the project involved;
 - b. To facilitate access to such meals; or
 - c. To provide other supportive services directly related to nutrition services.
7. Prior approval requests to expend program income in excess of the amount approved on the Notification of Grant Award must be submitted on the Program Income Addendum to the Department by no later than prior to September 30 of the current fiscal year (refer to section 900 of this manual for detailed reporting requirements).

C. Special Requirements for Providers Receiving Section 5311 Funds from the U.S. Department of Transportation

All transportation providers receiving support from Section 5311 and Title III-B and/or Title III-E must report rider donations as program income. Program income collected should be reported under Section 5311 and Title III-B and/or Title III-E only to the extent and in direct proportion to each funding source's financial participation. Thus, the same rider donations shall not be reported in the same amount as program income under both funding sources.

Accountability for Program Income

- A. Program income must be deposited into an appropriate bank account or converted to money orders on a regular basis.
- B. Cash participant contributions should be counted by two (2) persons, placed in a safe, secure place until deposited, deposited intact, and deposit receipts compared with count sheets. Such standards require the accurate recording of amounts collected at the project and site levels and subsequent use of these funds.
- C. Grantees must account for program income on an on-going basis, and must report such income to the Area Agency on Aging through the established financial reporting system.

- D. Accounting records and reports submitted by a recipient to the Area Agency on Aging should provide a clear audit trail on all program income and its uses. Account records and reports should accurately reflect the receipt of such funds **separately** from the receipt of Federal funds, grantee funds, and the use of such resources.
- E. Although interest income earned on General Revenue and/or local funds by non-profit organizations is not considered program income, project grantees should maintain adequate accounting records on any interest income earned. The Department on Aging must approve the Area Agency on Aging's proposed use of General Revenue Funding interest income as an activity which will further the purpose of the project and the Act.
- F. Rebates, discounts, and recoveries on leases should be treated as applicable credits and credited to the Federal grant accounts.

Voluntary Contributions

Each service provider must:

1. Provide each older person with an opportunity to voluntarily contribute to the cost of the service;
2. Protect the privacy of each older person with respect to his or her contribution;
3. Establish appropriate procedures to safeguard and account for all contributions; and
4. Use all contributions to expand the services of the provider under this part and supplement (not supplant) funds received under the Older Americans Act.

The service providers that receive funds under this part **shall not means test** for any service for which contributions are accepted or **shall not deny any older person service because the older person will not or cannot contribute** to the cost of service. Contributions made by older persons are considered program income.