

**(Identify the AAA here)**

<b>AAA Information and Assistance Worksheet</b>				<b>Section 05-I&amp;A</b>
<b>Review Section:</b>	<b>Requirement Reference</b>	<b>Additional Information</b>	<b>Requirement</b>	<b>Finding</b>
IA-01	PM 7.1.2. and 7.1.3 (IG I&A pg 2)		____ I&A provides client screening and makes appropriate referrals.	
IA-02	PM 7.1.4.		____ The AAA maintains information about the purpose and date of incoming calls, and referrals to other providers.	
IA-03	IG I&A pg 4		____ I&A services are provided by individuals that have participated in all training necessary to ensure proficiency of the program, services, rules, regulations, policies and procedures.	
IA-04	ADRC Rediness Assessment item 56		____ Identify any I&A staff that are AIRS certified.	
IA-05	IG I&A pg 3		____ Applicants are notified, in writing, of any denial or termination of service and maintain the right to appeal such a decision if the consumer was formally assessed and determined to be ineligible for the service.	
IA-06	IG I&A pg 2		____ When a financial institution, prosecutor, judge, any member of the judiciary, or law enforcement requests to make a report to Adult Protection or Ombudsman the caller will be transferred directly to the requested party without first conducting intake.	
IA-07	IG I&A pg 3		____ I&A maintains documentation of notice of denial and termination in consumer file.	
IA-08	IG I&A pg 3		____ I&A conducts a follow-up within the first 60 days of the initial screening date and annually afterwards, as long as the service authorization remains active.	
IA-09	IG I&A pg 3		____ I&A uses the follow up task to determine that needed services are received, the need for continued eligibility, and the need for additional referrals.	
IA-10	(IG I&A pg 2)		____ I&A service is provided by in-person contact, telephone conversation, email correspondence, or postal service.	
IA-11	IG I&A pg 2		____ When the emergency response is requested the caller is given an immediate referral for community emergency response (911).	
IA-12	IG I&A (pg 3)		____ Applicants are notified in writing the reason of denial or termination of service, and have the right to appeal if the consumer was formally assessed and determined to be ineligible for the service.	

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IA-13	IG I&A pg. 4		_____ I&A staff participates in all training necessary to ensure proficiency of the program, services, rules, regulations, policies and procedures.	
IA-14	IG I&A (pg 3)		_____ Documentation of notices are be kept in consumer file.	
IA-15	IG I&A (pg 3)		_____ Consumer records are maintained for three years following service termination.	
IA-16	IG I&A		_____ Managing waitlist is standardized.	