Chapter 9

Administration of the Respite for Elders Living in Everyday Families (RELIEF) Program

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Chapter Contents: This chapter provides program policies, standards and procedures for use by the Department and all contractors and subcontractors in administering the Respite for Elders Living in Everyday Families (RELIEF) program.

A. **Purpose:** The RELIEF program provides volunteer-based respite services designed to support family caregivers of frail homebound elders age 60 and over and those with Alzheimer's disease and related dementia. Additionally, the RELIEF program provides the following:

1. Opportunities for multi-generational corps of volunteers to contribute to their communities; and

2. Stipends to those who qualify, and reimbursements to volunteers to enable them to provide services at no cost to themselves.

LEGAL BASIS AND SPECIFIC LEGAL AUTHORITY:

Legal Basis: The authority for this program is provided by:

Specific Authority:

1. Section 430.071, Florida Statutes.

SERVICES PROVIDED UNDER THE RELIEF PROGRAM:

Respite is provided primarily during evenings and weekends, times that are not usually covered by other respite programs. Volunteers may spend up to four hours per visit providing companionship to a frail homebound elder, giving the caregiver an opportunity to take a much-needed break. Activities may include conversation, reading together, playing games, going for walks or preparing a light snack.

GENERAL CLIENT ELIGIBILITY CRITERIA:

Listed below are the eligibility criteria for the RELIEF program:

1. Individuals are 60 years of age or older.

2. The family unit is unable to pay for evening/weekend respite without jeopardizing other basic needs.

3. The homebound elderly individual would need to be moved to an assisted living or nursing facility without the family unit's assistance.

4. The client may not be enrolled in a Medicaid capitated long-term care program.

Target Groups

In addition to serving frail homebound elders at risk of institutionalization, the program serves the special needs of clients who have Alzheimer's disease or related dementia and clients and caregivers.

Client Priority

In addition to priority list criteria, assignments should be made that accomplish the following:

1. Deter or delay institutionalization of homebound elders with mental, emotional and/or physical impairments who need outside assistance to achieve and maintain their fullest potential to manage their loved;
2. Provide respite to households in which the burden of care for aged persons rests with household members who find it difficult to provide the level of support needed to prevent institutional placement; and
3. Assist elders who need a higher level of service to remain in their homes.

Client Assessment

The demographic portion of the 701A client assessment must be completed for each client for enrollment in the RELIEF program.

RELIEF clients will be enrolled in CIRTS based on demographics including the following information to be collected: social security number, owner ID, county of service, first name, last name, and date of birth, home address including: street address, zip code, city and state.

RELIEF Clients may be eligible for dual enrollment in other programs except for the Medicaid Long-Term Care Program. Clients enrolled in other program will also need to be enrolled in CIRTS under the RELIEF Program.

RELIEF Clients enrolled in CIRTS will be required to be terminated within the system if services have been terminated using the following CIRTS Codes:

1. Termination by Client (TRBC)
2. Terminated Client Died (TRCD)
3. Terminated Active – Moved to Managed Long-Term Care (TRML)
4. Terminated Client Placed NH (TRNH)

General Volunteer Qualifications

Volunteer qualifications shall be included in all position descriptions and recruitment advertisements. Qualified volunteers shall:

1. Be age 18 or older;

2. Pass a level II criminal background screening (initiated through the provided clearinghouse website and updated every five years) in accordance with Ch. 435; and

3. Committed to serve at least 4 hours per week.

Volunteer Recruitment

A volunteer recruitment plan shall be developed and updated annually, to ensure the recruitment of enough volunteers to meet the contracted service hours. The recruitment plan shall include volunteers that are representative of the communities they serve ensuring a diversity of volunteers.

Volunteer Enrollment

Volunteers are required to complete an application to serve in the program. Provider Agencies must screen and interview volunteers as well as conduct required background screening in accordance with *Appendix E of the Handbook*. Volunteers may not begin training or any other related service until receiving criminal history clearance.

Volunteer Training

A volunteer training plan shall be developed and updated annually to include training topics and dates for required orientation and in-service training. Orientation, in-service and service-learning training components shall address a broad range of topics regarding elder and respite-care issues including: (1) Physiological, psychological and social aspects of aging; (2) Health and personal-care assistance; (3) Communication techniques; (4) Problem behaviors and problem solving; and (5) Review of applicable RELIEF policies and procedures.

Volunteer Orientation

Volunteers are required to complete orientation before providing any direct service to clients. Orientation training must provide information that improves the volunteer's knowledge and ability to serve clients including, but not limited to:

1. A general explanation of the program;
2. General agency information;
3. Agency policy information on personnel, confidentiality, record keeping, performance reviews and other administrative requirements;
4. Information to acquaint with the agency staff and with other volunteers;
5. A description of the objectives of their respite service;
6. Information concerning the roles and activities involved in being a RELIEF volunteer;
7. Information about available community service to enable the volunteer to be better advocates for their clients;
8. General information regarding the economic, social and psychological aspects of aging; and
9. Prevention of elder abuse, neglect, and exploitation (ANE)

Volunteer In-Service Training

Provider agencies shall ensure that volunteers participate in at least 20 hours of pre-service training before providing any services to clients. After completing pre-service training, volunteers are required to complete a minimum of three hours of training each quarter. An in-service training on reporting suspected ANE shall be provided to volunteers annually. Volunteer training may be conducted individually or in group settings, and in job-shadowing settings, to assist volunteers in learning practical aspects of working with clients. Volunteers shall be provided information regarding training goals including scheduled meeting dates.

The purpose of in-service training is to:

1. Give more detailed instruction on working with elders who have special or exceptional issues;
2. Share information and guidance on matters pertinent to aging;
3. Provide information about community resources which can be accessed by clients; and
4. Provide feedback to volunteers about service, and for volunteers to share experiences and best practices serving clients.

Volunteer Training Reimbursement

All volunteer orientation and in-service training hours are reimbursable. Volunteer training hours must be recorded on the standard RELIEF time and travel log and approved by the designated volunteer supervisor. Volunteer orientation and in-service training logs, training agendas and sign-in sheets are also required as part of volunteer training documentation. A volunteer’s full signature is required for all training documentation.

Volunteer Stipends

Provider agencies may provide volunteers with a stipend not to exceed the current federal minimum wage. A volunteer stipend is provided for a period of service (per hour) and is not an hourly wage. Volunteer service hours must be recorded on the standard RELIEF time and travel log and approved by the designated volunteer supervisor.

Volunteer Assignments

Volunteers shall be assigned to clients in a way that benefits both the volunteer and client. Volunteers may be placed with multiple clients, based upon the demand for services and the ability of the volunteer to provide services. Two volunteers may not serve the same client unless one is a short-term substitute for the other. All assignments must include the following:

1. Involve person-to-person relationships with the clients served;

2. Be meaningful and rewarding the volunteer;

3. Reflect individual volunteer preferences as well as provide meaningful services to the family unit and elder

All volunteer assignments must be recorded using the RELIEF assignment sheet as documentation. Assignment sheets shall include information related to the client being served, the days and times services will be provided, allowable and unallowable activities and information regarding how to contact the designated volunteer supervisor. Assignment sheets must be signed by the client, the volunteer and volunteer supervisor. Copies of the assignment sheet shall be provided to volunteers and clients, and maintained in the volunteer file.

Volunteer Supervision

Volunteers shall receive proper supervision to maintain a consistently high level of performance and to ensure that the volunteers operate within the guidelines established by the provider agency. Volunteer position descriptions will include the name of the staff member (s) authorized to supervise volunteer activities. Supervision activities shall include, but are not limited to the following:

1. Visiting on-site periodically to monitor the volunteer's performance within the assignment and the progress of the client to determine the appropriateness of the assignment;
2. Helping volunteers arrange for community services that benefit the clients;
3. Maintaining a one-on-one relationship between the volunteers and the clients they serve; and
4. Conducting orientation and regular in-service training to explain policies to enhance skills related to assignments and provide information on community services

Volunteer Performance Appraisals

Volunteers shall receive performance evaluations at least once during each calendar year. Provider agencies must inform volunteers of the timing, content, and process of performance reviews. Performance reviews will acknowledge volunteer work done well, as well as identify any areas that may need improvement. Volunteer performance reviews shall be documented in the individual volunteer file. At a minimum performance reviews shall measure:

1. Performance/task assignments;
2. Reliability and promptness;
3. Relationships with staff, clients, caregivers and other volunteers;
4. Willingness to follow policies and procedures; and
5. Attendance at required meetings/training.

Volunteer Recognition

Provider agencies shall develop an annual volunteer recognition plan and host at least one annual volunteer recognition event to spotlight the contributions of volunteers and recognize them for their services and accomplishments. Volunteer recognition may also be conducted on a regular basis and in conjunction with monthly-in service training and other special events. Provider agencies should also seek to spotlight volunteer efforts in local newspapers, newsletters and other media available. Provider agencies shall also participate in the Department of Elder Affairs volunteer recognition efforts during Volunteer Appreciation Month held each April.

Volunteer Records

Provider agencies shall ensure the collection of current and accurate data for each volunteer. Volunteer records must be maintained in locked files. A RELIEF Volunteer File Checklist shall be used as a reference to ensure each file contains the following signed and completed forms:

1. Position Description;
2. Volunteer Application;
3. Reference Check Documentation;
4. Level II Criminal History Documentation;
5. Confidentiality Statement;
6. Statement of Understanding (allowable and prohibited activities);
7. Respite Assignment Plans;
8. Time and Travel Logs;
9. Training logs;
10. Grievance procedure; and
11. Other Volunteer related documentation

Program Reporting Requirements

Service Unit

The service unit for the RELIEF program shall be measured as one hour of respite care and/or one hour of pre-service or in-service training. All service units must be documented on the standard RELEIF Program time and travel log and approved by the designated volunteer supervisor.

Programmatic Reports

Provider agencies are responsible for responding in a timely fashion to routine and special requests for information and reports required by the Department. Reports and information that may be requested include but is not limited to: monthly service records, volunteer time sheets, training reports, and program highlights that show impact of program services.

Monthly Service Records

The provider agency shall complete and submit a RELIEF Monthly Service Record and CIRTS report in accordance with the established deadlines. Monthly Service Records are completed based on RELIEF Program Time and Travel Logs that have been signed and dated by both the volunteer and volunteer supervisor.

Client Information and Registration Tracking System (CIRTS) Reports

Provider agencies shall input RELIEF (CIRTS Code: RELF) specific service (CIRTS Code: RESP) data into CIRTS to ensure data accuracy. The Contractor shall use CIRTS generated reports which include the following:

1. Client Reports
2. Monitoring Reports
3. Services (Unit) Reports
4. Fiscal Reports

Only direct service hours documented on the RELIEF Program Time and Travel Logs and reported on the Monthly Service Record shall be reported in CIRTS. Training hours documented on RELIEF Program Time and Travel Logs and reported on the Monthly Service Record are not required to be reported in CIRTS.

AAAs shall provide access and CIRTS training to all provider agencies. In accordance with DOEA NOTICE # 040114-1-I0SWCBS, AAAs shall direct all direct questions, comments suggestions and issues regarding CIRTS to the established CIRTS email address:

CIRTSComments@elderaffairs.org

RESPONSIBILITIES OF STAKEHOLDERS:

A. DOEA:

1. **Purpose:** The purpose of DOEA in the RELIEF program is to budget, coordinate and develop policy at the state level necessary to carry out the RELIEF program.

2. **Responsibilities:** The responsibilities of DOEA are listed below:

   a. Develop an allocation formula for distributing RELIEF funds to Planning and Service Areas (PSAs).

   b. Allocate RELIEF funds to service providers through the Area Agencies on Aging (AAAs).

   c. Establish policies and procedures for AAA, and RELIEF provider agencies

   d. Evaluate the quality and effectiveness of services and client satisfaction with the RELIEF program, as required.

   e. Develop program reports.

   f. Provide for staff development and training.

   g. Provide and monitor program policies and procedures for the PSAs.

   h. Review and make recommendations for improvement on program reports.

   i. Provide technical assistance to the AAAs in program planning and development and ongoing operations, as needed.

   j. Process payments to the contract agencies.

   k. Provide ongoing technical assistance

B. AREA AGENCIES ON AGING (AAA):

1. **Purpose:** The purpose of the AAA in the RELIEF program is to monitor and fund Provider Agencies

2. **Responsibilities:** The AAA's responsibilities are listed below:

   a. Develop PSA level allocation formula for distribution of funds.

   b. Plan for, advertise and approve funding for provider agencies.

   c. Designate provider agencies and establish vendor agreements at the AAA level, when applicable.

   d. Provide technical assistance to provider Agencies and vendors to ensure provision of quality services.

   e. Assess provider agency fiscal management capabilities.

   f. Monitor and evaluate contracts, for programmatic and fiscal compliance.

   g. Submit payments to contractors.

   h. Review Provider agency volunteer time sheets and reconcile against the RELIEF Monthly Service Record

   i. Arrange technical assistance and training for Provider Agencies at least annually.

   j. Establish procedures for handling recipient complaints concerning such adverse actions as service termination, suspension or reduction in services.

   k. Ensure compliance with Client Information and Registration Tracking System (CIRTS) regulations.

   l. Monitor performance objective achievements in accordance with targets set by the Department.

m. Conduct client satisfaction surveys to evaluate and improve service delivery.

C. PROVIDER AGENCY:

1. **Purpose:** The purpose of the Provider Agency in the RELIEF program is to recruit, screen and manage volunteers and provide in-home respite services to clients.

2. **Responsibilities:** The Provider Agency's responsibilities are to:

   a. Ensure that coordination is established with all community-based health and social services for functionally impaired older persons funded wholly or in part by federal, state and local funds to provide a continuum of care.

   b. Provide DOEA copies of subcontracts or vendor agreements for RELIEF services, when applicable.

   c. Recruit, screen, train and supervise volunteers

   d. Conduct client assessment, match volunteers to clients and document volunteer assignments.

   e. Compile accurate Monthly Service Records, CIRTS reporting and monthly invoice.

   f. Arrange in-service training for staff, including volunteers and RELIEF service subcontractors, at least once a year. Monthly, or at least quarterly, training is recommended.

   g. Establish and follow procedures for handling recipient complaints concerning such adverse actions as service termination, suspension or reduction in services.

   h. Conduct client satisfaction surveys to evaluate and improve service delivery.

LINES OF COMMUNICATION:

Provider Agencies shall request and receive technical assistance from the AAA. When additional interpretation is needed, the AAA should forward the request to DOEA. DOEA will address all requests and provide a timely response.

GRIEVANCE PROCEDURES:

Please refer to Appendix D, “Minimum Guidelines for Recipient Grievance Procedures,” in this Handbook.