

DRAFT
REFERRAL AGREEMENT PROTOCOL

The purpose of this referral agreement protocol is to ensure elders and their families are able to access information and services in the most efficient and least cumbersome manner possible. When an elder or an elder's representative seeking information on long-term care services contacts a local community service organization (an access point) prior to contacting the Aging and Disability Resource Center, the following actions will occur:

I. *The Local Community Service Organization (access point) will:*

- A.** Provide, through the statewide web-based ReferNet information and referral database, consistent and uniform information and referral services, regardless of geographical location.
- B.** Provide, through the statewide web-based ReferNet information and referral database, information on the most appropriate and cost efficient service alternatives, including private pay and community organizations.
- C.** Refer individuals in need of long-term care services to the ADRC for screening and eligibility determination.
- D.** Ensure all employees that perform information and referral services complete required training on the statewide web-based ReferNet information and referral database and training on the ARC operational policies and procedures, including all continuing education training.
- E.** Safeguard each individual's confidentiality in compliance with state and federal law, and comply with all requirements of the federal Health Insurance Portability and Accountability Act of 1996 (HIPAA), as applicable. Except as provided for ADRC referrals, the public access point agrees not to use or disclose any information concerning an individual except upon written consent of the individual, or individual's authorized representative.
- F.** Provide the ADRC with a monthly report of contacts and other statistical data as requested by the ADRC.

II. *The Aging and Disability Resource Center will:*

- A.** Ensure appropriate handling of long-term care service referrals from the local community service organization (access point).
- B.** Provide the local community service organization (access point) with written policies and procedures and training as needed.

This protocol will apply to any community service organization that meets the "access point" definition in Chapter 58B-1.001(1), Florida Administrative Code, as follows, "a service provider or other entity that performs one or more aging resource center functions under an agreement with the aging resource center. The agreement can be in the form of a referral agreement, contract, memorandum of understanding, or similar document."