

2.4 Standard Intake Process

2.4.1 Purpose

The Standard Intake Information Form (SS-002) is an important tool used to achieve the standardization of intake information and to efficiently and effectively provide the most equitable system to customers.

2.4.2 Requirements

- A. The Area Agency on Aging (AAA)/Case Management Entity (CME) and/or their designee must complete a Standard Intake Information Form for customers requesting any in-home, case management, or adult day care/health service(s), excluding home-delivered meals.
- B. In the event that a waiting list exists for a service or program for which there is an assessment or registration requirement, AAA/CME staff and/or their designee must complete the intake and inform the customer about the existence of the waiting list.
- C. When a AAA/CME designee completes a Standard Intake Information Form, the completed form must be submitted to the AAA/CME.
- D. Each AAA/CME must maintain copies of all completed intakes for a period of five (5) years, including those intakes that do not result in assessments and those completed by a AAA/CME designee.
- E. When the Standard Intake Information Form results in an assessment or registration, AAA/CME and provider staff must follow policy as outlined in Sections 2.5 and 2.6 regarding the completion requirements for assessments or registrations.
- F. The interviewer must complete certain data fields of the Standard Intake Information Form. The required data fields are indicated by bolder type font on the form. The date the intake is considered complete is the date the required, bolded fields are completed.
- G. AAAs/CMEs, service providers, and Kansas Department on Aging (KDOA) direct contractors must develop and implement a written policy and procedure to ensure non-duplication of customer assessment and registration.
- H. The Standard Intake Information Form data must be entered into the KDOA designated management information system within ten (10) working days of the date the intake was completed.
- I. As appropriate, the information on the Standard Intake Information Form may be made available to service providers in order to facilitate service delivery.
- J. When an intake results in an assessment and subsequent service delivery, the AAA/CME must maintain the intake as a part of the customer's case file.