

173-39-02.15

**Independent living assistance service.**

(A) Independent living assistance (ILA) is a service that consists of activities that assist consumers to manage their households, handle their personal affairs, self-administer medications, and help ensure that consumers retain their community living arrangements and avoid institutionalization due to loss of shelter or other essential environmental services. There are three types of ILA: telephone support, in-person support activities and travel attendant activities.

(1) Telephone support includes:

- (a) Calling consumers according to a preset schedule to remind them to take prescribed and over-the-counter medications at specified times; and,
- (b) Calling consumers at times that no other in-home services are being provided to confirm that consumers are functioning safely in the home environment.

(2) In-person support includes one or more of the following:

- (a) Assisting consumers with banking to include making routine deposits and withdrawals;
- (b) Cashing a consumer's benefit checks;
- (c) Purchasing money orders for consumers;
- (d) Writing personal checks for consumers;
- (e) Paying bills in person or by mail on behalf of a consumer;
- (f) Balancing a consumer's checkbooks and reconciling the consumer's monthly checking account statements;
- (g) Organizing and coordinating health insurance records for consumers;
- (h) Assisting or acting as a consumer's authorized representative in order to obtain and/or maintain public benefits;
- (i) Applying for programs such as homestead exemption, home energy assistance program (heap) and subsidized housing on behalf of a consumer;

- (j) Monitoring and replenishing a consumer's stock of needed groceries; and,
  - (k) Assisting a consumer with business and personal correspondence including writing letters, purchasing postage stamps and delivering correspondence to the post office.
- (3) Travel attendant activities include:
- (a) Accompanying consumers to medical and other appointments; and,
  - (b) Accompanying consumers on errands and to other activities outside the home.
- (B) A unit of service is fifteen minutes of direct consumer service or one completed phone call.
- (C) Eligible providers of ILA service are long-term care agency providers.
- (D) The provider must maintain a consumer record documenting each episode of service delivery, including the date of service, service tasks performed, name of the staff person providing services, the beginning and ending times of services provided, and the provider staff's signature or electronic signature. Providers who do not utilize an electronic verification system to document services and keep records must also obtain the consumer's signature for each episode of in-person and travel attendant service.
- (E) Certified ILA providers must be able to document that they:
- (1) Have the capacity to deliver services five days per week; and,
  - (2) Have a service back-up plan to ensure services are delivered during staff absence.
- (F) Providers must demonstrate evidence of compliance with the following personnel requirements:
- (1) ILA staff must meet all of the following minimum requirements prior to working with consumers:
    - (a) Have a high school diploma, have successfully completed a GED, or have

a minimum of one year of relevant, supervised work experience with a public health, human services or other community service agency;

(b) Have the ability to understand written activity plans, execute instructions, document services delivered, and, for staff providing ILA in-person services, the ability to perform basic mathematical operations;

(c) Have the ability to communicate effectively with consumers;

(d) Have the ability to access emergency service systems; and,

(e) Have the ability to access transportation services required as appropriate.

(2) Eligible supervisors of ILA services must have at least one of the following:

(a) A current and valid license to practice in the state of Ohio as an RN, LPN, LISW, or LSW;

(b) A bachelor's degree or an associate degree in: home economics/nutrition or dietetics, counseling, gerontology, social work, nursing, public health, health education, other related field; or,

(c) A minimum of three years of employment experience in the provision of social services.

(3) The provider must document a minimum of eight hours of continuing education for each ILA staff providing in-person services every twelve months.

(G) The provider must demonstrate evidence of compliance with the following supervisory requirements:

(1) Prior to service initiation of ILA in-person and/or ILA travel attendant services, the supervisor must complete and document a home visit to define the expected ILA activities. The supervisor must develop and document a specific activities plan consistent with the case manager's authorized plan.

(2) Prior to service initiation of ILA telephone support services, the supervisor must conduct a conference call with the consumer or a home visit with the consumer to define the expected ILA telephone support activities. The supervisor must develop and document a specific activities plan consistent with the case manager's authorized plan.

- (3) The supervisor must evaluate the ILA staff compliance with the plan, consumer satisfaction and job performance during a home visit with the consumer receiving in-person and travel attendant ILA services at least every ninety days. The ILA staff need not be present during the visit. The supervisor must evaluate the ILA telephone support staff compliance with the plan, consumer satisfaction and job performance during a home visit or a telephone conference with the consumer receiving ILA telephone support services.

(H) The provider must demonstrate evidence of compliance with the following:

- (1) All employees who have contact with consumers must complete orientation and training prior to working with consumers. The orientation and training must include, but need not be limited to, the following:
  - (a) Expectations of employees;
  - (b) The employee code of conduct;
  - (c) An overview of personnel policies;
  - (d) Incident reporting procedures;
  - (e) Agency organization and lines of communication; and,
  - (f) Emergency procedures.
- (2) Comply with and maintain written policies and procedures as applicable supporting the operation of the business and provision of service that include, at a minimum:
  - (a) Reporting and documenting consumer incidents;
  - (b) Obtaining consumer's written permission to share information and/or release information to anyone;
  - (c) Consumer record contents, handling, storage and retention; and,
  - (d) Personnel requirements including:

- (i) Job descriptions for each position;
- (ii) Documentation of each employee's qualifications for the service(s) to be provided;
- (iii) Performance appraisals for all workers;
- (iv) Documentation of compliance with required staff orientation training; and,
- (v) The employee code of conduct as described in rule 173-39-02 of the Administrative Code.

R.C. 119.032 review dates: 11/18/2010 and 11/16/2015

**CERTIFIED ELECTRONICALLY**

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Certification

11/18/2010

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Date

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