SSA Intranet
ORANGE COUNTY SOCIAL SERVICES AGENCY
ADULT SERVICES
POLICY AND PROCEDURE MANUAL

Program:	**In-Home Supportive Services**	**Number:**	**SH 40.7.10**
Subject:	**Public Authority Referral**	**Date:**	**11/01/07**
Approved:	Signature On File	**Replaces:**	**New Procedure**
Reformatted:	**MM-DD-YY**		

———————————————————

I. PURPOSE
The Purpose of the procedure is to set forth guidelines for In-Home Supportive Services (IHSS) Social Workers (SW) to make a referral to the Orange County IHSS Public Authority (PA).

———————————————————

II. POLICY
When the IHSS SW approves an IHSS case and the client does not have a provider available, the IHSS SW makes a referral to the PA using a referral form that contains information about the client's needs. PA staff assist the client in finding an appropriate provider. One of the services they provide is to produce a list of potential providers who can meet the clients' needs. Clients and providers should also be referred to the PA for training as needed.

———————————————————

III. BACKGROUND
The County of Orange Board of Supervisors created the Orange County IHSS PA with the establishment of an Ordinance on February 5, 2002. Some of the PA's general functions are to establish a Registry of IHSS Providers for IHSS clients, conduct recruitment and screening of providers, and facilitate training for both IHSS clients and providers. The IHSS SWs make referrals to the Public Authority on behalf of their clients who are in need of a provider.

———————————————————

IV. PROCEDURE
A.   Making a Referral

Whenever the client does not have a provider available, the IHSS SW makes a referral to the PA. On new cases, the referral should be made after the case is approved. The methods of referring are listed below in order of preference:

1.   The IHSS SW completes the Consumer Application (**Attachment A**) and e-mails the completed form to the PA. Special instructions for the form are below:

a.   Note in the "Comments" section if the IHSS case has been inactive and the IHSS SW cannot obtain information on the previous provider's name and termination date. For example: "Case closed on 4/2/04 and previous provider information is not available."

b.   If the IHSS case is a new case, type in "NONE" for previous provider.

c.   If client has a current provider, type in the name of the provider and "current" either in the "Previous Provider" or in the "Comments" section.

2.   The IHSS SW may send an e-mail that includes the client's name, phone number, and case number to the PA Registry Training Specialist (RTS).

3.   The IHSS SW may call and leave a message with the PA RTS. The message should include the client's name, phone number, and case number.

B.   Referral Processing

1.   After receiving the Consumer Application from the IHSS SW, the PA RTS verifies eligibility on the Case Management Information and Payrolling System (CMIPS) and completes their intake over the phone with the IHSS client.

2.   The IHSS client's profile is entered in the PA Care Tracker database and a referral list of potential providers is generated based on the IHSS client's needs. This list is mailed to the IHSS client. The IHSS client then calls the potential providers on the list to interview (by phone and/or schedule face-to-face interview in the IHSS client's home).

3.   Once IHSS clients choose a provider, they notify the PA of the selection. The PA RTS sends the assigned IHSS SW a Match Notice (**Attachment B**). The PA RTS will send out the initial Provider Packet with timesheets for these PA matches only. When the completed Provider Packet is mailed back by the provider, the PA RTS reviews the documents for accuracy and sends the packet to the IHSS Senior Accounting Assistant (SAA) for processing.

C.   Completed Referral

1.   The IHSS SAA reviews the documents for completion and signature.

a.   If any documents are missing the SAA advises the PA RTS and the packet is held by the IHSS SAA until the documents are sent in by the PA RTS.

2.   The completed packet is accepted by the IHSS SAA and entered into CMIPS.

V. REFERENCES
Welfare and Institution Codes: 12301.6; 12301.7; and 12306.
California Department of Social Services (CDSS) Manual of Policies and Procedures (MPP) 30-767.2

VI. ATTACHMENTS
A.   OC IHSS PA Consumer Application
B.   Match Notice