

Inclusion Policy Review Team -Summary of Meeting from April 2, 2007

Inclusion Policy Review Team includes “everyone whose name begins with Mc and O” in honor of St. Patty’s Day: Barb Mc, Don Mc, Jane Mc, Sylvia (honorary Mc or O), Elizabeth (maiden name Mc), Raamesie/Linda (honorary Mc or O), Phil Oleksy. Only Sylvia and Phil were absent.

Lucinda reviewed the reason for the Inclusion Task Group and its charge:

1. Review and recommend changes to the IN211 Inclusion Policy
 - a. Review issue of for-profits in light of health care and other new privatization efforts
 - b. Review complaint process or suspension/removal process when organization does not do what it says.
 - c. Develop review process for new, statewide, and/or “client/center recommended for suspension/removal” organizations (including timeline, notification, rationale and appeal, and “local option to include”
2. Develop “minimum” recommended organizations for inclusion in ALL databases
3. Use Homesavers as the “first test” for Review process and recommend for Suspension, Removal or “local option to include”

Lucinda reviewed the background of the IN211 Database Inclusion Policy. Certain components, such as purpose, definition of human services and appeal policies, were included in order to address specific questions raised by the IURC and OUCC back in 2001-2002. While AIRS Standards require periodic review of the inclusion policy, IN211 has not formally reviewed the Inclusion Policy for the system since its adoption. Growth in use of for-profits for government-funded services, greater integration of area agencies on aging, and the need to standardize within the 2-1-1 system were cited as reasons for review. Furthermore, the compilation of multiple databases into a single repository creates issues when one Center removes a referral organization from its database but other Centers continue to include it.

Discussion about Specific Types of Programs and/or Programs

- Consensus that IN211 should maintain discretion. Even when an organization is “legal,” it may not serve the population or our mission for inclusion: examples cited were KKK and NAMBLA, the North American Man-Boy Love Association.
- Consensus that IN211 will look to primary database partners such as area agencies on aging for judgment about home health related organizations. There are times that the State of Indiana will provide licenses for companies to which local AAAs do not provide referrals.
- Consensus that need to balance needs of statewide database with local Center.
- Consensus to make the distinction about inclusion of web-links of those that are links from the IN211 website and those links that are included in the profile in the database.
- Consensus that For-Profit Dental services (programs, not individuals) that serve Medicaid patients should be included.
- Consensus to be cautious with for-profit consulting services offering seniors help with choosing health care or pharmacy programs.
- Consensus NOT to include Homesavers USA in IN211 Database with recommendation to all IN211 Centers to exclude it.

Recommended Process for Referral Profile Review Team

- Referral Profile Review Team shall consist of at least 3 and not more than 7 individuals. The Team shall have a standing committee meeting time each month, which will meet via conference call and/or online meeting. The Team shall consist of at least one representative from the following: Connect2Help (as the after-hours/disaster backup provider), an IN211 Center, an AAA partner (could be an AAA/211).
- Inclusion Process – When an IN211 Center, IN211 Staff or a primary IN211 Database Partner receives a request from or learns about an organization for inclusion that serves multiple counties or multiple Centers, the draft Profile or information is provided to the Review Team. The Review Team will process requests within 30 days. If questionable, the Review Team will send out Draft Profile and/or questions to the entire DB List with a deadline for feedback.
- Exclusion Process – When an IN211 Center, IN211 Staff or a primary IN211 Database Partner seeks to suspend or exclude an organization for inclusion that serves multiple counties or multiple Centers, the draft Profile or information is provided to the Review Team with the rationale for exclusion or suspension. If the suspension involves incidents of fraud, criminal conduct or other concerns that could jeopardize the safety of a referred client, the organization is immediately marked for “temporary suspension” for referrals and a notice is sent to ALL IN211 Centers and primary database partners.
- Recommendations for Inclusion, Exclusion, Suspension and/or Removal from the IN211 Database require no less than 2/3 the members of the Review Team. Centers or Database Partners may appeal a decision, asking for discussion and vote by full Database Committee. If unresolved, the DB Committee may refer issue to IN211 Board of Directors as a last resort.

Next Steps

1. The Referral Profile Review Team will review the Top 25 Needs and develop a set of recommendations around “minimal requirements” for inclusion of referrals. For example, since housing is in the top 25, all IN211 Centers or Database partners shall include at minimum the organizations that provide the following programs: Section 8, public housing, township trustee, (need to complete list) etc.
2. Full DB Committee will review revised Inclusion/Exclusion Policy for recommendation to Board of Directors on May 15.
3. Nord will disseminate the Style Guide that was created last fall.