

Instructions For Reporting Missed Visits And Significant Changes

(We recommend printing and reading these instructions before proceeding.)

It is a requirement for providers certified to provide PASSPORT and Assisted Living Services to report missed services, incidents and significant changes to the consumer's care manager within one business day. Since this electronic transmission will include Protected Health Information (PHI), it is necessary to send the information through a secure connection. The Area Agency on Aging District 7, Inc. (AAA7) utilizes Zixsecure encryption software that **MUST BE** used when reporting missed visits, incidents and/or significant changes.

Goals for implementing the email process for reporting missed visits and significant changes:

1. To provide immediate notification of services to the case manager's via secure email.
2. To give the service provider a verification that the AAA7 was notified of missed service.

IMPORTANT INFORMATION

Providers will be required to make an immediate phone call when there are time-sensitive issues.

- A. Changes that require authorization and there is **less than** a 24 hour notice:
 1. Consumer has doctor visit today but needs services rescheduled for tomorrow.
 2. Consumer needs transportation approval for tomorrow.
- B. There are changes involving health/safety issues.

ODA certified providers are subject to reporting **all** incident types – critical and reportable – defined in OAC rules 5160-44-05 and 173-39-02 ODA provider certification **as well as** any other events not consistent with routine care or service that could result in injury or property damage.

Items to be reported to case managers within one business day include:

1. **APS:** Section [5101.63](#) of the Revised Code, as applicable, requires the provider to report any reasonable cause to believe an individual suffered abuse, neglect, or exploitation to the local adult protective services program. The provider shall also notify ODA or its designee within one business day after becoming aware of the reasonable cause.
2. **Incidents:** The provider shall notify ODA or its designee of an incident no later than one business day after the provider is aware of the incident.

"Incident" means any event or situation that is not consistent with providing routine care or a service to an individual that may result in injury to a person or damage to property or equipment. Examples of an incident are abuse, neglect, abandonment, accidents, and exploitation. An incident may involve an individual, a caregiver (to the extent the event or situation impacts the individual), a provider, a facility, or a staff member of a provider, facility, ODA, ODA's designee, or another administrative authority. An incident can also include a fall, injury/accident or an accusation of theft. For a complete list of incidents to report and responsibilities for providers, please refer to Ohio Administrative Code 5160-44-05 at <https://codes.ohio.gov/ohio-administrative-code/rule-5160-44-05>.

3. **Significant changes:** The provider shall notify ODA or its designee no later than one business day after the provider is aware of any significant change that may affect the individual's service needs, including one or more of the following:

- (i) The provider does not provide an authorized service at the time, or for the period of time, authorized by ODA's designee.
- (ii) The individual moves to another address.
- (iii) The individual's repeated refusal of services.
- (iv) Any incident that is subject to the incident-reporting requirements in rule 5160-44-05 of the Administrative Code.
- (v) Any other significant change in the individual's physical, mental, or emotional status or the individual's environment that affects the individual's service needs or safety.

Sending A Secure Email Notification

1. Go to <https://www.aaa7.org>,
2. Far right click Provider Resources tab to Secure E-Mail Link.
3. Next you will want to click on "**Click Here to Send a Secure Email**" link. If you do not have an account to the secure email portal, please see step 4 for setup. If you already have a secure email through Zixsecure, you can skip to step 5.
4. If you do not already have an account to the secure email portal, you'll have to click on the "Register" button in the middle of the page.
 - a. You will need to put an email address that you use, create a password, and then re-enter the password. Please use a business email and not an individuals' personal email.
 - b. You'll then receive an email from us. You'll need to follow the instructions in the email to complete the setup.
 - c. Once the account creation is complete you'll be able to send an encrypted email.
5. Start a NEW MESSAGE.
 - a. To: CM_notification@aaa7.org. Please not the "_" in CM_notification@aaa7.org
 - b. Subject: either **Provider Missed Visit Reporting** or **Provider Notification**. Please do not use the consumer's name or other identifying information in the subject line.
 - c. Copy and paste the template provided by AAA7 for either the Missed Services or Significant Changes.
 - d. Complete the template (use clear language and/or standard abbreviations) and SEND the message.
 - e. Only send one consumer per email.

Please Note: The CM_notification@aaa7.org is a non-reply email.

AAA7 TEMPLATES

SUBJECT: Provider Missed Visit Reporting

Provider Agency:

Consumer Full Name:

Consumer ID #:

Service Missed:

Date Missed:

Units Missed:

Reason/Notes:

Replacement Aide Offered?:

Provider Agency staff who Reported:

AAA Case Manager:

----- OR -----

SUBJECT: Provider Notification

Provider Agency:

Consumer Full Name:

Consumer ID #:

Date of Incident:

Details of Incident:

Provider Agency staff who Reported:

AAA Case Manager:

If you have questions regarding the process, please contact either Andrea Pruitt, apruitt@aaa7.org, or Janet Saunders, jsaunders@aaa7.org, at 1-800-582-7277.