

Guidance for Consumer Contact and Return to In-Home Visits

The Pennsylvania Department of Aging recognizes that the COVID-19 pandemic may have a long-term impact on our consumers and on standard operating policies and procedures for many of our aging services programs. In accordance with Governor Wolf's strategic phased reopening plan for Pennsylvania, the following provides guidance to Area Agencies on Aging (AAAs) during the plan's Yellow and Green Phases for safely returning to in-home, face-to-face visits for purposes of conducting assessments and other essential activities. This guidance does not apply to Protective Services.

The safety of older adults and the aging network is the primary concern; therefore, it will be important to continue to follow Centers for Disease Control and Prevention ([CDC](#)) and Pennsylvania Department of Health ([DOH](#)) guidelines for mitigating the spread of the COVID-19 virus. The Department of Aging and the AAA network recognize the perceived fears and uncertainty that consumers and staff are experiencing as operations return to a "new normal" and will remain aware of this level of discomfort in making decisions regarding consumer contact and conducting in-home visits.

Yellow Phase:

- Continue with telephonic assessments unless there are extenuating circumstances, which may include cause or reason to believe an individual may be at risk.
- When the AAA believes it is necessary to conduct an in-home visit and the supervisor has approved, the Care Manager will:
 - Contact the consumer to explain the need for and schedule the in-home visit
 - Complete a *COVID-19 Consumer Comfort Level Screening* of the consumer
 - Maintain a record of the screening as a file attachment to the consumer's record in SAMS
 - Complete a *COVID-19 Consumer Health Screening* of the consumer and others in the home
 - Maintain a record of the screening as a file attachment to the consumer's record in SAMS
 - Schedule the visit if the consumer is comfortable with the in-home visit
 - Discuss any concerns with conducting the in-home visit with the supervisor
 - Document the reason for the in-home visit and outcomes of the *Comfort Level Screening* and *Health Screening* in a journal entry in SAMS
- The supervisor shall document their approval for the in-home visit in a journal entry in SAMS
- If the consumer is not comfortable with the in-home visit, the Care Manager will:
 - Attempt to ask the consumer to explain what makes the consumer uncomfortable about the in-home visit and what could be done to make the consumer feel more comfortable
 - Discuss the situation with their supervisor

- Explore alternatives to conducting the in-home visit, such as, conducting the meeting on the porch through the screen door
- Document the process and reasons for not conducting the in-home visit in SAMS journal entries
- On the day of the in-home visit, the Care Manager will:
 - Call the consumer to reconfirm the in-home visit
 - Ask the consumer if anything has changed since the last time you spoke
 - Confirm the consumer is still comfortable with the visit utilizing the *COVID-19 Consumer Comfort Level Screening* form attached to the consumer's record in SAMS
 - Confirm no change in health screening utilizing the *COVID-19 Consumer Health Screening* form attached to the consumer's record in SAMS.
 - Ask the consumer to conduct a self-evaluation as to their own health condition and comfort level
 - Discuss any concerns with conducting the in-home visit with their supervisor
 - Reschedule the in-home visit if needed. Document the reasons such as a positive screening for COVID-19 or consumer has COVID-19 symptoms for rescheduling an in-home visit in a journal entry in SAMS
- When conducting the in-home visit:
 - Follow applicable [CDC](#) and PA Department of Health [guidelines](#)
 - Assure the Care Managers are equipped with appropriate safety and hygiene supplies (masks, hand sanitizer, etc.)
 - Maintain social distancing within the home
 - Consider Best Practices, such as:
 - Ask the consumer during the call made on the day of the scheduled visit if they and others in the home have masks
 - Bring extra masks to the home in the event the consumer and others in the home do not have masks
 - Utilize the *Consumer Care Plan Report* in SAMS to eliminate the need for multiple signatures on various documents
 - Bring extra pens that can be left at the consumer's home when a signature is needed
- Telephonic assessments may be conducted, with supervisory approval, when the consumer is uncomfortable with the in-home visit or the consumer or others in the home report symptoms of illness as per the health screening.
 - The Care Manager will document the reason for not conducting the in-home visit, including outcomes of the Comfort Level Screening and Health Screening, in a journal entry in SAMS
 - The supervisor will document their approval for a telephonic assessment in a journal entry in SAMS

Green Phase:

- AAAs have within thirty (30) business days of a county moving into the Green Phase to start conducting in-home visits when the consumer is comfortable with the visit, and the consumer and others in the home report no signs or symptoms of illness per the health screening.
- When a Care Manager contacts the consumer to explain the need for and schedule the in-home visit, the Care Manager will:
 - Complete a *COVID-19 Consumer Comfort Level Screening* of the consumer
 - Maintain a record of the screening as a file attachment to the consumer's record in SAMS
 - Complete a *COVID-19 Consumer Health Screening* of the consumer and others in the home
 - Maintain a record of the screening as a file attachment to the consumer's record in SAMS
 - Discuss any concerns with conducting the in-home visit with the supervisor
 - Document outcomes of the *Comfort Level Screening* and *Health Screening* in a journal entry in SAMS
- If the consumer is not comfortable with the in-home visit, the Care Manager will:
 - Attempt to ask the consumer to explain what makes the consumer uncomfortable about the in-home visit and what could be done to make the consumer feel more comfortable
 - Discuss the situation with their supervisor
 - Explore alternatives to conduct the in-home visit, such as conducting the meeting on the porch through the screen door
 - Document the process and reasons for not conducting the in-home visit in SAMS journal entries
- On the day of the in-home visit, the Care Manager will:
 - Call the consumer to reconfirm the in-home visit
 - Ask the consumer if anything has changed since the last time you spoke
 - Confirm the consumer is still comfortable with the visit utilizing the *COVID-19 Consumer Comfort Level Screening* form attached to the consumer's record in SAMS
 - Confirm no change in health screening utilizing the *COVID-19 Consumer Health Screening* form attached to the consumer's record in SAMS.
 - Ask the consumer to conduct a self-evaluation as to their own health condition and comfort level
 - Discuss any concerns with conducting the in-home visit with their supervisor
 - Reschedule the in-home visit if needed. Document the reasons for the rescheduling in a journal entry in SAMS

- Telephonic assessments may be conducted, with supervisory approval, when the consumer is uncomfortable with the in-home visit or the consumer or others in the home report symptoms of illness as per the health screening.
 - The Care Manager will document the reason for not conducting the in-home visit, including outcomes of the Comfort Level Screening and Health Screening, in a journal entry in SAMS
 - The supervisor will document their approval for a telephonic assessment in a journal entry in SAMS

- When conducting in-home visits:
 - Follow applicable [CDC](#) and PA Department of Health [guidelines](#)
 - Assure care managers are equipped with appropriate safety and hygiene supplies (masks, hand sanitizer, etc.)
 - Maintain social distancing within the home
 - Consider Best Practices, such as:
 - Ask the consumer during the call made on the day of the scheduled visit if they and others in the home have masks
 - Bring extra masks to the home in the event the consumer and others in the home do not have masks
 - Utilize the *Consumer Care Plan Report* in SAMS to eliminate need for multiple signatures on various documents
 - Bring extra pens that can be left at the consumer's home when a signature is needed