

**POLICY: INITIATION OF SERVICES
(COMMUNITY CASE MANAGEMENT – INTELLECTUAL DISABILITIES)**

I. POLICY:

OHI shall take into consideration, the needs, rights, and interests of persons who desire case management services and supports, and to treat each person fairly in the service initiation process. OHI shall comply with the ADA, Section 504 of the Rehabilitation Act, the Civil Rights Act, and the Maine Human Rights Act.

II. GENERAL PROCEDURES

A. Description of Persons Supported:

1. Case management services shall be provided for adults age 18 and over, who are diagnosed with intellectual disabilities,
2. Persons may be accepted who are of either sex, any sexual orientation, gender identity, race, marital status, creed, religion, or veteran's status.
3. OHI shall provide reasonable accommodations for persons with other disabilities. Services shall be provided in accordance with the requirements of Section 504 of the Rehabilitation Act and will accommodate people with physical disabilities, as needed.
4. OHI recognizes that individuals with mental illness and intellectual disabilities can experience co-occurring disorders, such as mental illness and substance abuse issues or intellectual disabilities and mental illness, or a combination of all three. OHI welcomes such individuals into its services and seek to provide supports in a comprehensive manner, taking all challenges into account during service planning and delivery.

III. APPLICATION PROCEDURES

- A. The Community Case Manager or designee shall record all referrals. All referring persons shall receive an OHI Handbook, service initiation policies and procedures and a brochure concerning laws, regulations, criteria, and agency procedures concerning eligibility for and initiation of services.
- B. The information received by OHI from the referring person shall include all relevant materials or evaluations used by DHHS in determining the person's eligibility for intellectual disability services.
- C. Screening Process
 1. The Community Case Manager or his/her designee shall review the referral and accompanying materials to verify that the applicant meets minimum criteria, as well as to reasonably assure that OHI can meet the needs of the applicant.
 2. The Community Case Manager shall conduct an interview with the individual and guardian or other service providers, and assess the person's needs and OHI's ability to meet the person's identified needs.
 3. An applicant who meets minimum criteria, shall be assigned a Community Case Manager within three business days of determination of eligibility.
 4. The applicant and/or the applicant's legally appointed representative shall be given a packet of information, upon acceptance of receiving services and supports, which shall contain a summary of the laws, regulations and procedures concerning

initiation and completion of services to a person.

- F. If it is determined that a referral is eligible and appropriate for services, the date, time, and location of the service initiation meeting shall be documented, including the name of the OHI employee conducting the service initiation meeting. This information shall be documented and included in the referral file.
 - 1. OHI staff shall educate the applicant about OHI's participation in HealthInfoNet and the Opt In and Opt Out Forms.
 - 2. Staff shall educate the applicant about OHI's hours of operation and access to services.

- D. Statistical data shall be maintained and assessed on the number of applications received, who from, where from, age, gender, diagnosis, and the person's status. This information shall be compiled annually by the Community Case Manager or designee and presented to the President and Chief Executive Officer for strategic planning purposes.

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