

ADRC of Tarrant County ~ Information Sharing Protocol

Goal: The goals of the information sharing protocol are to move closer to the seamless customer service culture desired by the Tarrant County community, to curtail the duplication of paperwork and, most importantly, to expedite the eligibility application/intake process for ADRC consumers.

1. CADS Members who are also DADS Agencies and DADS Contractors who have signed the Data Sharing MOU Addendum:

- Agree to have a signed MOU and addendum on file that states they understand that approved data elements (the ADRC Intake Forms & attachments) can be shared with other DADS agencies and DADS Contractors who have signed the MOU Addendum.
- Agree that these elements can be shared by a trained ADRC Resource Coach as part of the referral process after obtaining written or verbal consent from client. Written consent is preferred, but documented verbal consent, after the ADRC Resource Coach has verbally reviewed the consent agreement with the consumer, is allowed.
- Agree to the data that can be shared: the ADRC I&R form, Release of Information Form, any of the ADRC supportive document tools from the ADRC file or from the ServicePoint screens (Person Centered Plan; IADL's; Safety Checklist; and consumer presented eligibility documents: copy of ID card, Medicaid letter, Medicare card, Insurance info., etc.)
- Agree that consumer information can be shared through controlled, secured, password protected access to the consumer data management software – ServicePoint. This information can be referred directly through the ServicePoint screen process with agencies that have a “power-user” to pull down the referrals. Or can be shared by phone between the referring and referral agencies when each access the ServicePoint consumer’s data.
- Agree that this material or documents can also be shared in hard copy and/or by fax. At this time this information cannot be shared over the internet or through e-mail for security purposes. Notations will be made in the ADRC consumer’s file, noted in the ServicePoint referral screen or through adding the fax coversheet to the consumer’s file.
- ADRC Program Staff will develop & update regularly a grid information sheet for all ADRC workers so they can clearly distinguish which CADS agencies require which processes and procedures.

2. CADS Members who are Non-DADS Agencies & have signed the MOU:

- Agree that these elements can be shared by a trained ADRC Resource Coach as part of the referral process after obtaining written or verbal consent from client. Written consent is preferred, but documented verbal consent, after the ADRC Resource Coach has verbally reviewed the consent agreement with the consumer, is allowed.
- follow the above guidelines.

3. Non-CADS Members:

- **Non-DADS Agencies and/or**
- **DADS Agencies who have not signed a MOU & Addendum and/or**
- **any other service or agency with whom a referral is needed :**

- When making referrals to these agencies, consumers will be required to sign a release of information from the ADRC before eligibility information can be shared. The exception to this guideline is if the ADRC Resource Coach obtaining the information is from a non-DADS agency, they can act on the information received from the consumer as it responds to their agency's focus.
 - Resource Coaches will be expected to explain this to consumers and either offer to mail the release to them for their signature or have them come in to sign. Confidential information cannot be released without this signature.
 - Callers can always be given the choice to call themselves with a direct contact person and number.

Action: MOUs and addendum have been revised to include above elements. The ADRC Release of Information form has been revised to allow for indication if a verbal consent was obtained from the ADRC consumer.

ADRC/CADS (1/2009)