

**From:** Kester, Tony  
**To:** Theriot, Susan <stheriot@aging.sc.gov>  
**Date:** 4/15/2013 8:11:46 AM  
**Subject:** RE: Assessment

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I am.

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**From:** Theriot, Susan  
**Sent:** Monday, April 15, 2013 7:39 AM  
**To:** Kester, Tony  
**Subject:** FW: Assessment

FYI-  
Want to make sure you are okay with this.  
Thanks  
Sue

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**From:** Rivers, Denise  
**Sent:** Friday, April 12, 2013 1:11 PM  
**To:** Hoard, Betsy; Theriot, Susan; 'Julia Foster'  
**Cc:** Pondy, Kevin  
**Subject:** RE: Assessment

I agree with Betsy. When a client gives any information, it is used to determine eligibility for services and for our reporting. The demographics for reporting are all rolled into aggregate data with no identifying information. The information for determining eligibility for services is shared with other service providers, if necessary, for the client to obtain a service or to advocate for the client in obtaining a service. An example would be if someone is having issues with Medicaid or Social Security and the worker needs their Medicaid or SSN AND the client's permission to use their Medicaid or SSN to help resolve the issue with the appropriate agency. In almost all cases, the client is willing to give and share information if it is being used to assist them in getting services.

*Denise W. Rivers, LMSW, CIRS*  
Deputy Director  
Division for Community Living  
Lt. Governor's Office on Aging  
1301 Gervais Street, Suite 350  
Columbia, SC 29201  
803-734-9939  
[www.scaccesshelp.org](http://www.scaccesshelp.org)  
[www.aging.sc.gov](http://www.aging.sc.gov)



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**From:** Hoard, Betsy  
**Sent:** Friday, April 12, 2013 8:30 AM  
**To:** Theriot, Susan; 'Julia Foster'; Rivers, Denise  
**Cc:** Pondy, Kevin  
**Subject:** RE: Assessment

I would like to pass this question to Denise as far as the understanding of how the form is used. And if there is a regulation requiring it in OAA.

MY understanding – when a client gives information for a service, they have a right to allow the information to be used by other professionals that may be providing them with a service or for a referral to another provider. And, they can refuse to share their data with the LGOA and OAA for reporting purposes. (However, this data is more on a summarized level and their name is not attached to their demographics).

The Assessment contains health questions as well. I am attaching the most current version so that you can see the information asked of them.

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**From:** Theriot, Susan  
**Sent:** Friday, April 12, 2013 8:02 AM  
**To:** 'Julia Foster'; Hoard, Betsy  
**Cc:** Pondy, Kevin  
**Subject:** RE: Assessment

Hi Julia.  
Thank you for all of your help with this assessment.  
We really appreciate it.  
Betsy's direct number is 734-9935.  
Have a great Friday.  
Sue

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**From:** Julia Foster [<mailto:JuliaFoster@scstatehouse.gov>]  
**Sent:** Thursday, April 11, 2013 4:53 PM  
**To:** Hoard, Betsy  
**Cc:** Pondy, Kevin; Theriot, Susan  
**Subject:** RE: Assessment

Betsy,  
What is your direct number?  
I want to have a clear understanding of how this form is used and how client information may be used/shared before I give the thumbs up.

I will likely leave work right around 5 to pick up my son, but would love to chat with you some time tomorrow if you have a chance.

Thanks so much!

Julia  
734-5292

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**From:** Hoard, Betsy [<mailto:bhoard@aging.sc.gov>]  
**Sent:** Thursday, April 11, 2013 1:28 PM  
**To:** Julia Foster  
**Cc:** Pondy, Kevin; Theriot, Susan  
**Subject:** Assessment

Hi Julia.  
We have developed a new Assessment form for clients who are seeking services. As a part of this process, the client is asked to sign a Consent to Release Information.  
I have written a rough draft of one attached as CONSENT TO RELEASE Assess that I would like for you to review.

I have also attached a Consent from Lexington and one from Lancaster.  
As well, below are two sites (TX and FLA) that I have used. Tony also liked the TX one.

[http://www.dads.state.tx.us/providers/AAA/Forms/standardized/client\\_intake\\_eng.pdf](http://www.dads.state.tx.us/providers/AAA/Forms/standardized/client_intake_eng.pdf)

<http://www.agingflorida.net/resources/Program%20Documents/2010%20DOEA%20Program%20Handbook/Chapter%202%20-%20Intake,%20Prioritization%20and%20Case%20Management.pdf>

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Can I please get your thoughts? We are hoping to have this incorporated with the Assessment and ready to present at the AAA meeting on Tue.

Thanks – Betsy!!!