

# Coordinated Point of Entry Standards

## CPoE Workgroup

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**Older Adult Services Act CPoE Definition:** *“Coordinated Point of Entry means an integrated access point where consumers receive information and assistance, assessment of needs, care planning, referral, assistance in completing applications, authorizations of services where permitted and follow up to ensure that referrals and services are accessed.”*

A Coordinated Point of Entry may be (but is not limited to) an Area Agency on Aging, a Senior Center, a Case Coordination Unit, an Information and Assistance provider, an Aging and Disability Resource Center, or a combination of these entities.

## STANDARDS

1. The CPoE shall provide basic information to clients, their families and the general public on aging topics as well as disability issues. The CPoE shall use the IDoA approved, standardized intake form/process to identify the issues and capacities of the individual beyond the presenting problem, and make appropriate referrals. The CPoE's protocols must be compatible with the Comprehensive Care Coordination system, which may be the next step for a client (intake) following information and assistance provision. The CPoE shall maintain client confidentiality and respect client privacy when providing service.
2. The CPoE shall have a working relationship and a written agreement with a local disability-related information provider, as well as the major human services providers.
3. The CPoE must have staff with appropriate qualifications, education (AA., B.S., B.A., LPN, RN, etc.) or experience to be further defined by the Department. The CPoE shall have at least one person with AIRS certification on staff.
4. The CPoE must adhere to a standard, statewide (IDoA Approved) training protocol for training new employees and for updating existing employees.
5. The CPoE shall engage in outreach and public awareness activities in coordination with the SeniorHelpline and be full participants in statewide outreach activities.
6. The CPoE system shall utilize the State-approved brand name and logo.
7. The CPoE shall at least provide full day (at least 7 hours) M-F availability for staffing and information.
8. The CPoE must have three-way calling phone systems for 'warm transfers' of callers.
9. The CPoE must have a disability-accessible environment for meeting customers and the general public.

10. The CPoE must have an internet link to utilize the state Enhanced Services Program (ESP) resource data base, the Benefits CheckUp assessment tool, [illinoishousingsearch.org](http://illinoishousingsearch.org) (IDHA), and other web tools as selected in the development of the statewide system.
11. The CPoE shall make unbiased referrals reflecting the best outcomes for the client, and shall make efforts to avoid a conflict of interest.
12. The CPoE must utilize Person-Centered-Planning procedures when advising clients or their families.
13. The CPoE must establish a relationship with an array of formal or informal access points within their catchment area to funnel contacts to the CPoE.
14. The CPoE must train staff in LTC options counseling as a priority, or make appropriate referrals so that clients are carefully prepared to make decisions.
15. The CPoE must provide individual and systemic advocacy to identify problems, barriers and successful best practices.
16. The CPoE must provide assistance in filling out applications, obtaining authorizations and shall follow up with clients to make sure that services are accessed.
17. The CPoE must participate in statewide efforts regarding the continual development process for improving the system and ongoing quality assurance for clients and the system as a whole.
18. The CPoE must participate in the IDoA Disaster Assistance Planning protocol.
19. The CPoE must follow statewide and regional protocol for coordination between the CPoE system and 211 providers, as this system is developed.
20. The CPoE must demonstrate cultural competency and have measures in place for persons of Limited English Proficiency (LEP).
21. The CPoE will meet Department reporting requirements and will be subject to IDoA evaluation. The CPoE's will be evaluated as to whether or not the access system is effectively responding to needs of older adults, family caregivers and other consumers, and targeting those in greatest social and economic need.
22. The CPoE is prohibited from making referrals to agencies that are unlicensed, unregistered, or uncertified; if such agencies are required to be licensed, registered, or certified.

Approved 9/14/09  
Older Adult Services Advisory Committee