

Client Documents Required for Services

	Client Intake	Client's Rights & Responsibilities	Nutritional Assessment	Functional Assessment (Form 2060)	Care Plan	Narratives or Case Recording	Services Authorization	Record of Units Provided (timesheets, IR&A logs, etc.)	Estimated Audience	Client Contact Report	90 Day Reassessment	Follow Up / Monitoring
Adult Day Care												
Assisted Transportation												
Care Coordination												
Caregiver Education & Training (Contract)												
Caregiver Education & Training (In-house)												
Caregiver Information Services												
Caregiver Respite Care-In Home												
Caregiver Respite Care-Institutional												
Caregiver Respite Care-Non-Residential												
Caregiver Support Coordination												
Chore Maintenance												
Congregate Meals												
Emergency Response												
Escort												
Evidence Based Intervention												
Evidence Based Intervention (In-house)												
Health Maintenance												
Health Screening/Monitoring (Group)												
Health Screening/Monitoring (Individual)												
Home Delivered Meals												
Homemaker												
Hospice												
Income Support												
Information Referral & Assistance												
Instruction and Training												
Legal Assistance Age 60 & Over (Contract)												
Legal Assistance Age 60 & Over (In-house)												
Legal Awareness												
Legal Assistance Under 60												
Mental Health Services												
Nutrition Counseling												
Nutrition Education												
Participant Assessment												
Personal Assistance												
Physical Fitness												
Recreation												
Residential Repair												
Telephone Reassurance												
Transportation D/R												
Transportation Fixed Route												
Visiting												
Volunteer Placement												
Voucher-Caregiver Respite Care												
Voucher-Homemaker												
Voucher-Transportation												

AAAs must also follow the items listed below:

- When a program participant uses a mark, such as an "X" as their signature, the service provider must sign as witness.
- All documents and forms must be dated.