

THE NEW YORK CITY DEPARTMENT FOR THE AGING
 Bureau of Community Services
 FY 2011 Case Assistance Verification Tool

QUES. #	QUESTIONS
CSAS-1	Was the presenting problem of each client an appropriate one for Case Assistance service? (CSAS, Standard 2.1)
CSAS - 2	Were the clients' needs addressed in a timely manner (e.g., referrals; applications for benefits or entitlements; supportive contacts made with necessary frequency)? (CSAS, Standard 5)
CSAS - 3	Does each Case Worker maintain a Case Assistance log which indicates the name of each client served, the date of service, the amount of time spent with or on behalf of the client, and the nature of the assistance provided? (CSAS, Standard 15.1)
CSAS-4	Do the case notes clearly indicate what service was provided, for example if the case assistance provided was a referral, is it clear to whom the referral was made? If the assistance provided was advocacy, is it clear what the issue was? If a benefit was applied for, is it clear what benefit? (CSAS, Standard 15.3)
CSAS - 5	Is there a completed signed Release of Information form maintained in the files? (Note: a new consent (release or authorization) is obtained each year when the exchange is related to the original request or whenever the exchange is not related to the original request. (CSAS, Standard 17.3, 17.4 and 17.5)
CSAS - 6	Do the case notes indicate that follow-up is conducted in accordance with DFTA's guidelines to ensure a satisfactory outcome for contacts with clients involved in referral for a service/resource, or assistance with the application for an entitlement/benefit or an appeal on behalf of the client? (e.g. if the client was referred for a service, is it clear that the referral was successful? If the client was assisted with an entitlement, Is it clear that she/he got the entitlement?) (CSAS, Standard 16)
CSAS - 7	Is the amount of time spent with or on behalf of each client totaled for each Case Worker, and then added together to get the number of Case Assistance units (hours) to report to DFTA? (CSAS, Standard 21)
CSAS - 8	Do reported units for a sample month match on-site documentation of hours provided during that month? (CSAS, Standard 21)
CSAS - 9	Does each file contains an <u>Intake form, stating the client's presenting problem or need for service</u> ? (CSAS, Standard 14.3)
CSAS -10	Staff receive appropriate supervision (Standard 13)