

**MA Veterans Independence Plus (VIP) Program  
Veteran Tasks Agreement**

Care Advisor Name: \_\_\_\_\_

Date: \_\_\_\_\_

Veteran Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

City: Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fiscal Intermediary: \_\_\_\_\_

**Service Agreement Sections**

<b>Section A. Veteran Assessment to Manage VIP Services . . . . .</b>	<b>Page 2 &amp; 3</b>
<b>Section B. Veteran/Surrogate Responsibilities . . . . .</b>	<b>Page 4</b>
<b>Section C. Support Worker Roles and Responsibilities . . . . .</b>	<b>Page 6</b>
<b>Section D. Support Worker Backup Plan/List . . . . .</b>	<b>Page 6</b>
<b>Section E. Agency – AAA/ASAP Responsibilities . . . . .</b>	<b>Page 6</b>
<b>Section F. Fiscal Intermediary (FI) Responsibilities . . . . .</b>	<b>Page 7</b>
<b>Section G. Signatures . . . . .</b>	<b>Page 8</b>

**Glossary of Terms**

**AAA/ASAP – Area Agency on Aging/Aging Service Access Point**

**FI – Fiscal Intermediary**

**VIP – Veterans Independence Plus Program**

**ADLs - Activities of Daily Living**

**IADLs - Instrumental Activities of Daily Living**

**Introduction**

The Service Agreement is an important part of the Veteran’s plan of care while participating in the VIP program and will be developed based on the Veteran’s individual needs. The Service Agreement assesses the Veteran’s ability to manage the VIP program and describes the roles and responsibilities of the Veteran, the surrogate, if any, the support worker, the AAA/ASAP, and the FI.

This agreement will be reviewed and modified as appropriate:

- At the time of the Veteran’s redetermination for services;
- When the Veteran is not managing VIP effectively as evidenced by the Veteran exhibiting a pattern of overutilization, or inappropriate use of VIP services, and not responding to intervention from a Care Advisor; or is not managing VIP services effectively;
- When the Veteran, or the Fiscal Intermediary requests a review;

- When there is a significant change in the Veteran’s medical, cognitive, or emotional condition that affects the Veteran’s ability to manage VIP services independently.

## Section A: Veteran Assessment to Manage VIP Program Services

The result of the Veteran Assessment to manage VIP program services is a decision that either:

- The Veteran can manage VIP program services independently; or
- The Veteran requires the assistance of a surrogate to manage some or all aspects of the VIP program service.

### Reason for Assessment:

- Initial assessment
- Change in condition - if checked, describe: \_\_\_\_\_
- Difficulty managing VIP program services
- Requested by the FI

### Guardianship Status

Does the Veteran have a court-appointed legal guardian?  yes  no

If no, proceed to Part I, Section 1, Communication and Decision Making.

If yes, no further assessment is necessary: a surrogate is required. Complete (c) and (d) and proceed to Part III.

Name of the legal guardian: \_\_\_\_\_

Describe the evidence of guardianship: \_\_\_\_\_

## I. Assessment

### 1. Communication and Decision Making

A “yes” response to question (a) or a “no” response to question (b), (c), or (d) indicates that the Veteran requires the assistance of a surrogate with communication and decision making.

- a. Does the Veteran demonstrate cognitive/behavioral disabilities that would impair the Veteran’s ability to self-direct his or her care?  yes  no

If “yes,” list the cognitive/behavioral disability: \_\_\_\_\_

If “yes,” describe how the Veteran’s ability to self-direct would be impaired: \_\_\_\_\_

- b. Does the Veteran remember important information?  yes  no
- c. Can the Veteran communicate his or her needs effectively?  yes  no
- d. Does the Veteran manage his or her own finances?  yes  no

**Result:**

- The Veteran does not require the assistance of a surrogate with communication and decision making.**
- The Veteran requires the assistance of a surrogate with communication and decision making.**

**2. Knowledge of Disability and Related Conditions**

A “no” response to any question indicates that the Veteran requires the assistance of a surrogate with knowledge of disability and related conditions.

- a. Is the Veteran able to describe his or her disability and related conditions?  yes  no
- b. Is the Veteran able to describe a plan to manage medications (schedules and dosages)?  yes  no
- c. Is the Veteran able to describe the use of any assistive devices or adaptive equipment?  yes  no

**Result:**

- The Veteran does not require the assistance of a surrogate to understand his or her disability and related conditions.**
- The Veteran requires the assistance of a surrogate to understand his or her conditions.**

**3. Knowledge of Personal Assistance Needs**

A “no” response to question (a), (b), (c), or (d) indicates that the Veteran requires the assistance of a surrogate to understand personal assistance needs and routines.

- a. Is the Veteran able to describe a routine day and give examples of assistance needed, such as bathing, toileting, and other personal care?  yes  no
- b. Can the Veteran describe the preferred transfer method?  yes  no
- c. Can the Veteran describe meal preparation and dietary needs?  yes  no
- d. Can the Veteran describe housekeeping needs?  yes  no

**Result:**

- The Veteran does not require the assistance of a surrogate with knowledge of personal assistance needs.**
- The Veteran requires the assistance of a surrogate with knowledge of personal assistance needs.**

**4. Ability to Employ Support workers**

A “no” response to any question indicates that the Veteran requires the assistance of a surrogate to employ support workers.

- a. Can the Veteran describe how to recruit, hire, and schedule a support worker?  yes  no

- b. Is the Veteran able to describe how to train and supervise a support worker?  yes  no
- c. Can the Veteran describe the backup plan he or she will use if a support worker is sick or absent?  
 yes  no
- d. Can the Veteran complete activity forms correctly?  yes  no

**Result:**

- The Veteran does not require the assistance of a surrogate to employ support workers.**
- The Veteran requires the assistance of a surrogate to employ support workers.**

**II. Assessment Summary**

- The Veteran needs the assistance of a surrogate in the following areas (check all that apply.)
  - Communication and decision making
  - Understanding of his or her disability and related condition
  - Understanding his or her personal assistance needs and routines
  - Employing support workers

**III. Decision - Check one.**

- The Veteran is able to independently perform all tasks required to manage the VIP program and does not require the assistance of a surrogate.
- The Veteran requires the assistance of a surrogate to perform some or all of the VIP management tasks that the Veteran is unable to perform.

**If the Veteran is assessed to require a surrogate, one must be identified for VIP program services to commence or continue.**

**If the Veteran receives skills training that enable the Veteran to independently manage the VIP program, revise this form to reflect any changes.**

**Section B: Veteran/Surrogate Responsibilities**

Veteran areas of responsibility are listed below. Veteran, AAA/ASAP, and surrogate, if any, will complete this section together. Check who will be responsible for each area:

<b>Assessments and Evaluations:</b>	<b>Veteran</b>	<b>Surrogate</b>
Cooperating with the AAA/ASAP during assessments, evaluations, and reevaluations		
<b>VIP Program Management Tasks:</b>		
Ensuring Veteran does not bill for services during a hospital or nursing facility stay		
Employing support workers for no more than the number of hours authorized		
Ensuring that support workers perform the tasks described in this Agreement		
Notifying the FI of the date of hire and termination and a support worker's change of address		

	Veteran	Surrogate
Working with the AAA/ASAP to develop a backup list when a regular support worker cannot work		
Working with the FI and the AAA/ASAP to resolve any disagreements or complaints		
<b>Veteran Responsibilities as an Employer:</b>		
Complying with applicable state and federal labor laws, including child labor laws.		
Hiring, scheduling, training, and terminating support workers		
Completing and signing all employment forms as required by the FI		
Submitting activity forms (timesheets) in the time frame required by the FI		
Ensuring that the Veteran's activity forms (timesheets) correctly identify the hours that the support worker worked for each pay period, and that the name of the support worker is correct		
<b>Functional Skills Training:</b> The AAA/ASAP can provide Skills Training in any of the following. Check any areas of need and indicate who will be trained:		
Program Rules and Requirements <ul style="list-style-type: none"> <li><input type="checkbox"/> Rights and responsibilities as a Veteran or surrogate</li> <li><input type="checkbox"/> Program rules and regulations</li> <li><input type="checkbox"/> Roles and responsibilities of other program participants (AAA/ASAP, FI)</li> </ul>		
Support worker Training <ul style="list-style-type: none"> <li><input type="checkbox"/> Functions of Support workers</li> <li><input type="checkbox"/> Assisting with ADLs and IADLs</li> <li><input type="checkbox"/> Scheduling of support workers so hours are used correctly</li> </ul>		
VIP Program Management <ul style="list-style-type: none"> <li><input type="checkbox"/> Hiring, recruiting, training, terminating, and supervising support workers</li> <li><input type="checkbox"/> Evaluating the support worker's performance</li> <li><input type="checkbox"/> Developing/maintaining a list of people to call if a support worker is unable to work</li> <li><input type="checkbox"/> Using the appropriate number of hours per week</li> <li><input type="checkbox"/> Identifying tasks to be covered by the VIP program</li> </ul>		
Personal Health Care Maintenance <ul style="list-style-type: none"> <li><input type="checkbox"/> Understanding and describing the Veteran's medical conditions, routines and treatments, including medication schedules and dosages, nutritional planning, bowel and bladder routine, and range-of-motion routine</li> </ul>		
Emergency Management <ul style="list-style-type: none"> <li><input type="checkbox"/> Describing how and when to use a physician /local hospital emergency room</li> <li><input type="checkbox"/> Understanding appropriate treatment or equipment for dealing with an emergency</li> <li><input type="checkbox"/> Maintaining a list of emergency phone numbers and procedures</li> </ul>		
Fiscal Intermediary <ul style="list-style-type: none"> <li><input type="checkbox"/> Completing and submitting accurate Forms in the time frame specified</li> <li><input type="checkbox"/> Completing paperwork required by the FI</li> </ul>		
Other Areas (Describe):		

## Section C : Support Worker Roles and Responsibilities

### 1. What to Look for When Hiring a Support Worker:

- meets all legal requirements to work in the United States (the FI can tell the Veteran what these are)
- is able to understand and carry out instructions given by the Veteran and/or the Veteran's surrogate
- is willing and able to receive training and supervision in all services from the Veteran and the surrogate
- provides the Veteran with care that is free from abuse and neglect.

## Section D: CDC Backup Plan/List

It is very important that the Veteran have a plan in place in the event a support worker is unable to work. Describe what will be done and who will be contacted to work if the regularly scheduled support worker is unexpectedly not available.

---

---

---

List all people who are available to work if a support worker is unavailable to work his or her regularly scheduled hours. This list should be kept current. The Veteran will need to contact the FI if the person on the backup list wants to be paid.

Support Worker Name	Phone #	Address	Completed FI Paperwork (Y/N)

## Section E: Agency (AAA/ASAP) Responsibilities

The AAA/ASAP is responsible for all of the following:

### 1. Employer Tasks Agreement

- Developing and reviewing this Agreement with the Veteran and the Veteran's surrogate, if any;
- Providing the Veteran and the Veteran's surrogate, if any, with a copy of this Agreement giving the Veteran an opportunity to disagree with the Veterans Tasks Agreement; and providing a way to resolve any disagreements as soon as possible; and
- Monitoring the Agreement to ensure that the Veteran, or the Veteran's surrogate, if any, is managing the VIP program successfully.

### 2. Customer Service:

- Seeking and including the Veteran's input into the services provided by the AAA/ASAP.
- Providing the Veteran with a copy of the AAA/ASAP's complaint and grievance process and working with the Veteran to resolve any complaints about services in a timely fashion

- Having a telephone system that the Veteran can call and leave a message with after business hours;
- Responding to Veteran inquiries and voicemails within two business days;
- Providing written information to Veterans in an understandable language and format; and
- Providing services that are culturally sensitive.

### 3. **Intake and Orientation and Functional Skills Training:**

- If the Veteran is new to the VIP program, providing intake and orientation services to the Veteran to begin the eligibility determination process for VIP services,
- Providing skills training to instruct the Veteran and the surrogate, if any, about how to manage the program
- Teaching the Veteran ways to recruit, hire, train, schedule, evaluate, and terminate support workers
- Working with the Veteran to establish a list of persons whom the Veteran can call to work if the regularly scheduled support worker is unable to work;
- Informing Veteran about the FI and helping the Veteran complete paperwork required before hiring a support worker;
- Informing the Veteran and surrogate, if any, about ways to have services that are safe, such as the availability of Criminal Offender Record Information (CORI), Disabled Persons Protection Commission (DPPC), the Sex Offender Registry, and the Elder Services hotline; and
- Providing skills training to the Veteran as described in this Agreement, and at the request of the Veteran or FI.

## **Section F - Fiscal Intermediary (FI) Responsibilities**

The FI is responsible for all of the following.

### 1. **Veteran Employer-Required Tasks**

- Performing the employer-required tasks that are described in the AAA/ASAP-Veteran Agreement;
- Issuing checks for support workers; and
- Ensuring the Veteran has an active authorization from the AAA/ASAP for services before paying support workers.

### 2. **Customer Service**

- Answering Veteran telephone calls about forms (timesheets), tax forms, and the functions of the FI (When Veteran concerns cannot be addressed by telephone, Veterans may be referred to the AAA/ASAP.)
- Operating a toll-free telephone service during business hours from 9:00 A.M. to 5:00 P.M., Monday through Friday, excluding holidays;
- Operating a toll-free answering or voice messaging service during non-business hours;
- Providing the Veteran with a copy of the FI's complaint and grievance process and working with the Veteran to resolve any complaints about the FI's services in a timely fashion;
- Notifying the Veteran's AAA/ASAP and the Veteran if the Veteran is sending in Activity Forms (timesheets) for more than the hours per month authorized.
- Providing the Veteran with activity forms (timesheets) and schedules for the Veteran to complete for each support worker.

## Section G - Signatures

My ability to manage the VIP program has been assessed. If I do not agree with the results of this assessment, I must let the AAA/ASAP know and I have been informed of the process for resolving the disagreement.

I understand it is important that all participants in the VIP program understand their roles and responsibilities. I understand the VIP program is Veteran-Directed and I am the employer of my support workers. I and my surrogate, if any, will be provided with a copy of this Agreement.

Signature of Veteran or Legal Guardian \_\_\_\_\_ Date \_\_\_\_\_

Printed Name \_\_\_\_\_

I have assessed this Veteran's ability to manage the VIP program.

Signature of Assessor \_\_\_\_\_ Date \_\_\_\_\_

Printed Name \_\_\_\_\_

This section must be completed for any Veteran who requires a surrogate

I agree to act as surrogate to assist the above-named Veteran in managing his/her VIP program services. I agree that the Veteran will be involved in the management of the VIP program as much as he/she is capable. I understand, have the ability, and am responsible for the tasks as outlined in Section A and B of this document. It is my responsibility to act in the best interest of the Veteran.

### Surrogate Information:

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_

Surrogate relationship to the Veteran: \_\_\_\_\_ Frequency of visits: \_\_\_\_\_

Signature of Surrogate \_\_\_\_\_ Date \_\_\_\_\_