

**DEPARTMENT OF SOCIAL SERVICES**

744 P Street, Sacramento, California 95814



May 29, 2000

TO: REGIONAL OFFICE MANAGERS  
RESIDENTIAL DISTRICT OFFICE MANAGERS

FROM: DAVE DODDS, Chief  
Advocacy and Policy Branch

SUBJECT: **TRANSPORTATION OF RESIDENTS IN RESIDENTIAL CARE  
FACILITIES FOR THE ELDERLY**

The purpose of this memo is to clarify policy regarding the responsibilities of RCFE licensees with respect to transportation of residents to medical or dental care. The specific regulatory requirement found in section 87575 (a)(2), states the following: "The licensee shall provide assistance in meeting necessary medical and dental needs. This includes transportation that may be limited to the nearest available medical or dental facility that will meet the resident's need. In providing transportation the licensee shall do so directly or make arrangements for this service." In order to ensure consistent, statewide enforcement of this regulation section, it is necessary for all LPAs to similarly interpret licensee responsibilities for meeting resident medical transportation needs and for charging for this service. This memorandum will address transportation for both the SSI/SSP and private pay resident. The question and answer format is being used to convey this information.

- Q. What regulatory responsibilities do licensees have for the provision of medical and dental transportation?
- A. The licensee is responsible for either directly transporting, or arranging for the transportation of residents, both to and from appointments. This responsibility is considered a basic service and must be available at times that ensure residents' medical and dental care needs are promptly met.

The licensee may either provide the service directly, or arrange for it to be provided. It is not unreasonable for facilities to have certain days of the week and a range of times that residents will be encouraged to schedule appointments. If predetermined times are specified in any way, they must meet the medical and dental needs of all residents. It is not acceptable for any facility to limit the availability of transportation to the degree that it hampers a resident's ability to access medical and dental care, including but not limited to regular check-ups.

Licensees are always responsible for ensuring that the residents' health care needs are addressed. This applies equally to emergency situations. Regardless of any transportation schedules, if a resident needs immediate treatment, the facility is responsible for immediately providing or arranging for transportation to this treatment.

Q. How can transportation costs be charged?

A. SSI Recipients:

As stated in the Evaluator Manual, "transportation to meet medical and dental appointments and to obtain needed medical services are basic services that must be provided at the basic rate." For SSI/SSP recipients, the basic rate refers to the SSI/SSP established rate. (See Section 87101 (b)(1)). For SSI/SSP residents, transportation, as with all basic rate services, must be directly provided or arranged by the licensee, at no additional charge.

Private pay residents:

There are two ways a licensee may handle transportation costs for the private pay resident. Transportation may be either included as part of the basic rate or it may be itemized as an individual service within the admission agreement.

A). When the admission agreement includes transportation services in a basic rate structure (no itemization of basic services), the licensee may not assess additional charges for this service while the admission agreement is in force. If the admission agreement does not specify transportation availability in terms of days and/or times, a resident can assume that medical transportation will be provided or arranged at no additional charge anytime it is needed by the resident.

B). When the admission agreement itemizes fees for basic services, the agreement must specify the costs associated with the provision of transportation to meet medical and dental needs. The agreement must also specify the hours and days of the week this transportation will be available for the service fee. In addition, the agreement must disclose the true cost of transportation, which may include items such as:

- ◆ Fees for emergency or other non-scheduled transportation needs
- ◆ Fees for arranging non-facility provided transportation
- ◆ Fees for non-facility provided transportation (approximate) and how this will be provided (taxi, van, bus, community service providers, family members)
- ◆ Fees for extra mileage
- ◆ Fees for escorts

Q. What should the admission agreement contain regarding transportation costs?

A. The LPA should review the admission agreement in an effort to determine answers to the following questions:

- ◆ Does the facility provide transportation directly or does it arrange for transportation?
- ◆ Is transportation included in the basic rate for private pay residents? If not, does the agreement specify the costs of transportation including fees for the services in paragraph B. above?
- ◆ Is there a transportation schedule or is transportation provided on an as needed basis?

These policies will be incorporated into regulations and the Evaluator Manual in the near future. If you have any questions, please contact Mark Sticklin at (916) 324-4075.