

**NC DIVISION OF AGING
AREA AGENCIES ON AGING
TRANSPORTATION SERVICES ASSESSMENT
TOOL**

Community Service Provider:

Review Date: State Fiscal Year: AAA Monitor:

Provider Staff Interviewed and Title(s):

Services monitored: ☐ HCCBG 033 Medical Transportation
 ☐ HCCBG 250 General Transportation
 ☐ HCCBG 252 Bus Pass Program

PROGRAM ADMINISTRATION (In addition to the Transportation Service Standard cited at the end of each question, other authorities are cited as appropriate.)		Yes	No	N.A.
1. The agency has a transportation coordinator with at least a high school diploma or a GED certificate. (Service Standards, VIII.B.1, page 6)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documentation used to verify compliance (verbal assurance is acceptable): Click or tap here to enter text.				
		Yes	No	N.A.
2. Drivers (paid or volunteer) meet the following qualifications: a. Drivers are 18 years of age or older. b. Drivers hold a valid North Carolina drivers license for the class of vehicle they are to operate..... c. Drivers have two years driving experience. (Service Standards, VIII.B.2a, page 7. NC Gen. Statutes § 20-10 and NC Gen. Statutes §20-7.) <i>Also see Attachment B worksheet.</i>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documentation used to verify compliance and other notes: Click or tap here to enter text.				

	Yes	No	N.A.
5. All vehicles utilized by the agency to transport clients have adequate liability insurance as required by the State of North Carolina (Service Standards, VIII.D.1c, page 8.*) <i>Also see Attachment B and C worksheets and the monitoring guidance for assuring liability insurance requirements found on the tool webpage.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>* Agency insurance: vehicles with passenger seating capacity of 15 or less-\$1,500,000; vehicles with passenger seating capacity of 16 or more-\$5,000,000</p> <p>Documentation used to verify compliance and other notes (monitors should review the declarations page of an unexpired insurance policy or other appropriate documentation): Click or tap here to enter text.</p>			
	Yes	No	N.A.
6. The agency has written policies and procedures establishing priority for:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. ridership			
b. destination and purpose of trip	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. geographic area covered and	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. routes and schedules for providing services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(Service Standards, VIII, page 5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Documentation used to verify compliance and other notes: Click or tap here to enter text.</p>			

	Yes	No	N.A.
<p>7. The agency has written policy and procedures regarding accidents and traffic violations involving agency vehicles while on and off duty. (Service Standards, VII.E, page 9)</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Documentation used to verify compliance and other notes: Click or tap here to enter text.</p>			
	Yes	No	N.A.
<p>8. The agency demonstrates that transportation services are being coordinated through one of the following ways:</p> <p>a. Agency is identified in the Community Transportation Services Plan (CTSP), the Locally Coordinated Plan (LCP), or a similar multi-agency coordination document.</p> <p>b. Agency has written documentation (e.g., a Memorandum of Understanding, board minutes, etc.) that services are coordinated with at least one other human services transportation agency or public/private transportation provider (e.g., the sharing of vehicles, drivers, or operating costs). (Service Standards, VIII.A.1-2, pages 5-6)</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Documentation used to verify compliance and other notes: Click or tap here to enter text.</p>			

TRANSPORTATION SERVICES

MONTH AND YEAR REVIEWED:

➤ Provide a copy to the agency during the exit interview of both sides of this completed worksheet if unverified units are found.

[illegible]

THIS REPRESENTS _____ % OF TOTAL UNITS REPORTED FOR THE MONTH REVIEWED. If 10% or more, expand sample and select another month to review.

Signature of reviewer(s) _____ **Date:** _____

ATTACHMENT B: DRIVER REQUIREMENTS [PAID AND/OR VOLUNTEER] WORKSHEET

Page of

AGENCY:

DATE:

DRIVER'S NAME	PAID OR VOL?	AGE 18 OR OLDER?	CURRENT AND VALID DRIVERS LICENSE? *	2 YRS DRIVING EXPERIENCE?	DRIVES AGENCY VEHICLES?	DRIVES PERSONAL VEHICLE?	Personal vehicles of volunteers have min. liability ins?

* If the agency being reviewed is a transit system, the monitor may be able to determine real-time license status information from NC DMV. Systems enrolled in the NC Transit Driver System can determine the driver's license status of their enrolled drivers on a 24/7 basis. If the system being monitored is enrolled in the DMV notification system, monitors should ask if the license statuses of HCCBG drivers can be viewed on-line or if a printout can be generated. This will provide the monitor with the most up-to-date information available.

ATTACHMENT C: VEHICLE REQUIREMENTS WORKSHEET (OPTIONAL*)

Page of

AGENCY:

DATE:

VEHICLE MAKE & MODEL OR VEHICLE ID #	UNEXPIRED STATE INSPECTION? (only for vehicles with permanent plates)	UNEXPIRED VEHICLE REGISTRATION? (only for vehicles with regular plates)	ADEQUATE LIABILITY INSURANCE?**	OTHER OBSERVATIONS RE VEHICLES?

* Monitors may find it easier to make a photocopy of the agency's vehicle inventory and use that list to make notes about inspections and registrations. This worksheet is offered as an option for documenting compliance as needed.

** Liability insurance compliance may be documented here, on Attachment B, or on Q5.