## **NC DIVISION OF AGING**

## AREA AGENCIES ON AGING TRANSPORTATION SERVICES ASSESSMENT TOOL

C	ommunit	y Service i	Provider:				
Review Date: State Fiscal Year: AAA Monitor:							
Ρ	rovider S	staff Intervi	ewed and Title(s):				
S	ervices n	nonitored:	<ul><li>☐ HCCBG 033 Medical T</li><li>☐ HCCBG 250 General T</li><li>☐ HCCBG 252 Bus Pass</li></ul>	ransportation			
-	(In addit of each 1. Th	tion to the <sup>c</sup> question, c ne agency l	NISTRATION Transportation Service Stanton Service Stanton Service Stanton Stan	s appropriate.)	Yes	No	N.A.
	(Service Standards, VIII.B.1, page 6)						
_	CI						
					Yes	No	N.A.
		Drivers (paid or volunteer) meet the following qualifications:  a. Drivers are 18 years of age or older					
			old a valid North Carolina c	frivers license for the class			
		venicle the	ey are to operate				
		Drivers h	ey are to operate ave two years driving expe	rience			
	(S an	Drivers hervice Star d NC Gen	ey are to operate	rience			

				Yes	No	N.A.
	3. If the agency utilizes volunteers to provide transportation with their own vehicles, then the agency:					
a. maintains	a. maintains volunteer records and					
	b. provides or assures minimum liability insurance coverage on all vehicles owned by volunteers that are used to transport					
279.21(b)(2).*	-	age 10. <u>NC Gen. Statutes § 2</u> sheet.	<u>0-</u>			
		: bodily injury liability – \$30,0 y – \$25,000 each accident.	00 each per	son; \$60	0,000 e	ach
	on used to veri or tap here to e	fy compliance (e.g., insurance) enter text.	e declaratio	ns page	e) and o	ther
				Yes	No	N.A.
Permanent registra towns, per NC Gen		y be issued to counties, cities <u>-84</u> .	, and			
		All vehicles utilized by the agreent registration.	jency			
		<u>es</u> . All vehicles utilized by the n properly inspected by the s				
(Service Stand	dards, VIII.D.1,	page 8)				
vehicles used or permanent	for HCCBG tra license plates, d inspection ar	t. Determine whether the sar insportation have regular lice because the requirements for re different. DMV eliminated in in 2008.	nse plates r			
		Registration Card	Inspectio	n Recei	pt	I
Regular Plate				Х	-	
Permanent Plate		Χ				
	on used to veri ere to enter te	fy compliance and other note xt.	s:			

5. All vehicles utilized by the agency to transport clients have adequate liability insurance as required by the State of North	Yes	No	N.A.
Carolina			
(Service Standards, VIII.D.1c, page 8.*)			
Also see Attachment B and C worksheets and the monitoring			
guidance for assuring liability insurance requirements found on the tool webpage.			
* Agency insurance: vehicles with passenger seating capacity of 15 or less	-\$1 500	00 000.	vehicles
with passenger seating capacity of 16 or more-\$5,000,000	ψ.,σσο	,,,,,,,,	70,110,00
Documentation used to verify compliance and other notes (monitors of the declarations page of an unexpired insurance policy or other approdocumentation):  Click or tap here to enter text.		eview	
	Yes	No	N.A.
The agency has written policies and procedures establishing			
priority for:			
a. ridership			
b. destination and purpose of trip			
c. geographic area covered and		]	_
c. geographic area covered and			

		Yes	INO	N.A.
accidents and on and off dut	nas written policy and procedures regarding I traffic violations involving agency vehicles while ty. dards, VII.E, page 9)			
	on used to verify compliance and other notes: ere to enter text.			
		Yes	No	N.A.
being coordin a. Agency is Services F	lemonstrates that transportation services are lated through one of the following ways: identified in the Community Transportation Plan (CTSP), the Locally Coordinated Plan (LCP), ar multi-agency coordination document.			
Understar coordinate transporta	as written documentation (e.g., a Memorandum of nding, board minutes, etc.) that services are ed with at least one other human services ation agency or public/private transportation provider sharing of vehicles, drivers, or operating costs).			
(Service S	Standards, VIII.A.1-2, pages 5-6)			
	on used to verify compliance and other notes: ere to enter text.			

## ATTACHMENT A: CLIENT RECORD REVIEW AND UNIT VERIFICATION WORKSHEET TRANSPORTATION SERVICES

Page of

MONTH AND YEAR REVIEWED:

Reviewer should select a random sample of clients from each Site/Route/Worker Code.

- Attach to this worksheet the Units of Service Verification Report used to select the sample of clients and units. Identify on this report the persons sampled and the month(s) reviewed. Also attach copies or samples of any documentation reviewed on-site. Examples include drivers' logs; billing statements that show individual client names, pick-up addresses, and drop-off addresses for specific dates of service; or any printouts from ride-tracking software that clearly represents one-way rides provided on specific dates.
- List on the reverse side of this worksheet the clients and specific dates for which units could not be verified, if applicable.
- > Provide a copy to the agency during the exit interview of both sides of this completed worksheet if unverified units are found.

				DAAS-101	CRF			# units to
			Date of	CRF is on	updated at			be
	S/RW	Eligible	most recent	file &	least every	# units	# units	adjusted
CLIENT NAME	Code	client?	CRF?	complete?	12 mo.?	reported	verified*	in ARMS
TOTAL UNITS NOT VERIFIED =	% OF TOTA	AL UNITS RE	PORTED	FOR THE	MONTH			
Total units reported for all clients in month reviewed =			10% or more					

*Specify documentation reviewed to verify ur	iits:
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Signature of reviewer(s)	Dat	e:
• • • • • • • • • • • • • • • • • • • •		

AGENCY:

## 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?	PERSONAL	Personal vehicles of volunteers have min. liability ins?

<sup>\*</sup> 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.

Page

of

DATE:

AGENCY:

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

<sup>\*</sup> 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.

<sup>\*\*</sup> Liability insurance compliance may be documented here, on Attachment B, or on Q5.