



State of South Carolina
Department on Aging

Henry McMaster
Governor

Connie D. Munn, MSW
Director

PROGRAM INSTRUCTION FOR: Client Eligibility and Priority Policy

INFORMATION MEMORANDUM FOR: Area Agencies on Aging

SUBJECT: Client Eligibility and Priority Policy

DATE: August 10, 2026

AAA COMPLIANCE DATE: July 1, 2027

CLIENT ELIGIBILITY AND PRIORITY	POLICY NUMBER
REFERENCE(S): Section 305(a)(1)(C)	
RELEASE DATE: July 1, 2026	AAA COMPLIANCE DATE: July 1, 2027

Definitions of terms:

Policy Statement

All individuals aged 60 and older are eligible to receive assistance funded with Older Americans Act (OAA) Title III, parts B and C. To ensure the best use of limited resources, the OAA requires that all states identify and prioritize service delivery to people in the greatest economic and social need. For detailed program eligibility, please refer to the program's requirements.

The South Carolina Department on Aging (SCDOA) has established an assessment protocol to ensure that all individuals seeking services are evaluated fairly and consistently in determining both eligibility and service priority. Clients shall be assigned to a priority service tier based on the results of their assessment. When service capacity is limited, clients who wish to receive services shall be placed on a waitlist according to their designated priority service tier and the availability of program resources.

Older Adults living in licensed and unlicensed residential care facilities are not eligible to receive the Older Americans Act services of congregate and home delivered meals, home care services and all types of transportation. It is the responsibility of these facilities to provide these services to their residents. Long Term care facility residents may obtain OAA services through the LTC Ombudsman Program and the Legal Services Program.

The SCDOA must ensure that the assessment process contains validated tools and that it supports the identification of people in the greatest economic and/or the greatest social need, as determined by the SCDOA in the Targeting policy. The system shall support the determination of service priority based on the data collected in the assessment.

The SCDOA shall regularly monitor service and waitlist data to ensure that outcomes are consistent with the state's targeting and priority of service objectives.

Priority of Service

The SCDOA requires that all AAAs manage service waiting lists in accordance with established eligibility criteria and priority service tiers. Waiting lists are designed to ensure that services are provided equitably and based on assessed need, consistent with the intent of the Older Americans Act. There are four (4) tiers used to categorize clients on the waiting list. These tiers are designed to align with the priority targets established under the Older Americans Act.

1. Tier 0 – Emergency Priority Tier

- a. Tier 0 represents the highest priority level and results in an immediate referral to a service provider.
- b. Older adults referred by Adult Protective Services (APS) and/or the Vulnerable Adult Guardian Ad Litem (VAGAL) with an active case are automatically placed in Tier 0.
- c. A written justification for Tier 0 placement must be entered in CaseWorthy and approved by the Assessment Coordinator and/or AAA Director.
- d. Older adults placed in Tier 0 must receive services within 48 hours of referral.
- e. A follow-up visit must occur within two (2) weeks of service initiation. The client must then be reassessed at 3, 6, 9, and 12 months after the initial assessment. All reassessments must be conducted in person.
- f. If APS or VAGAL maintains an open case, additional follow-ups are not required.

2. Tier 1 – High Priority Tier

- a. Tier 1 includes older adults identified through the Client Assessment as having the highest priority for services, after emergency cases.
- b. Clients in Tier 1 must be reassessed at least once every 365 days.
- c. Selection for service delivery from the waiting list shall occur in order of date of the assessment.
- d. External referrals must be made and properly documented in the appropriate program system.

3. Tier 2 – Moderate Priority Tier

- a. Tier 2 includes older adults determined by the Client Assessment to have a significant, but not the highest, need for services.
- b. Clients in Tier 2 must be reassessed at least once every 365 days.
- c. Removal from the waiting list shall occur based on the assessment date.
- d. The Tier 1 waiting list must be cleared before any Tier 2 clients are removed for service initiation.
- e. External referrals shall be made and properly documented in the appropriate program system.

4. Tier 3 – Minimum Eligibility Tier

- a. Tier 3 includes older adults who meet the minimum eligibility criteria for the requested service(s) but do not demonstrate a significant level of need as determined by the Client Assessment.
- b. Tier 3 clients require only an initial assessment; reassessment is not required unless there is a change in condition.
- c. The AAA must contact Tier 3 clients every 365 days to determine whether any significant changes have occurred. This contact may occur by phone or in person. If significant changes are identified, an in-home reassessment must be conducted.
- d. If a client chooses to be removed from the waiting list, this decision must be documented in Caseworthy. When applicable, external referrals must be made, and documentation entered in SC ACT if I&R/A staff assist.
- e. If a client's most recent assessment is older than 365 days when services become available, the client must be reassessed before service authorization.
- f. Clients must be removed from the waiting list based on their assessment date. Tiers 1 and 2 must be cleared before a Tier 3 client is authorized to begin services.
- g. External referrals shall be made and properly documented in the appropriate program system.

SUA Procedure

The SCDOA will ensure the accuracy of the SCDOA Assessment Tool and the SCDOA Client Management Tool so that the AAAs can manage its waiting list as required.

The SCDOA will define the method of identifying prioritized clients and monitoring the processes that provide accurate information for the state.

AAA Procedure

AAAs shall ensure consistency in the administration of service delivery through the utilization of the client service priority determinations (tiers) made through the assessment process.

AAAs must adhere to the established priority service tiers when removing clients from the service waiting list. Clients shall be removed from the waiting list in accordance with their assigned priority service tier and spot.

See also: (related/cross-referenced policies and/or forms – use hyperlinks)

Targeting policy

Assessment and Waiting List Policy

HDM Policy

CM Policy

Personal Care Policy

Homemaker Policy

Chore Policy

MHR Policy

Transportation Policy



Connie D. Munn, MSW
Agency Director, SCDOA