

OAA and OPI SERVICE UNITS AND DEFINITIONS FREQUENTLY ASKED QUESTIONS

Based on definitions released in APD AR 11-047

1. When will we receive training on Options Counseling?
Answer: Contact Suanne Jackson (ADRC Program Analyst) at 503.373.1750 for training information.
2. Are you sure Access Services to Caregivers (Matrix #15) is where we should report case management for caregivers?
Answer: Few caregiver service categories are available and Access Services to Caregivers most closely fits with the four general components of case management (access, assessment, service implementation and monitoring).
3. If materials are approved by a registered dietician, but presented by a nutrition services coordinator at the mealsite - is it an eligible Nutrition Education (Matrix #12) service unit?
Answer: Yes. For further information and advise, contact Kimberly LaCroix (Nutrition Services Program Analyst) at 971.673.0606
4. SHIBA insurance and Rx counseling – is there a service category this fits under for reporting?
Answer: Education about the availability, benefits and appropriate use of Medicare preventive health services or other preventive health programs may be reported as Matrix #40-3 Preventive Screening, Counseling and Referral.
5. Are AAA's required to offer Cash and Counseling (Matrices #72, 73 and 73a)?
Answer: The Administration on Aging requires AAA's, through a public process to develop and implement an Area Plan based upon the needs of their planning and service area and to provide a comprehensive and coordinated system of services. The State Unit on Aging in collaboration with AAA Director's will establish a list of eligible expenses for Cash & Counseling which align with this intent.
6. Caregiver Training (Matrices #70-9 and 70-9a) – it's not feasible that AAA's collect NAPIS forms for attendees. Many take training and ask for no other service. We are expected to create a client record in OACCESS for a one-time service such as this?

Answer: Caregiver Training is a Group 1 service and in addition to the unduplicated caregiver count and units of service received - the Administration on Aging requires reporting caregiver's age, gender, rural, race, ethnicity and relationship to service recipient. Completion of the Caregiver NAPIS form is the only means of collecting this data.

7. Native American Caregiver Conference – is this eligible to report as Caregiver Training?

Answer: Depending upon the various focuses of the conference, attendance may suitably fit under Caregiver Training (Matrices 70-9 and 70-9a); Caregiver Support Groups (Matrices 30-6, 30-6a, Caregiver Counseling (Matrices 70-2a and 70-2b); or if a tuition voucher was provided, the AAA should report it as Caregiver Cash & Counseling (Matrices 73 and 73a).

8. Matrix #13 Information and Assistance – Clients contact offices multiple separate times for different information. Wouldn't it count as multiple service units?

Answer: Yes, the unit definition for Information and Assistance (Matrix #13) is 1 contact. Each contact is a reportable unit.

9. May we use Title III E funds for Matrix #14 Outreach since the definition mentions "caregivers"?

Answer: The Administration on Aging identifies Caregiver Access Assistance (Matrices #16 & 16a) as the service category to report activities such as informing caregivers of available services and resources. The unit definition is equal to that of outreach – 1 contact.

10. Please provide clarification on where to report expenditures for maintaining ADRC Resource Database.

Answer: Administration on Aging approves functions such as reporting and maintaining required records as eligible Area Plan Administration (Matrix 20-1) expense.

11. Would you please consider adding Preventive Screening, Counseling and Referral (Matrix 40-3) to the list of Access services eligible in meeting required 18% Title III B expenditures.

Answer: Yes, Title III B expenditures for Matrix #40-3 are eligible towards meeting the required 18% Access services as evidenced by the reference to 'health services in the Older Americans Act (306 (a)(2)(A)).

12. For Matrix 30-7 Caregiver Supplemental Services – who is eligible for the home-delivered meal?
Answer: Supplemental services such as a home-delivered meal and transportation services may be, depending upon the situation, delivered to both the caregiver or care recipient. Judgment should be exercised in determining the variables involved in the need for the supplemental service.
13. What service matrix would I report activities such as distribution of disaster preparedness education, *File of Life* kits, 72-hour emergency disaster kits and other related materials?
Answer: Matrix #70-10 Public Outreach/Education (1 unit = 1 activity)
14. The unit of service for Matrix #70-2 Options Counseling is 1 unit = 1 hour, however, we do not have a way to track the length of the call. Please clarify how to report these units.
Answer: Report each contact or call as 1 unit of service.
15. It appears from the definition of #30-7 Caregiver Supplemental Services that priority is given to individuals who meet the definition of frail, but in the Caregiver Standards there is quite a list of services that are eligible for reporting as a supplemental service, including supervised activities for children like tutoring, swimming lessons, sports, etc. Please clarify.
Answer: Clarification that no ADL/IADL is required for supplemental services to children, and a reference to the Caregiver Standards for and expanded list of examples has been added to the notations under this matrix.