



DATE: March 6, 2020

TO: Area Agency on Aging Directors

FROM: Robert Torres
Secretary

SUBJECT: **Area Agency on Aging (AAA) Program Requirements, Planning Allocations and Title XIX Format for FY 2019-20**

Area Agencies on Aging (AAAs) are advised that the Department of Aging has prepared APD #20-01-06 " AREA AGENCY ON AGING (AAA) PROGRAM REQUIREMENTS, PLANNING ALLOCATIONS AND REPORTING REQUIREMENTS FOR THE TITLE XIX AGREEMENT FOR FY 2019-20 REVISION NO.1". The APD is available to be electronically accessed on the AAAEXCEL drive.

Highlights of the initial changes for FY 2019-20 include:

- The removal of MA Assessment funding from the allocation.
- An increase in the Information and Referral allocation of \$256K.
- Allowing AAAs to provide up to a 2% increase to vendors.
- Merging I&R and ADRC allocation budgeting and expenditure reporting requirements.

Please forward questions regarding this information to Rob Heinlen. He can be contacted by telephone at (717) 772-0192 or by email rheinlen@pa.gov. As always, thank you for your cooperation with meeting the budget submission requirements.



AGING PROGRAM DIRECTIVE

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| APD# 20-01-06 | |
| Issuance Date: March 6, 2020 | Effective Date: July 1, 2019 |
| Program Area: AAA Administration | Disposition: |
| Origin: Bureau of Finance | Contact: Finance-Rob Heinlen |

Subject: AREA AGENCY ON AGING (AAA) PROGRAM REQUIREMENTS, PLANNING ALLOCATIONS AND REPORTING REQUIREMENTS FOR THE TITLE XIX AGREEMENT FOR FY 2019-20 REVISION NO. 1

To: Executive Staff
Administration on Aging
Area Agencies on Aging
PA Association of Area Agencies on Aging
Office of Long-Term Living
PA Council on Aging
Bureau of Home & Community Based Services
DPW, Office of Program Development & Support
Comptroller

From: _____
Robert Torres
Secretary

Purpose: The purpose of this Aging Program Directive (APD) is to update the Title XIX funding allocations for the Fiscal Year (FY) 2019-20; transmit program requirement changes as needed; and issue the reporting requirements for activities and expenditures.

Background: This APD transmits, in one document, all key information required for the submission of the FY 2019- 20 Title XIX-Revision No.1. AAAs

are advised to refer to this APD frequently throughout the planning process for the development of these plans.

The Federal subsidy affected by this APD is MA Support funding provided by the Center for Medicaid and Medicare Services. The Catalog for Domestic Assistance (CFDA) number is 93.778.

Administration and Support

At the request of the AAA network administrative costs have been divided into two separate columns (Administration and Support) in order to better track the expenditures. Costs that are recorded here include any expenditure not directly attributable to the Information and Referral (I&R) or Aging and Disability Resource Center (ADRC) functions but are necessary to support these activities. The net costs of the Administration and Support activities must not exceed **15%** of the total budgeted allocation.

Administrative and Support expenses are to be funded using 50/50 funding only.

Administrative, I&R, and ADRC budget and expenditure amounts are recorded on the W0520XX.xls and W1520XX.xls reports respectively.

Costs shown on the W1520XX.XLS should agree with the amounts reported in AccuFund and on the associated FRR under the element of expense *Title XIX-Aging*.

MA Assessments

Allocations:

The MA Assessment allocation has been removed from the Department of Aging's allocation and no longer exists.

Information and Referral

Allocations:

This funding is based on the amounts within the Title XIX Agreement. The allocation should be used to assist consumers in communicating with the appropriate agencies or community resources for needed services. These funds may also be used for costs incurred while communicating information related to waiver programs and Community Health Choices.

ADRC Funds:

The ADRC program is designed to be a coordinated network of core and collaborative partner agencies which allows for the consumer to initiate contact with any Link network partner and, generally speaking, experience the same intake to access information, assistance, and resources. A consumer should directly or

seamlessly be connected to the information and services needed no matter the initial point of entry into the system. The “No Wrong Door” approach attempts to minimize duplication of efforts by consumer and providers. Core and collaborative partners work in conjunction for ongoing development of communication, cross-training and marketing/outreach. AAA’s may manage Link (ADRC) funds or may contract with another Link core partner to serve as fiscal manager following previously sent parameters for Link funding.

Allowable activities include: information referral and assistance, Options counseling, benefits counseling, application assistance, person centered transition support, partnership development, training, community outreach and education, and special projects.

**Contractor Rate
Increases:**

AAAs are authorized to provide contractor rate increases up to **2%** of their existing rates. The awarding of a rate increase given to a contractor is at the discretion of the AAA Director/Administrator.

**Program
Requirements:**

AAAs must comply with the requirements set forth in the Home and Community Based Services (HCBS) Procedure Manual and any other program directive provided by PDA.

Funds up to 10%/\$10,000, whichever is higher, may be moved between the administrative, support, and I&R cost centers without a budget revision or a waiver request approved by the Department. ADRC funds must be spent on ADRC activities.

None of the funding covered by this APD is available as a resource for Assessment related expenditures.

**Budget
Submission
Requirements:**

The W0520XX.XLS incorporates budgeting information for all programs being funded by this APD. AAA developed budgets are due to the Department of Aging within **45** days of the issuance date of this APD. Templates will accompany this APD and be provided to the AAA network by email. Budget information should also be entered in the AccuFund reporting system within the same 45-day period.

**Fiscal Reporting
Submission
Requirements:**

The W1520XX.XLS incorporates budgeting information for all programs being funded by this APD and reports quarter specific

expenditures. Templates will accompany this APD and be provided to the AAA network fiscal officers by email.

**Fiscal Reporting
Due Dates:**

AAAs must transmit the fiscal reporting documents in an Excel format by close of business on the date(s) listed on the schedule below.

| <u>Report</u> | <u>Months Covered</u> | <u>Due Date(s)</u> |
|-------------------------|-----------------------|-----------------------|
| 1 st Quarter | July-September | October 20th |
| 2 nd Quarter | August-December | January 20th |
| 3 rd Quarter | January-March | April 20th |
| 4 th Quarter | April-June | July 20 th |

**Technical
Assistance:**

Please contact Diane Bressler (717.772.0189 or dbressler@pa.gov) with any questions regarding the completion of the budget and financial reporting requirements. Questions regarding data entry in the SAMS/OMNIA database should be directed to Ed Slavinsky at eslavinsk@pa.gov. Questions regarding the budgeting and expenditure of ADRC funding should be addressed to Patrick Lally at c-plally@pa.gov. If technical assistance is needed for the electronic transmission, please contact the Management Information Systems (MIS) Division of the Department of Aging, at (717) 783-3126.