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January 28, 2025

Georgie Darrah, Assistant Director of Programs  
Area Agency on Aging of Pasco-Pinellas, Inc.  
9549 Koger Blvd, Suite 100  
St Petersburg, FL 33702

Dear Georgie,

Enclosed is the Annual Programmatic Monitoring report for the Older Americans Act Title III-E National Family Caregiver Support program for contract year January 1, 2024 - December 31, 2024.

The purpose of monitoring is to perform a programmatic review of operations and to verify that corrective actions resulting from previous monitoring reviews have been implemented. The objective of monitoring is to ensure programs, policies and practices comply with state and federal rules and meet standards of good governance and practices.

The 2024 monitoring produced no findings and one recommendation. The cooperation of your staff throughout the monitoring process was appreciated.

Sincerely,



Ann Marie Winter  
Executive Director

Enclosures

cc: Christine Didion, Director of Program Accountability  
Cynthia Galvan, Program Manager  
Jody Ferguson-Hensler, Caregiver Specialist Coordinator  
Nicole Day, Caregiver Specialist  
Elizabeth Deland, Caregiver Specialist





## 2024 Programmatic Monitoring

**PROVIDER:** AAAPP OAA Title III E National Caregiver Support Program

**DATE(S) OF VISIT:** Desk Review Completed January 21, 2025

**PARTICIPANT(S):** Christine Didion, Director of Programs  
Georgie Darrah, Assistant Director of Programs  
Jody Ferguson-Hensler, Caregiver Specialist Coordinator  
Nicole Day, Caregiver Specialist  
Elizabeth Deland, Caregiver Specialist

**MONITOR(S):** Cynthia Galvan, Program Manager

## REPORT SUMMARY

*(This section provides an overview of minor recommendations, significant, findings and positive/noteworthy activities recognized during the monitoring period. Details are outlined in the Contract Compliance and Service Delivery section of the report).*

### I. Recommendations for Improvement

*(Recommendations require a written response from the provider)*

- Using the Client File Review Checklist, there were minimal issues, concerns, or discrepancies noted. Caregiver Specialists complete 701A assessments in a timely manner. Case documentation clearly notes appropriate follow-up and service provision to caregivers and clients. Reassessments are completed 365 days after the prior assessment through the end of the month and are reflected correctly in eCIRTS in congruence with the assessment / reassessment date. All program enrollments appear correct. Of ten files reviewed, ten client eCIRTS records were found to have services with missing service authorizations in the eCIRTS Authorizations tab. Moreover, of ten files reviewed, eight client eCIRTS records were found to either be missing services from the client's annual service plan, or the client's service plan has not been created to reflect all services within the client's annual year. This has resulted in a formal recommendation. Pursuant to the DOEA Programs and Services Handbook Appendix C, Section II-A, "Program enrollment information must be entered on all clients receiving case management or OAA and LSP Registered Services, all individuals receiving services through OAA Title III E, and LSP and OA3B clients receiving transportation services". A written response is required regarding these eCIRTS service and data integrity errors to demonstrate how Caregiver Specialists will be trained on these deficiencies according to this DOEA standard and how caregiver specialists will implement these requirements.

### II. Findings/Corrective Action

*(Findings result in a formal corrective action plan)*

- None.

## CONTRACT COMPLIANCE AND SERVICE DELIVERY

*Each standard will note at least one of the following:*

- *Achieved*
- *Partially Achieved*
- *Not Achieved*
- *Not Applicable*
- *Follow-Up Required*

### **Standard #1 – Previous Programmatic Monitoring**

*All issues from the previous programmatic monitoring have been resolved within an established and reasonable timeframe.*

**Response:** Not applicable.

The 2023 monitoring produced no findings and no formal recommendations.

### **Standard #2 – Outreach and Targeting**

*A targeting plan with specific targeting objectives is in place:*

- Provider has implemented the approved plan to target individuals with greatest economic need, older individuals with greatest social needs, older individuals at risk for institutional placement, older minority individuals, low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas (Pasco only).*
- Provider is serving the proposed number and percentage of older individuals with greatest economic need, older minority individuals, older individuals at risk for institutional placement, low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas (Pasco only).*
- Provider currently utilizes an Older Americans Act Prioritization Instrument in accordance with the Provider's Prioritization Policy.*
- A random sample of client files were selected from the Assessed Prioritized Consumer List (APCL) in eCIRTS. Files were reviewed for prioritization policy and procedure compliance.*

**Response:** Achieved

- Per the OAA IIIIE Prioritization Policy, clients are placed on the OAA IIIIE waitlist by ADRC Intake/Screening staff. Prioritization form containing targeting criteria is used for waitlist management. Provider also utilizes a form to track additional OAA IIIIE prioritization requirements. Using these tools, the Caregiver Specialists can prioritize clients for enrollment. This ensures that services are being targeted to clients with greatest economic and social needs, clients with English as a second language, and clients residing in rural areas (Pasco only). Additionally, the tracking tools ensure clients on the waitlist are matching IIIIE requirements of having a caregiver and meeting the definition of frailty. The tracking tools further track additional factors that

demonstrate the need for IIIE Services including eCIRTS APCL date, client's age, caregiver's age, client's health status, client's dementia diagnosis, availability of an informal local support system, client's ability to be left alone, caregiver's employment status, and eCIRTS ranking. The tracking tool is regularly reconciled against the eCIRTS APCL report to ensure that all clients are captured and that terminated clients are removed.

- B. Not applicable.
- C. Pursuant to the IIIE prioritization policy, the screening assessment is utilized along with the Waitlist Tracking Tool and Prioritization Form.
- D. Ten (10) APCL client files were reviewed during the desk review. All files contained the completed Prioritization Form that indicates priority criteria used.

### **Standard #3 – Staff Training**

*Provider staff has received training pertinent to the performance of required functions:*

- A. *Utilizing the appropriate DOEA Assessment Tool, 701A, in accordance with the DOEA Programs and Services Handbook.*
  - a. *Review of policies and procedures for DOEA Assessment Tools including the 701S, 701A, and/or 701C to ensure assessments are being completed as outlined in the DOEA Programs and Services Handbook.*
  - b. *Ensure requirements for face-to-face visits are being adhered to.*
- B. *DOEA standards for specific service training as outlined in the most current DOEA Program and Services Handbook is being utilized:*
  - a. *DOEA web-based training with receipt of a certificate of completion. The certificate must be submitted to the AAAPP for all 701 assessors and will be verified during monitoring.*
  - b. *DOEA 701S Training Webinar with appropriate documentation of completion is required per the AAAPP.*
- C. *Mandatory reporting of suspected abuse, neglect, self-neglect, and exploitation of the elderly training is conducted annually for all applicable program staff.*

### **Response: Achieved**

- A. In all files reviewed, Caregiver Specialists are documenting appropriate changes in the client's and caregiver's status. All assessments were completed face-to-face with client and caregiver. All assessments reviewed were fully complete and uploaded to eCIRTS in "complete" status. All annual assessments were completed on time and in congruence with DOEA Programs and Services Handbook standards. Caregiver Specialists continue to maintain ability to utilize eCIRTS Mobile Assessment feature to complete assessments in client eCIRTS records to capture as accurate information as possible. See Client File Review Checklist for details regarding full review of assessments.
- B. Assessment training certificates are on file for all Caregiver Specialists.
- C. Caregiver Specialists are aware of the mandate to report suspected abuse, neglect, or exploitation to the elderly to the Central Abuse Hotline. There were no incidents reported. Information on incidents is documented thoroughly in client case

narratives. Caregiver Specialists attended training on reporting suspected abuse, neglect, or exploitation of the elderly in March 2024. Additionally, the Caregiver Specialists attended the following trainings in 2024:

- a. Alzheimer's Disease and Related Disorders Training (March & April)
- b. Cybersecurity Training
- c. HIPAA and Confidentiality Practices Training
- d. eCIRTS and Outcome Measures (November)

#### **Standard #4 – Programmatic Reporting**

*All required programmatic reports are accurate and submitted in a timely manner:*

- A. *Annual Outreach and Public Education Report*
- B. *Quarterly Reports*
- C. *Detailed meeting minutes from the agency Board of Director meetings are submitted regularly.*
- D. *Surplus/Deficit Reports*

**Response:** Achieved

- A. Caregiver Specialists participate in outreach activities and documentation is kept on file. OAA Program Manager receives reports from all external providers and compiles annual report yearly. Internal providers are no longer included in this report.
- B. Not applicable.
- C. Not applicable.
- D. IIIIE budget is monitored monthly and agency report is submitted to the Department of Elder Affairs.

#### **Standard #5 – Outcome Measures**

*Outcome measures referenced in the current Standard Contract are achieved (OAA REGISTERED SERVICES ONLY):*

- A. *The provider has implemented the strategies detailed in the current Service Provider Application including:*
  - a. *Using available eCIRTS reports to track outcome achievement.*
  - b. *Each exception is addressed on the quarterly outcome measures report detailing the factors that enhance or inhibit ability to achieve outcome measures.*
  - c. *Appropriate actions, including staff training to address outcomes which are not achieved, are included in the quarterly narrative of the outcome measures report.*

**Response:** Not applicable.

Outcome Measure reports remain unavailable in eCIRTS. Service Provider Application is not applicable to the OAA Title IIIIE Program; However, Caregiver Specialists complete Outcome Measure reports monthly when available in eCIRTS. When reports are available, caregiver specialists review each exception and submit a timely report that thoughtfully addresses each exception. Caregiver Specialists attended AAAPP's Outcome Measure and eCIRTS Training in November 2024.

## **Standard #6 – Case Record Compliance**

*Using the AAAPP Client File Monitoring Tool, case records sampled showed:*

- A. Compliance with requirements for client eligibility, intake, and service delivery.*
- B. eCIRTS records of assessment/reassessment, program enrollment, and received services are accurate, entered in eCIRTS in a timely manner and agree with client and project records:*
  - a. 701A attempts are made within three business days after receipt of a client referral and completion of the assessments are no later than 14 days from initial contact.*
  - b. Reassessments are completed 365 days after the prior assessment through the end of the month and are reflected correctly in eCIRTS in congruence with the assessment/reassessment date.*

### **Response: Partially Achieved**

- A. All client files reviewed contained Screening Assessments completed to determine eligibility prior to placement on the OAA IIIIE waiting list. Caregiver Specialists review client and caregiver eligibility using screening assessments and prioritize clients utilizing a Waiting List Tracking Tool and Prioritization Form. Caregiver Specialists verify eligibility when completing initial 701A assessment. File documentation reviewed revealed no concerns related to service delivery or client eligibility. Regarding completeness of forms, of ten files, all ten files were found to have a Client Choice of Providers form with missing designation of providers to indicate client choice. As a reminder, all forms, including the Client Choice of Provider form, should be filled out completely with designation of client's choice of providers. Please see the attached Client File Review Checklist for other details.
  - a. Using the Client File Review Checklist, there were minimal issues, concerns, or discrepancies noted. Caregiver Specialists complete 701A assessments in a timely manner. Case documentation clearly notes appropriate follow-up and service provision to caregivers and clients. Reassessments are completed 365 days after the prior assessment through the end of the month and are reflected correctly in eCIRTS in congruence with the assessment / reassessment date. All program enrollments appear correct. Of ten files reviewed, ten client eCIRTS records were found to have services with missing service authorizations in the eCIRTS Authorizations tab. Moreover, of ten files reviewed, eight client eCIRTS records were found to either be missing services from the client's annual service plan, or the client's service plan has not been created to reflect all services within the client's annual year. This has resulted in a formal recommendation. Pursuant to the DOEA Programs and Services Handbook Appendix C, Section II-A, "Program enrollment information must be entered on all clients receiving case management or OAA and LSP Registered Services, all individuals receiving services through OAA Title IIIIE, and LSP and OA3B clients receiving transportation services". Written response is required regarding these eCIRTS service and data integrity errors to demonstrate how Caregiver Specialists will be trained on

these deficiencies according to this DOEA standard and how caregiver specialists will implement these requirements.

**Standard #7 – eCIRTS Exception Reports**

- A. *eCIRTS Exception Reports are reviewed on a regular basis and exemplify accuracy (OAA REGISTERED SERVICES ONLY). Specific Older Americans Act Reports include:*
- a. *Assessment Due Report*
  - b. *ACTV, APPL, APCL Clients Moved to Another PSA*
  - c. *ACTV Clients Not Serviced in a Time Range*
  - d. *Clients Served Not Enrolled*
  - e. *Consumer Age Verification*
  - f. *Possible Duplicate Clients*
  - g. *ACTV PACE Clients Who Are ACTV, APCL, or APPL In Another Program*
  - h. *eCIRTS DATA Clean Up*
  - i. *ACTV MLTC Clients Who are ACTV, APCL, or APPL In Another Program*
  - j. *Data Inconsistencies Found When Comparing Vital Statistics Death Certificates With eCIRTS*

**Response: Achieved**

- A. AAAPP Assistant Director and Program Managers run eCIRTS exception reports on a weekly or monthly basis, depending on exception report and availability within eCIRTS. AAAPP Assistant Director and Program Managers follow-up with providers as exceptions appear. When exceptions do appear, Caregiver Specialists quickly review each exception and submit a timely report that thoughtfully addresses each exception. Data accuracy for OAA IIIIE is noted to be in compliance with DOEA standards.

**Standard #8 – Budgetary compliance**

- A. *Provider is serving or has a plan to serve the number of proposed units as identified in the service provider application.*
- B. *For the month of May 2024, the provider has a clear audit trail for units of service entered in eCIRTS as indicated by a review of client files, service logs, monthly summaries, and quarterly reports to the AAAPP.*

**Response: Achieved**

- A. Not applicable.
- B. Monthly review of billing by AAAPP staff is conducted. All monthly reviews reveal Caregiver Specialists receive accurate billing summaries that match units entered into eCIRTS. Program Manager reviewed service authorizations, case notes, and submitted vendor invoice summaries for the month of May 2024 from ten case files reviewed. Services entered as received in May 2024 are corroborated with a service authorization, billed invoice, and/or case narrative. No discrepancies were noted.

**Standard #9 – Consumer Satisfaction**

*Customer satisfaction and effective delivery of service has been verified through:*



- A. *Policies and procedures related to consumer satisfaction detailing how satisfaction will be measured annually.*
- B. *Home Visits and/or client interviews (including service observation, if possible) in order to reveal effective delivery of service.*
- C. *Client satisfaction surveys accompanied by a satisfaction survey summary report for the last fiscal year.*
- D. *Provide status on the timeframe for the client satisfaction survey in the current fiscal year.*

**Response:** Achieved

- A. AAAPP Client Satisfaction/Program Evaluation Process is on file and reviewed.
- B. Caregiver Specialists continue to collect verification of service delivery as authorized and client satisfaction of services by phone and review services received during annual home visits. All ten files reviewed contained documentation that verification of receipt of authorized services and satisfaction is addressed. When necessary, Caregiver Specialists document additional follow-up to address any issues or outstanding needs of the clients and caregivers.
- C. Satisfaction Survey Summary and Result Analysis for surveys completed in November 2024 have been submitted. A total of 106 surveys were mailed to clients and their caregivers. Overall, there was a survey participation rate of 42.45% based on the number of completed surveys received. 100% of caregivers who responded reported satisfaction with the services they are receiving. 97% reported they are satisfied with the services they receive through the IIIIE Program. 97% reported they felt the services helped the person receiving care to stay in the home and 91% reported that the services helped the caregiver maintain or improve the quality of their life.
- D. Samples of Customer Satisfaction surveys sent to OAA IIIIE recipients in November 2024 were reviewed during this monitoring. The samples reviewed detail notes of appreciation to all of the Caregiver Specialists. Caregiver Specialists are commended for their excellent work with the clients and caregivers they continue to serve in a professional and helpful manner.

**Standard #10 – Grievances, Complaints, and Incidents**

*Consumer satisfaction and effective delivery of service has been verified through:*

- A. *Provider has approved grievance policies, procedures, and logs, including documentation of the service provider's response and resolution.*
- B. *Provider has approved complaint policies and procedures. Complaints are recorded using the appropriate AAAPP narrative and log which will include documentation of the service provider's response and resolution.*
- C. *(Legal Providers Only) Provider has internal grievance policies and procedures that address both denial of service and complaints by clients about manner or quality of legal assistance.*
- D. *Provider has approved incident policies, procedures, and logs, including documentation of the service provider response and resolution.*

**Response:** Achieved

- A. Current Grievance Policy and Procedure was received. Provider submitted the grievance log along with attestation that no grievances have been received in 2024. Submitted log observed to have appropriate areas to complete responses and resolutions.
- B. Current Complaint Policy and Procedure was received. Provider submitted the complaint log along with verbal attestation that no complaints have been received in 2024. Submitted log observed to have appropriate areas to document complete responses and resolutions in a timely manner.
- C. Not applicable.
- D. Program adheres to the AAAPP Incident Policies and Procedures included in the Agency Safety Plan.

**Standard #11 – Voluntary Contributions**

*Provider has voluntary contribution system in place conforming with the Older Americans Act:*

- A. *Approved Voluntary Contributions Policy/Procedure*
- B. *Sample letter and/or sign related to voluntary contributions which clearly convey services are free of charge and all contributions shall be used to increase service availability.*

**Response:** Achieved

- A. Current Voluntary Contributions Policy and Procedure was received.
- B. All ten files reviewed contained documentation that clients and caregivers received letter clearly conveying services are free of charge and voluntary contributions were used to increase service availability. When a contribution is received, acknowledgement is sent to the client verifying receipt of the donation.

**Standard #12 – Regulatory Compliance**

*OAA Provider is in Regulatory Compliance with:*

- A. *OAA services reviewed are being provided in accordance with the most current DOEA Program and Services Handbook and the most current approved Service Provider Application.*
- B. *Provider complies with all regulations pertinent to the service being provided (i.e. fire, health inspections, licensure, etc.)*
- C. *Provider is acting in accordance with the Florida Statue 119.071 (5) requiring any agency that collects social security numbers to provide a written explanation the reason for collection to the individual.*
- D. *Health Insurance Portability and Accountability Act (HIPAA) requirements including policies/procedures.*
- E. *Provider follows the Provider Conflict of Interest Program Procedure (PR 132) issued 12/2017.*
- F. *Provider submits their Comprehensive Emergency Management Plan/Continuity of Operations Plan annually as required.*

**Response:** Achieved

- A. File documentation reviewed indicates that services are being provided in accordance with the current DOE Program and Services Handbook. No concerns noted.
- B. Not applicable.
- C. Nine of ten files reviewed contained documentation that clients and caregivers are being provided with a written explanation for the collection of Social Security Numbers. One file (ED 1837980) was found to be missing documentation that the client was provided a written explanation for social security collection. Caregiver specialists are reminded to maintain a copy of this document in each client case record.
- D. All files reviewed contained documentation that clients and caregivers are being provided with information about HIPAA and AAAPP Privacy Policy. No concerns noted.
- E. Not applicable
- F. Not applicable.

**STANDARD #13 – Involvement with the ADRC**

*Provider is involved with the Aging and Disability Resource Center (ADRC) and abides by the no-wrong-door system:*

- A. *Maintains partnership with the ADRC, state, and community agencies to ensure that regardless of which agency people contact for help, they can access information about the options available across all the agencies and in their communities.*
- B. *Services not arranged through agency contracts should be obtained through referrals to other community resources (i.e. ADRC, volunteer agencies, informal networks and/or proprietary agencies that charge fees).*
- C. *If applicable, essential information is captured about the nature of the person's physical, mental and functional abilities, concerns, limitations or problems, as well as general background information during the 701S intake process to assist in screening for eligibility and applicable program and service referrals. Potential LTCC clients are referred to the ADRC for the appropriate screening measures.*

**Response: Achieved**

- A. Program continues to maintain these partnerships in the community.
- B. Per Prioritization Policy and documentation noted in the client files reviewed, referrals are made to the ADRC to add clients to the waiting lists for other programs as needs are identified and per client or caregiver request. Documentation of referrals to community resources were noted in the client files reviewed.
- C. Program adheres to the AAAPP ADRC Procedures for intake screening and prioritization. All ten files reviewed showed appropriate referrals to the ADRC or vendors for additional services identified.

**STANDARD #14 – Subcontractors**

*Provider shall monitor, at least once per year, each of its subcontractors that are paid from OAA/LSP funds as required by the Standard Contract and will:*

- A. *Submit a copy of the programmatic monitoring record to the AAAPP upon completion to ensure contractual compliance.*
- B. *Submit a copy of all subcontracts to the AAAPP within thirty (30) days of execution of each subcontract agreement.*

**Response: Achieved**

- A. Vendor billing monitoring is completed on an annual basis by the Caregiver Specialists. Caregiver Specialists conducted desk review of vendor billing in December 2024. Billing Monitoring Summary Sheets were completed, and applicable follow-up is documented. Caregiver Specialists address billing discrepancies found immediately when identified during monthly billing. If trends or ongoing issues are noted, corrective action and technical assistance are provided as needed. Additionally, AAAPP Service Analysts completed administrative reviews of all vendors in December 2024 and January 2025, which included review of licensure, insurance, vendor complaint procedures, and background screenings. No issues were noted, and any outstanding documents were provided by vendors.
- B. Not applicable.

**STANDARD #15 – Volunteers**

*Provider has policies/procedures governing the utilization of volunteers and submits the Department of Elder Affairs Volunteer Activity Report annually as required.*

**Response: Achieved**

The OAA IIIIE Program adheres to the AAAPP policies and procedures for use of volunteers.

Signatures:

<p><i>Cynthia Galvan</i></p> <hr/> <p>Cynthia Galvan, Program Manager</p>	<p>1/28/2025</p> <hr/> <p>Date</p>
<p><i>Christine Didion</i></p> <hr/> <p>Christine Didion, Director of Programs</p>	<p>01/28/2025</p> <hr/> <p>Date</p>
<p><i>K. Marsalek</i></p> <hr/> <p>Kerry Marsalek, Chief Operating Officer</p>	<p>01/28/2025</p> <hr/> <p>Date</p>



Area Agency on Aging of Pasco-Pinellas, Inc.  
Client File Monitoring Tool for Registered Services  
Specific to 701A

Organization: Area Agency on Aging of Pasco-Pinellas  
Registered Service: OAA Title III National Family Caregiver Support Program

Questions	B.B. 528217	J.L. 1182676	Z.C. 1795782	T.M. 1751971	K.C. 1793907	E.D. 1837980	J.L. 1486905	R.S. 1781383	S.C. 1814222	O.L. 282706	Comments
Was the most current assessment (PILA and/or POC) completed in a timely manner and entered into eCHRS correctly?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
If applicable, was the reassessment completed 60 days after the prior assessment (through the end of the month)?	Y	N/A	Y	Y	Y	Y	Y	Y	N/A	Y	
Was client eligibility verified (per "Service Eligibility for OAA Programs")?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Has OAA priority for service delivery been established and recorded using an approved prioritization tool?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Did the worker obtain a signed Release of Information (ROI) form?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Was the client notified of why their ROI is collected?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Did the worker notify the client of their current Complaint Procedure?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Is the client currently enrolled for this program and service in eCHRS?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Based on the next 60 month selected for review, do the received services in eCHRS balance with provider's internal records?	May	May	May	May	May	May	May	May	May	May	
Do notes within the client's file reflect the current status of the client as indicated in eCHRS?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
If service frequency increased/decreased at any time during the fiscal year, were notes updated accordingly?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
B.B. 528217	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
J.L. 1182676	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
Z.C. 1795782	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
T.M. 1751971	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
K.C. 1793907	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
E.D. 1837980	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
J.L. 1486905	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
R.S. 1781383	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
S.C. 1814222	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										
O.L. 282706	<ul style="list-style-type: none"> <li>1) Did the provider furnish care services as planned?</li> <li>2) Did the provider notify the client of all authorized services within the client's service plan?</li> </ul>										

Not a Service  
Not a Registered Service  
Not a Registered Service



**Area Agency on Aging of Pasco-Pinellas, Inc.**  
**Client File Monitoring Tool for Registered Services**  
 Specific to 7015

Organization: Area Agency on Aging Of Pasco-Pinellas  
 Registered Service: OAA Title III-E National Family Caregiver Support Program

Attachment I.

Questions	R.A. 1750451	S.A. 481658	S.A. 1893927	N.G. 1892426	G.L. 1725975	D.L. 1901661	R.R. 1794411	S.S. 1901695	J.S. 1907956	S.T. 1879704	Notes
Was the most current intake/7015 assessment completed and entered into eCIRTS correctly?	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	
Was client eligibility verified? (see "Service Eligibility for OAA Programs")	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Has OAA priority for service delivery been established using an approved prioritization tool?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Was the client notified of why their SS# is collected?	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	ADRC	
Is the client correctly enrolled on the waitlist for this program/service in eCIRTS?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Notes	eCIRTS lists client as OABE TERM APCL - effective date 12/4/2024 Client Moved. OAB8/RP38 ACTV (TRS), LSP TRS ACTV										

Yes = Compliant  
 No = Non-compliant and comment is required  
 N/A = Not applicable











# 2024 IIIE Monitoring Report Complete - Unsigned


Final Audit Report

2025-01-28


Created:	2025-01-28 (Eastern Standard Time)
By:	Cynthia Galvan (cynthia.galvan@aaapp.org)
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## "2024 IIIE Monitoring Report Complete - Unsigned" History

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