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March 12, 2025

Ms. Shelby Newman, VA Program Manager  
Area Agency on Aging of Pasco-Pinellas, Inc.  
9549 Koger Boulevard  
Suite 100  
St. Petersburg, Florida 33702

Dear Shelby,

This letter confirms the completion of the Semi-Annual Programmatic file monitoring for the Veterans Directed Home and Community Services program.

Please find enclosed the completed monitoring tools for the three (3) Bay Pines and three (3) James Haley client files reviewed during the Annual programmatic file monitoring. We are pleased to note that of the six (6) files reviewed, all client files contained completed, appropriate, and required documentation. No findings were identified, and no further follow-up is needed at this time.

Thank you for your assistance and cooperation during this programmatic monitoring.

Sincerely,

*Victoria Anci*

Victoria Anci  
General Revenue Program Manager

Enclosures  
CC: Kerry Marsalek, COO

**Veterans Directed Home and Community Based Services Program  
Monitoring Tool**

VA: Bay Pines  
Client: MB  
Date: February 2025

| Section 1: Referral and Assessment   |  | Yes | No | N/A | Comments  |
|--|--|-----|----|-----|---|
| A  | Did the ADRC confirm receipt of the referral from the VA and was it documented?  |     |    | x   | Clients are no longer referred through the ADRC. Referrals are sent directly to VA Program Manager and assigned to VA case manager immediately. |
| B  | Was the Initial Home Visit completed by the Provider within 10 business days from receipt of the referral?   |     |    | x   | Reauthorization 4/1/24. Budget completed 6/11/2024. Delay due to difficulty with enrolling employee. Quarterly Home visits completed timely.    |
| Section 2: Care Plan/Service Planning  |  | Yes | No | N/A | Comments  |
| A  | According to file documentation, did the Consultant provide Service Planning Assistance?   | x   |    |     |   |
| B  | Do the needs identified in the VA Assessment match Budget Plan needs?  | x   |    |     |   |
| C  | Was the enrollment documentation submitted to the VA for review?   | x   |    |     |   |
| D  | Does the documentation reflect that the Consumer and/or Representative was able to decide what mix of goods and services will best meet their need? Did the Consultant assist in this process? |     |    | x   |   |
| E  | Is the Consumer and/or Representative being assisted by the Consultant to purchase items or services needed to live independently in the community?  | x   |    |     | Per monthly notes, VA case manager continues to contact representative and provide assistance as needed.  |
| F  | If desired, was the Consumer and/or Representative able to utilize traditional service providers?  |     |    | x   | Veteran has chosen to utilize directly hired employees rather than traditional service providers.   |
| G  | Is the Consultant providing support services to facilitate service delivery?   | x   |    |     | Per monthly notes, case manager provides assistance as needed   |
| H  | If there were any conflicts between program design and implementation of self-direction, was the VA made aware of the situation and was the conflict resolved?                                 |     |    | x   |   |
| Section 3: Budget Planning   |  | Yes | No | N/A | Comments  |
| A  | Did the Consumer and/or Representative stay within the budget authorized by the VA?  | x   |    |     |   |
| B  | Is the Consultant assisting the Consumer and/or Representative in managing their budget?   | x   |    |     |   |
| C  | Was the Budget Plan completed correctly?   | x   |    |     |   |
| Section 4: Financial Management Services   |  | Yes | No | N/A | Comments  |
| A  | Is Mains'I providing Financial Management Services for Consumer?   | x   |    |     |   |
| B  | Is the Consultant receiving client budget and billing in the Mains'I system to ensure client / representative are entering billing correctly?  | x   |    |     | Consultant has access to the Mains'I system and is able to review time as it is entered.  |
| <b>Summary/Comments:</b>   |  |     |    |     |   |
| Current authorization from VA is included in file and effective through 3/31/2025. Budget on file and completed with representative/consumer on 6/11/2024. Monthly contacts continue to assess client's needs and status. No concerns noted. |  |     |    |     |   |

Monitor Signature: *Victoria Anel*

**Veterans Directed Home and Community Based Services Program  
Monitoring Tool**

VA: Bay Pines  
Client: TF  
Date: February 2025

| Section 1: Referral and Assessment   |  | Yes | No | N/A | Comments  |
|--|--|-----|----|-----|---|
| A  | Did the ADRC confirm receipt of the referral from the VA and was it documented?  |     |    | x   | Clients are no longer referred through the ADRC. Referrals are sent directly to VA Program Manager and assigned to VA case manager immediately. |
| B  | Was the Initial Home Visit completed by the Provider within 10 business days from receipt of the referral?   |     |    | x   | Reauthorization 3/1/2024. Budget completed 3/4/2024. Quarterly Home visits completed timely.  |
| Section 2: Care Plan/Service Planning  |  | Yes | No | N/A | Comments  |
| A  | According to file documentation, did the Consultant provide Service Planning Assistance?   | x   |    |     |   |
| B  | Do the needs identified in the VA Assessment match Budget Plan needs?  | x   |    |     |   |
| C  | Was the enrollment documentation submitted to the VA for review?   | x   |    |     |   |
| D  | Does the documentation reflect that the Consumer and/or Representative was able to decide what mix of goods and services will best meet their need? Did the Consultant assist in this process? |     |    | x   |   |
| E  | Is the Consumer and/or Representative being assisted by the Consultant to purchase items or services needed to live independently in the community?  | x   |    |     | Per monthly notes, VA case manager continues to contact representative and provide assistance as needed.  |
| F  | If desired, was the Consumer and/or Representative able to utilize traditional service providers?  |     |    | x   | Veteran has chosen to utilize directly hired employees rather than traditional service providers.   |
| G  | Is the Consultant providing support services to facilitate service delivery?   | x   |    |     | Per monthly notes, case manager provides assistance as needed   |
| H  | If there were any conflicts between program design and implementation of self-direction, was the VA made aware of the situation and was the conflict resolved?                                 | x   |    |     |   |
| Section 3: Budget Planning   |  | Yes | No | N/A | Comments  |
| A  | Did the Consumer and/or Representative stay within the budget authorized by the VA?  | x   |    |     |   |
| B  | Is the Consultant assisting the Consumer and/or Representative in managing their budget?   | x   |    |     |   |
| C  | Was the Budget Plan completed correctly?   | x   |    |     |   |
| Section 4: Financial Management Services   |  | Yes | No | N/A | Comments  |
| A  | Is Mains'l providing Financial Management Services for Consumer?   | x   |    |     |   |
| B  | Is the Consultant receiving client budget and billing in the Mains'l system to ensure client / representative are entering billing correctly?  | x   |    |     | Consultant has access to the Mains'l system and is able to review time as it is entered.  |
| <b>Summary/Comments:</b>   |  |     |    |     |   |
| Current authorization from VA is included in file and effective through 2/28/2025. Budget on file and completed with representative/consumer on 3/04/2024. Monthly contacts continue to assess client's needs and status. No concerns noted. |  |     |    |     |   |

Monitor Signature: *Victoria Ancl*



**Veterans Directed Home and Community Based Services Program  
Monitoring Tool**

VA: Bay Pines  
Client: MM  
Date: February 2025

| Section 1: Referral and Assessment   |  | Yes | No | N/A | Comments  |
|--|--|-----|----|-----|---|
| A  | Did the ADRC confirm receipt of the referral from the VA and was it documented?  |     |    | x   | Clients are no longer referred through the ADRC. Referrals are sent directly to VA Program Manager and assigned to VA case manager immediately.               |
| B  | Was the Initial Home Visit completed by the Provider within 10 business days from receipt of the referral?   |     |    | x   | Reauthorization 11/1/24. Budget dated for 10/18/2024. Quarterly Home visits completed timely. Updated budget not due to be signed until next quarterly visit. |
| Section 2: Care Plan/Service Planning  |  | Yes | No | N/A | Comments  |
| A  | According to file documentation, did the Consultant provide Service Planning Assistance?   | x   |    |     |   |
| B  | Do the needs identified in the VA Assessment match Budget Plan needs?  | x   |    |     |   |
| C  | Was the enrollment documentation submitted to the VA for review?   | x   |    |     |   |
| D  | Does the documentation reflect that the Consumer and/or Representative was able to decide what mix of goods and services will best meet their need? Did the Consultant assist in this process? |     |    | x   |   |
| E  | Is the Consumer and/or Representative being assisted by the Consultant to purchase items or services needed to live independently in the community?  | x   |    |     | Per monthly notes, VA case manager continues to contact representative and provide assistance as needed.  |
| F  | If desired, was the Consumer and/or Representative able to utilize traditional service providers?  |     |    | x   | Veteran has chosen to utilize directly hired employees rather than traditional service providers.   |
| G  | Is the Consultant providing support services to facilitate service delivery?   | x   |    |     | Per monthly notes, case manager provides assistance as needed   |
| H  | If there were any conflicts between program design and implementation of self-direction, was the VA made aware of the situation and was the conflict resolved?                                 | x   |    |     |   |
| Section 3: Budget Planning   |  | Yes | No | N/A | Comments  |
| A  | Did the Consumer and/or Representative stay within the budget authorized by the VA?  | x   |    |     |   |
| B  | Is the Consultant assisting the Consumer and/or Representative in managing their budget?   | x   |    |     |   |
| C  | Was the Budget Plan completed correctly?   | x   |    |     |   |
| Section 4: Financial Management Services   |  | Yes | No | N/A | Comments  |
| A  | Is Mains'I providing Financial Management Services for Consumer?   | x   |    |     |   |
| B  | Is the Consultant receiving client budget and billing in the Mains'I system to ensure client / representative are entering billing correctly?  | x   |    |     | Consultant has access to the Mains'I system and is able to review time as it is entered.  |
| <b>Summary/Comments:</b>   |  |     |    |     |   |
| Current authorization from VA is included in file and effective through 10/31/2025. Budget on file and completed with representative/consumer on 10/18/2024. Monthly contacts continue to assess client's needs and status. No concerns noted. |  |     |    |     |   |

Monitor Signature: *Victoria Anici*

**Veterans Directed Home and Community Based Services Program  
Monitoring Tool**

VA: James Haley  
Client: BH  
Date: February

| 2025<br>Section 1: Referral and Assessment  |  | Yes | No | N/A | Comments  |
|---|--|-----|----|-----|---|
| A   | Did the ADRC confirm receipt of the referral from the VA and was it documented?  |     |    | x   | Clients are no longer referred through the ADRC. Referrals are sent directly to VA Program Manager and assigned to VA case manager immediately. |
| B   | Was the Initial Home Visit completed by the Provider within 10 business days from receipt of the referral?   |     | x  |     | Initial authorization and budget dated 7/1/24. Initial home visit 7/22/24. Quarterly Home visits completed timely.                              |
| Section 2: Care Plan/Service Planning   |  | Yes | No | N/A | Comments  |
| A   | According to file documentation, did the Consultant provide Service Planning Assistance?   | x   |    |     |   |
| B   | Do the needs identified in the VA Assessment match Budget Plan needs?  | x   |    |     |   |
| C   | Was the enrollment documentation submitted to the VA for review?   | x   |    |     |   |
| D   | Does the documentation reflect that the Consumer and/or Representative was able to decide what mix of goods and services will best meet their need? Did the Consultant assist in this process? |     |    | x   |   |
| E   | Is the Consumer and/or Representative being assisted by the Consultant to purchase items or services needed to live independently in the community?  | x   |    |     | Per monthly notes, VA case manager continues to contact representative and provide assistance as needed.  |
| F   | If desired, was the Consumer and/or Representative able to utilize traditional service providers?  |     |    | x   | Veteran has chosen to utilize directly hired employees rather than traditional service providers.   |
| G   | Is the Consultant providing support services to facilitate service delivery?   | x   |    |     | Per monthly notes, case manager provides assistance as needed   |
| H   | If there were any conflicts between program design and implementation of self-direction, was the VA made aware of the situation and was the conflict resolved?                                 | x   |    |     |   |
| Section 3: Budget Planning  |  | Yes | No | N/A | Comments  |
| A   | Did the Consumer and/or Representative stay within the budget authorized by the VA?  | x   |    |     |   |
| B   | Is the Consultant assisting the Consumer and/or Representative in managing their budget?   | x   |    |     |   |
| C   | Was the Budget Plan completed correctly?   | x   |    |     |   |
| Section 4: Financial Management Services  |  | Yes | No | N/A | Comments  |
| A   | Is Mains'I providing Financial Management Services for Consumer?   | x   |    |     |   |
| B   | Is the Consultant receiving client budget and billing in the Mains'I system to ensure client / representative are entering billing correctly?  | x   |    |     | Consultant has access to the Mains'I system and is able to review time as it is entered.  |
| <b>Summary/Comments:</b>  |  |     |    |     |   |
| Veteran has been enrolled since 07/2024 . Budget on file and completed with representative/consumer on 7/22/2024. Monthly contacts continue to assess client's needs and status. No concerns noted. |  |     |    |     |   |

Monitor Signature: *Victoria Anai*



**Veterans Directed Home and Community Based Services Program  
Monitoring Tool**

VA: James Haley  
Client: HS  
Date: February 2025

| Section 1: Referral and Assessment   |  | Yes | No | N/A | Comments  |
|--|--|-----|----|-----|---|
| A  | Did the ADRC confirm receipt of the referral from the VA and was it documented?  |     |    | x   | Clients are no longer referred through the ADRC. Referrals are sent directly to VA Program Manager and assigned to VA case manager immediately. |
| B  | Was the Initial Home Visit completed by the Provider within 10 business days from receipt of the referral?   |     |    | x   | Reauthorization 01/01/2024. Budget dated for 02/06/2024. Quarterly Home visits completed timely.  |
| Section 2: Care Plan/Service Planning  |  | Yes | No | N/A | Comments  |
| A  | According to file documentation, did the Consultant provide Service Planning Assistance?   | x   |    |     |   |
| B  | Do the needs identified in the VA Assessment match Budget Plan needs?  | x   |    |     |   |
| C  | Was the enrollment documentation submitted to the VA for review?   | x   |    |     |   |
| D  | Does the documentation reflect that the Consumer and/or Representative was able to decide what mix of goods and services will best meet their need? Did the Consultant assist in this process? |     |    | x   |   |
| E  | Is the Consumer and/or Representative being assisted by the Consultant to purchase items or services needed to live independently in the community?  | x   |    |     | Per monthly notes, VA case manager continues to contact representative and provide assistance as needed.  |
| F  | If desired, was the Consumer and/or Representative able to utilize traditional service providers?  |     |    | x   | Veteran has chosen to utilize directly hired employees rather than traditional service providers.   |
| G  | Is the Consultant providing support services to facilitate service delivery?   | x   |    |     | Per monthly notes, case manager provides assistance as needed   |
| H  | If there were any conflicts between program design and implementation of self-direction, was the VA made aware of the situation and was the conflict resolved?                                 | x   |    |     |   |
| Section 3: Budget Planning   |  | Yes | No | N/A | Comments  |
| A  | Did the Consumer and/or Representative stay within the budget authorized by the VA?  | x   |    |     |   |
| B  | Is the Consultant assisting the Consumer and/or Representative in managing their budget?   | x   |    |     |   |
| C  | Was the Budget Plan completed correctly?   | x   |    |     |   |
| Section 4: Financial Management Services   |  | Yes | No | N/A | Comments  |
| A  | Is Mains'I providing Financial Management Services for Consumer?   | x   |    |     |   |
| B  | Is the Consultant receiving client budget and billing in the Mains'I system to ensure client / representative are entering billing correctly?  | x   |    |     | Consultant has access to the Mains'I system and is able to review time as it is entered.  |
| <b>Summary/Comments:</b>   |  |     |    |     |   |
| Current authorization from VA is included in file and effective through 12/31/2024. Budget on file and completed with representative/consumer on 2/6/2024. Monthly contacts continue to assess client's needs and status. No concerns noted. |  |     |    |     |   |

Monitor Signature: *Victoria Anel*

**Veterans Directed Home and Community Based Services Program  
Monitoring Tool**

VA: James Haley

Client: RI

Date: February

| 2025   |  |     |    |     |   |
|--|--|-----|----|-----|---|
| Section 1: Referral and Assessment   |  | Yes | No | N/A | Comments  |
| A  | Did the ADRC confirm receipt of the referral from the VA and was it documented?  |     |    | x   | Clients are no longer referred through the ADRC. Referrals are sent directly to VA Program Manager and assigned to VA case manager immediately. |
| B  | Was the Initial Home Visit completed by the Provider within 10 business days from receipt of the referral?   |     |    | x   | Reauthorization 11/01/2024. Budget dated for 11/5/2024. Quarterly Home visits completed timely.   |
| Section 2: Care Plan/Service Planning  |  | Yes | No | N/A | Comments  |
| A  | According to file documentation, did the Consultant provide Service Planning Assistance?   | x   |    |     |   |
| B  | Do the needs identified in the VA Assessment match Budget Plan needs?  | x   |    |     |   |
| C  | Was the enrollment documentation submitted to the VA for review?   | x   |    |     |   |
| D  | Does the documentation reflect that the Consumer and/or Representative was able to decide what mix of goods and services will best meet their need? Did the Consultant assist in this process? |     |    | x   |   |
| E  | Is the Consumer and/or Representative being assisted by the Consultant to purchase items or services needed to live independently in the community?  | x   |    |     | Per monthly notes, VA case manager continues to contact representative and provide assistance as needed.  |
| F  | If desired, was the Consumer and/or Representative able to utilize traditional service providers?  |     |    | x   | Veteran has chosen to utilize directly hired employees rather than traditional service providers.   |
| G  | Is the Consultant providing support services to facilitate service delivery?   | x   |    |     | Per monthly notes, case manager provides assistance as needed   |
| H  | If there were any conflicts between program design and implementation of self-direction, was the VA made aware of the situation and was the conflict resolved?                                 | x   |    |     |   |
| Section 3: Budget Planning   |  | Yes | No | N/A | Comments  |
| A  | Did the Consumer and/or Representative stay within the budget authorized by the VA?  | x   |    |     |   |
| B  | Is the Consultant assisting the Consumer and/or Representative in managing their budget?   | x   |    |     |   |
| C  | Was the Budget Plan completed correctly?   | x   |    |     |   |
| Section 4: Financial Management Services   |  | Yes | No | N/A | Comments  |
| A  | Is Mains'l providing Financial Management Services for Consumer?   | x   |    |     |   |
| B  | Is the Consultant receiving client budget and billing in the Mains'l system to ensure client / representative are entering billing correctly?  | x   |    |     | Consultant has access to the Mains'l system and is able to review time as it is entered.  |
| <b>Summary/Comments:</b>   |  |     |    |     |   |
| Current authorization from VA is included in file and effective through 10/31/2025. Budget on file and completed with representative/consumer on 11/05/2024. Monthly contacts continue to assess client's needs and status. No concerns noted. |  |     |    |     |   |

Monitor Signature: *Victoria Ancl*