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July 5, 2023

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

Dear Dijana,

Please find enclosed the completed monitoring tools for the three Bay Pines and three James Haley VDHCBs client files reviewed during the June 2023 client file monitoring. The files reviewed contained appropriate and required documentation and paperwork.

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

Sincerely,

*Michelle Tavares*

Michelle Tavares  
General Revenue Program Manager

Enclosures

CC: Kerry Marsalek, COO

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

VA: James Haley  
Client: Vincent, Giambalvo  
Date: 6/30/2023

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. Current authorization is on file effective 04/01/2023. Client enrollment date effective 7/1/2023. Per case manager, the client was unable to find employees.
B	Was the Initial Home Visit completed by the Provider within 72 working hours (9 business days) from receipt of the referral?	x			Home visit and budget completed 6/16/2023.
Section 2: Care Plan/Service Planning		Yes	No	N/A	Comments
A	According to file documentation, did the Consultant provide Service Planning Assistance?	x			Case manager provides assistance as needed.
B	Do the needs identified in the VA Assessment match Budget Plan needs?	x			Veteran is assessed as needing hands-on assistance with ADLs, per VA authorization. Budget Plan is for Personal Care Assistance.
C	Was the enrollment documentation submitted to the VA for review?			x	Due to COVID-19, VA does not have to review for approval.
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?				Enrollment effective 7/1/2023. Assistance to be provided 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?				Enrollment effective 7/1/2023. Assistance to be provided 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?				None noted.
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			No issues noted.
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?				Enrollment effective 7/1/2023
B	Is the Consultant receiving client budget and billing in the Mains'l system to ensure client / representative are entering billing correctly?				Enrollment effective 7/1/2023
Summary/Comments:					

Monitor Signature: Michelle Tavares

# Veterans Directed Home and Community Based Services Program

## Monitoring Tool

VA: James Haley  
Client: Dealva, Paul  
Date: 6/30/2023

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. Client has been enrolled in VDHCBs since 1/01/2022. Current authorization is on file effective 12/01/2022.
B	Was the Initial Home Visit completed by the Provider within 72 working hours (9 business days) from receipt of the referral?				Home visit and budget completed 12/07/2022.
Section 2: Care Plan/Service Planning		Yes	No	N/A	Comments
A	According to file documentation, did the Consultant provide Service Planning Assistance?	x			Per monthly notes, case manager provides assistance as needed.
B	Do the needs identified in the VA Assessment match Budget Plan needs?	x			Veteran is assessed as needing hands-on assistance with ADLs, per VA authorization. Budget Plan is for Personal Care Assistance.
C	Was the enrollment documentation submitted to the VA for review?			x	Due to COVID-19, VA does not have to review for approval.
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	None noted.
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			No issues noted.
B	Is the Consultant assisting the Consumer and/or Representative in managing their budget?	x			Per monthly notes, case manager provides assistance as needed.
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.
Summary/Comments:					

Monitor Signature: Michelle Tavares



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

VA: James Haley  
Client: Motley, William K  
Date: 6/30/2023

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. Client has been enrolled in VDHCBs since 9/01/2013. Current authorization is on file effective 06/16/2022.
B	Was the Initial Home Visit completed by the Provider within 72 working hours (9 business days) from receipt of the referral?				Home visit and budget completed 3/01/2023.
Section 2: Care Plan/Service Planning		Yes	No	N/A	Comments
A	According to file documentation, did the Consultant provide Service Planning Assistance?	x			Per monthly notes, case manager provides assistance as needed.
B	Do the needs identified in the VA Assessment match Budget Plan needs?	x			Veteran is assessed as needing hands-on assistance with ADLs, per VA authorization. Budget Plan is for Personal Care Assistance.
C	Was the enrollment documentation submitted to the VA for review?			x	Due to COVID-19, VA does not have to review for approval.
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	None noted.
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			No issues noted.
B	Is the Consultant assisting the Consumer and/or Representative in managing their budget?	x			Per monthly notes, case manager provides assistance as needed.
C	Was the Budget Plan completed correctly?	x			
Section 4: Financial Management Services		Yes	No	N/A	Comments
A	Is Mains' providing Financial Management Services for Consumer?	x			
B	Is the Consultant receiving client budget and billing in the Mains' system to ensure client / representative are entering billing correctly?	x			Consultant has access to the Mains' system and is able to review time as it is entered.
Summary/Comments:					

Monitor Signature: Michelle Tavares

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

VA: Bay Pines  
Client: Albert, Gentileco  
Date: 6/30/2023

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. Client was enrolled in VDHCBs on 3/01/2023. Current authorization is on file effective 01/02/2023.
B	Was the Initial Home Visit completed by the Provider within 72 working hours (9 business days) from receipt of the referral?				Home Visit and budget completed 2/09/2023.
Section 2: Care Plan/Service Planning		Yes	No	N/A	Comments
A	According to file documentation, did the Consultant provide Service Planning Assistance?	x			Per monthly notes, case manager provides assistance as needed.
B	Do the needs identified in the VA Assessment match Budget Plan needs?	x			Veteran is assessed as needing hands-on assistance with ADLs, per VA authorization. Budget Plan is for Personal Care Assistance.
C	Was the enrollment documentation submitted to the VA for review?			x	Due to COVID-19, VA does not have to review for approval.
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	None noted.
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			No issues noted.
B	Is the Consultant assisting the Consumer and/or Representative in managing their budget?	x			Per monthly notes, case manager provides assistance as needed.
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.
Summary/Comments:					

Monitor Signature: Michelle Tavares



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

VA: Bay Pines  
Client: Silva, Richard  
Date: 6/30/2023

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. Client has been enrolled in VDHCBs since 5/01/2022. Current authorization is on file effective 01/03/2023.
B	Was the Initial Home Visit completed by the Provider within 72 working hours (9 business days) from receipt of the referral?				Home visit was not conducted due to COVID-19. Budget completed by phone on 3/01/2023.
Section 2: Care Plan/Service Planning		Yes	No	N/A	Comments
A	According to file documentation, did the Consultant provide Service Planning Assistance?	x			Per monthly notes, case manager provides assistance as needed.
B	Do the needs identified in the VA Assessment match Budget Plan needs?	x			Veteran is assessed as needing hands-on assistance with ADLs, per VA authorization. Budget Plan is for Personal Care Assistance.
C	Was the enrollment documentation submitted to the VA for review?			x	Due to COVID-19, VA does not have to review for approval.
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	None noted.
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			No issues noted.
B	Is the Consultant assisting the Consumer and/or Representative in managing their budget?	x			Per monthly notes, case manager provides assistance as needed.
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>					
Veteran has been actively enrolled in VDHCBs Program since 5/01/2022. Current authorization from VA is included in file and effective through 1/02/2023. Budget on file and completed with representative/consumer on 3/01/2023. Monthly contacts continue to assess client's needs and status. No concerns noted.					

Monitor Signature: Michelle Tavares

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

VA: Bay Pines  
Client: Chelius, Robert  
Date: 6/30/2023

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. Client has been enrolled in VDHCBBS since 3/01/2020. Current authorization is on file effective 01/02/2023.
B	Was the Initial Home Visit completed by the Provider within 72 working hours (9 business days) from receipt of the referral?				Home Visit and budget completed 2/02/2023.
Section 2: Care Plan/Service Planning		Yes	No	N/A	Comments
A	According to file documentation, did the Consultant provide Service Planning Assistance?	x			Per monthly notes, case manager provides assistance as needed.
B	Do the needs identified in the VA Assessment match Budget Plan needs?	x			Veteran is assessed as needing hands-on assistance with ADLs, per VA authorization. Budget Plan is for Personal Care Assistance.
C	Was the enrollment documentation submitted to the VA for review?			x	Due to COVID-19, VA does not have to review for approval.
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	None noted.
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			No issues noted.
B	Is the Consultant assisting the Consumer and/or Representative in managing their budget?	x			Per monthly notes, case manager provides assistance as needed.
C	Was the Budget Plan completed correctly?	x			
Section 4: Financial Management Services		Yes	No	N/A	Comments
A	Is Mains' providing Financial Management Services for Consumer?	x			
B	Is the Consultant receiving client budget and billing in the Mains' system to ensure client / representative are entering billing correctly?	x			Consultant has access to the Mains' system and is able to review time as it is entered.
<b>Summary/Comments:</b>					
Veteran has been actively enrolled in VDHCBBS Program since 3/01/2020. Current authorization from VA is included in file and effective through 1/02/2023. Budget on file and completed with representative/consumer on 2/02/2023. Monthly contacts continue to assess client's needs and status. No concerns noted.					

Monitor Signature: Michelle Tavares