

Cathy Cooper
Authorized Signature

Number: SPD-AR-10-111

Issue Date: 12/17/2010

CORRECTED

Topic: Other

Due Date: 1/31/2011

Subject: REVIEW & COMMENT OF UPDATED OAA SERVICE DEFINITIONS

Applies to (check all that apply):

- | | |
|--|---|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Children, Adults and Families | <input type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Other (please specify): |

Action Required:

Please exercise your option to review and comment on the recommended updates to the Older Americans Act Service Definitions.

Comments may be typed directly into the draft document (found at www.oregon.gov/DHS/spwpd/sua/info-aaa.shtml under sub-category *Guidance*, menu-item Service and Unit Definitions) or comments may be hand-written, scanned and e-mailed or faxed to the Contact noted below.

Deadline for receipt of comments is end of business day January 31, 2011.

Reason for Action:

2005 Older Americans Act Service Definitions have been updated to align with published Administration on Aging Definitions.

Field/Stakeholder review: Yes No

If yes, reviewed by:

If you have any questions about this action request, contact:

Contact(s):	Rhonda Buedefeldt, OAA/NAPIS Program Analyst		
Phone:	503.373.1854	Fax:	503.373.1133
E-mail:	rhonda.buedefeldt@state.or.us		

**COMPARISON DOCUMENT FOR AAA REVIEW AND COMMENT OF
PROPOSED 2011 OAA/OPI SERVICE DEFINITIONS**

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#1 PERSONAL CARE (1 unit = 1 Hour of service) Personal assistance, stand-by assistance, cueing, or supervision for persons having difficulty with one or more of the following activities of daily living; eating, dressing/grooming, bathing/hygiene, toileting, and mobility/transferring. (SPD definition of Personal Care takes precedence over the OAA definition)</p>	<p>PERSONAL CARE Matrices #1 (agency) and #1a (HCW) (1 Hour) – In-home services provided to maintain, strengthen, or restore an individual's functioning in their own home when an individual is dependent in one or more ADLs, or when an individual requires assistance for ADL needs. Assistance can be provided either by a contracted agency or by a Homecare worker paid in accordance with the collectively bargained rate. (OAR 411-0032)</p>	
<p>#1a PERSONAL CARE (1 Hour of service) Personal care services, as described in #1 above, provided by Homecare Workers through the Client Employed Provider Program</p>	<p>Matrix #1a included above</p>	
<p>#2 HOMEMAKER (HOME CARE) (1 unit = 1 Hour of service) Assistance to persons having difficulty with one or more of the following instrumental activities of daily living; preparing meals, shopping for personal items, managing money, accessing available transportation services, medication management, using the telephone, or housekeeping. (SPD definition of Home Care takes precedence.)</p>	<p>HOMEMAKER Matrices #2 (agency) and #2a (HCW) (1 Hour) - Assistance such as preparing meals, shopping for personal items, managing money, using the telephone or doing light housework. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p>	
<p>#2a HOMEMAKER (HOME CARE) (1 unit = 1 Hour of service) Homemaker services, as described in #2 above, provided by Homecare Workers through the Client Employed Provider Program</p>	<p>Matrix #2a included above</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#3 CHORE (1 unit = 1 Hour of service) Assistance to persons having difficulty with one or more of the following activities: heavy housework, yard work or sidewalk maintenance.</p>	<p>CHORE Matrices #3 (contractor) and #3a (HCW) (1 Hour) - Assistance such as heavy housework, yard work or sidewalk maintenance. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>Note: Chore services are provided on an intermittent basis.</p>	
<p>#3a CHORE (1 unit = 1 Hour of service) Chore services, as described in #3 above, provided by Homecare Workers through the Client Employed Provider Program</p>	<p>Matrix #3a included above</p>	
<p>#4 HOME DELIVERED MEALS (1 unit = 1 Meal delivered) A meal provided to a qualified individual in his/her place of residence. The meal must comply with the Dietary Guidelines for Americans and provides a minimum of 33 and 1/3 percent of the current daily Recommended Dietary Allowances as established by the Food and Nutrition Board of the National Research Council of the National Academy of Sciences.</p>	<p>HOME-DELIVERED MEAL Matrix #4 (1 Meal) - A meal provided to a qualified individual in his/her place of residence that meets all of the requirements of the Older Americans Act, state and local laws. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>Note: 45 CFR 1321.69(b) states: The spouse of the older person, regardless of age or condition, may receive a home-delivered meal if, according to criteria determined by the area agency, receipt of the meal is in the best interest of the homebound older person. Refer to Section 3.b. of the OAA Nutrition Program Standards for additional eligibility requirements www.oregon.gov/DHS/spwps/sua/docs/nu-prg-standards.pdf</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#5 ADULT DAY CARE / ADULT DAY HEALTH (1 unit = 1 Hour of service) Personal care for dependent elders in a supervised, protective, and congregate setting during some portion of a twenty-four hour day. For the purposes of the Older Americans Act program, an "elder" is a person age 60 or over. Services typically include social and recreational activities, training, counseling, meals, other services such as rehabilitation, medications assistance and home health aid services for adult day health.</p>	<p>ADULT DAY CARE/ADULT DAY HEALTH Matrix #5 (1 hour) - Personal care for dependent elders in a supervised, protective, and congregate setting during some portion of a day. Services offered in conjunction with adult day care/adult day health typically include social and recreational activities, training, counseling, and services such as rehabilitation, medications assistance and home health aide services for adult day health. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p>	
<p>#6 CASE MANAGEMENT (1 unit = 1 Hour) (OAA IIIB and OPI only) Assistance in the form of either access or care coordination in circumstances where the older person is experiencing diminished functioning capacities, personal conditions, or other characteristics which require the provision of services by formal service providers or family caregivers. Typical activities include assessing needs, developing care plans, authorizing services, arranging services, coordinating the provision of services among providers, follow-up and reassessment, as required. (NOTE: Case Management Services for FCSP funded by IIIE should be recorded using matrix #16).</p>	<p>CASE MANAGEMENT Matrix #6 (1 Hour) - A service designed to individualize and integrate social and health care options for or with a person being served. Its goal is to provide access to an array of service options to assure appropriate levels of service and to maximize coordination in the service delivery system. Case management must include four general components: access, assessment, service implementation, and monitoring. (OAR 411-032)</p> <p>Note: Case Management to caregivers is reported as Matrix #16 Access Assistance Caregiver.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#7 CONGREGATE MEALS (1 unit = 1 Meal) A meal provided to an eligible participant at a nutrition site, senior center or some other congregate setting which complies with the Dietary Guidelines for Americans and provides a minimum of 33 and 1/3 percent of the current daily Recommended Dietary Allowances (RDA) established by the Food and Nutrition Board of the National Research Council of the National Academy of Sciences. Revised January 2005</p>	<p>CONGREGATE MEAL Matrix #7 (1 Meal) - A meal provided to a qualified individual in a congregate or group setting. The meal as served meets all of the requirements of the Older Americans Act and State/Local laws. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>Note: OAA 339(2)(H) permits AAA’s to establish procedures that allows the option to offer a meal, on the same basis as meals provided to participating older individuals, to individuals providing volunteer services during the meal hours. OAA 330(2)(I) allows for meals to spouses of eligible participants, individuals with disabilities, regardless of age who reside in housing facilities reside in housing facilities occupied primarily by older individuals at which congregate nutrition services are provided. Refer to Section 3.a. of the OAA Nutrition Program Standards for additional eligibility detail. www.oregon.gov/DHS/spwpd/sua/docs/nu-prg-standards.pdf</p>	
<p>#8 NUTRITION COUNSELING (1 unit = 1 Session per participant) Individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, chronic illness, or medication use. This advice and guidance can also be provided to caregivers who are caring for persons at nutritional risk. Counseling is provided one-on-one by a registered dietician and addresses the options and methods for improving nutrition status.</p>	<p>NUTRITION COUNSELING Matrix #8 (1 session per participant) - Individualized guidance to individuals who are at nutritional risk because of their health or nutrition history, dietary intake, chronic illnesses, or medications use, or to caregivers. Counseling is provided one-on-one by a registered dietician, and addresses the options and methods for improving nutrition status. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#9 ASSISTED TRANSPORTATION (1 unit = 1 One-way trip) Assistance and transportation, including escort, to a person who has difficulty (physical or cognitive) using regular vehicular transportation.</p>	<p>ASSISTED TRANSPORTATION Matrix #9 (1 One Way Trip) - Assistance and transportation, including escort, to a person who has difficulties (physical or cognitive) using regular vehicular transportation. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p>	
<p>#10 TRANSPORTATION (1 unit = 1 One-way trip) A means of transportation from one location to another. Does not include any other activity.</p>	<p>TRANSPORTATION Matrix #10 (1 One Way Trip) - Transportation from one location to another. Does not include any other activity. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>Note: Transportation services provided to a caregiver recipient and funded with Title III-E dollars should be reported as a Supplemental Service - Matrix #30-7 unless it is transportation to an adult day center or similar program – AoA notes it should then be reported as part of the respite expense.</p>	

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<p>#11 LEGAL ASSISTANCE (1 unit = 1 Hour) Legal advice, counseling, and representation by an attorney or other person acting under the supervision of an attorney.</p>	<p>LEGAL ASSISTANCE Matrix #11 (1 hour) - Legal advice or representation provided by an attorney to older individuals with economic or social needs, including counseling or other appropriate assistance by a paralegal or law student acting under the direct supervision of an attorney, or counseling or representation by a nonlawyer where permitted by law.¹ Assistance with will preparation is not a priority service except when a will is part of a strategy to address an OAA-prioritized legal issue. Priority Legal assistance issues include income, health care, long-term care, nutrition, housing, utilities, protective services, defense of guardianship, abuse, neglect, and age discrimination.² Legal services may also include assistance to older individuals who provide uncompensated care to their adult children with disabilities and counsel to assist with permanency planning for such children.³ ¹OAA 102(a)(33); ²OAA 307(a)(11)(E), ³321(a)(6)</p> <p>Note: Legal assistance to family caregivers is to be reported as Matrix #30-7 or #30-7a Supplement Services.</p>	
<p>#12 NUTRITION EDUCATION (1 unit = 1 Session per participant) A program to promote better health by providing accurate and culturally sensitive nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants or participants and caregivers in a group or individual setting overseen by a dietitian or individual of comparable expertise.</p>	<p>NUTRITION EDUCATION Matrix #12 (1 session per participant) - A program to promote better health by providing accurate and culturally sensitive nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants, caregivers, or participants and caregivers in a group or individual setting <i>overseen by a dietitian or individual of comparable expertise.</i> (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p>	

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<p>#13 INFORMATION AND ASSISTANCE (1 unit = 1 Contact) A service for older individuals that provides current information on opportunities and services available within their communities; assesses the problems and capacities of the individuals; links individuals to the opportunities and services; to the maximum extent feasible, ensures the individual receives the services needed and is aware of the opportunities available by establishing adequate follow-up procedures. Internet web site "hits" are to be counted only if information is requested and supplied.</p>	<p>INFORMATION and ASSISTANCE Matrix #13 (1 Contact) – A service that (a) provides individuals with information on services available within the communities; (b) links individuals to the services and opportunities that are available within the communities; (c) to the maximum extent practicable, establishes adequate follow-up procedures. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>Note: Information and Assistance to individual caregivers is reported as Matrix 16 Access Assistance.</p> <p>Internet web site "hits" are to be counted <i>only if</i> there is evidence that information was requested and provided.</p>	
<p>#14 OUTREACH (1 unit = 1 Contact) Intervention initiated by an agency or organization for the purpose of identifying potential clients and encouraging their use of existing services and benefits. Outreach services provided under this service is restricted to services provided to individuals on a one-on-one basis. (See 70-10 for public/group outreach/presentation activities.)</p>	<p>OUTREACH Matrix#14 (1 Contact) - Individual one-on-one contact with an elderly client or caregiver for the purpose of identifying potential client(s) or their caregivers and encouraging their use of existing services and benefits. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>Note: Use Public Outreach/Education – Matrix 70-10 for group outreach activities. Outreach activities for caregiver services I reported as Matrix #15 Information Services (to caregivers).</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#15 INFORMATION FOR CAREGIVERS (1 unit = 1 Activity) A service for caregivers that provides the public and individuals with information on resources and services available to individuals within their communities. This may include group services, public education, provision of information at health fairs and other similar functions. (NOTE: Service units for information for caregivers are for activities directed to large audiences of current or potential caregivers such as disseminating publications, conducting media campaigns, and other similar activities.)</p>	<p>INFORMATION SERVICES FOR CAREGIVERS Matrices #15 (serving elderly) and 15a (serving children) (1 activity) - A service for caregivers that provides the public and individuals with information on resources and services available to the individuals within their communities. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>Note: Service units for information services are for activities directed to large audiences of current or potential caregivers such as disseminating publications, conducting media campaigns, and other similar activities.</p>	
<p>#16 ASSISTANCE IN GAINING ACCESS TO CAREGIVER SERVICES (1 unit = 1 Contact) A service that assists caregivers, on a one-on-one basis, in obtaining access to the services and resources that are available within their communities. To the maximum extent practicable, it ensures that the individuals receive services needed by establishing adequate follow-up procedures. Assistance can be provided either in the form of Information & Assistance or Case Management.</p>	<p>ACCESS ASSISTANCE Matrices #16 (serving elderly) and 16a (serving children) (1 contact) - A service that assists caregivers in obtaining access to the available services and resources within their communities. To the maximum extent practicable, it ensures that the individuals receive the services needed by establishing adequate follow-up procedures. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#20-1 AREA PLAN ADMINISTRATION (OAA and OPI only) Area Agency administrative functions required to implement the planned services, maintain required records, fulfill the requirements of Federal regulation, State rules, and State Unit Policies and Procedures; and support the Advisory Committee. Includes such responsibilities as bidding, contract negotiation, reporting, reimbursement, accounting, auditing, monitoring, and quality assurance.</p>	<p>AREA PLAN ADMINISTRATION Matrix #20-1 Area Agency administrative functions required to implement the planned services, maintain required records, fulfill the requirements of Federal regulation, State rules, and State Unit Policies and Procedures; and support the Advisory Committee. Includes such responsibilities as bidding, contract negotiation, reporting, reimbursement, accounting, auditing, monitoring, and quality assurance. (OAA 301-308)</p>	
<p>#20-2 AAA ADVOCACY Monitor, evaluate and comment on issues related to community actions affecting older persons; conduct or attend public hearings; represent older persons' interests at the local, state and national level; support Long Term Care Ombudsman program and coordinate planning with other agencies and organizations.</p>	<p>AAA ADVOCACY Matrix #20-2 Monitor, evaluate, and, where appropriate, comment on all policies, programs, hearings, levies, and community actions which affect older persons. Represent the interests of older persons; consult with and support the State's long-term care ombudsman program; and coordination of plans and activities to promote new or expanded benefits and opportunities for older persons. (45 CFR 1321.61(b)(1-5))</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#20-3 PROGRAM COORDINATION The functions of Area Agency staff directed toward the coordination of programs funded by OAA funds with other supportive federal, state, local, or private programs. It presumes a continuing activity that links together, in support of common service objectives, existing planning and service resources on a cyclical and ongoing basis.</p>	<p>PROGRAM COORDINATION and DEVELOPMENT Matrix # 20-3 Activities include AAA liaison with other agencies and organizations serving the elderly; services development; and mobilization of non-OAA funds to enhance delivery of services to the elderly. (Condensed from AoA PI-83-4)</p> <p>NOTE: The administrative allowance of 10% must be exhausted before Title IIIB supportive services funds can be expended for Program Development and Coordination, <u>plus</u> the AAA must also evidence that notice for review and comment by the general public has been met and any such expenditure will have a direct and positive impact on the enhancement of services. (Refer to 45 CFR 1321.17 (f)(14)(i-iii))</p>	
<p>#20-4 PROGRAM PLANNING AND DEVELOPMENT Functions of the Area Agency staff directed toward the development of specific service(s), goals or objectives. Includes such functions as needs assessment, plan development, budgeting/resource analysis, inventory, standards development, policy analysis, public education, resource development, training and education, research and development and legislative activities.</p>	<p>Merged with #20-3 as Program Coordination & Development</p>	
<p>#20-9 MEDICAID AAA SERVICES (Optional) Functions or services of AAAs that are funded with Medicaid and/or Local match funds only, i.e. case management, screening, outreach, etc.</p>	<p>Eliminated – not allowable Title XIX expenditure</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#30-1 HOME REPAIR/MODIFICATION (1 unit = 1 Activity) Minor modification of homes that is necessary to facilitate the ability of older individuals to remain at home, and that is not available under other programs, except that not more than \$150 per client may be expended under OAA Title III-D for such modification.</p>	<p>HOME REPAIR/MODIFICATION Matrix #30-1 (1 Activity) - Minor health and safety modification including screening of high-risk home environments and provision of educational programs on home modifications to prevent falls, and home modifications to promote access and safety of older adults in their home. These services are designed to facilitate the ability of older individuals to remain at home. (Based on OAA 102(a)(30)(E))</p>	
<p>#30-2 HOME HEALTH (1 unit = 1 Home visit) Services furnished to an individual by a Home Health Agency, or by others under arrangement with such agency, on a visiting basis in client's temporary or permanent home.</p>	<p>Eliminated – Funded under Medicare</p>	
<p>#30-3 IN-HOME VOLUNTEERS (1 unit = 1 Hour of service) Services provided by volunteers in a client's home that will enable the client to remain at home (i.e. shopping assistance, meal preparation, respite, etc.) This service can include the development and maintenance of a "central registry" to match qualified providers with elderly clients not eligible for Medicaid nor OPI services. For the purposes of the Older Americans Act program, an "elder" is a person age 60 or over. Services can include recruitment, screening and training of qualified volunteer in-home providers to effectively maintain a central registry.</p>	<p>Merged with #90-1 Volunteer Services</p> <p>NOTE TO AAA REVIEWERS : Volunteers performing a direct service such as respite, in-home care, chore service, shopping, etc.. are reported under the appropriate service category as a unit of service and value of volunteer time is reported as In-Kind Match on Form 150, pg 2.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#30-4 RESPITE (1 unit = 1 Hour of service) Paid temporary services to provide relief for families or other caregivers. This service should be used ONLY when no other service is provided in conjunction with respite. NOTE: Respite {30-4} should be used to record those respite services funded through OPI and IIIB. Respite provided using IIIE funds should be recorded under Caregiver Respite {30-5}.</p>	<p>RESPITE CARE Matrices #30-4 (IIIB/OPI, 1 unit = 1 hour) and #30-5 (IIIE serving elderly, 1 unit = 1 hour) and #30-5a (IIIE serving children, 1 unit = 1 hour) - Services which offer temporary, substitute supports or living arrangements for care recipients in order to provide a brief period of relief or rest for caregivers. Respite Care includes: (1) In-home respite (personal care, homemaker, and other in-home respite); (2) respite at a senior center or other nonresidential program; (3) respite provided by placing the care recipient in an institutional setting such as a nursing home for a short period of time; (4) and for grandparents/relatives caring for children – day or overnight summer camps. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov & SPR Q&A #28, 2008)</p> <p>Note: SPR Q&A #28, 2008 states units of service for overnight institutional respite and overnight summer camps are more appropriately reported by days than hours. Example: Two days of institutional respite is 2 units (not 48 units) and six days at camp equal 6 units instead of 144.</p> <p>NOTE TO AAA REVIEWERS: Currently we await a response from AoA regarding minimum ADL/IADL eligibility for this service. It will be included only if AoA directs.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#30-5 CAREGIVER RESPITE (1 unit = 1 Hour of service) Services that offer temporary, substitute supports or living arrangements for care recipients in order to provide a brief period of relief or rest for unpaid caregivers served under the Family Caregiver Support Program. Respite care includes: (1) in-home respite (personal care, home care, and other in-home respite); (2) respite provided by attendance of the care recipient at a senior center or other nonresidential program; (3) institutional respite provided by placing the care recipient in an institutional setting such as a nursing home for a short period of time as a respite service to the caregiver; and (for grandparents caring for children) summer camps. To be eligible for caregiver respite, the care recipient must either: (1) be unable to perform at least two activities of daily living (ADL's) without substantial human assistance, including verbal reminding, physical cueing OR (2) due to a cognitive or other mental impairment, require substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or another individual. NOTE: Any caregiver respite services that are paid at a daily or weekly rate need to be converted to an hourly unit before entry into the database. E.g. Adult Day Care paid at a daily rate = 8 hours; one week at summer camp = 168 hours (24 hrs x 7 days).</p>	<p>Matrix #30-5 included above with #30-4 and #30-5a</p>	
<p>#30-6 ORGANIZATION and MAINTENANCE OF SUPPORT GROUPS FOR CAREGIVERS (1 unit = 1 Session per participant) Activities that organize and maintain support groups that provide assistance to caregivers and their families in making decisions and solving problems related to their caregiving roles. (One session is equivalent to one meeting of a support group).</p>	<p>#30-6 merged with #70-2 a to align with AoA definition of Caregiver Counseling.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#30-7 SUPPLEMENTAL SERVICES TO CAREGIVERS (1 unit = 1 Activity) Those services that will provide assistance with Activities of Daily Living or Instrumental Activities of Daily Living, are to be provided on a limited basis to complement the care provided by caregivers. Examples of supplemental services include, but are not limited to, home repair/modifications, assistive technologies, emergency response systems, home delivered meals, and incontinence supplies. To be eligible for supplemental services, the care recipient must either: (1) be unable to perform at least two activities of daily living (ADL's) without substantial human assistance, including verbal reminding, physical cueing OR (2) due to a cognitive or other mental impairment, require substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or another individual.</p>	<p>SUPPLEMENTAL SERVICES Matrices #30-7 (serving elderly) and 30-7a (serving children) (1 activity) – Services provided on a limited basis that complements the care provided by family and other informal caregivers. Examples of supplemental services include, but are not limited to, legal assistance, home modifications, transportation, assistive technologies, emergency response systems and incontinence supplies. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>NOTE TO AAA REVIEWERS: Currently we await a response from AoA regarding minimum ADL/IADL eligibility for this service. It will be included only if AoA directs.</p>	
<p>#40-1 HEALTH/NUTRITION SCREENING (1 unit = 1 Screening per participant) Screening activities that determine a client's physical or mental health or nutritional status.</p>	<p>#40-1 merged with #40-3</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#40-2 EXERCISE OR PHYSICAL FITNESS (1 unit = 1 Session per participant) Programs regarding physical fitness, group exercise, and music, art, and dance movement therapy, including programs for multi-generational participation that are provided through local educational institutions or community-based organizations.</p>	<p>PHYSICAL ACTIVITY, HEALTHY EATING, and FALLS PREVENTION Matrix #40-2 (1 Session per participant) - Programs for older adults that provide physical fitness, group exercise, and dance-movement therapy, including programs for multi-generational participation that are provided through local educational institutions or community-based organizations. Programs that include a focus on strength, balance, and flexibility exercise to promote physical activity and/or prevent falls; that are based on best practices; and that have been shown to be safe and effective with older populations are highly recommended. (OAA 102(a)(14) D, E, F)</p>	
<p>#40-3 WELLNESS EDUCATION (1 unit = 1 Session per participant) Health promotion programs, including programs relating to chronic disabling conditions (prevention and reduction of effects), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management and providing information about the availability of, benefits and appropriate use of other preventive health services or programs.</p>	<p>PREVENTIVE SCREENING, COUNSELING, and REFERRAL Matrix #40-3 (1 Session per participant) - Education about the availability, benefits and appropriate use of Medicare preventive health services or other preventive health programs. Health risk assessments and screenings, and preventive health education provided by a qualified individual, to address issues including hypertension, glaucoma, cholesterol, cancer, vision, hearing, diabetes, bone density and nutrition screening. Health information on on-going and age-related conditions including osteoporosis, cardiovascular diseases, diabetes, and Alzheimer's disease and related disorders. (OAA 102(a)(14) (A-B),(H)& (J)</p> <p>Note: Home-delivered meal assessments and Congregate nutritional risk assessments are reported under this service category.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#40-4 MENTAL HEALTH SERVICES (1 unit = 1 Hour of service) Mental health services can include any of the following services: Screening for the prevention of depression, coordination of community mental health services, provision of information to seniors about mental health services, development of "peer" gerontological counseling programs, therapeutic mental health counseling (provided by qualified, licensed mental health professionals or others trained and supervised by another qualified professional) and referral to psychiatric and psychological services.</p>	<p>MENTAL HEALTH SCREENING, EDUCATION and REFERRAL Matrix #40-4 (1 Hour of Service) Services can include screening for the prevention of depression; coordination of community mental health services, and referral to psychiatric and psychological services; or providing educational and peer counseling activities based on current best practices to address depression, substance abuse, and other identified mental health needs. (Condensed from OAA 102(a)(14)(D) & (G))</p> <p>Where possible, AAAs are encouraged to consider use of best practice and evidence-based mental health programs such as Healthy Ideas, IMPACT, PEARLS, and EnhanceWellness.</p>	
<p>#40-5 HEALTH EQUIPMENT LOANS (1 unit = 1 Loan) Assist clients in obtaining usable health care equipment on a temporary basis. #40-6a MEDICAL ALERT INSTALLATION (1 unit = 1 Installation per Client) A service provided to frail seniors that includes installation of an electronic device that a client can activate to alert a monitored system when help is needed.</p>	<p>HEALTH and MEDICAL EQUIPMENT Matrix #40-5 (1 Loan or Payment) Assistive devices such as durable medical equipment, mechanical apparatus', electrical appliance's, or instruments of technology used to assist and enhance an individual's independence in performing any activity of daily living. (OAR 411-027-0005)</p>	
<p>#40-6b MEDICAL ALERT RENTAL (1 unit = 1 Payment for service per client) A service provided to frail seniors that includes the monthly rental of an electronic device that a client can activate to alert a monitored system when help is needed.</p>	<p>#40-6b merged with #40-5</p>	
<p>#40-7 MEDICAL EQUIPMENT (1 unit = 1 Client Served) Purchase of health care equipment for clients when loaned equipment is unavailable or not feasible.</p>	<p>#40-7 merged with #40-5</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#40-8 REGISTERED NURSE SERVICES (1 unit = 1 Hour of Service) Non-Medicaid services provided by a Registered Nurse on a short-term or intermittent basis which include, but are not limited to: interviewing the client, assessing the client's ability to perform tasks; preparing a care plan which includes treatment needed by the client; monitoring medication; training and educating care providers; and setting realistic goals and outcomes for the client.</p>	<p>REGISTERED NURSE SERVICES Matrix #40-8 (1 Hour of Service) - Services provided by a Registered Nurse on a short-term or intermittent basis which include, but are not limited to: interviewing the client, assessing the client's ability to perform tasks; preparing a care plan which includes treatment needed by the client; monitoring medication; training and educating care providers; and setting realistic disease prevention and health promotion outcomes for the client. (Definition developed by AAA/SUA workgroup)</p>	
<p>#40-9 MEDICATION MANAGEMENT (1 unit = 1 Session per Client) Services that provide information, counseling, or education on issues related to prescription drugs and over the counter medications. Services include such activities as: public education activities related to medication management problems; assisting seniors in applying for low cost or no cost prescription programs through pharmaceutical and community resources; training programs on medication management skills for consumers and caregivers; screening programs with public health and health practitioners to identify persons at high risk of medication interactions and adverse reactions; and provision of client specific medication review and consultations by pharmacists, nurse practitioners or physicians.</p>	<p>MEDICATION MANAGEMENT Matrix #40-9 (1 Session per Client) - Screening and education to prevent incorrect medication and adverse drug reactions, including individual medication reviews or group-based programs that include information on medication management (including Stanford's Chronic Disease Self-Management program (Living Well)). (OAA 102(a)(14) I) & (H.R. 2764; P.L. 110-161)</p> <p>NOTE TO AAA REVIEWERS: Currently we await a response from AoA regarding assistance in application to low or no-cost prescription programs is an eligible Medication Management activity. Definition will be altered if AoA allows for the inclusion.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#50-1 GUARDIANSHIP/CONSERVATORSHIP (1 unit = 1 Contact) Performing legal and financial transactions on behalf of a client based upon a legal transfer of responsibility (e.g., as part of protective services when appointed by court order) including establishing the guardianship/conservatorship.</p>	<p>GUARDIANSHIP/CONSERVATORSHIP Matrix #50-1 (1 Hour of Service) - Performing legal and financial transactions on behalf of a client based upon a legal transfer of responsibility (e.g., as part of protective services when appointed by court order) including establishing the guardianship/conservatorship. (Definition developed by AAA/SUA workgroup)</p>	
<p>#50-2 PROTECTIVE SERVICE (1 unit = 1 Contact) Protective services for vulnerable elders who are at risk as a result of harm or neglect and who have been evaluated to be incapable of making competent decisions about their well-being. This harm or neglect may be self-imposed or may be perpetuated by another person. For the purposes of the Older Americans Act program, an "elder" is a person age 60 or over.</p>	<p>#50-2 has been eliminated. This is not an OPI or OAA function.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#50-3 ELDER ABUSE AWARENESS (1 unit = 1 Activity) Activities that promote understanding and increase public awareness of elder abuse. For the purposes of the Older Americans Act program, an "elder" is a person age 60 or over. (For example, one activity could include securing a local public service announcement; provide a local training for nursing facility staff, or law enforcement agencies, or district attorney staff or other local agencies; local training for a multi-disciplinary team; producing a specific brochure or other publication, etc.)</p>	<p>ELDER ABUSE AWARENESS and PREVENTION Matrix #50-3 (1 Activity) - ELDER ABUSE AWARENESS (1 Activity) Public Education and outreach for individuals, including caregivers, professionals, and para-professionals on the identification, prevention, and treatment of elder abuse, neglect, and exploitation of older individuals. Training for individuals in relevant fields on the identification, prevention, and treatment of elder abuse, neglect, and exploitation, with particular focus on prevention and enhancement of self determination and autonomy. (Definition based on OAA 721(b)(1, 2, & 6))</p> <p>Note: Multi-Directional Teams (MDT), Gatekeeper education programs, short-term emergency shelter or transportation funding are allowable activities under this service.</p>	
<p>#50-4 CRIME PREVENTION/HOME SAFETY (1 unit = 1 Activity) Activities that educate elders regarding crime prevention or that provide home safety. For the purposes of the Older Americans Act program, an "elder" is a person age 60 or over.</p>	<p>CRIME PREVENTION/HOME SAFETY Matrix #50-4 (1 Activity) - Activities that educate elders regarding crime prevention or that provide home safety such as smoke alarms, etc.. (Definition developed by AAA/SUA workgroup)</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#50-5 LTC OMBUDSMAN (1 unit = 1 Activity) Functions of the Ombudsman program are to receive, investigate, and act on complaints by individuals age 60 or over, who are residents of long-term care facilities and to advocate for the well-being of such individuals. Activities may include: direct support to certified Ombudsman volunteers and administrative support to local committees engaged in recruiting, screening and supporting the Ombudsman program (e.g. mileage reimbursements, support for monthly meetings, etc.).</p>	<p>LTC OMBUDSMAN Matrix #50-5 (1 LTC office served) - Financial support for activities that assist in the functions of the Ombudsman program. Activities could include; local volunteer recruitment and outreach activities, such as ads, posters, flyers, and outreach events; local volunteer support and recognition such as training expenses, mileage reimbursements, recognition events and local volunteer administrative expenses such as postage, copies, and office supplies.</p>	
<p>#60-1 RECREATION (1 unit = 1 Activity per Participant) Activities that promote socialization, such as sports, performing arts, games, and crafts, either as a spectator or as a participant.</p>	<p>Eliminated. Service category was not used by AAA's and had no supportive OAA passage to support OAA expenditure.</p> <p>NOTE TO REVIEWERS: Funds provided towards senior center recreation is financial support for SC operations and may be reported as Matrix 80-1 Senior Center Assistance</p>	
<p>#60-2 FRIENDLY VISITING (1 unit = 1 Visit) Visits to physically, geographically or socially isolated individuals.</p>	<p>#60-2 merged with #60-3</p>	
<p>#60-3 TELEPHONE REASSURANCE (1 unit = 1 Contact) Providing regular telephone calls to individuals to determine if they are safe and well, if they require assistance, and to provide psychological reassurance.</p>	<p>REASSURANCE Matrix #60-3 (1 Contact) – Providing regular telephone calls or visits to physically, geographically or socially isolated individuals to determine if they are safe and well, if they require assistance, and to provide reassurance. (Definition developed by AAA/SUA workgroup)</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#60-4 VOLUNTEER RECRUITMENT (1 unit = 1 placement) Providing staff support, recruitment, coordination, and training/educational opportunities for volunteers. (One placement means one volunteer identified, trained and assigned to a volunteer position.)</p>	<p>VOLUNTEER RECRUITMENT Matrix #60-4 (1 placement) - One placement means one volunteer identified, trained and assigned to a volunteer position. (Definition developed by AAA/SUA workgroup)</p>	
<p>#60-5 INTERPRETING/TRANSLATION (1 unit = 1 Hour) Providing assistance to clients with limited English speaking ability to access needed services.</p>	<p>INTERPRETING/TRANSLATION Matrix 60-5 (1 Hour) - Providing assistance to clients with limited English speaking ability to access needed services. (Definition developed by AAA/SUA workgroup)</p>	
<p>#70-1 CASE MONITORING (1 unit = 1 Hour) Documented ongoing follow-up activity (telephone contact, Senior Center contact or home visit) of individuals with a case plan. Case Monitoring includes: a) Providing early identification of current or potential problem areas; b) Assessing the needs for changes in service; and c) Reviewing intervention results to determine if what was done achieved desired results.</p>	<p>#70-1 is eliminated. (This duplicates #6 Case Management)</p>	
<p>#70-2 COUNSELING (1 unit = 1 Hour) Providing guidance and/or suggestions to a client to enable the client and/or family to resolve problems including insurance, tax or employment issues.</p>	<p>OPTIONS COUNSELING Matrix #70-2 (1 Hour) Counseling that supports informed long term care decision making through assistance provided to individuals and families to help them understand their strengths, needs, preferences and unique situations and translates this knowledge into possible support strategies, plans and tactics based on the choices available in the community. (Based upon NASUA's definition)</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#70-2a Individual Counseling for Caregivers (1 unit = Hour) Providing one-on-one counseling for caregivers to assist in making decisions and resolving problems related to their caregiving roles. Individual counseling includes, but is not limited to: grief counseling, mental health counseling, etc. Note: Case management services for FCSP should not be counted as Individual Counseling. Case management for FCSP should be listed under Access Services {16}.</p>	<p>CAREGIVER COUNSELING/SUPPORT GROUPS Matrices #70-2a (serving elderly) and 70-2b (serving children) (1 session per participant) - Counseling to caregivers to assist them in making decisions and solving problems relating to their caregiver roles. This includes counseling to individuals, support groups, and caregiver training (of individual caregivers and families). (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p>	
<p>#70-3 SCREENING (1 unit = 1 Screening) Initial contact with a client to identify potential service needs and/or eligibility for services.</p>	<p>#70-3 is eliminated. Duplicates #14 Information and Assistance</p>	
<p>#70-4 GERIATRIC ASSESSMENT (1 unit = 1 Assessment) An in-depth interview with a client to determine needs and potential intervention strategies, and includes when appropriate, developing a goal oriented service plan and informing clients of available services.</p>	<p>Eliminated (requires GNP, MD or MSW)</p>	
<p>#70-5 NEWSLETTER (1 unit = 1 Newsletter Distributed) Preparation and regular distribution of publications that inform seniors and the community of available services and activities.</p>	<p>NEWSLETTER Matrix #70-5 (1 Newsletter Distributed) - Preparation and regular distribution of publications that inform seniors and the community of available services and activities. (Definition developed by AAA/SUA workgroup and SPR Q&A #61, 2008)</p> <p>Note: Each issue of the newsletter is an activity. The estimated audience size would be the number of persons directly receiving the newsletter plus the estimated number of the bulk copies which are distributed. This also applies to articles distributed to news media, caregiver brochures distribution, etc.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#70-6 GATEKEEPER TRAINING (1 unit = 1 Activity) Training sessions to educate utility employees, postal employees and other local organizations about visible indicators that may suggest need for assistance by an elderly person. For the purposes of the Older Americans Act program, an "elder" is a person age 60 or over.</p>	<p>Merged with #50-3 Elder Abuse Awareness</p>	
<p>#70-7 PLACEMENT SERVICES (1 unit = 1 Referral) Providing clients with direct access to a pool of screened, qualified in-home service workers.</p>	<p>#70-7 is eliminated. This is not a 'stand alone' service, but instead a component of Options Counseling, Information and Assistance, and Case Management.</p>	
<p>#70-8 PRIVATE CASE MANAGEMENT (1unit = 1 Hour) A service provided to an employer on behalf of its employees who have caregiver responsibilities for elderly relatives. (For the purposes of the Older Americans Act program, an "elder" is a person age 60 or over). It is a service with several components, which collectively make up case management. Components of private case management include a combination of some or all of the following: access, intake and/or screening; assessment; care planning; care plan implementation and/or coordination, and continued care management. Further definitions of these components are included in the policy issued as IM 90-28.</p>	<p>FEE-BASED CASE MANAGEMENT Matrix #70-8 (1unit = 1 Hour) - A service designed to individualize and integrate social and health care options. Its goal is to provide access to an array of service options to assure appropriate levels of service and to maximize coordination in the service delivery system. Case management must include four general components: access, assessment, service implementation, and monitoring. (OAR 411-032)</p> <p>Note: Units of service will be upload as Case Management service units in the SPR.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#70-9 CAREGIVER TRAINING (1 unit = 1 Session per participant) Training provided to caregivers and their families that supports and enhances the caregiving role. For example: Powerful Tools training; Communicating Effectively with Health Care Professionals; conferences, etc.. Note: This does not include training to paid providers. (A session for conferences would be equal to one day's attendance at the conference).</p>	<p>CAREGIVER TRAINING Matrices #70-9 (caregivers serving elderly) and 70-9a (caregivers serving children) (1 Session per participant) - Training provided to caregivers and their families that supports and enhances the care giving role. For example: Powerful Tools training; Communicating Effectively with Health Care Professionals; conferences, etc. (A session for conferences would be equal to one day's attendance at the conference). (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov) Note: This does not include training to paid providers</p>	
<p>#70-10 PUBLIC OUTREACH/EDUCATION (1 unit = 1 Activity) Services or activities targeted to provide information to groups of current or potential clients and/or to aging network partners and other community partners regarding available services for the elderly (For the purposes of the Older Americans Act program, an "elderly" is defined as a person age 60 or over) and to encourage use of existing services and benefits. (Examples of this type of service would be participation in a community senior fair, publications, publicity campaigns, other mass media campaigns, presentations at local senior centers where information on OAA services is shared, etc.)</p>	<p>PUBLIC OUTREACH/EDUCATION Matrix #70-10 (1 Activity) - Services or activities targeted to provide information to groups of current or potential clients and/or to aging network partners and other community partners regarding available services for the elderly Examples of this type of service would be participation in a community senior fair, publications, publicity campaigns, other mass media campaigns, presentations at local senior centers where information on OAA services is shared, etc. (Definition developed by AAA/SUA workgroup)</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#80-1 SENIOR CENTER ASSISTANCE (1 unit = 1 Center Served) Financial support for the operation of a senior center. However, if the operation cost is to pay for services, it must be spread in the plan among the approved services, i.e., Outreach, I and R, Friendly Visitation. Otherwise, the monies for general operation (not specific services) would be listed as Senior Center Operations. Costs attributed to Senior Center Operations are considered administrative costs.</p>	<p>SENIOR CENTER ASSISTANCE Matrix #80-1 (1 Center Served) - Financial support for use in the general operation costs of a senior center. i.e., administrative expenses</p> <p>Note: Funds for specific services provided by the Senior Center are program related and reported under the correct service category. (Definition developed by SUA)</p>	
<p>#80-2 EMPLOYMENT ASSISTANCE (1 unit = 1 Contact) Counseling and assistance provided to older persons who want to seek employment</p>	<p>#80-2 is eliminated</p>	
<p>#80-3 UTILITY ASSISTANCE (1 unit = 1 Contact) Financial assistance to help low-income clients meet the cost of heat, electricity, water/sewer service or basic telephone service.</p>	<p>#80-3 is merged with #80-4 Financial Assistance</p>	
<p>#80-4 FINANCIAL ASSISTANCE/MATERIAL AID (1 unit = 1 Contact) Limited financial assistance for low-income clients to cover costs of prescription, medical, dental, vision care or other health care needs not covered under other programs.</p>	<p>FINANCIAL ASSISTANCE Matrix #80-4 (1 Contact) - Limited financial assistance for low-income clients to aid in maintaining health and/or housing. Services may include prescription, medical, dental, vision care or other health care needs not covered under other programs; and, the cost of utilities such as heat, electricity, water/sewer service or basic telephone service. (Definition developed by AAA/SUA workgroup)</p> <p>Note: OAA funding source is Title IIIB Supportive Services.</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p>#80-5 MONEY MANAGEMENT (1 unit = 1 Contact) Assistance with financial tasks for seniors who are unable to handle their personal finances. (i.e. banking transactions, paying bills, taxes, etc.).</p>	<p>MONEY MANAGEMENT Matrix #80-5 (1 Hour) - Assistance with financial tasks for seniors who are unable to handle their personal finances. (i.e. banking transactions, paying bills, taxes, etc.). (Definition developed by AAA/SUA workgroup)</p>	
<p>#80-6 CENTER RENOVATION/ACQUISITION (1 unit = 1 Center acquired or renovated) The use of Older Americans Act funds to acquire or renovate buildings that will be used as senior activity centers.</p>	<p>CENTER RENOVATION/ACQUISITION Matrix #80-6 (1 Center acquired/renovated) - The use of Older Americans Act funds to acquire or renovate buildings that will be used as senior activity centers. (Definition developed by AAA/SUA workgroup)</p>	
<p>#80-7 HOUSING ASSISTANCE (1 unit = 1 Contact) Assistance to seniors who need emergency financial assistance in order to obtain or maintain housing.</p>	<p>#80-7 is merged with #80-4 Financial Assistance</p>	
<p>#90-1 VOLUNTEER SERVICES (1 unit = 1 Hour of service) Volunteer services provided to OAA clients. This includes meal site volunteers and volunteers doing home care, housekeeping, and chore services.</p>	<p>VOLUNTEER SERVICES Matrix #90-1 (1 Hour of Service) - Uncompensated supportive services to AAA's, nutrition sites, etc., Examples of volunteer activities may be, but are not limited to meal site management, Board and Advisory Council positions, home-delivered meal deliveries, office work, etc... Note: Volunteers performing a direct service such as respite, in-home care, chore service, shopping, etc.. are reported under the appropriate service category as a unit of service and value of volunteer time is reported as In-Kind Match on Form 150, pg 2 ,</p>	

CURRENT DEFINITIONS	PROPOSED NEW DEFINITIONS	AAA REVIEW COMMENTS
<p style="text-align: center;">New</p>	<p>CHRONIC DISEASE PREVENTION, MANAGEMENT, AND EDUCATION – (1 unit = 1 session per participant) Programs such as the evidence-based Living Well (Stanford's Chronic Disease Self-management) program, weight management, and tobacco cessation programs that prevent and help manage the effects of chronic disease, including osteoporosis, hypertension, obesity, diabetes, and cardiovascular disease. (OAA 102(a)(14)(D))</p>	
<p style="text-align: center;">New</p>	<p>CASH and COUNSELING (1 unit = 1 unduplicated client) This covers the range of services provided or paid for through allowance, vouchers, or cash which are provided to the client so that the client can obtain the supportive services which are needed. (AoA Title III/VII Reporting Requirements Appendix – www.aoa.gov)</p> <p>NOTE TO AAA REVIEWER: OMB approve AoA's request for the addition of this service category. The service will not be offered in Oregon until DHS/SPD provides AAA with further instruction</p>	