

AAA New Leader Training

March 5, 2026

DARS | Virginia Department for Aging and Rehabilitative Services

DIVISION FOR AGING SERVICES

Welcome

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INTRODUCTIONS



AGENDA REVIEW



HOUSEKEEPING

Training Objectives:

- Understand AAA role in implementing the Older Americans Act (OAA)
- Understand AAA reporting responsibilities
- Understand how DARS collaborates with AAAs



OAA, SUA, & AAA Overview
History, Structure, Roles, and Key Programs

An Overview of DARS

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- The mission of the Virginia Department for Aging and Rehabilitative Services (DARS) is to improve the employment, quality of life, security, and independence of older Virginians, Virginians with disabilities, and their families.
- Some Key Programs and Services:

Vocational Rehabilitation (VR)	Disability Determination Services (for SSDI & SSI)	Adult Protective Services (through local departments of social services)	Disability Services (e.g., Independent Living & Brain Injury Services)	**Aging Services**

Division for Aging Services

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- The Division for Aging Services (DAS) fosters the independence and well-being of older Virginians and supports their caregivers through leadership, advocacy and oversight of state and community programs, and guides the Commonwealth in preparing for an aging population.

- The Division oversees the implementation of the federal Older Americans Act (OAA) services as well as other federal and state-funded programs that support older adults and caregivers.

The Older Americans Act

History & Structure

OAA History

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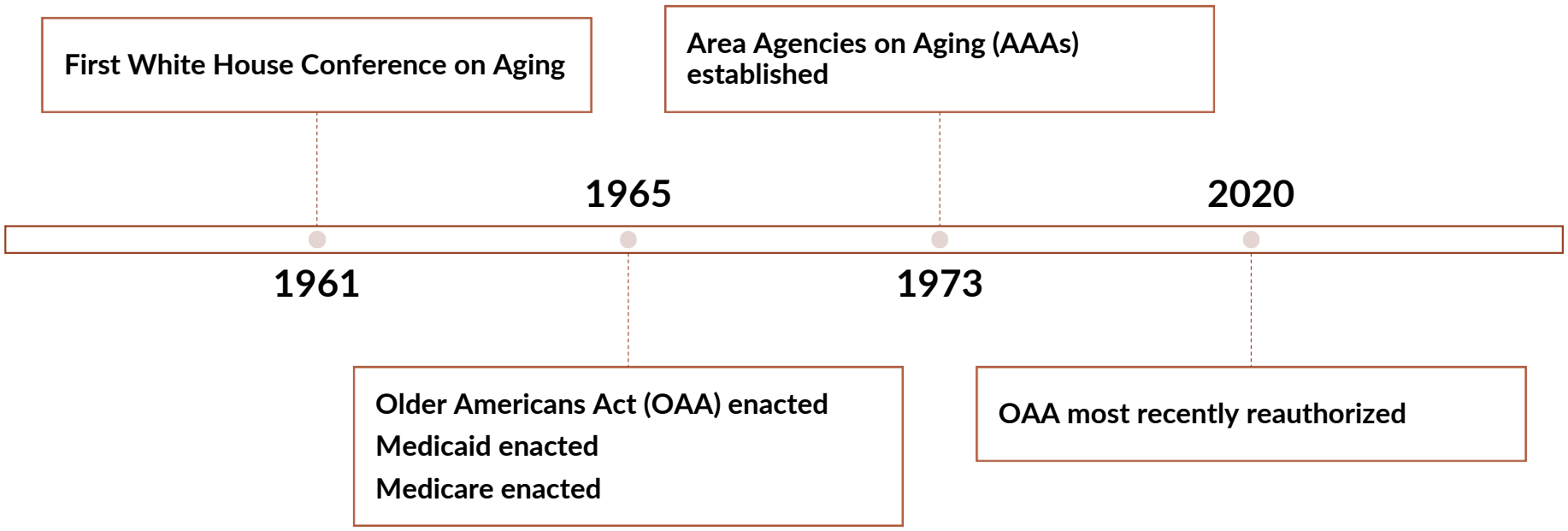

OAA History

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- Part of 1965 'The Great Society' legislation: Passed in response to concern by policymakers about a lack of community social services for older adults
- Established the federal Administration on Aging (AoA)
- Created a structure for State Units on Aging (SUAs) and (a few years later) Area Agencies on Aging (AAAs) to deliver aging services
- OAA has been reauthorized 18 times since its initial adoption



President Johnson signing the OAA in 1965.

OAA Title III

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Part A: Establishes the Framework
- Maximize Independence and Dignity
- Remove Individual and Social Barriers
- Continuum of Care
- Managed In-home and Community-Based Services

State Units on Aging (SUAs)
- Develop and Administer State Aging Plan
- Advocate for Older Individuals
- Designate Area Agencies on Aging (AAAs)
- Establish Policies, Procedures, Service Standards
- Provide Technical Assistance

Area Agencies on Aging (AAAs)
- Develop and Administrator Local Aging Plan
- Establish Advisory Council
- Provide Services
- Establish Focal Points to Provide Services
- Facilitate Coordination of Community Services

Part B: Support Services & Senior Centers
- Community-Based Services and In-Home Services: adult day care, checking (reassuring contact), chore, homemaker, personal care, residential repair and renovation.
- Access Services: care coordination, information and assistance, transportation.

Part C: Nutrition / Meals
- Subpart 1: Congregate (Group)
- Subpart 2: Home Delivered

Part D: Disease Prevention and Health Promotion

Part E: National Family Caregiver Support Program

Other OAA Title Sections

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Title IV: Activities for Health, Independence and Longevity

- Demonstration Grants / Programs
  - Aging & Disability Resource Center Grants
  - Alzheimer's Disease Grants
  - Evidence Based Programs (Chronic Disease Self-Management Program)

Title V: Community Service Senior Opportunities Act

- Older American Community Service Employment Program
  - States
  - National Contractors

Program is managed by the DARS Division for Rehabilitative Services

Title VI: Grants for Native Americans

- Federally recognized American Indian Tribes
- Native Hawaiian Program

Title VII: Vulnerable Elder Rights Protection Activities

- Ombudsman

Program is managed by the DARS Office of the State Long-Term Care Ombudsman

- Elder Abuse, Neglect, and Exploitation

Program is managed by the DARS Adult Protective Services Division

- State Legal Assistance Development

Program is managed by the DARS Division for Aging Services

State Unit on Aging

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42 U.S.C § 3025(a)(1) designates SUAs and requires them to:

- Develop and administer a state plan on aging;
- Be primarily responsible for planning, policy development, administration, etc. of state activities as it pertains to aging;
- Serve as an advocate for older individuals and provide technical assistance to any agency, organization, etc. representing the needs of older individuals; and
- Divide the State into distinct planning and service areas (PSAs).

DARS is the designated SUA and Oversees Federal OAA and designated State funds

SUA Activities in Virginia

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- Within DARS, the Division for Aging Services (DAS):

Oversees Virginia's 25 Area Agencies on Aging (AAAs)

Distributes federal and state funding to AAAs

Monitors the delivery of aging services by AAAs

Implements federal and state discretionary grant programs

Leads the No Wrong Door (NWD) Virginia System

Facilitates constituent advisory boards and councils

Develops and implements the State Plan for Aging Services

State Plan for Aging Services

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- Each state must develop a state plan and get it approved by the federal government in order to receive OAA funding
- Virginia's State Plan:
  - Meets the OAA requirements/obligations
  - Serves as a Strategic Plan that encompasses all the required elements identified in § 51.5-136 of the Code of Virginia
  - Includes the receipt of reports from all state agencies on the impact of aging on their work/scope and staffing
  - **Must be grounded in a needs assessment (e.g., NCI-AD)**
  - Includes significant stakeholder engagement and solicitation of public comment



Area Agencies on Aging

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- Virginia has 25 AAAs, and each community in Virginia has a designated AAA to serve it
- AAA structures vary:

14 AAAs	5 AAAs	5 AAAs	1 AAA
• Private Nonprofit Organizations	• Part of a County or City Government	• Joint Exercise of Powers (local government established)	• Community Services Board (CSB)

Map of 25 AAAs

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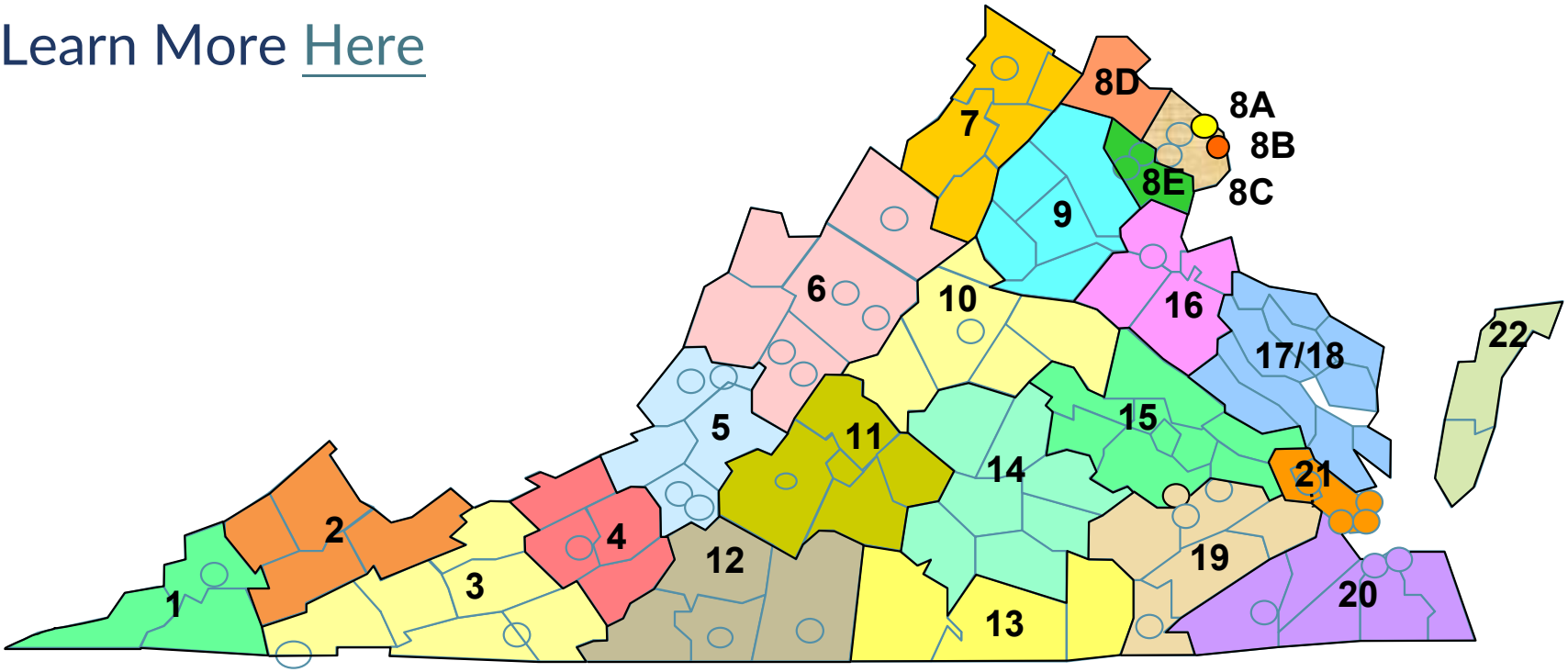
- Learn More Here



The Older Americans Act

An Overview of Programs, Services, and Funding

General Eligibility

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- Individuals aged 60 and over can qualify for most OAA services. A few programs are available to younger individuals.
- OAA is **not** an entitlement program (i.e., guaranteed access to benefits), like Social Security, Medicare or Medicaid.
- OAA services can be curtailed due to lack of funding.
- OAA clients self-declare income. AAAs do not verify income or ability to pay. Services are not means tested.
- OAA services are targeted to individuals with greatest economic need and greatest social need.
- OAA clients are asked to voluntarily contribute to some OAA services, but it is not required.

Limitations on AAA Services

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- Due to funding constraints, AAAs may not be able to provide services to everyone who needs them or to meet an individual's complete need.
- AAAs are directed to focus outreach efforts on identifying and serving individuals with greatest economic need and greatest social need.
- AAAs may limit services in the following ways:
  - Limit the menu of different services provided
  - Limit number of people served (e.g., maintain waiting lists)
  - Limit the services provided to an individual (e.g., cap meals or hours)
  - Limit where services are provided within the PSA (e.g., some local governments provide supplemental funding for more meal sites than others are able to)

AAA Required Services

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- Under the OAA and through state-established requirements, all AAAs must provide the following services:

Care Coordination	Congregate (Group) Meals	Disease Prevention & Health Promotion	Elder Abuse Prevention	Long-Term Care Ombudsman Program	Home Delivered Meals
Information, Referral & Assistance	Legal Assistance	Nutrition Education	Nutrition Counseling	Options Counseling	Public Information & Education
		Transportation	Virginia Insurance Counseling & Assistance Program (VICAP)		

AAA Optional Services

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- AAAs may also provide the following services:

Adult Day Care/Services	Assistive Technology	Caregiver Counseling & Training	Care Transitions	Checking (Reassurance)	Chore Services (Heavy Housework)	Consumable Supplies
Emergency Services	Employment (Title V Services)	Financial Consultation	Homemaker Services (Light Housework)	Medication Management	Money Management	Personal Care Services
	Residential Repair & Renovation	Respite Care	Socialization & Recreation	Assisted Transportation (door to door)	Volunteer Services	

OAA Funding Stream

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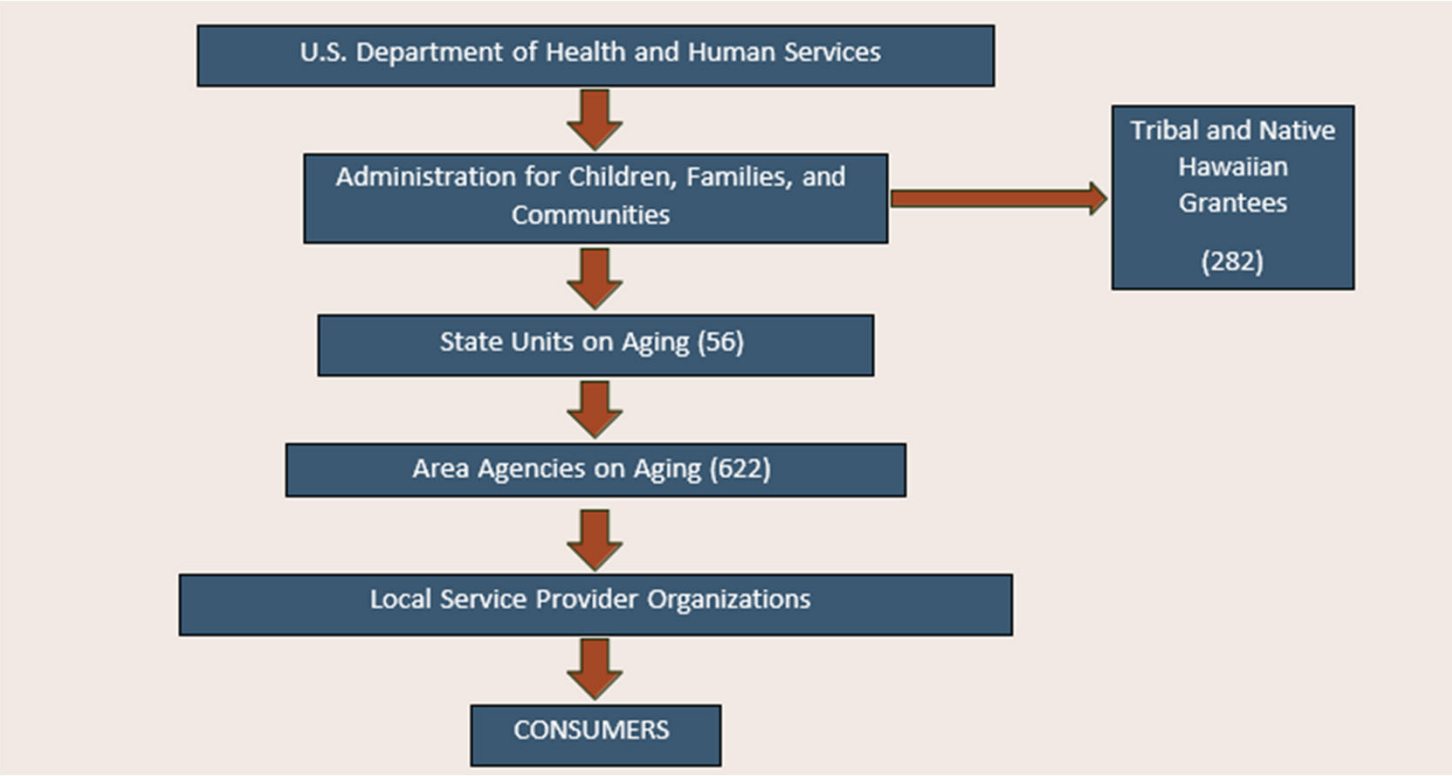

OAA Funding Scope

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- Funding for OAA services is **substantially smaller** than funding for Medicaid services
  - In FFY 2023, the federal government spent $2.38 billion on OAA services
  - In FFY 2023, the federal government spent $606 billion, and states spent $274 billion on Medicaid ($880 billion total)
  - The entire national appropriation for OAA services equals what the state of Delaware spends on its Medicaid program
- DAS administers approximately $40 million in federal funding and $20 million in state funding for aging services

FFY = Federal Fiscal Year

Service Categories by Funding

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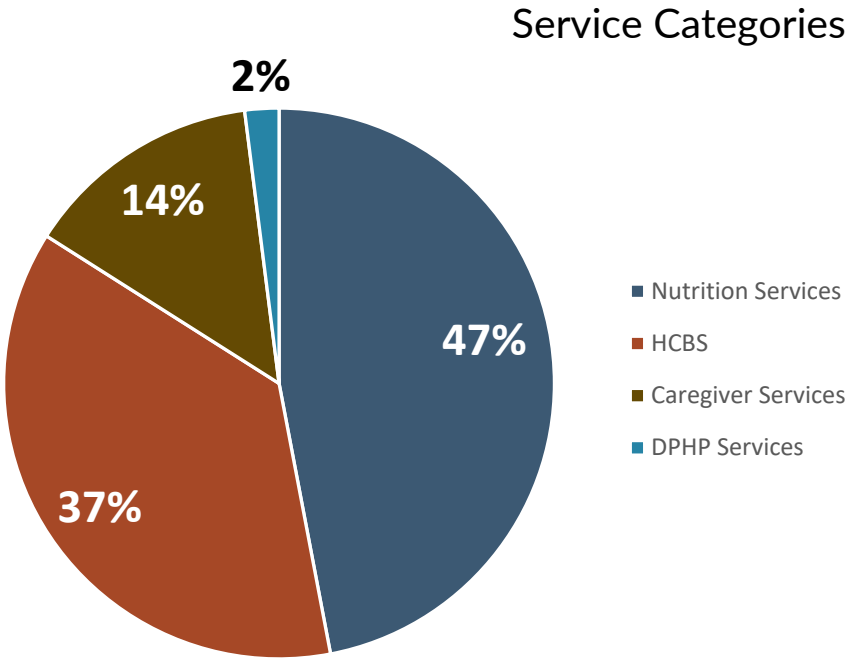
- The largest OAA service category is **Nutrition Services** (e.g., Congregate Meals and Home Delivered Meals or "Meals on Wheels")
- The 2nd largest service category includes an array of **HCBS** (e.g., Information & Referral, Care Coordination, Transportation, Homemaker Services, Chore Services)
- The 3rd largest category is **Caregiver Services**
- And the 4th main category is **Disease Prevention & Health Promotion** (DPHP) Services



Note: These figures do not include funding for the LTC Ombudsman Program or Senior Community Service Employment Program.

Impact and Reach

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- In SFY 2025, AAAs served over 76,000 older adults across all aging services
- In SFY 2025, AAAs provided:
  - 2.2 million Home Delivered Meals
  - 580,000 Congregate Meals
  - 600 people with 72,000 hours of Homemaker Services
  - 530 people with 108,000 hours of Personal Care Services

SFY = State Fiscal Year

2022 Needs Assessment Process and Findings

Data on the Needs of Older Virginians

Last Needs Assessment

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- In 2022, DARS used the Community Assessment Survey for Older Adults (CASOA) to randomly survey older Virginians
- Roughly 9,000 older Virginians responded to the mailed and electronic survey (10% response rate)
- The survey sample was not specific to individuals receiving aging services

CASOA Findings

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- **79%** Older residents rated their overall **quality of life as excellent or good**
- **45%** Older residents reported **housing needs**
- **24%** Older adults reported **transportation needs**
- **30%** Older adults reported **financial challenges**
- **42%** Older adults reported **information access challenges**

Full survey reports are on the DARS website

Aging in Place Concerns

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- Among older Virginians with concerns about aging in place in their current home, the top concerns were:

52%	44%	27%
• Financial Reasons	• Health Reasons	• Home Not Suited for Aging in Place

In-Home Service Needs

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- 41% stated they needed chore services
- 22% of older Virginians stated they needed homemaker services
- 6% stated they needed personal care services



Home Modification Needs

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- 37% of older Virginians needed home repairs or home maintenance assistance
- 18% needed assistance with maintaining the minimum housing standards
- 18% needed minor home modifications
- 16% needed major home modifications



Governance & Advisory Boards

Understanding Roles, Responsibilities, and Compliance Requirements

Types of AAAs

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Different Structures

- Private-nonstock, Nonprofit, 501c3 (14)
- Joint Exercise of Powers (5)
- Branches of County or City Government (5)
- Community Services Board (1)



Older Americans Act (OAA)

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Title III-State & Community Programs

- Defines purpose
- Creates State Units on Aging (DARS)
- Creates Area Agencies on Aging (AAAs)
  - Develop and Administer Local Plan
  - Establish Advisory Councils
  - Provide Services
  - Establish Focal Points to Provide Services
  - Facilitate Coordination of Community Long-Term Care Services

Types of Governing Bodies

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- **Governing Boards:** Responsible for policy making, program determination and oversight, assuring the availability of funds and accountability for their expenditure
- **Advisory Bodies: A**dvisory councils, task forces, commissions, committees, etc. Advisory Bodies provide structured guidance and recommendations to the AAA

Establishing Advisory Council

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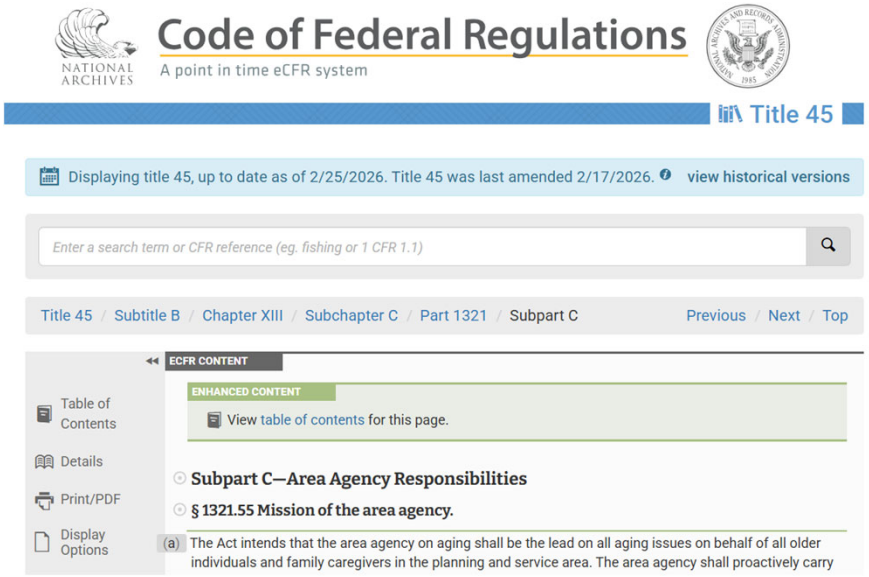
Statutory

- Section 1321.63 of the Code of Federal Regulations requires each AAA to establish an Advisory Council
- https://www.ecfr.gov/current/title-45/section-1321.63



Advisory Council Definition

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- The council shall carry out advisory functions which further the area agency's mission of developing and coordinating community-based systems of services for all older individuals and family and older relative caregivers specific to each planning and service area.

Advisory Council Functions

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- Formal liaison between the Area Agency on Aging and the Public
- Ensures that the agency understands public concerns
- Ensures the activities of the agency are communicated to the public
- May have other decision-making powers, if legally delegated by the governing authority
- May participate in the development of public policy by providing comment and advice

Advisory Council Functions

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- **Area plan review by advisory council.**
  - The area agency shall submit the area plan and amendments for review and comment to the advisory council before it is transmitted to the State agency for approval.
- **Conflicts of interest.**
  - The advisory council shall not operate as a board of directors for the area agency.
  - Individuals may not serve on both the advisory council and the board of directors for the same entity.

Advisory Council Composition Requirements

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Required Membership

- The council shall include individuals and representatives of community organizations from or serving the planning and service area who will help to enhance the leadership role of the area agency in developing community-based systems of services targeting those in greatest economic need and greatest social need
- Include more than 50% older individuals who are eligible to participate in programs
- Paid staff of the agency should not be members of the Advisory Council

Advisory Council Composition Requirements

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Representation Categories

- Family caregivers, older relative/kinship caregivers
- Health care providers
- Service providers
- Individuals with leadership experience in private/voluntary sectors
- Local elected officials
- General public
- Tribal representatives
- Volunteers

Advisory Council
Bylaws Requirements

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Bylaws must include:

1. Function and responsibilities of the Advisory Council
2. Election of officers and establishment of standing committees with a clear statement of the authority and responsibilities of each officer and committee
3. Process of appointment and removal of members
4. Relationship of Advisory Council to Governing Board, and procedures to be followed to express the views of the Council to the Board

Advisory Council Bylaws Requirements

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5. Procedures for amending bylaws by more than a simple majority
6. Regular, at least quarterly, meeting requirements
7. Procedures for conducting a meeting to public participation in accordance with the Virginia Freedom of Information Act
8. Minutes of the Advisory Board are to be kept in accordance with the agency's document retention and destruction policy/records management policy

Governing Board

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- When the AAA is a private nonprofit or a joint exercise of powers, it will have a Governing Board
- Legal body with authority derived by charter from the state, or from the joint exercise of powers agreement
- Many local governments play an important role in appointing members to current Governing Boards

Governing Board

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Membership

- Membership should be identified in bylaws
- Most AAAs have one or more appointments made by the local city or county Board of Supervisors



Community Connection

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Maintain the Community Connection

- Represent the public interest
- Represent the full range of community views and values
- Represent the organization to the community



Organization Oversight

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- Attend to legal requirements
- Direct the process of planning
- Approve long range strategic goals
- Approve annual objectives
- Monitor achievement of goals and objectives
- Establish and review high level policy
- Leadership oversight
- Financial stewardship

Governing Board

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Member Legal Responsibility

- The Board is the principal policy making unit of the AAA
- AAA Board is autonomous, bound by
  - Legal responsibilities under its charter and bylaws
  - Contractual agreements with State and local agencies
- AAA Board is obligated to:
  - Fulfill the purposes stated in its charter
  - Accomplish goals and objectives outlined in the Area Plan

Planning and Budgeting

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Planning Responsibilities

- Establish service goals and objectives in order of priority
- Define specific needs to be addressed and target populations to be served
- Oversee evaluation of products, services, and programs
- Approve Area Plan and Budget

Organizational Effectiveness

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Evaluation of Organizational Effectiveness

- Measure progress toward specific goals and objectives
- Assess responsiveness to new situations
- Evaluate the degree and effectiveness of volunteer leadership



Leadership Oversight

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Retention, Supervision and Evaluation of Top Management

- Approve HR policies
- Hire the Executive Director
- Establish the salary and conditions of employment for the Executive Director
- Maintain clear communication with the Executive Director and avoid confusing or conflicting requests
- Evaluate the Executive Director's performance regularly
- Offer advice as part of an open, collaborative relationship

Fiduciary Duties

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- **Duty of Loyalty** – self dealing
  - Use of inside information
  - Conflicts of interest
- **Duty of Obedience** – remain faithful to the mission
- **Duty of Care** – cause no harm



Financial Stewardship

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- Approve Area Plan and budget
- Review monthly financial statements
- Approve the firm hired to audit the agency and receive annual audit
- Approve expenditures outside the authorized budget
- Solicit contributions in fundraising campaigns
- Have a policy on signing of legal documents
- Develop financial resources
- Set conditions and standards for all funds solicited
- Exercise fiduciary care
- Conduct sound long-range financial planning

Board
Bylaws Requirements

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Bylaws must be written and address:

- The duties and responsibilities of the Governing Board
- The process for appointment and removal of members of the Board, with provisions for:
  - Representation of the political jurisdictions served by the AAA
  - Time-limited periods for appointment
  - Renewal of appointments
  - Rotation of the Board Officers
  - Replacement of members who are unable or unwilling to serve
- The election of officers, with a clear statement of the authority and responsibilities of each

Board
Bylaws Requirements

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Bylaws Continued…

- The establishment of standing committees, with a clear statement of the authority and responsibilities of each committee
- The relationship between the Governing Board and the Executive Director
- The relationship between the Governing Board and the Advisory Council, with procedures for how the Governing Board will consider the views of the Advisory Council in the execution of its responsibilities
- Frequency of meetings; quorum;
- Procedures for amending the bylaws by more than a simple majority; and
- Procedures for closing a meeting to the public in accordance with the Virginia Freedom of Information Act

Board Liability

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Two basic concepts:

- Board has primarily and fundamentally a policy-making role, as distinguished from an implementation and administration role
- Authority of the Board is derived from its group action. No individual Board Member has authority to act on its own or over the AAA unless the Board grants them that authority

Board Liability

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Virginia Code § 13.1-870 General rule that a Board Member will not be held liable for actions as a Board Member as long as:

- There is some rational basis for their decisions
- No conflicting interest is involved
- A reasonably informed decision is made

Board Liability

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Contract Liability

- Board members are not personally liable on contracts made on behalf of AAA. A problem may arise when the officer intentionally agrees to contract liability or unintentionally agrees because of inadequate disclosure. Officers should sign contracts using both their name and position

Tort Liability

- Board Members normally not liable for the conduct of the organization that causes harm or injury. Can have liability for their own conduct.

Board Liability

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Employment and Discrimination Liability

- Subject to federal and state discrimination laws
- IRS “responsible person” is liable for failure to withhold and remit applicable incomes and payroll taxes
- Antitrust Law
- Bankruptcy
- Environmental Statutes

Board Liability

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Area Plan Contract Insurance Requirements

- In addition to insurance required in Attachment A, Section Q, the Area Agency must maintain the following coverage throughout the Contract term.
- Proof of coverage must be provided to the State Agency upon request.
- Coverage may be through commercial insurance, self-insurance, or a combination.

Board Liability

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- **Commercial Crime Coverage** – $100K: Covers check-signers, Executive Director, staff handling funds, and fundraising personnel.
- **Directors & Officers Liability** – $1M: Protects board, Executive Director, and officers from claims for wrongful executive actions.
- **Employment Practices Liability** – $1M: Covers discrimination, wrongful termination, harassment, and related employment claims.

Avoiding Exposure

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- Pay special attention to the authority granted them by the organization, and don't deviate from that authority without permission required by the organization's operating documents
- Refrain from self-dealing, conflicts of interest and receipt of corporate opportunities without consent
- Exercise good business judgment and act in good faith
- Attend all meetings and familiarize yourself with operating documents

Board Development

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- Establish procedures for the orientation and training of new Board Members
- Appoint committee members
- Promote attendance at Board/Committee meetings
- Recruit new Board Members
- Plan agenda for Board meetings
- Take minutes at Board meetings
- Sign legal documents

Compensation

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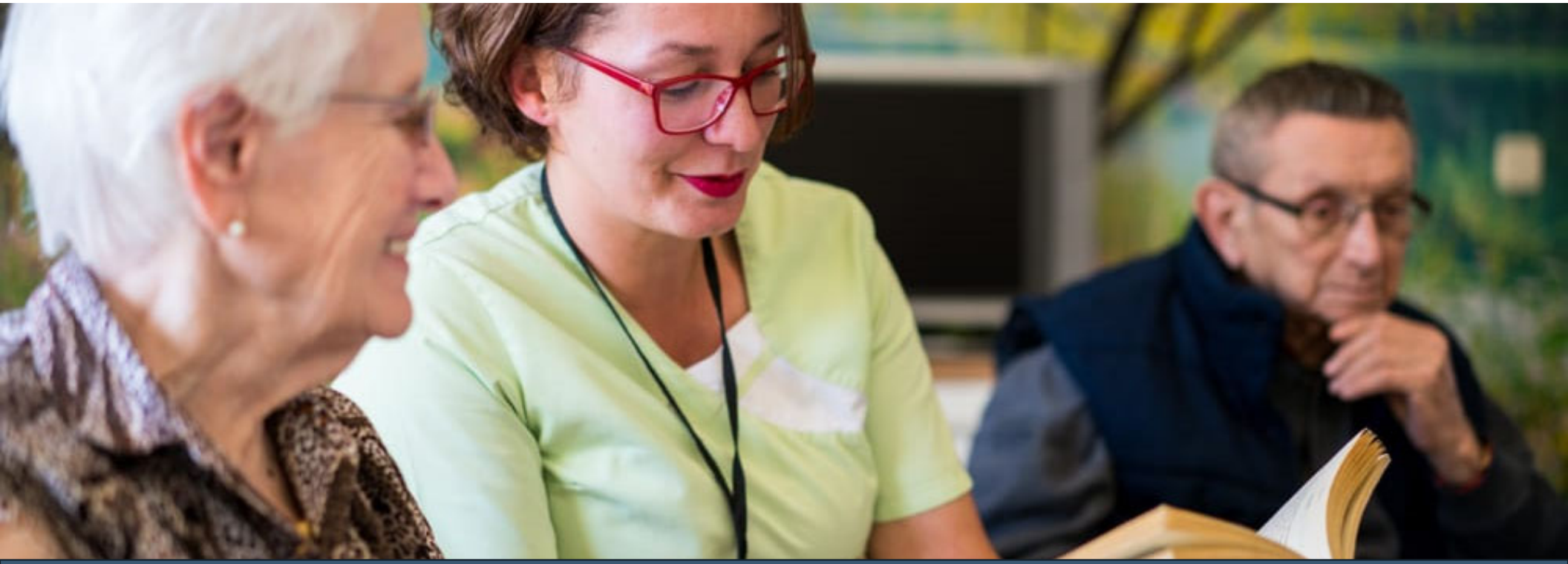
- The Commonwealth of Virginia has a tradition of volunteer governance.
- Generally, AAAs do not offer compensation to Boards of Directors or Advisory Councils.
- AAA may reimburse for reasonable and necessary travel costs associated with official meetings. The rate should be consistent with the AAA's policy on travel reimbursement for employees.

BREAK



Area Plans

Background

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- Older Americans Act (OAA) Requirements:
  - Section 305 of the OAA states that to be designated as an Area Agency on Aging (AAA) by the State Unit on Aging (SUA), the AAA must have the ability to develop an Area Plan and carry out such a plan within its planning and service area (PSA).
  - Section 306 of the OAA outlines various requirements around the content of Area Plans including submission and approval as a condition of funding, the submission frequency, funding allocations, priority populations, assurances, objectives, coordination, and accountability.
  - Section 307 requires the SUA to review and approve Area Plans and to incorporate Area Plan content into the State Plan in accordance with federal requirements.

Overview

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- Area Plan Purpose: To serve as the local blueprint detailing how the Area Agency on Aging will allocate and use federal OAA funds; what services will be provided, how they will be delivered, who will be served, and how need will be identified and prioritized—through a comprehensive and coordinated system of services for older adults

It is both:

- A service delivery framework, and
- A strategic planning instrument

What Makes Up the Area Plan?

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1. AREA PLAN PROGRAM

- Provides Background on the AAA
- Summarizes the PSA and Community Needs
- Identifies AAA Services to be Provided

2. AREA PLAN BUDGET

- Identifies Allocations for OAA and State-Funded Services

Due August 1

Most of the Area Plan content requirements are derived from the OAA statute and 45 CFR § 1321.65

Area Plan Program Parts

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- Available in the DARS Provider Portal as the Full Template or Part A/Part B

Part A

- Part 1: Background on the AAA
- Part 2: Objectives & Strategies

Part B

- Part 3: Title III Services
- Part 4: Title VII Services
- Part 5: General Fund Services
- Part 6: Other AAA Services

Area Plan Process

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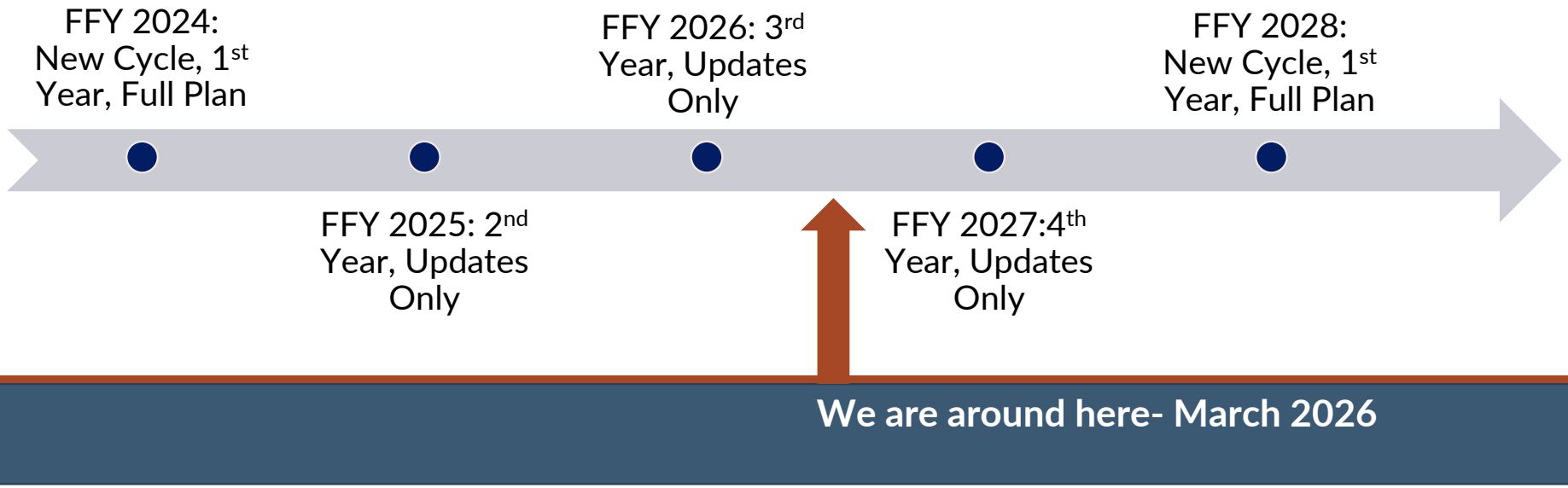
- Runs on a 4-Year Cycle
- 1st Plan Year: Full Plan (New DARS-AAA Contract)
- 2nd – 4th Plan Years: Updates (Contract Modifications)

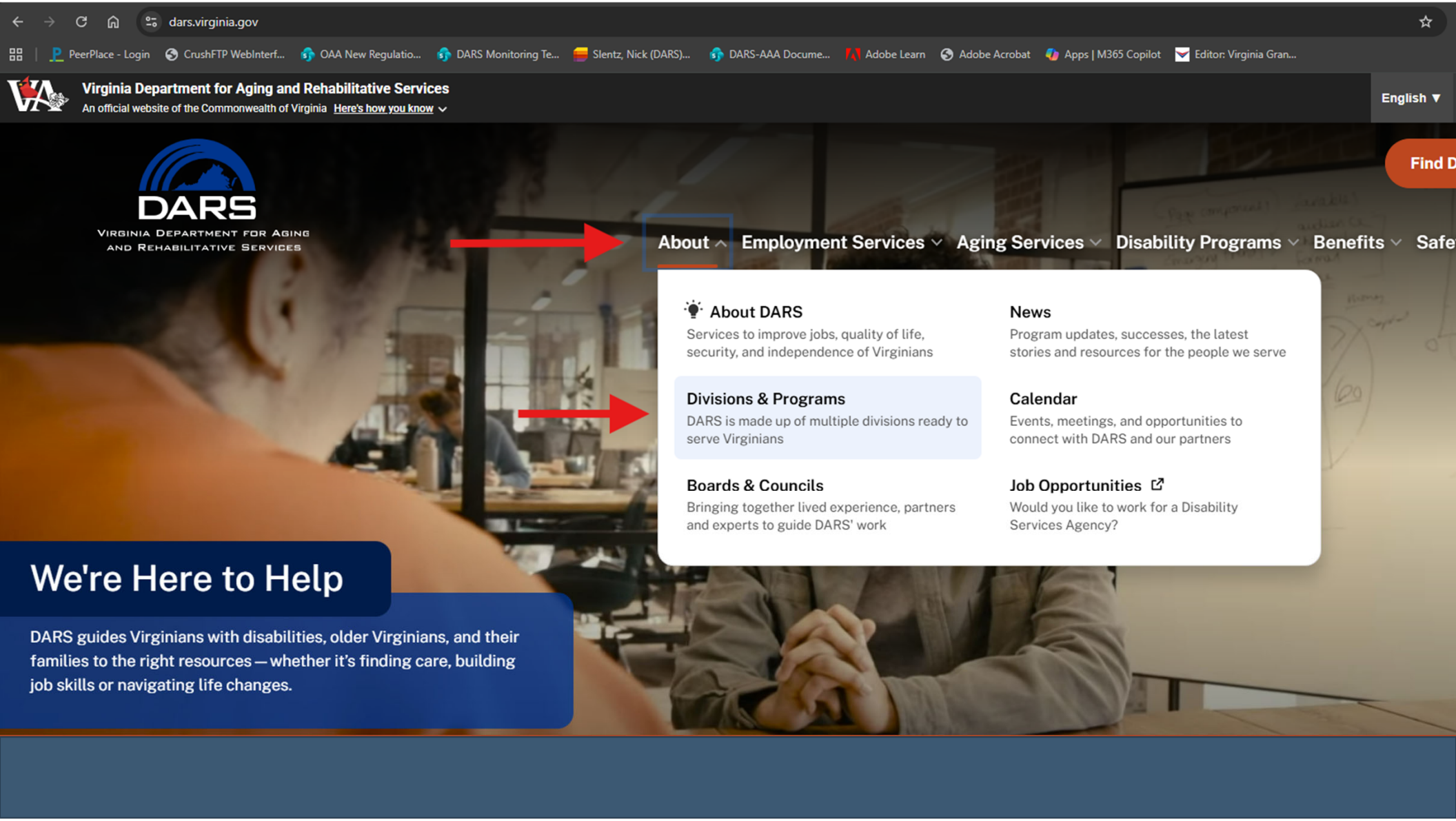


Locating the Documents

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

1. Go to dars.virginia.gov
2. In the menu bar, select **About**, then **Divisions & Programs**
3. Select **Division for Aging Services**
4. Under **For Providers,** click on the **Provider's Portal** button
5. Bookmark it, for next time!
6. Click on **Area Plan**
7. Navigate to various folders for the information you seek:

   - **Annually Required Documents**
   - **Area Plan 2026** (current documents)
   - **Area Plan Mid-Year Changes**


dars.virginia.gov
PeerPlace - Login
CrushFTP WebInterf...
OAA New Regulatio...
DARS Monitoring Te...
Slentz, Nick (DARS)...
DARS-AAA Docume...
Adobe Learn
Adobe Acrobat
Apps | M365 Copilot
Editor: Virginia Gran...
Virginia Department for Aging and Rehabilitative Services
An official website of the Commonwealth of Virginia
Here's how you know
English
DARS
Virginia Department for Aging and Rehabilitative Services
Find D
About
Employment Services
Aging Services
Disability Programs
Benefits
Safe
About DARS
Services to improve jobs, quality of life, security, and independence of Virginians
News
Program updates, successes, the latest stories and resources for the people we serve
Divisions & Programs
DARS is made up of multiple divisions ready to serve Virginians
Calendar
Events, meetings, and opportunities to connect with DARS and our partners
Boards & Councils
Bringing together lived experience, partners and experts to guide DARS' work
Job Opportunities
Would you like to work for a Disability Services Agency?
We're Here to Help
DARS guides Virginians with disabilities, older Virginians, and their families to the right resources — whether it's finding care, building job skills or navigating life changes.

DARS
Virginia Department for Aging and Rehabilitative Services

Search dars.virginia.gov

Find DARS Services

About | Employment Services | Aging Services | Disability Programs | Benefits | Safety & Security

Divisions & Programs



Division for Aging Services

Helps older Virginians live as independently as possible by coordinating and providing essential services to help them maintain their dignity and security.

Adult Protective Services

Oversees local departments of social services that respond to reports of adult abuse and provide or arrange other adult services.

Division for Community Living

With its community partners, assists individuals with disabilities in living as independently as possible within their community.

State Long-Term Care Ombudsman

The Long-Term Care Ombudsmen speak up for people in long-term care, whether they live in a nursing home, an assisted living facility, or are in their own homes.



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Find DARS Services

About | Employment Services | Aging Services | Disability Programs | Benefits | Safety & Security

Divisions & Programs

Division for Aging Services

- State Plan for Aging Services
- Dementia State Plan
- Demographic Data on Aging For Virginia
- Virginia Blueprint for Livable Communities

Adult Protective Services

Division for Community Living

State Long-Term Care Ombudsman

Disability Determination Services

Division of Rehabilitative Services

No Wrong Door

Division for Aging Services

The Division for Aging Services helps older Virginians live as independently as possible by coordinating and providing services to help them maintain their dignity and security. The division works with 25 local Area Agencies on Aging to provide these services to older Virginians.

Subscribe to the Aging Services newsletter

Sign-up Today

For Providers

Forms, reports, training and more

Provider's Portal

VDA Providers

VDA Providers

Search this site

- Home
- Notebook
- Documents
- Document Directory
- Site Contents

Welcome to the Office for Aging Services

SharePoint Portal!

Please choose from one of the links below

OR You may also select from any of the links on the left side of this page. Whichever way you choose to view documents is up to you. After choosing a link, the documents will be displayed in alphabetical order. At any time, you may change the sorting by clicking on any of the headings and selecting descending order. If you are viewing a group of documents with different categories, you can also click the drop down beside the category heading and choose to view only selected categories. After finding your document, click on the document name and the document will open.

We hope you find this new format easy to navigate! If you have any trouble accessing documents please contact Tanya.brinkley@dars.virginia.gov for assistance.



Area Plan

Forms/Reports

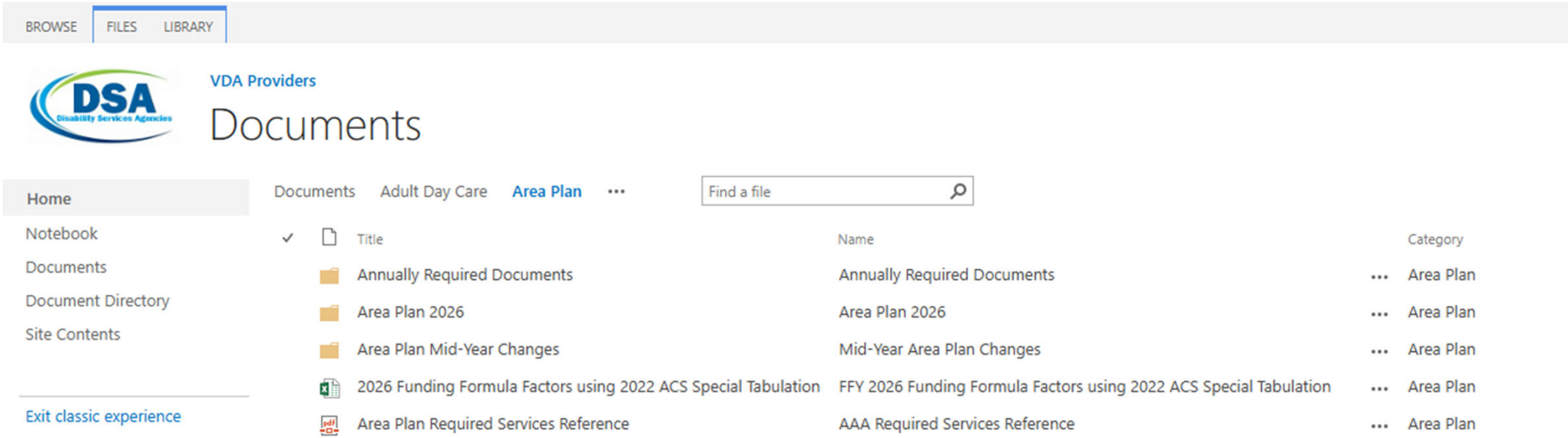
Governance & Management Guidance/Training

NCI-AD Survey Materials

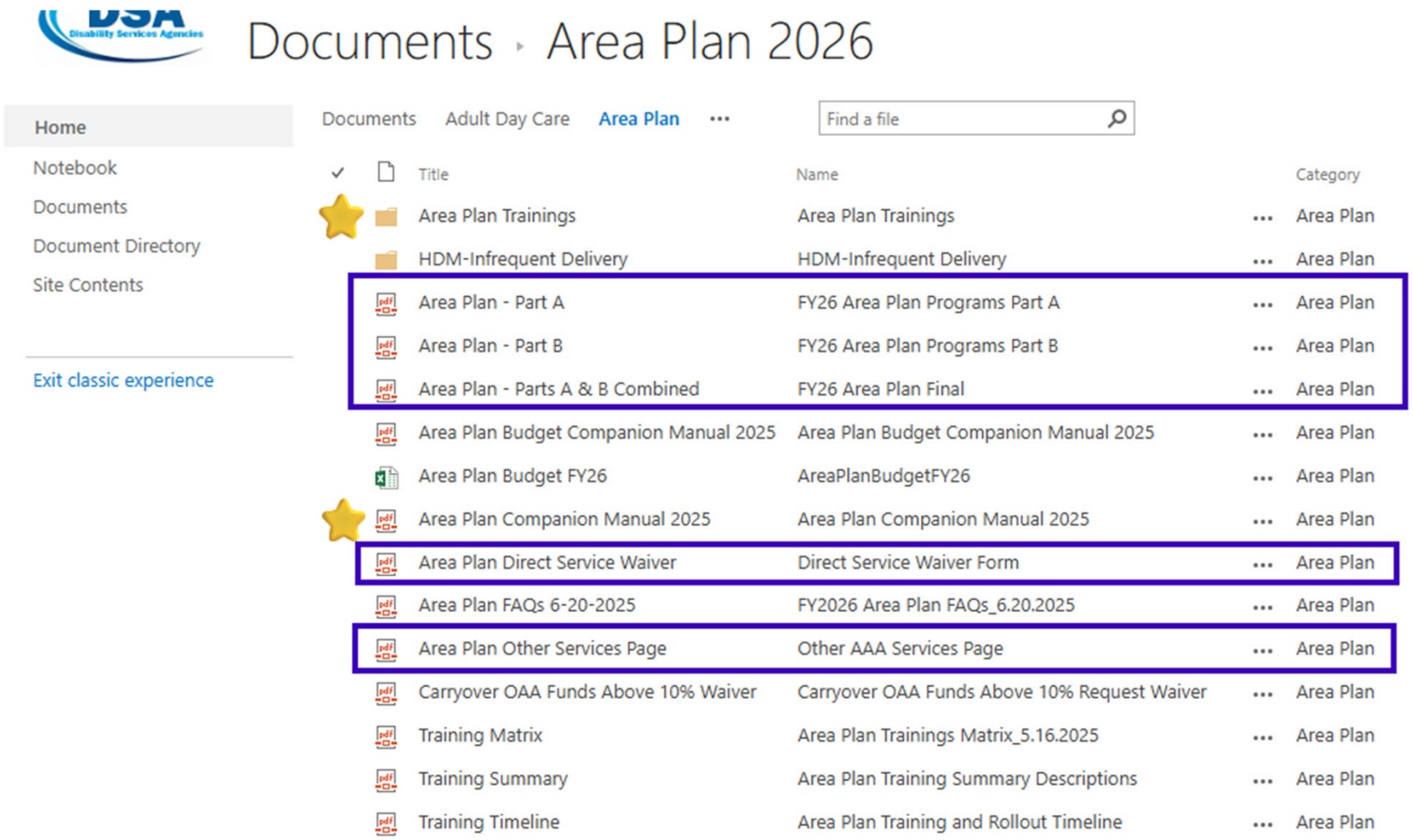
OAA New Regulations

Programs

Remittance


BROWSE
FILES
LIBRARY
DSA
Disability Services Agencies
VDA Providers
Documents
Home
Notebook
Documents
Document Directory
Site Contents
Exit classic experience
Documents
Adult Day Care
Area Plan
Find a file
Title
Name
Category
Annually Required Documents
Annually Required Documents
Area Plan
Area Plan 2026
Area Plan 2026
Area Plan
Area Plan Mid-Year Changes
Mid-Year Area Plan Changes
Area Plan
2026 Funding Formula Factors using 2022 ACS Special Tabulation
FFY 2026 Funding Formula Factors using 2022 ACS Special Tabulation
Area Plan
Area Plan Required Services Reference
AAA Required Services Reference
Area Plan

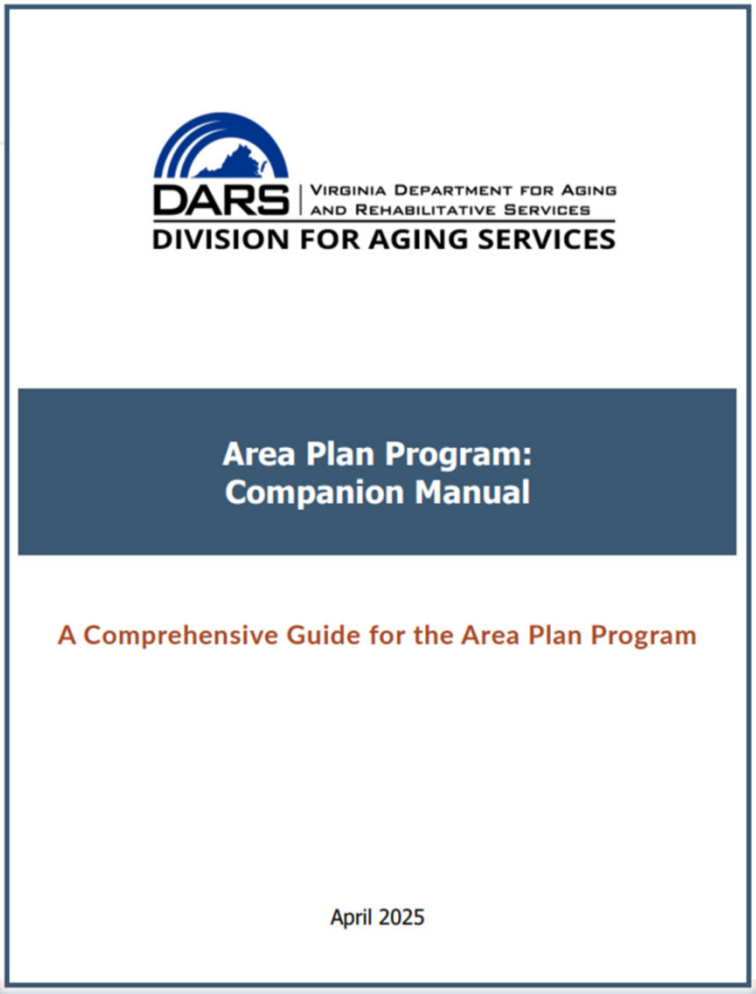
Documents ▸ Area Plan 2026



Companion Manual

- DARS strongly recommends that AAAs review this as they are completing the Area Plan Program sections
- Stay Tuned: This will be updated for the FY28 Area Plan (Year 1 of the next Area Plan cycle)





AAA Area Plan Timeline

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Here is a generally recommended timeline outlined below to develop Area Plans:

Late April-June 1
- Complete the Area Plan Program Parts 1 & 2
- Prepare Content for the Area Plan Program Parts 3-6

June 1 – June 24
- Complete the Remaining Area Plan Program Parts 3-6
- Complete the Area Plan Budget

June 25 – July 25
- 30-Day Public Comment Period
- Consult AAA Advisory Council
- Host Public Hearing

July 28 – 31
- Integrate Advisory Council and Public Input
- Obtain Governing Board Approval

August 1
- AAA Deadline to Submit Finalized Area Plans to DARS

When planning ahead, consider if you need to adjust your Governing Board or Advisory Council meeting dates.

Documents for Public Input

DARS | Virginia Department for Aging and Rehabilitative Services
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Public Input: YES CORE Documents	No Public Input: NO* ANCILLARY Documents

• Area Plan Program (Parts A and B)
• Waiver Request Forms
• HDM-ID Transition Plan, if applicable
• Other Services Pages
• Area Plan Budget Sheets:
  • Summary
  • Requirements
  • Title III
  • Title III-E
  • III-E Grandparents
	• Supporting Documents for Waiver Requests
	  • Examples: HDM-ID Plan, RFPs, Meeting Minutes, Legal Assistance Entity Type documents
	• Area Plan Budget Sheets:
	  • Respite
	  • FEDERAL
	  • GENERAL 3-4
	  • GENERAL 1-4
	  • NSIP
	  • DMAS OMB

*NOTE: AAAs must make Ancillary Documents available for public inspection if there is a request for them

Providing Public Notice

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- DARS recommends AAAs provide public input notice about the 30-Day Public Comment Period and Public Hearing(s) at the same time
- AAA websites must have:
  - Public input notice information **AND**
  - A copy of the draft Area Plan documents or information about how the public can obtain copies of the Area Plan documents
- AAAs should use several appropriate methods for distributing the public input notice (e.g., social media, websites, local newspapers, flyers for clients, etc.)
- AAAs should consider specifically targeting current AAA clients for the public input notice
- If applicable, AAAs should also notify Title VI Grantees in overlapping service areas

Collecting Public Input

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30-Day Public Comment Period

- DARS recommends AAAs use these dates: June 25 - July 25
- AAAs should allow multiple (i.e., at least two) mechanisms to receive public input (e.g., email, mail, phone, fax) during the public comment period

Public Hearing(s)

- AAAs must schedule at least one (1) public hearing
  - AAAs can have more than one hearing though
- Public hearings can be done in-person, virtual, or hybrid
  - AAAs should consider what is appropriate for their PSA
- Public hearings should be held within the first half of the public comment period
- AAAs should consider starting the public hearing with an overview presentation about the Area Plan for level-setting

Public Input Recordkeeping

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DIVISION FOR AGING SERVICES

- AAAs must maintain a record of the public input
  - Log public comments
  - Record minutes for the public hearing(s)
- AAAs will need to integrate the outcomes of the public input solicitation into the Area Plan Program Part 1 prior to submitting a final Area Plan to DARS by August 1

Consulting the Advisory Council

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Requirement

- After your AAA has developed a draft Area Plan, you need to seek input from the AAA Advisory Council (AC)
- The AC is not required to formally approve the Area Plan
- However, AC endorsements or other types of "approvals" can be offered and recorded

Activities

- Provide AC members the Area Plan materials in advance of the AC meeting
- Present an overview of the Area Plan process, the AAA's planned services, and any relevant rationale
- Consider opportunities to ask AC members questions about sections or decisions that the AAA would specifically like to get feedback on
- Take detailed minutes that capture AC member input on the Area Plan

Outcomes

- AAAs need to integrate the outcomes of their AC consultations into the Area Plan Program Part 1 prior to submitting final Area Plans to DARS by August 1

Getting Governing Board Approval

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DIVISION FOR AGING SERVICES

Requirements

- Each AAA Governing Board (GB) must approve the AAA's Area Plan after the Advisory Council consultation and public input solicitation but before it is submitted to DARS
- DARS strongly recommends AAAs seek/receive the GB's approval between July 28-31 in order to meet the August 1 submission deadline to DARS*

Activities

- Provide the Area Plan materials to the GB members in advance of the meeting
- Consider starting the GB meeting by providing an overview presentation
- Share a summary of the Advisory Council's feedback and any public input received
- Ensure the meeting minutes reflect the GB's approval (checked on monitoring visits)

*There is an allowable exception for Government-Sponsored AAAs. Please review the Companion Manual for more information.

Part 1: Background of the AAA

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- This section of the Area Plan provides background information on Area Agencies on Aging (AAAs) in general, for members of the public, and includes fields to provide agency specific information.

- The name of the AAA, type of organization, mission statement, public participation process and summary source of funds is all contained within Part 1.

Summary Source of Funds

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- Summary Source of Funds:
  - Last section in Part 1
  - The AAA must disclose all funding amounts and sources for the Fiscal Year
  - Funding is grouped by source type:
    - DARS (this includes all sources of funding passed through)
      - **OAA**
      - **State General Funds**
      - **Other Grants (VICAP, Senior Cool Care, SFMNP, etc.)**
    - Other State (DRPT, DMAS, DBHDS…)
    - Other Federal (AmeriCorps, CMS, Veterans Administration…)
    - Local Government (County/City funding)
    - Private (Foundations, Private Contracts, Commercial Relationships…)
    - Other (Contributions, Fees, Investments, Rental Income….)

Summary Source of Funds

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- NOTE: These are **estimated funds** for a Federal Fiscal Year (FFY) and may or may not be exact amounts for each funding source. DARS understands that there are factors at play, such as differences in federal and state fiscal years, funding sources that are not appropriated on an annual basis, and that the exact funding for upcoming year may not be known yet.

- Common potential funding sources have been prefilled, but the blank text fields at the bottom of each source section allows for further sources to be defined.

- **Total Projected Revenues** at the bottom of the table will automatically total the funding amounts entered.

Summary Source of Funds

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Estimated Funds for Fiscal Year 2026	
Source	**Amount**
Department for Aging and Rehabilitative Services	
Older Americans Act (include Nutrition Services Incentive Program or NSIP)	
State General Funds	
Virginia Insurance Counseling and Assistance Program (VICAP); including State Health Insurance Assistance Program (SHIP) and Medicare Improvements for Patients and Providers (MIPPA)	
Respite Care Initiative	
Dominion Energy Senior Cool Care	
U.S. Dept. Of Agriculture – Senior Farmers Market Nutrition Program (USDA-SFMNP)	
Supplemental Nutrition Assistance Program (SNAP) Outreach	
Senior Community Service Employment Program (SCSEP)	
Other State Government Sources	

Part 2: Objectives and Strategies

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- This section of the Area Plan provides an opportunity for the Area Agency on Aging (AAA) to paint a clear and robust picture of the planning and service area (PSA), including demographic characteristics and unmet needs, and to begin to build out its rationale for the Area Plan's menu of service offerings and corresponding budgeting.

- Part 2 also includes several Older Americans Act (OAA) statutory and regulatory requirements that must be included or accounted for in an AAA's Area Plan.

Part 2: Objectives and Strategies

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- **Identification of Populations of Greatest Need**
  - Identifies populations of Greatest Economic Need (GEN) and Greatest Social Need (GSN) using multiple data sources
- **Unmet Needs Assessment and Evaluation**
  - Summarizes unmet needs identified by the AAA across OAA service categories using objective data
- **Serving Low-Income Minority Objectives**
  - Reports the number of low-income minority older adults, outlines outreach methods and objectives, and evaluates service effectiveness for this population
- **Alignment with State Plan Goals**
  - Ensures Area Plan objectives align with Virginia's State Plan for Aging Services goals
- **How Objectives and Strategies Inform the Area Plan**
  - Explains how demographic data, unmet needs, State Plan goals, public input, and Advisory Council feedback shaped the Area Plan's priorities and decisions

Part 2: Objectives and Strategies

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- **Funding Within the Planning and Service Area**
  - Describes how OAA funds are distributed within the PSA to address GEN and GSN populations (Does not apply to the 3 single locality PSAs)
- **Service Coordination**
  - Outlines how the AAA fulfills required coordination assurances under the OAA, including partnerships and referral efforts to improve awareness and access to mental and behavioral health services for older adults, and coordination with the Virginia Assistive Technology System (VATS) to expand access to assistive technology resources.
- **Emergency Preparedness**
  - Summarizes COOP and emergency planning efforts, risk assessments, and coordination with emergency response partners.
- **Serving Older Native Americans**
  - Describes outreach, coordination, and culturally appropriate service collaboration with Title VI Tribal partners when applicable (Only applies to 4 AAAs at present).

Part 2: Objectives and Strategies

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- **Services to Be Provided**
  - Identifies all services the AAA will provide using OAA-related funds, ensuring alignment with the Area Plan Budget and required Service Pages.
  - Includes a short answer response to state which services address hunger, food insecurity, malnutrition, social isolation, and physical and mental health conditions, as required by the OAA Final Rule.
  - Includes a short answer response to state if the AAA offers any services through self-direction, as stated in the OAA Final Rule.
  - Lists additional AAA services provided outside of OAA funding
- **Waiver Requests**
  - This section contains the various waiver requests that can be applied for through the Area Plan Process and directions and requirements for completion.
    - Minimum Adequate Proportion, Cost Sharing, Alternative Fee Scale and Direct Service Waivers are in this section

Services to be Provided

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

This section of the Area Plan is where all the OAA AAA services are identified and their major OAA funding source (or State General Funds). Some sources cannot be used for certain programs.

This section should align with both the Area Plan budget and the Service Pages in the Area Plan Program Part B.

Area Plan Services	Title III Funding Source					
Title III Services	B	C1	C2	D	E	State GF
Group 1: In-Home						
Adult Day Care						
Checking						
Chore						
Homemaker						
Personal Care						
Group 2: Access						
Care Coordination						
Care Transitions						
Communication, Referral, Information & Assistance	X					
Options Counseling						
Transportation	X					
Assisted Transportation						
Group 3: Legal Assistance						
Legal Assistance	X					
Group 4: Other Services						
Assistive Technology/Durable Medical Equipment (DME)/Personal Emergency Response System (PERS)						
Consumable Supplies						
Emergency Services						

Other AAA Services

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

This section is where the AAA indicates **all** the services it provides with non-OAA funds.

Service pages must be completed for all programs listed here.

Services not provided by the **AAA** do not need to be identified (AAAs that are a part of a local government, AAAs with a separate SCC Entity ID from the AAA to operate other programs)

Other AAA Services	Providing Service
Adult Day Center	
Certified Application Counselors	
Care Transitions	
Community Action Agency (CAA)	
DRPT Transportation	
Emergency Services	
Foster Grandparents	
Home Repair/Modification	
U.S. Housing and Urban Development (HUD) Housing	
Low Income Home Energy Assistance Program (LIHEAP)	
Managed Care Services	
Medicaid Transportation	
Options Counseling	
Program for All-Inclusive Care for the Elderly (PACE)	
Virginia Public Guardianship & Conservator Program	
Retired Senior Volunteer Program (RSVP)	
Senior Community Service Employment Program (SCSEP; OAA Title V)	
Senior Companions	
Senior Cool Care	
Senior Farmers' Market Nutrition Program	
Senior Medicare Patrol	
Supplemental Nutrition Assistance Program (SNAP) Benefit Counseling	
Virginia Insurance Counseling and Assistance Program (VICAP)	
Weatherization	

Waiver Requests

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- Minimum Adequate Proportion
- Cost Sharing
- Alternative Fee Scale
- Direct Service



Minimum Adequate Proportion

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Purpose: This waiver request is needed when the AAA would like to budget less for certain program categories than the minimum funding amounts required by the OAA regulations and set by DARS.

Current Minimum Adequate Proportion (MAP) amounts for III-B funds are:

- 15% for Access Services
- 5% for In-Home Services
- 1% for Legal Assistance

The AAA must be able to demonstrate to DARS that services being provided in the category for which the waiver is being requested are already sufficient to meet the need for such services within the PSA.

This waiver **always** requires a public hearing when requested which may be a part of the normal Area Plan Public input process, depending on when its requested.

Cost Sharing

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Purpose: This waiver request is needed when the AAA **DOES NOT** want to implement cost sharing (i.e., charge a client along a sliding fee scale) for an allowed OAA program.

AAAs **must** cost share for applicable programs unless:

- A significant proportion of persons receiving services under the OAA have incomes below the threshold established in DARS policy
- Cost sharing would be an unreasonable administrative or financial burden upon the AAA

Programs funded solely by State General Funds* must cost share and the requirement cannot be waived. Individuals whose incomes are determined to be at or below the federal poverty level (FPL) cannot be charged for any OAA service.

Cost Sharing is prohibited by the OAA for:

- CRIA, Outreach, Care Coordination
- Ombudsman, Elder Abuse Prevention, Legal Assistance
- Congregate and Home Delivered Meals
- Any service delivered through a Tribal Organization

*Those programs are: CCEVP 1, CCEVP 2 and State Funded HDM

Alternative Fee Scale

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Purpose: This waiver request is needed when the AAA wants to implement a fee scale for a program that differs from the DARS Sliding Fee Scale.

Individuals whose incomes are at or below the federal poverty level (FPL) cannot be charged a fee for any OAA service, even when an Alternative Fee Scale is requested.

Justification for the waiver must be provided with the waiver request, the scale must be approved by the governing board (and reviewed regularly), and the fee scale must be submitted with the waiver request for review and consideration.

Alternative Fee Scale Examples:

- A fee scale in which cost sharing begins between 200% FPL and 350% FPL, and clients below 200% FPL are not charged a fee
- A fee scale where instead of a 10% charge for Level B it's a flat fee of $5.00, Level C is a flat fee of $10.00, etc.

Direct Service

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Purpose: This waiver request is needed when the AAA intends to provide an OAA service directly instead of utilizing a subcontractor to provide the service.

The AAA must be able to justify to DARS that:

- Providing the service directly is necessary to assure an adequate supply of such services
- The service is directly related to the AAA's administrative functions, or
- Providing the service directly is more economical and of comparable quality than that of a subcontractor

DARS has categorically approved AAAs to provide these services directly without requesting a waiver:

- CRIA
- Care Coordination
- Outreach

This waiver request form must be completed for EACH service (except those named above) the AAA intends to provide directly. There is also a corresponding check box on the service page to checked.

Part 3: Title III Services

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DIVISION FOR AGING SERVICES

- Part 3 provides a detailed overview of each of the AAA's OAA services and makes up the bulk of the Area Plan Document.
- It is divided into Service Groups (1-9)
- The section is designed to comply with the OAA federal regulations by addressing: Each service, including its definition, number of individuals to be served, type and number of units to be provided and corresponding OAA and related expenditures.
- The service pages are designed to be as consistent as possible, but depending on the program, there are some variations in structure and content.

Part 3: Title III Services

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DIVISION FOR AGING SERVICES

- Core Elements of the Service Pages:
  - Unit Type *(prefilled except for Other Respite and Other Supplemental Services)*
  - Total Units
  - People Served
  - Direct Service Waiver *(yes or no; categorically approved is prechecked yes)*
  - Proposed Expenditure Amount
  - Funding Source *(main sources are prelisted with additional fields)*
  - Match Funding *(prechecked for automatically matched sources)*
  - Locality Served
  - Service Providers(s)
  - Entity Type *(select from drop down list)*
  - Definition of Service *(prefilled)*
  - Target Populations *(will be prefilled with some additional space for next cycle)*
  - Service Description

Notes on the Service Pages

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- **Units**, **People Served** and **Proposed Expenditures** can all be found (and should match) what is reported in the Area Plan Budget
- Ensure the **Direct Service Waiver** field is marked correctly
- List ALL **Proposed Expenditures** and **Funding Sources** for the service, by name. "Other non-federal" is not adequate for these fields.
- Don't get hung up on the **Match** field. Local jurisdiction funds are usually the only source that you would check the box for.
- If a service provider is PSA wide, you don't need to list every **Locality Served**, "ALL" or "PSA #" is perfectly fine (unless you really want to).
- Make sure to list ALL **Service Providers**, if you subcontract. They should be the ones you will maintain contracts with, in the upcoming year. List yourself if it's provided directly.
- **Target Populations** is essentially the default OAA language (60+, greatest need, limited English…). Cut and paste. If using III-E funds, don't forget to mention caregivers.
- **Service Descriptions** must be specific. This is your program in a one-page narrative, that is what you put there. Remember, you are telling DARS and the public about how it works.

Service: Adult Day Center						Direct Service Waiver			
Unit Type	Hours	**Total Units**	1,000	**People Served**	500	X	**Yes**		**No**

Proposed Expenditure Amount	Funding Source	Match Funding
$150,000.00	Title III-B	
$25,000.00	Title III-E	
	General Fund- OAA General	X
$25,000.00	General Fund- Community Based	X
	Voluntary Contributions	
	Fees	
$10,000.00	Local Jurisdiction Funds	X
$210,000.00	**Total Proposed Expenditures**	

Locality Served	Service Provider(s)	Entity Type
ALL	Virginia Area Agency on Aging	AAA

Service Definition: Adult Day Centers are community-based programs designed to provide social, recreational, and therapeutic activities for older adults who need assistance with daily activities or have health concerns. These centers offer a safe environment where seniors can receive care and companionship during the day, which may provide respite to family caregivers.

Target Populations:

Individuals aged 60 and older, with special emphasis on those in greatest economic need and social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas).

Family caregivers, with special emphasis on those caring for and individual with a form of dementia, and older relative caregivers, who are 55 and older, live with, and are the primary caregiver (grandparent or other relative) of a child, and have a legal responsibility for the child, or are caring for an individual with a disability.

Service Description:

Adult Day Center is delivered by a team of trained professionals, including registered nurses, certified nursing assistants and personal care aides. All staff members are thoroughly vetted through background checks and receive ongoing training to ensure they meet our high standards of care. Supervisors are assigned to monitor staff performance and maintain consistent communication with clients to ensure satisfaction.

Upon initial contact, clients will undergo a comprehensive intake process that includes an initial assessment to understand their needs, preferences, and any special requirements. This process ensures that the appropriate services and staff are assigned. Intake is completed within 5 business days of the client's inquiry, and all documentation is reviewed for accuracy and completeness.

A full comprehensive Universal Assessment Instrument is conducted within 15 days to evaluate the client's health, functional needs, and living environment. The assessment typically takes 60-90 minutes, depending on the client's needs. Regular reassessments are conducted every six months, or sooner if there are significant changes in the client's condition or needs.

Client satisfaction is routinely gathered through surveys and direct feedback during regular check-ins. Satisfaction surveys are administered yearly, and all feedback is reviewed by management. Client input is used to make continuous improvements to our services.

Area Plan-Part 4, Part 5 & Part 6

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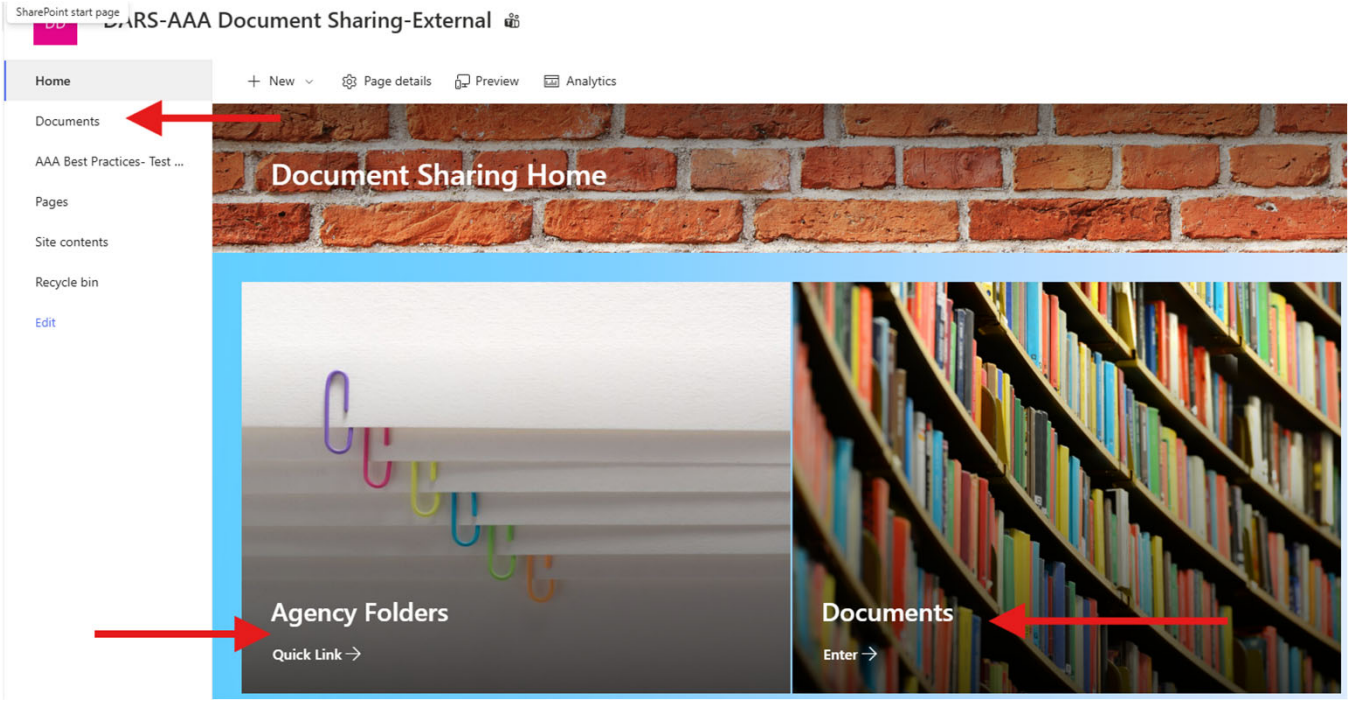
DIVISION FOR AGING SERVICES

- Part 4: Title VII Services
  - Contains Elder Abuse Prevention and Long-Term Care Ombudsman service pages
  - Differs the most from the rest of the service pages
  - Consult the Area Plan Companion Manual for a detailed explanation of each field
- Part 5: State General Fund Services
  - Contains the OAA related programs that are solely funded by the State General Fund
  - State Funded Home Delivered Meals and Care Coordination for Elderly Virginians Program (CCEVP) services falls under this group
  - Service pages do not differ significantly from Part 3: Title III Services
- Part 6: Other AAA Services
  - This section is where the Other AAA services that were listed in Part 2: Objectives and Strategies- Services to be Provided are detailed.
  - Designed the same at the OAA service pages, but depending on the service, not all fields may apply.
  - Requires slightly less detailed information than the OAA service pages
  - **They are differentiated from OAA services by this color**

DARS-AAA Document SharePoint

VIRGINIA DEPARTMENT FOR AGING AND REHABILITATIVE SERVICES
DIVISION FOR AGING SERVICES

- You need to request access from DARS to this site.
- Some users experience IT issues with gaining access occasionally. Reach out to DARS to troubleshoot.
- You can access your agency folders by clicking any of the icons in the image.



Document Submission

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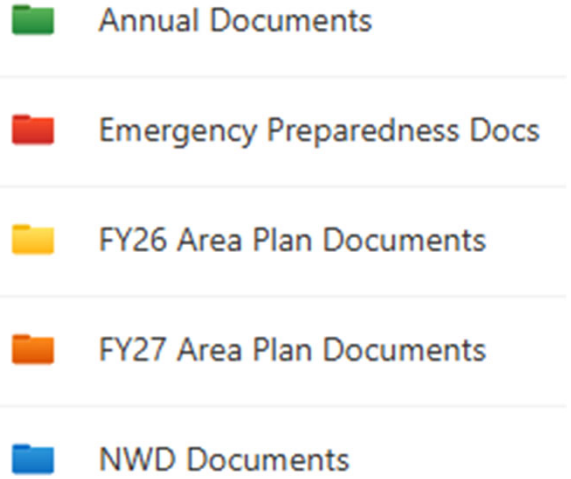
AAA Information Form, Board and Council Information, Staff Listing, Organizational Chart

COOP Plan, Risk Assessment, All Hazards Plan

Last year's Area Plan, Waivers, Budget, Supporting Documents

This year's Area Plan and Budget!

NWD Documents



You won't see the FY27 Area Plan Documents Folder until early April

Naming Conventions

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For Annual Documents:

- Refer to the Instructions and Checklist on the Providers Portal
- Numbered **1-10,** and the file names can remain untouched
- Example: 1. AAA Information Form, 2. Governing Board
- You can add your PSA# at the end if you desire: [1. AAA Information Form- PSA 0]
- Items 8-10 are considered Emergency Preparedness Documents and can go in that folder

For FY27 Area Plan Documents:

- Use PSA ## FY27- FILE NAME
- Example: [PSA 0 FY27- Area Plan Budget]

For NWD Documents:

- You should only have to put in your PSA number at the end
- Example: [2026 NWD Standards Review – PSA 0]

Area Plan Review Process

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AAA submits their Area Plan and related documents (budget, waiver forms, etc.)

→

Area Plan reviewers make comments within the PDF for corrections and clarification

- Area Plan document is "checked out" in SharePoint, locking it for further editing until review is complete, and then "checked in"

→

Area Plan- MARKUP is uploaded into Area Plan Folder

- Email requesting any AAA corrections is sent with summary of reviewer notes
- 1:1 technical assistance meeting can be requested with DARS to go over corrections

↓

AAA Makes Necessary Corrections

- Edits the existing Area Plan Document or uploads an edited version into the SharePoint folder.
- Notifies DARS that corrections have been made

→

DARS conducts subsequent reviews, as needed

- If further corrections are needed, reaches back out by email
- When Area Plan is ready to be finalized, the Area Plan and all supporting documents are routed for contracting

→

The Area Plan and supporting documents are merged with the contract language and routed for signature

- AAA signs contract
- DARS signs and contract is executed

But what about this year's plan?

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Stay tuned!

We will have additional information about this year's Area Plan process during the March 25th AAA Input Session including:

- Timeline
- Training Information
- **April*- Instructions and Documents*
- **May-June* - Training and 1:1 consultation*

Other AAA Documents: 2026

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EMERGENCY PREPAREDNESS DOCUMENTS

- Continuity of Operations Plan (COOP)
- All-Hazards Risk Assessment
- All-Hazards Emergency Response Plan

Due October 1, 2025

ANNUALLY REQUIRED DOCUMENTS

- AAA Information Forms
- Key Staff, Governing Board & Advisory Council Information

Due February 1, 2026

Other AAA Documents: 2027+

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ANNUALLY REQUIRED DOCUMENTS

- AAA Information Form*
- Governing Board Information
- Governing Board Bylaws
- Advisory Council Information
- Advisory Council Bylaws
- Organizational Chart
- Staff Listing
- Continuity of Operations Plan (COOP)
- All-Hazards Emergency Response Plan
- All-Hazards Risk Assessments

Updated Annually- By February 1

***The AAA Information Form should be updated when key staff change**

AAA Information Form

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- The form is intended to capture all changes made to the document automatically.
- The goal is that it can permanently reside in the AAA's Annual Documents folder on the SharePoint and be updated digitally when required, reducing the need for printing, and saving multiple versions of the document.
- We are still working out the process a bit, however…..

AAA Information Form

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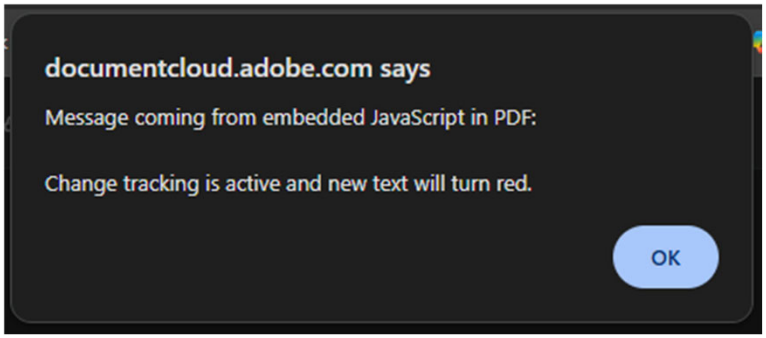
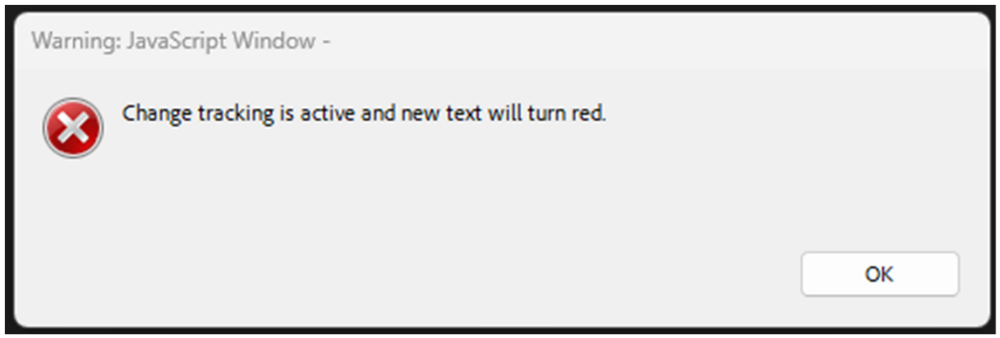
When you go to open the document, you should see a pop-up window-

When opened on a web browser:



When opened in Acrobat:



AAA Information Form

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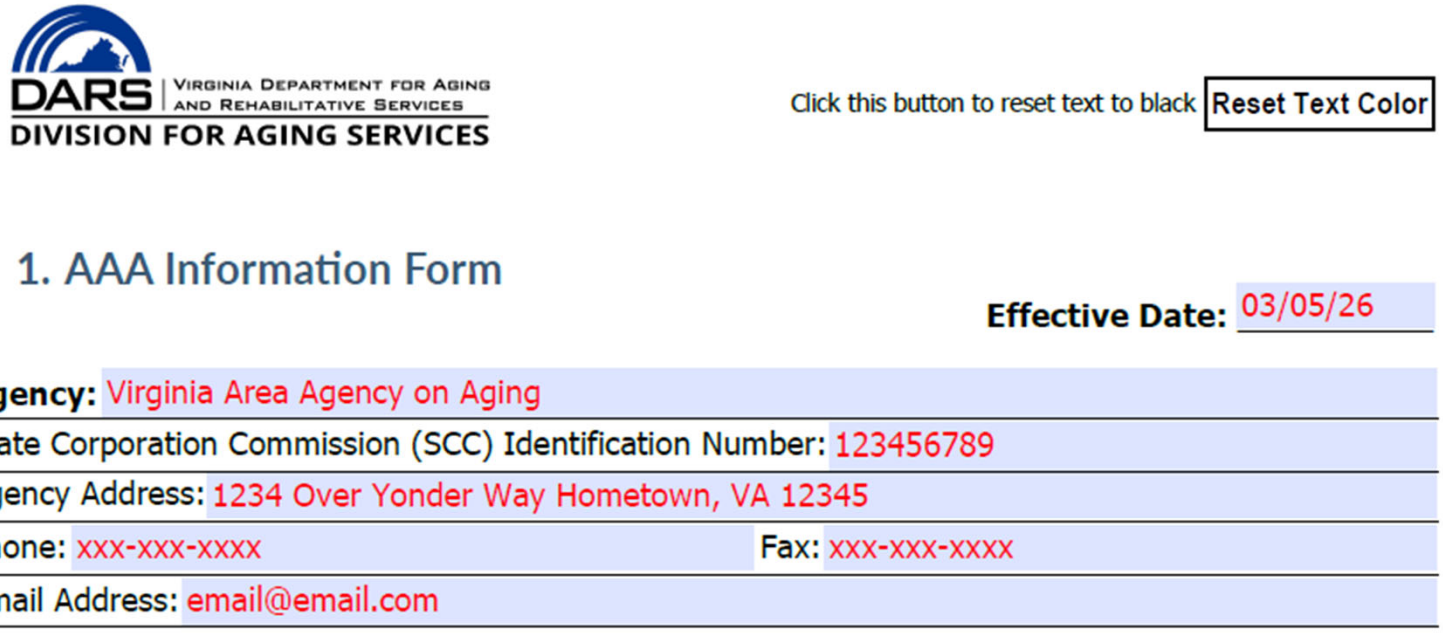
The first time the form is completed, all text should be **red:**



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Click this button to reset text to black [Reset Text Color]

1. AAA Information Form

Effective Date: 03/05/26

Agency: Virginia Area Agency on Aging	
State Corporation Commission (SCC) Identification Number: 123456789	
Agency Address: 1234 Over Yonder Way Hometown, VA 12345	
Phone: xxx-xxx-xxxx	Fax: xxx-xxx-xxxx
Email Address: email@email.com	

AAA Information Form

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Whether this form will continue to work, depends on how you go about getting the Executive Director's signature:

Authorized Staff to Sumit AMR

Provide the email address of staff and one alternate authorized to email the AMR to the Department for Aging and Rehabilitative Services. Reports sent by any other email will not be recognized as approved.

Primary: Number 1 Person **Alternate:** Number 2 Person

Agency: Virginia Area Agency on Aging

Agency Head Signature: **Date:** 03/05/26

AAA Information Form

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To get the most out of this form, you can either-

A. have the ED sign it digitally, but **NOT** through e-sign, which would lock the document for editing, then upload into SharePoint
B. OR, upload the unsigned document AND
    a. print the document, get a wet signature, scan and upload that also
    b. Route for a digital e-signature, locking the document, and then uploading that also

Option A will allow you to make future edits to the document within the SharePoint as needed.

Option B will still allow you to make edits to the unsigned document as needed, but you will need to maintain two versions.

AAA Information Form

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When there is a change inside of the Annual Documents folder (new document added or document is edited or changed), DARS is notified so we can update our records.

The next time you need to make a change to the AAA Information Form, all you need to do is open the document, hit the button on the top right, which will reset all text to black, then make your updates, which will automatically turn red again. Save, and close.

We will be alerted, and anything within the document in red, we now know is new information that needs to be updated in our records.

AAA Information Form

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1. Click this button to reset text to black **Reset Text Color**

2.

1. AAA Information Form

Effective Date: 03/05/26

Agency: Virginia Area Agency on Aging
State Corporation Commission (SCC) Identification Number: 123456789
Agency Address: 1234 Over Yonder Way Hometown, VA 12345
Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx
Email Address: email@email.com

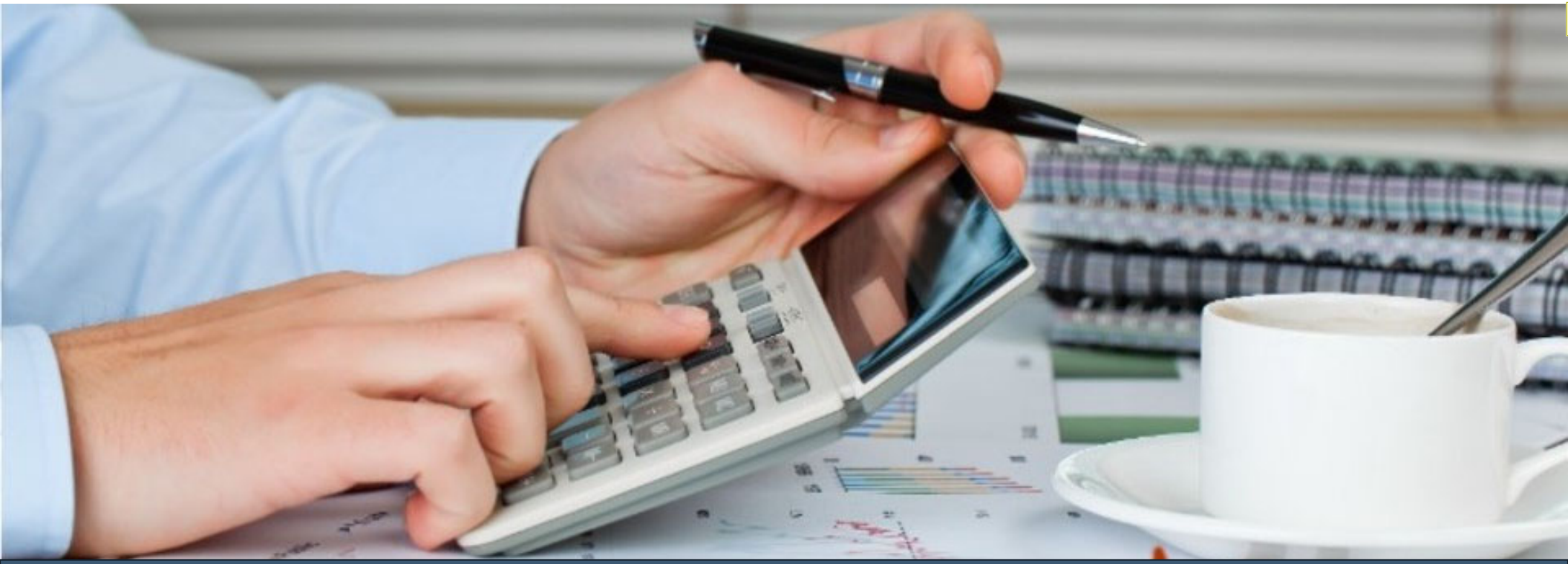
3.

1. AAA Information Form

Effective Date: 03/06/26

Agency: Virginia Area Agency on Aging, Inc.
State Corporation Commission (SCC) Identification Number: 123456789
Agency Address: 1234 Over Yonder Way Hometown, VA 12345
Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx
Email Address: email@email.gov

How simple is that?



Area Plan Budgets and the AMR/AMR-OC

Slide 120

JW1 [@Carpenter, John (DARS)] [@Brinkley, Tanya (DARS)] I copied over all slides from June 2025 AAA Director Orientation. You're likely going to have to condense and just hit on main points for this training - you've got 45 minutes

Winship, Jodi (DARS), 2026-02-24T23:08:25.025



Budget Process

Planning for the New Year

Budget Companion Manual

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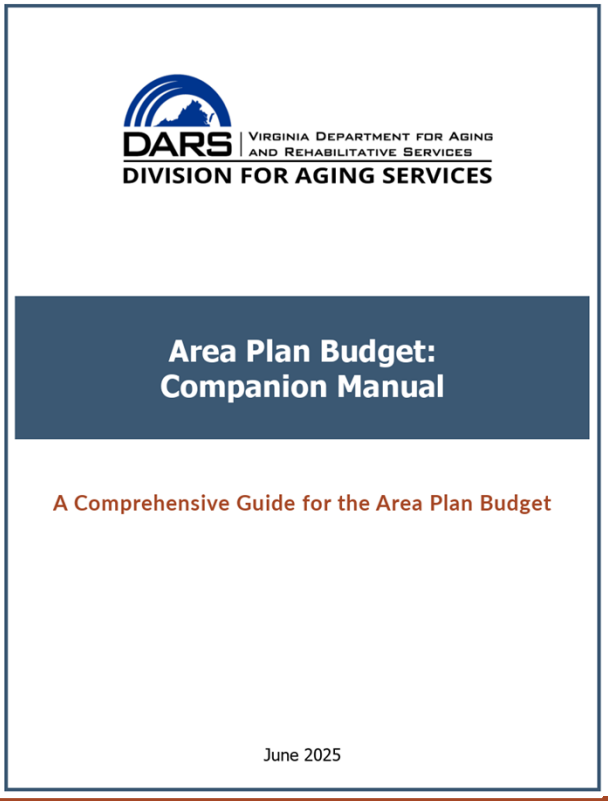
- Accompaniment to the Area Plan Companion Manual
- Written as a step-by-step guide to help formulate the budget
- The area plan budget translates the area plan into dollars by specifying the level of resources that the AAA will utilize to fulfill the area plan objectives
- The documents are located in the Providers' Portal



Navigating the Budget

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- Excel Workbook with multiple tabs
- Tabs are formula driven and work together to complete the budget
- Cells are color coded

Color	Indicator
BLUE	Indicates the AAA may enter data into these cells.
YELLOW	Indicates that the data the AAA entered is not within the requirements.
Grey	Indicates data is within a protected field and is not available for entry.
White	Indicates data is automatically populated with a formula and cannot be edited.

Tabs in the Budget

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- Summary
- Requirements
- Title III
- Title III-E
- III-E Grandparents
- CCEVP
- Respite
- FEDERAL
- GENERAL 3-4
- GENERAL 1-4
- NSIP
- DMAS OMB

Federal Funds Allocated

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- The Federal Fund categories received through the Older Americans Act are:
  - Title III-B Supportive Services
  - Title III-C(1) Congregate Meals
  - Title III-C(2) Home Delivered Meals
  - Title III-D Preventive Health
  - Title III-E Family Caregivers
  - Title VII Elder Abuse Prevention
  - Title VII Ombudsman
  - Nutrition Services Incentive Program (NSIP)
  - DMAS Ombudsman (non-OAA)

State Funds Allocated

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- State General Fund (SGF) categories are:
  - OAA General
  - Community Based Services
  - Transportation
  - Home Delivered Meals
  - Supplemental Nutrition
  - Care Coordination for Elderly Virginians (CCEVP)
  - Ombudsman

Obligations Auto-Populated

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	A	B	C	
3	Projected Resources and Spending		Title III-B	Titl
4	Estimated Unencumbered Cash on Hand on 10/1/25		26,000	
5	FY'26 Obligation		392,422	
6	FY'26 Transfers		25,000	
7	Total Resources		443,422	
8	Total Proposed Spending FY'26			
9	Proposed Carryover into FY'27		443,422	
10				
11	Projected Resources and Spending		OAA General	Comm
12	Estimated Unencumbered Cash on Hand on 10/1/25		9,300	
13	FY'26 Obligation (Oct 1, 2025 - Jun 30, 2026)		161,844	
14	FY'26 Transfers (Oct 1, 2025 - Jun 30, 2026)			
15	FY'27 Obligation (Jul 1, 2026 - Sep 30, 2026)		21,193	
16	FY'27 Transfers (Jul 1, 2026 - Sep 30, 2026)			
17	Total Resources		192,337	
18	Total Proposed Spending FY'26*			
19	Balance prior to Reallocation of Undesignated Funds		192,337	
20	Reallocation Requested of Undesignated Funds **			
21	Proposed Carryover into FY'27		192,337	

23	Projected Resources and Spending	DMAS OMB
24	Estimated Unencumbered Cash on Hand on 10/1/25	
25	FY'26 Obligation	1,571
26	Total Resources	1,571
27	Total Proposed Spending FY'26	
28	Proposed Carryover into FY'27	1,571

Unencumbered Cash on Hand

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- The next step on the Summary tab is to enter the Estimated Unencumbered Cash on Hand going into October

	A	B	C	D	E	F	G	H	I	J
1	Agency:	0						PSA #		
2										
3	Projected Resources and Spending		Title III-B	Title III-C(1)	Title III-C(2)	Title III-D	Title III-E	Title VII - EA	NSIP	Title VII - OMB
4	Estimated Unencumbered Cash on Hand on 10/1/25									

11	Projected Resources and Spending	OAA General	Community Based	Transportation	Home Delivered Meals	Supplemental Nutrition	CCEVP	GF OMB
12	Estimated Unencumbered Cash on Hand on 10/1/25							

23	Projected Resources and Spending	DMAS OMB
24	Estimated Unencumbered Cash on Hand on 10/1/25	

Federal Fund Transfers

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- Federal transfers can only be made between Title III-B, Title III-C(1), and Title III-C(2). No other funding categories are eligible for transfers.
- Prior to providing the estimated allocation of funds to the AAAs, DARS makes the following estimated transfer of Federal Funds:
  - 15% of Title III-C(1) to Title III-C(2)
  - 20% of the total of Title III-C from III-C(1) to Title III-B
- AAAs can request additional Federal Fund transfers of:
  - 25% of Title III-C(1) to Title III-C(2)
  - 10% of the total of Title III-C to Title III-B
- AAAs can also request DARS to reverse any part of the transfers made prior to the AAA's allocation.

State Fund Transfers

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- State General Fund (GF) transfers can be made between the Community Based Services, Transportation, and Home Delivered Meals categories.
- AAAs can request general fund transfers of:
  - 40% between Community Based Services, Transportation, and Home Delivered Meals.
- AAA transfers can only occur in the timeframe the general funds were awarded. Transfers are not allowed across two (2) state fiscal years.
- Transfers are not allowed for the following general fund categories: OAA General, Supplemental Nutrition, CCEVP, and Ombudsman.

Transfer Location

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- Federal Fund Transfers – Row 6

1	Agency: 0					PSA #			
2									
3	Projected Resources and Spending	Title III-B	Title III-C(1)	Title III-C(2)	Title III-D	Title III-E	Title VII - EA	NSIP	Title VII - OMB
4	Estimated Unencumbered Cash on Hand on 10/1/25								
5	FY'26 Obligation	0	0	0	0	0	0	0	0
6	FY'26 Transfers								

- State Fund Transfers – Rows 14 and 16

10								
11	Projected Resources and Spending	OAA General	Community Based	Transportation	Home Delivered Meals	Supplemental Nutrition	CCEVP	GF OMB
12	Estimated Unencumbered Cash on Hand on 10/1/25							
13	FY'26 Obligation (Oct 1, 2025 - Jun 30, 2026)	0	0	0	0	0	0	0
14	FY'26 Transfers (Oct 1, 2025 - Jun 30, 2026)							
15	FY'27 Obligation (Jul 1, 2026 - Sep 30, 2026)	0	0	0	0	0	0	0
16	FY'27 Transfers (Jul 1, 2026 - Sep 30, 2026)							

Total Resources

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- Once the Estimated Unencumbered Cash on Hand and Transfers have been entered, the total available funds will populate as Total Resources as demonstrated below.

6	FY'26 Transfers	25,000	(30,000)	5,000					
7	Total Resources	365,383	170,771	304,380	19,092	107,963	2,978	46,000	14,044
8	Total Proposed Spending FY'26								
9	Proposed Carryover into FY'27	365,383	170,771	304,380	19,092	107,963	2,978	46,000	14,044
10									
11	Projected Resources and Spending	OAA General	Community Based	Transportation	Home Delivered Meals	Supplemental Nutrition	CCEVP	GF OMB	
12	Estimated Unencumbered Cash on Hand on 10/1/25	9,300	1,000	600	2,000	1,000			
13	FY'26 Obligation (Oct 1, 2025 - Jun 30, 2026)	99,564	71,536	25,906	91,326	22,072	62,470	6,927	
14	FY'26 Transfers (Oct 1, 2025 - Jun 30, 2026)		5,000	5,000	(10,000)				
15	FY'27 Obligation (Jul 1, 2026 - Sep 30, 2026)	16,933	23,845	8,635	30,442	7,357	20,823	2,309	
16	FY'27 Transfers (Jul 1, 2026 - Sep 30, 2026)		1,000	1,000	(2,000)				
17	Total Resources	125,797	102,382	41,141	111,768	30,429	83,293	9,236	

23	Projected Resources and Spending	DMAS OMB
24	Estimated Unencumbered Cash on Hand on 10/1/25	
25	FY'26 Obligation	1,665
26	Total Resources	1,665
27	Total Proposed Spending FY'26	
28	Proposed Carryover into FY'27	1,665

Requirements Tab

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- The Requirements tab has formulas that verify whether the information provided follows federal and state requirements and automatic calculations that verify requirements are met for:

- Minimum Adequate Proportion (MAP)
- Title III-B Preparation and Administration
- Title III-B Services
- Title III-C1 Services
- Title III-C2 Services
- Federal Transfer Limits
- State Transfer Limits
- Title III-E
- Title III-E Categories
- Title III-E Grandparents
- Ombudsman Title III-B expenditures
- CCEVP Tab
- Undesignated Funds

Minimum Adequate Proportion

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- Must spend at least 15% of OAA Title III-B allotment on Access Services, such as Care Coordination, Care Transitions, Communication, Referral, Information & Assistance (CRIA), Options Counseling, Transportation and/or Assisted Transportation.
- Must spend at least 5% of OAA Title III-B allotment on In-Home Services, such as Adult Day Center, Checking, Chore, Homemaker, and/or Personal Care.
- Must spend at least 1% of OAA Title III-B allotment on Legal Assistance.

MAP Location

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- MAP section is calculated and shown in the upper left corner of the Requirements tab

	A	B	C	D
1	**Agency:**	**0**		
2				
3	**Requirement**			**Agency Status**
4	**Minimum Adequate Proportion**			
5	Access (minimum 15%)			
6	In-Home (minimum 5%)			
7	Legal (minimum 1%)			

Requirement		**Agency Status**
Minimum Adequate Proportion		
Access (minimum 15%)	100,000	30.2%
In-Home (minimum 5%)	100,000	30.2%
Legal (minimum 1%)	1,500	0.5%

Preparation and Administration

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- Operating costs are considered Prep and Admin.
- Costs may not exceed 10% of the total of the AAA's combined allotments for OAA Title III funds, and the Federal Funding share may not exceed 75% of total Prep and Admin costs.
- The proportion of funds available is calculated as 10% of the total Federal Funds provided to the AAA for Title III-B, Title III-C(1), Title III-C(2), Title III-D, and Title III-E.
- Prep and Admin expense may be charged to Title III-B, Title III-C(1), Title III-C(2), and Title III-E.
- Prep and Admin expenses must not be charged to Title III-D, Title VII, and NSIP funds.
- Up to 5% may be used from the general fund category 'OAA General Fund' for Prep and Admin costs.

Prep and Admin Location

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Requirement		Agency Status
Minimum Adequate Proportion		
Access (minimum 15%)		
In-Home (minimum 5%)	50,000	83.3%
Legal (minimum 1%)		
Title III-B Preparation and Administration		
Spending (10% or less)	10,000	16.7%
Federal Share (75% or less)	10,000	50.0%
Non-Federal Share (25% or more)	10,000	50.0%
Title III and Title III-E Preparation and Administration using OAA General Fund (5% or less)	20,000	100.0%

Requirement	Agency Status
Title III-E	
Prep & Admin Spending (10% or less)	16.7%
Prep & Admin Federal Share (75% or less)	50.0%
Services Federal Share (75% or less)	83.3%
Title III-E Categories	
Respite Services	
Supplemental Services	
Funds Spent on Grandparents	
% Spent on Grandparents (10% or less)	

LTC Ombudsman

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- The OAA requires that, at a minimum, the amount of Title III-B expenditures reported for FY 2019 continue to be spent in the LTC Ombudsman Program.
- Referred to as Maintenance of Effort (MOE).
- During the review of Area Plan Budgets, DARS verifies each AAA's information against what was reported in the FY 2019 annual audit report.
- NOTE: The field labeled YR 2019 automatically populates once the PSA number is selected on the Summary tab.

16			
17	FY 2019 Title III-B Expenditures in the LTC	Current YR Diff	YR 2019
18	Ombudsman Program Comparison	-7,500	7,500
19			

State and Local Match

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- Title III-B Supportive Services and Title III-C Nutrition Services
  - The federal share of incurred costs under Title III-B and Title III-C may not exceed 85% of total costs.
  - Match (state and local) for Title III-B, Title III C-1, and Title III C-2 must equal or exceed 15%.
  - The match requirement is at the Federal Fund level (e.g., all of Title III-B), not at the specific service level.
  - Match is computed separately for each Title, (e.g., Title III-B, Title III-C(1), and Title III-C(2)).
  - One third (1/3) of the minimum match (5%) must come from general funds.

Prep and Admin Match

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- Title III Area Plan Administration Costs
  - The Federal Fund share may not exceed 75% of total costs.
  - The match (state and local) must equal or exceed 25%.
- There are no match requirements for III-D, Title VII Elder Abuse, and Title VII Ombudsman

National Family Caregiver

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- Title III-E: National Family Caregiver Support Program (NFCSP)
  - The Federal Funding share of the total program costs provided under Title III-E shall not be more than 75%. Match (state and local) must be equal to or exceed 25%.
  - Federal Funds spent on Grandparents shall not exceed 10% of the total of Title III-E spending.
  - Costs for Prep and Admin may not exceed 10% of the total of the AAA's combined allotments for Title III-E funds and cannot exceed 75% of total Area Plan Prep and Admin costs.

Match Location

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	Requirement		Agency Status
4	**Minimum Adequate Proportion**		
5	Access (minimum 15%)		
6	In-Home (minimum 5%)	100,000	80.0%
7	Legal (minimum 1%)		
8			
9	**Title III-B Preparation and Administration**		
10	Spending (10% or less)	25,000	11.1%
11	Federal Share (75% or less)	25,000	62.5%
12	Non-Federal Share (25% or more)	15,000	37.5%
13			
14	Title III and Title III-E Preparation and Administration		
15	using OAA General Fund (5% or less)	20,000	11.6%
16			
17	FY 2019 Title III-B Expenditures in the LTC	Current YR Diff	YR 2019
18	Ombudsman Program Comparison		
19			
20	**Title III-B Services**		
21	Federal Share (85% or less)	100,000	57.1%
22	Non-Federal Share plus State Share (15% or more)	75000	42.9%
23	State Share (5% or more)	75,000	42.9%
24			
25	**Title III-C1 Services**		
26	Federal Share (85% or less)	50,000	66.7%
27	Non-Federal Share plus State Share (15% or more)	25,000	33.3%
28	State Share (5% or more)	25,000	33.3%
29			
30	**Title III-C2 Services**		
31	Federal Share (85% or less)	50,000	96.2%
32	Non-Federal Share plus State Share (15% or more)	2,000	3.8%
33	State Share (5% or more)	2,000	3.8%

Requirement	Agency Status
Title III-E	
Prep & Admin Spending (10% or less)	7.6%
Prep & Admin Federal Share (75% or less)	50.0%
Services Federal Share (75% or less)	52.6%
Title III-E Categories	
Respite Services	5,000
Supplemental Services	5,000
Funds Spent on Grandparents	1,000
% Spent on Grandparents (10% or less)	1.5%
Enter **Title III-B** general fund expenditures used to match non OAA funds or used for services under a non OAA allowed sliding fee scale.	
Enter **Title III-C1** general fund expenditures used to match non OAA funds.	
Enter **Title III-C2** general fund expenditures used to match non OAA funds.	
CCEVP Tab (If yellow go to tab)	
Care Coordination Level 2	

Transfer Requirements Example

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

35		**10/1/25-6/30/26**	**7/1/26 - 9/30/26**
36	**State Transfers** (40% or less)		
37	Community Based Transfers	-4.3%	-13.0%
38	Transportation Transfers	12.0%	64.8%
39	Home Delivered Meal Transfers		-10.2%
40	Total Transfers Equal Zero		1,000
41			**10/1/25-9/30/26**
42	**Federal Transfers**		
43	Title III-B (30% or less)		-2.0%
44	Title III-C(1) (25% or less to C(2), 10% or less to B)		-3.9%
45	Title III-C(2) (25% or less to C(1), 10% or less to B)		4.4%
46	Total Transfers Equal Zero		500

CCEVP

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DIVISION FOR AGING SERVICES

- If the Requirements Tab highlights a service in yellow, visit the CCEVP tab and complete the needed information.

CCEVP Tab (If yellow go to tab)	
Care Coordination Level 2	
Care Coordination Level 1	
Care Transitions	
Senior Outreach to Services (S.O.S.)	
Options Counseling Services	

Undesignated Funds

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- Undesignated Funds cannot be changed during the year after the Area Plan and budget have been approved. These are unrestricted dollars that may be used over and above the match requirements in any service category.
- After all planned expenditures have been entered, the AAA will have the opportunity to reallocate any funds that exceed the match required for Title III-B, Title III-(C)1, and Title III-(C)2. The Requirements tab will calculate the match required and if the match is met; any general funds that exceed the match required will be reclassified as Undesignated Funds.
- Regulations prohibit the transfers in Title III-D, Title III-E, CCCEVP, and Ombudsman funds; however, the AAA may add Undesignated Funds to any of these services.

Using Undesignated Funds

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DIVISION FOR AGING SERVICES

- In the example below, the dollars show $72,237 calculated as Undesignated funds.
- This is the amount that can be reallocated to other services by subtracting the amount of general funds in one service category and applying that amount to the Undesignated Funds funding source rows on the Title III, III-E, III-E Grandparents tabs. Each service will have an Undesignated funding row where the new planned expenditures can be added.

Undesignated Funds		
Match Required (Title III-B, C1, C2)	627,763	
Match Met	700,000	
Undesignated Funds	72,237	
Total Undesignated Funds Budgeted to OAA General *		**
Total Undesignated Funds Budgeted to CCEVP *		

Service Tabs

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DIVISION FOR AGING SERVICES

- Location of planned expenditure data for the Area Plan Budget year. These tabs, especially the Title III and III-E tabs, drive the majority of the automatic formula calculations on the Summary and Requirements tabs. The tabs are as follows:
  - Title III
  - Title III-E
  - Title III-E Grandparents
  - Respite (if using State General Community Based Funds).

Service Data Entry

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DIVISION FOR AGING SERVICES

- BLUE highlighted cells of each tab indicate that data entry is permitted.
- Any service containing planned expenditures must also contain correlating service data at the bottom of each service column.
- The Title III, Title III-E, and Title III-Grandparents, tab will highlight the cells that are not within requirements in yellow. For example, if units are missing, that will be highlighted in YELLOW and 'Enter Units' will appear.

30	**Total Cash**	1	10,000	1
31	**In-Kind Amount**			
32	**Service Data:**			
33	Planned Number of Units		10,000	
34				
35	Unit Defined as:	Hours	Contacts	Individual Hours
36	Unit Cost		$1.00	
37	Planned Persons Served		10,000	
38		Enter Units		Enter Units
39		Enter Persons		Enter Persons

Service Data Entry Cont.

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DIVISION FOR AGING SERVICES

- If the Area Plan indicates a service will be provided, there must be a correlating Budget line item to reflect those expenditures and unit costs.
- The Planned Number of Units, Planned Persons Served, and OAA-related expenditures entered into the budget service columns must also match each Service Page in the Area Plan.
- The amount of funds budgeted by service (columns) are totaled at the bottom of the tab. The total amounts by funding source (rows) are calculated at the right of the tab.
- The funding source data will automatically be populated as the “Total Proposed Spending FY26” on the Summary tab.

	A	B	C	D	E	F	G	H	I	J	K
1	**PSA:**	**1**									
2			This row is left available for your internal comments. For example, some agencies use it to indicate internal account numbers.								
3	**Planned Expenditures**		**In-Home Services**								**Access**
4	**Funding Source**		**Adult Day Care**	**Checking**	**Chore**	**Homemaker**	**Personal Care**	**Care / Service Coordination Level 2**	**Service Coordination Level 1**	**Care Transitions**	**S.O.S.**
5	**Older Americans Act**										
6		Title III-B									
7		Title III-C(1)									
8		Title III-C(2)									
9		Title III-D									
10		Title VII - Ombudsman									
11		Title VII - Elder Abuse									
12	**Other Funds**										
13		Voluntary Contributions									
14		Other Non-Federal									
15		Fees									
16	**Other Federal**										
17		DMAS - Ombudsman									
18		Other Local Federal Funding									
19		NSIP									
20	**General Funds**										
21		OAA General									
22		Community Based									
23		Transportation									
24		Home Delivered Meals									
25		Supplemental Nutrition									
26		CCEVP									
27		Ombudsman									
28	**Undesignated Funds to OAA General***										
29	**Undesignated Funds to CCEVP***										
30	**Total Cash**										
31	**In-Kind Amount**										
32	**Service Data:**										
33	Planned Number of Units										
34											
35	Unit Defined as:		Hours	Contacts	Individual Hours	Individual Hours	Individual Hours	Individual Hours	Individual Hours	Contacts	Referrals
36	Unit Cost										
37	Planned Persons Served										

	A	B	C	D	E	F	G	H	I	J	K
2			This row is left available for your internal comments. For example, some agencies use it to indicate internal account numbers.								
3	**Planned Expenditures**		**Individual Counseling**	**Support Groups**	**Caregiver Training**	**Care / Service Coordination Level 2**	**Information and Assistance**	**Outreach/ Public Information/ Education**	**Respite Voucher**		
4	**Funding Source**		**Individual Counseling**	**Support Groups**	**Caregiver Training**	**Care / Service Coordination Level 2**	**Communication Referral & I&A**	**Outreach/ Public Information/ Education**	**Respite Voucher**	**Adult Day Care (Out of Home)**	**Homemaker (In-Home)**
5	**Older Americans Act**										
6		Title III-E									
7	**Other Funds**										
8		Voluntary Contributions									
9		Other Non-Federal									
10		Fees									
11	**Other Federal**										
12		Other Local Federal Funding									
13		NSIP									
14	**General Funds**										
15		OAA General									
16		Community Based									
17		Transportation									
18		Home Delivered Meals									
19		Supplemental Nutrition									
20	**Undesignated Funds to OAA General ***										
21	**Total Cash**										
22	**In-Kind Amount**										
23	**Service Data:**										
24	Planned Units of Service										
25	Unit Defined as:		Hours	Sessions	Hours	Individual Hours	Contacts	# of Activities	# of Vouchers	Individual Hours	Individual Hours
26	Unit Cost										
27	Planned Persons Served with a Caregiver							Est. Audience Size			
28	Planned Caregivers Served										
29	Planned Number of Caregivers Benefited										

	A	B	C	D	E	F	G	H	I
1	**Agency:**	**Mountain Empire Older Citizens, Inc.**							
2									
3			**Proposed Spending**						
4			**Respite Care Initiative Grant**	**Client Fees**	**Other (Specify)**	**Other (Specify)**	**Other (Specify)**	**General Fund Community Based**	**Total**
5									
6	**Personnel Expenses:**								
7	Salaries (Supervisory and Support Staff)								0
8	Wages (Respite Provider Staff)								0
9	Fringe Benefits (FICA, WC, Health, etc.)								0
10	**Total Personnel Services**		0	0	0	0	0	0	0
11	**Non-Personnel:**								
12	Contractual Services (Direct Service Providers)								0
13	Supplies and Materials								0
14	Continuous Charges (Insurance, Rent, Maintenance, etc.)								0
15	Other (Identify)								0
16	**Total Non-Personnel**		0	0	0	0	0	0	0
17	In Kind Other (Identify)								0
18	**Total**		0	0	0	0	0	0	0
19									
20	**Spending Requirements**			**Agency Status**					
21	Respite Care Grant - no more than 55%								
22	Matching Funds - at least 45%								
23	In-Kind Matching Funds – no more than 20%								

CCEVP Tab

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DIVISION FOR AGING SERVICES

- "Client Data" must be entered on the CCEVP tab for the Care Coordination for Elderly Virginians Program (CCEVP) funding source. "Client Data" in this tab means estimated Labor Hours, Unduplicated Clients to be Served, and other general referral and service data.
- CCEVP funds can be used for the following services:
  - Service Coordination Level 1 and 2
  - Care Transitions
  - Senior Outreach Services (SOS)
  - Options Counseling

Agency: **Mountain Empire Older Citizens, Inc.**

Client Data:

Care Coordination Level 2

1. Estimated Care Coordination Labor Hours
2. Unduplicated Care Coordination Clients to be Served

Care Coordination Level 1

1. Estimated Care Coordination Labor Hours
2. Unduplicated Care Coordination Clients to be Served

Care Transitions

1. Estimated Number of Persons Offered Care Transitions
2. Estimated Number of Persons Accepting Care Transitions
3. Estimated number of persons that Completed Care Transitions
4. Estimated Number of Persons Readmitted within 30 days of Discharge

Senior Outreach to Services (S.O.S.)

1. Estimated Number of Persons to be Served
2. Estimated Number of SOS Referrals
3. Estimated Number of SOS Implementations
4. Estimated Number of Clients with 2 or More ADL's

Options Counseling Services

1. Unduplicated Options Counseling Clients to be Served
2. Estimated Options Counseling Hours



AMR and AMR-OC

Invoice Submission

SharePoint Links

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Welcome to the Office for Aging Services

SharePoint Portal!

Please choose from one of the links below

OR You may also select from any of the links on the left side of this page. Whichever way you choose to view documents is up to you. After choosing a link, the documents will be displayed in alphabetical order. At any time, you may change the sorting by clicking on any of the headings and selecting descending order. If you are viewing a group of documents with different categories, you can also click the drop down beside the category heading and choose to view only selected categories. After finding your document, click on the document name and the document will open.

We hope you find this new format easy to navigate! If you have any trouble accessing documents please contact Tanya.brinkley@dars.virginia.gov for assistance.

COVID-19

Area Plan

Forms/Reports

Programs

Remittance

Weekly Mailing

Aging Monthly Reports

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Documents Adult Day Care **Forms/Reports** ... Find a file

	Title	Name		Category
	Annually Required Documents	Annually Required Documents	...	Area Plan
	Area Plan 2026	Area Plan 2026	...	Area Plan
	Area Plan Mid-Year Changes	Mid-Year Area Plan Changes	...	Area Plan
	2026 Funding Formula Factors using 2022 ACS Special Tabulation	FFY 2026 nding Formula Factors using 2022 ACS Special Tabulation	...	Area Plan
	AAA Service Type Mapping Lookup Grid	AAA Ser Type Mapping Lookup Grid	...	Forms/Reports
	Acceptable Use Policy Agreement	AUPA	...	Forms/Reports
✓	Aging Monthly Report - Other Contracts	FY26 AgingMonthlyReport-OtherContracts	...	Forms/Reports
✓	Aging Monthly Report for Area Agencies on Aging FY2026	FY26 AgingMonthlyReportforAreaAgenciesonAging	...	Forms/Reports
	Aging Services in Virginia	Aging Services in Virginia 11-27-2023	...	Forms/Reports
	Area Agency on Aging Contractor Information Form	AAAContractorInfoForm	...	Forms/Reports

Aging Monthly Report (AMR)

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Expenditures Reported

- Title III-B, C(1) and C(2), III-D, VII- Ombudsman, VII-Elder Abuse,
- Title III-E & Title III-E Grandparents
- Other Non-Federal, Contributions, and Fees
- DMAS Ombudsman, Other Local, and NSIP
- OAA General, Community Based, Transportation, HDM, Supplemental Nutrition, CCEVP, and Ombudsman
- VICAP and MIPPA
- Respite Care Initiative
- Senior Cool Care and Senior Farmer's Market

Aging Monthly Report–Other Contracts (AMR-OC)

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Expenditures Reported

- Directed Appropriations
- SCSEP
- SNAP

AMR – Payment

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Agency: 0 PSA #

Month Ending: Year:

FEDERAL FUNDS

Title III-B	Title III-C(1)	Title III-C(2)	Title III-D	Title III-E	Title VII Elder Abuse	Title VII Ombudsman	NSIP

STATE GENERAL FUNDS

OAA General	Community Based	Transportation	Home Delivered Meals	Supplemental Nutrition	CCEVP	Ombudsman	

OTHER PROGRAMS

DMAS Ombudsman	Senior Cool Care	Senior Farmer's Market	Senior Farmer's Market ARPA Expansion	Senior Farmer's Market General Funds FY23	Senior Farmer's Market General Funds FY24	Respite Care Initiative Program	

VICAP

Previous Year VICAP Basic	Current Year VICAP Basic	MIPPA Priority 1 - SHIP	MIPPA Priority 2 - AAA	Priority 3 - ADRC	VICAP General Funds FY23	VICAP General Funds FY24	TOTAL PAYMENT
							0

If your cash requested exceeds the 30/60 day level calculated, a statement of explanation must be included in the e-mail transmitting the report. This report must be submitted by the close of business no later than the 12th of the following month. If the 12th is not a state business

Payment | Request | Requirements | Title III | Title III-E | III-E Grandparents | COVID-19 MDD | VICAP | Care Tran ...

AMR - Request

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

PSA #: 0	Month Ending:				Year:						
	Federal										
Status of Funds	Title III-B	Title III-C(1)	Title III-C(2)	Title III-D	Title III-E	Title VII - Elder Abuse	Title VII - Ombudsman	NSIP	OAA General	Community Based	Tra
Unencumbered Cash-on-Hand at AAA at Beginning of Contract											
Unadvanced Balance of Previously Awarded Funds at VDA											
Current Year Award											
Total Funds Available for This Contract											
Planned Carryover											
Approved Budget											
Y-T-D Expenditures											
Cash Received Y-T-D for This Contract											
Cash Requested Last Report But Not Yet Received											
Cash Disbursed Y-T-D											
Accounts Payable at End of Report Month (Accrued Expenses)											
Cash-on-Hand at End of Report Month											
Cash Required for 30 Days of Program Operations											
Cash Request Calculated											
Cash Requested (See Note Below)											
YTD Percentage of Cash Requested											
Revised 9/27/2023	If this report is for the month of September, the Cash Requested may appear yellow. This is because the formula does not take into account the availabil										

Payment | Request | Requirements | Title III | Title III-E | III-E Grandparents | COVID-19 MDD | VICAP | Care Tran ...

AMR – Request Instructions

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

PSA #:	Blue cells on all tabs are input cells. All other cells are locked.
Unencumbered Cash-on-Hand at AAA at Beginning of Contract	This is the amount of advance funds received by the AAA and should be an audit liability on the agency's books from the prior year. When the audit has been finalized, the amount reported here should come from the last column on Schedule A, Status of Funds. See carryover limits on next line.
Unadvanced Balance of Previously Awarded Funds at DARS	This is the amount of funds previously awarded remaining on the September 202X Remittance. This amount does not change during the year. The carryover limit for federal funds is the sum of "Unencumbered Cash-on-Hand at AAA at Beginning of Contract" and "Unadvanced Balance of Previously Awarded Funds at DARS".
Current Year Award	When viewing the Obligation Page, this is the sum of prior year - New Obligation and New Year Obligation plus transfers. This should also be the same as the new year's funding allocation plus any approved transfers.
Total Funds Available for This Contract	Formula: Sum of line 4, 5, and 6. When comparing to the Summary of Obligation Page, this amount should equal the "Total Obligation for Fiscal Year 202X" on the Obligation Page minus line 4 above "Unencumbered Cash-on-Hand at AAA at Beginning of Contract".
Planned Carryover	This amount should be set at the beginning of year by agency or board policy and adjusted based on future funding formula projections and agency circumstances. Can be adjusted during the year. Federal funds cannot exceed 10% of "Current Year Award" without DARS approval.
Approved Budget	Formula: "Total Funds Available for This Contract" line 7 minus "Planned Carryover" line 8.
Y-T-D Expenditures	Formula: Total expenditure for the fund brought forward from the appropriate tab. This amount must be derived from the agency's accounting records. This cannot exceed "Total Funds Available for This Contract" line 7, but should not exceed the "Approved Budget" line 9.
Cash Received Y-T-D for This Contract	This amount should agree to the Remittance, "Grant to Date Payment" column, unless there is payment in transit reflected on line 12.
Cash Requested Last Report But Not Yet Received	Amount requested from prior month's report, that was not received by month end.
Cash Disbursed Y-T-D	Fill in the amount of cash you have paid for services provided under this contract.
Accounts Payable at End of Report Month (Accrued Expenses)	Formula: Line 10 minus line 13. This should agree with your agency's balance sheet payable by fund.
Cash-on-Hand at End of Report Month	Formula: "Unencumbered Cash-on-Hand at AAA at Beginning of Contract" line 4 plus "Cash Received Y-T-D for This Contract" line 11 plus "Cash Requested Last Report But Not Yet Received" line 12 minus "Cash Disbursed Y-T-D" line 13.
Cash Required for 30 Days of Program Operations	Formula: "Approved Budget" line 9 divided by 12.
Cash Request Calculated	Formula: The lesser of either "Approved Budget" line 9 minus "Unencumbered Cash-on-Hand at AAA at Beginning of Contract" line 4 minus "Cash Received Y T-D for This Contract" line 11 plus "Cash Requested Last Report But Not Yet Received" line 12 or "Cash Required for 30 Days of Program Operations" line 16 minus "Cash-on-Hand at End of Report Month" line 15. You can be advanced "Cash Required for 30 Days of Program Operations", but it is limited to the balance of remaining funds.
Cash Requested	Enter the amount of funds you are requesting. If the cell is yellow you have exceeded the cash available or are requesting more than the "Cash Request Calculated". Correct and/or provide explanation in the email when submitting this request. The request must be for a specific reason. Requesting remaining federal balances at year end is not an acceptable explanation.
YTD Percentage of Cash Requested	Formula: "Unencumbered Cash-on-Hand at AAA at Beginning of Contract" line 4 plus Cash Received Y-T-D for This Contract" line 11 plus "Cash Requested Last Report But Not Yet Received" line 12 plus "Cash Requested" line 18) divided by "Approved Budget" line 9.

AMR - Requirements

VIRGINIA DEPARTMENT FOR AGING AND REHABILITATIVE SERVICES
DIVISION FOR AGING SERVICES

Agency:	0			PSA:		
Requirement			**Agency Status**	**Requirement**		**Agency Status**
Minimum Adequate Proportion				**Title III-E**		
Access (minimum 15%)				Prep & Admin Spending (10% or less)		
In-Home (minimum 5%)				Prep & Admin Federal Share (75% or less)		
Legal (minimum 1%)				Services Federal Share (75% or less)		
Title III-B, C, and D Preparation and Administration				**Title III-E Categories**		
Spending 10% or less of B, C, and D Fed Funds				Respite Services		
Federal Share (75% or less)				Supplemental Services		
Non-Federal Share (25% or more)						
Title III and Title III-E Preparation and Administration using OAA General Fund (5% or less)				Funds Spent on Grandparents		
				% Spent on Grandparents - 10% or less		
		Current Yr Difference				
Enter the FY 2019 Title III-B Expenditures in the LTC Ombudsman Program			0			
Title III-B Services				Enter **Title III-B** general fund expenditures used to match non OAA funds or used for services under a non OAA allowed sliding fee scale.		
Federal Share (85% or less)						
Non-Federal Share plus State Share (15% or more)						
State Share (5% or more)						
Title III-C1 Services				Enter **Title III-C1** general fund expenditures used to match non OAA funds.		
Federal Share (85% or less)						
Non-Federal Share plus State Share (15% or more)						
State Share (5% or more)				Enter **Title III-C2** general fund expenditures used to match non OAA funds.		
Grab & Go (25% or less)						
Title III-C2 Services						
Federal Share (85% or less)						
Non-Federal Share plus State Share (15% or more)						
State Share (5% or more)						

AMR - Expenditures

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

PSA: 0
Month:

This row is left available for your internal comments. For example, some agencies use it to indicate internal account numbers.

YTD Expenditures		In-Home Services					Access Services				
Funding Source		**Adult Day Care**	**Checking**	**Chore**	**Homemaker**	**Personal Care**	**Care / Service Coordination Level 2**	**Service Coordination Level 1**	**Care Transitions**	**S.O.S.**	**Communication Referral & I&A**
Older Americans Act											
	Title III-B										
	Title III-C(1)										
	Title III-C(2)										
	Title III-D										
	Title VII - Ombudsman										
	Title VII - Elder Abuse										
Other Funds											
	Other Non-Federal										
	Voluntary Contributions										
	Fees										
Other Federal											
	DMAS - Ombudsman										
	Other Local Federal Funding										
	NSIP										
General Funds											
	OAA General										
	Community Based										
	Transportation										
	Home Delivered Meals										
	Supplemental Nutrition										
	CCEVP										
	Ombudsman										
Total Cash											
In-Kind Amount											
Service Data:											
Actual Number of Units											
Unit Defined as:		Hours	Contacts	Individual Hours	Individual Hours	Individual Hours	Individual Hours	Individual Hours	Contacts	Referrals	Contacts
Unit Cost											
Actual Persons Served											
Voluntary Contributions Collected											
Fees Collected											

Voluntary Contribution/Fees Collected should approximate Voluntary Contributions/Fees Spent.

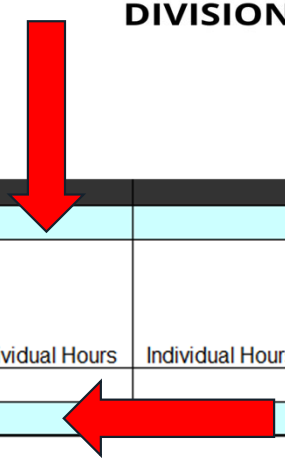
Entering Expenditures

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

PSA: 0 Month: YTD Expenditures	This row is left available for your internal comments. For examp ome agencies use it to indi In-Home Services				
Funding Source	**Adult Day Care**	**Checking**	**Chore**	**Homemaker**	**Personal Care**
Old Americans Act					
Title III-B					
Title III-C(1)					
Title III-C(2)					
Title III-D					
Title VII - Ombudsman					
Title VII - Elder Abuse					
Other Funds					
Other Non-Federal					
Voluntary Contributions					
Fees					
Other Federal					
DMAS - Ombudsman					
Other Local Federal Funding					
NSIP					
General Funds					
OAA General					
Community Based					
Transportation					
Home Delivered Meals					
Supplemental Nutrition					
CCEVP					
Ombudsman					

Recording Units

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES



Service Data:					
Actual Number of Units					
Unit Defined as:	Hours	Contacts	Individual Hours	Individual Hours	Individual Hours
Unit Cost					
Actual Persons Served					
Voluntary Contributions Collected					
Fees Collected					
Revised 6/17/2025	Voluntary Contribution/Fees Collected should approximate Voluntary Contributions/Fees Spent.				



Remittance

Tracking Funds

SharePoint Links

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Welcome to the Office for Aging Services

SharePoint Portal!

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any time, you may change the sorting by clicking on any of the headings and selecting descending order. If you are viewing a group of documents with different categories, you
category heading and choose to view only selected categories. After finding your document, click on the document name and the document will open.

We hope you find this new format easy to navigate! If you have any trouble accessing documents please contact Tanya.brinkley@dars.virginia.gov for assistance.

Area Plan

Forms/Reports

Governance & Management Guidance/Training



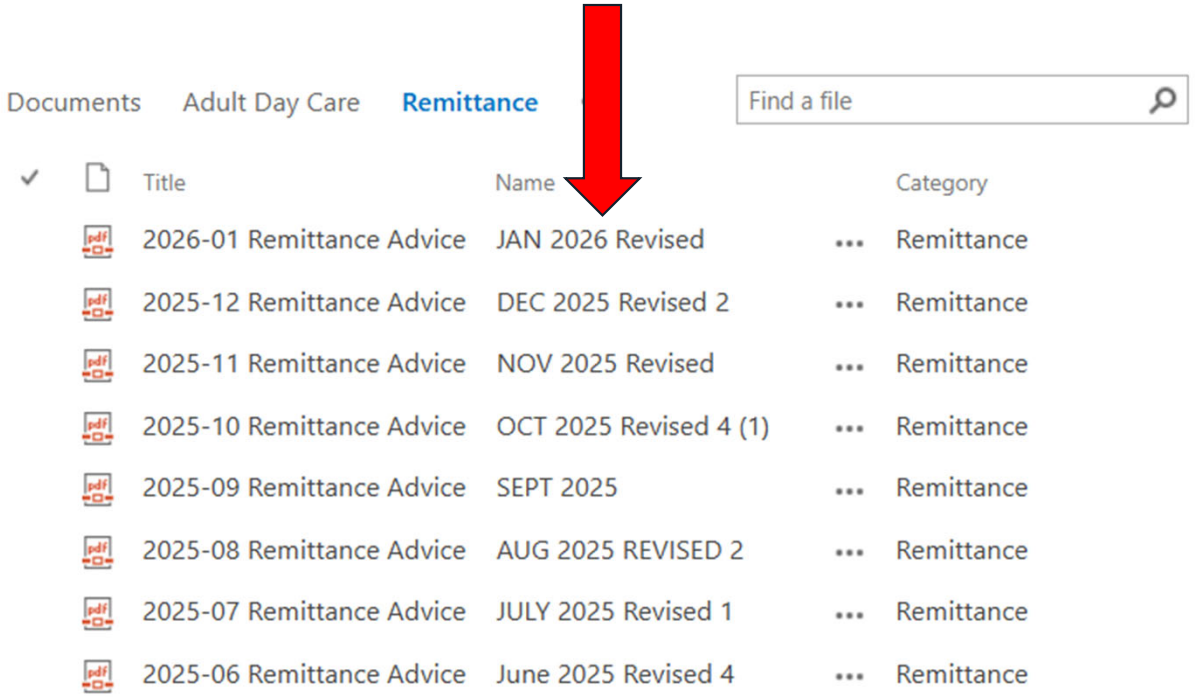
OAA New Regulations

Programs

Remittance

Monthly Remittances

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES



Remittance Example - Federal

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

	CFDA#	PROJECT #	PERIOD	OBLIGATION	PAID PRIOR 10/1/2025	PREVIOUSLY PAID	THIS PAYMENT	GRANT TO DATE PAYMENT	BALANCE
T-III B AP & SS	93.044	0000126469	FY'25 10/24 - 09/25	29,617.00		28,137.00		28,137.00	**1,480.00**
T-III C1 CON MEAL	93.045	0000126468	FY'25 10/24 - 09/25	20,111.00		16,609.00		16,609.00	**3,502.00**
T-III C2 - H D MEALS	93.045	0000126470	FY'25 10/24 - 09/25	28,130.00		25,789.00		25,789.00	**2,341.00**
T-III D PREV HEAL	93.043	0000126471	FY'25 10/24 - 09/25	1,669.00		177.00	1,189.00	1,366.00	**303.00**
T-III E NFCSP	93.052	0000126472	FY'25 10/24 - 09/25	5,014.00		3,747.00		3,747.00	**1,267.00**
T-VII G ELDER ABUSE	93.041	0000126474	FY'25 10/24 - 09/25	119.00		119.00		119.00	
T-VII OMBUDSMAN	93.042	0000126475	FY'25 10/24 - 09/25	304.00		304.00		304.00	
T-III B AP & SS	93.044	0000128460	FY'26 10/25 - 09/26	284,766.00		24,261.00	26,199.00	50,460.00	**234,306.00**
T-III C1 CON MEAL	93.045	0000128461	FY'26 10/25 - 09/26	146,660.00		11,187.00	13,898.00	25,085.00	**121,575.00**
T-III C2 - H D MEALS	93.045	0000128405	FY'26 10/25 - 09/26	251,250.00		20,775.00	23,282.00	44,057.00	**207,193.00**
T-III D PREV HEAL	93.043	0000128418	FY'26 10/25 - 09/26	12,599.00					**12,599.00**
T-III E NFCSP	93.052	0000128407	FY'26 10/25 - 09/26	102,849.00		14,231.00	8,989.00	23,220.00	**79,629.00**
T-VII G ELDER ABUSE	93.041	0000128419	FY'26 10/25 - 09/26	2,359.00		295.00	207.00	502.00	**1,857.00**
T-VII OMBUDSMAN	93.042	0000128420	FY'26 10/25 - 09/26	12,740.00		1,870.00	1,087.00	2,957.00	**9,783.00**
NSIP	93.053	0000126473	FY'25 10/24 - 09/25	19,330.00		9,920.00	3,667.00	13,587.00	**5,743.00**
NSIP	93.053	0000128408	FY'26 10/25 - 09/26	27,256.00					**27,256.00**
DMAS OMBUDSMAN	93.778	ARS46200	FY26	1,895.00		278.00	138.00	416.00	**1,479.00**

Remittance Example - Other

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

	CFDA#	PROJECT #	PERIOD	OBLIGATION	PAID PRIOR 10/1/2025	PREVIOUSLY PAID	THIS PAYMENT	GRANT TO DATE PAYMENT	BALANCE
DOL FY26	17.235	0000128342	7/1/25 - 6/30/26	231,172.00		10,412.00	19,264.00	29,676.00	**201,496.00**
VICAP FFY '25	93.324	0000127312	04/25 - 03/26	24,648.00	8,216.00	12,324.00	2,054.00	14,378.00	**10,270.00**
MIPPA Priority # 1	93.071	0000128427	9/01/25 - 8/31/26	11,151.00					**11,151.00**
MIPPA Priority # 2	93.071	0000128428	9/01/25 - 8/31/26						
MIPPA Priority # 3	93.071	0000128429	9/01/25 - 8/31/26						
SENIOR COOL CARE 2024		ARS71001	9/30/24	6,600.00	6,600.00	6,600.00		6,600.00	
SENIOR COOL CARE 2025		ARS71001	12/31/25	6,600.00		6,600.00		6,600.00	
SUPP NUTRITION ASSIST (SNAP)	10.561	0000126481	10/1/24 - 9/30/25						
SUPP NUTRITION ASSIST (SNAP)	10.561	0000128426	10/1/25 - 9/30/26						

Remittance Example - State

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

	CFDA#	PROJECT #	PERIOD	OBLIGATION	PAID PRIOR 10/1/2025	PREVIOUSLY PAID	THIS PAYMENT	GRANT TO DATE PAYMENT	BALANCE
OAA GENERAL		ARS75080	SFY'26 - 10/01/25	99,564.00		9,708.00	9,708.00	19,416.00	**80,148.00**
GF COM BASE		ARS75082	SFY'26 - 10/01/25	71,536.00		7,949.00	7,949.00	15,898.00	**55,638.00**
GF TRANSPORTATION		ARS75081	SFY'26 - 10/01/25	25,906.00		2,878.00	2,878.00	5,756.00	**20,150.00**
GF H D MEALS		ARS75084	SFY'26 - 10/01/25	91,326.00		10,147.00	10,147.00	20,294.00	**71,032.00**
SUPPLEMENTAL NUTR T-III C1&2 (GF)		ARS75086	SFY'26 - 10/01/25	22,072.00		2,452.00	2,452.00	4,904.00	**17,168.00**
CARE COORDINATION		ARS75875	SFY'26 - 10/01/25	62,470.00		6,941.00	6,941.00	13,882.00	**48,588.00**
GF OMBUDSMAN		ARS75083	SFY'26 - 10/01/25	6,927.00		770.00	770.00	1,540.00	**5,387.00**
GF RESPITE CARE		ARS75200	SFY'26 - 10/01/25						
OAA GENERAL		ARS75080	SFY'27 - 07/01/26	16,933.00					**16,933.00**
GF COM BASE		ARS75082	SFY'27 - 07/01/26	23,845.00					**23,845.00**
GF TRANSPORTATION		ARS75081	SFY'27 - 07/01/26	8,635.00					**8,635.00**
GF H D MEALS		ARS75084	SFY'27 - 07/01/26	30,442.00					**30,442.00**
SUPPLEMENTAL NUTR T-III C1&2 (GF)		ARS75086	SFY'27 - 07/01/26	7,357.00					**7,357.00**
CARE COORDINATION		ARS75875	SFY'27 - 07/01/26	20,823.00					**20,823.00**
GF OMBUDSMAN		ARS75083	SFY'27 - 07/01/26	2,309.00					**2,309.00**
GF RESPITE CARE		ARS75200	SFY'27 - 07/01/26						
GF VICAP FY'25			SFY'25 (7/1/24-6/30/25)	25,000.00	4,166.00	25,000.00		25,000.00	
GF VICAP FY'26		0000122030	SFY'26 (7/1/25-6/30/26)	25,000.00	4,166.00	8,332.00	2,083.00	10,415.00	**14,585.00**
GF SFMNP FY'25		0000122897	SFY'25 (7/1/24-6/30/25)	1,956.00	1,956.00	1,956.00		1,956.00	

Upcoming Events

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- CFO Quarterly Touch Base – Late April
- Area Plan Budget Training – Early June
- Internal Controls – In-process

Content Example

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Area Agency on Aging
Internal Control Best Practices Summary Document

Enhancing internal controls at Area Agencies on Aging requires a comprehensive approach that strengthens financial oversight, improves vendor monitoring, and establishes a culture of compliance. Key strategies include adopting risk-based monitoring for subrecipients, ensuring strict segregation of duties, and maintaining up-to-date, written policies.

Key areas for enhancing internal controls, based on standard practices and regulatory guidelines:

1. Strengthening Fiscal Controls and Management

- **Establish Robust Financial Systems:** Maintain detailed records that clearly identify the source and application of funds, including grant-supported activities, subcontracts, and authorizations.
- **Implement Segregation of Duties:** Ensure that the staff authorized to approve expenditures are not the same individuals responsible for recording them.
- **Regular Financial Monitoring:** Conduct, at a minimum, annual fiscal monitoring of local service providers, either on-site, virtually, or through desk reviews.
- **Independent Audits:** Retain public accountants independent of those who authorize expenditures to perform annual audits according to Government Auditing Standards.

2. Enhancing Subrecipient (Vendor) Monitoring

- **Risk-Based Approach:** Develop criteria to categorize service provider agencies

Summary of Enhancing Internal Controls at Area Agencies on Aging Policy

Purpose & Authority

- Establishes internal control framework for AAAs to ensure compliance with 2 CFR Part 200 and GAO Green Book standards.
- Applies to AAA staff, subrecipients, contractors, and governing boards.

Core Policy Areas

- Internal Control Requirements (§200.303): Written policies, segregation of duties, cybersecurity, fraud risk measures.
- Governance & Roles: Board sets tone; Compliance Officer oversees monitoring; Finance Director ensures compliance.
- Segregation of Duties: Clear separation for purchasing, payroll, and cash management; RACI matrix provided.
- Risk-Based Monitoring of Subrecipients (§200.332): Pre-award checks, annual risk assessments, scaled monitoring.
- Financial Management & Drawdowns: Immediate needs basis for cash draws; documentation for expenditures.
- Procurement Standards (§§200.317–200.327): Competitive procurement, conflict-of-interest policies, outreach to small/minority businesses.
- Indirect Costs (§200.414): Negotiated or de minimis rate; documented in subaward.
- Reporting & Records: Timely financial and performance reporting; records retention per §200.334.

LUNCH



DAS & NWD Showcase

Programs & Commissions Housed in DARS

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- Commonwealth Council on Aging
- Virginia Lifespan Respite Program & Virgina Caregivers Coalition
- VICAP
- Senior Farmers' Market
- GrandDriver
- Senior Cool Care
- Dementia Services & ADRDC
- No Wrong Door

Dementia Capable VIRGINIA

Dementia Services

Dementia Services

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

No Wrong Door Dementia Capability

- New memory questions in Peer Place
- NWD Cognitive Impairment Identification Tool
- Promoting Cognitive Screening
- My Dementia Capable Journey brochure
- New training modules coming soon

Dementia Capable Virginia

- New and updated resources on Dementia Capable Virginia
- Virginia Dementia Roadmap (updated in 2025)
- New website—expanded content
- Spanish language Roadmap and web content soon!

Dementia Capable VIRGINIA

Dementia Services

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Dementia Friendly Initiatives

- Dementia Friends—quarterly virtual training for Champions
- Supporting new and existing Dementia Friendly Community initiatives
- Co-leading efforts with LeadingAge Virginia

Brain Health Resources

- Social media toolkit for AAAs with brochures, suggested messaging
- Tying existing programs to pillars of brain health

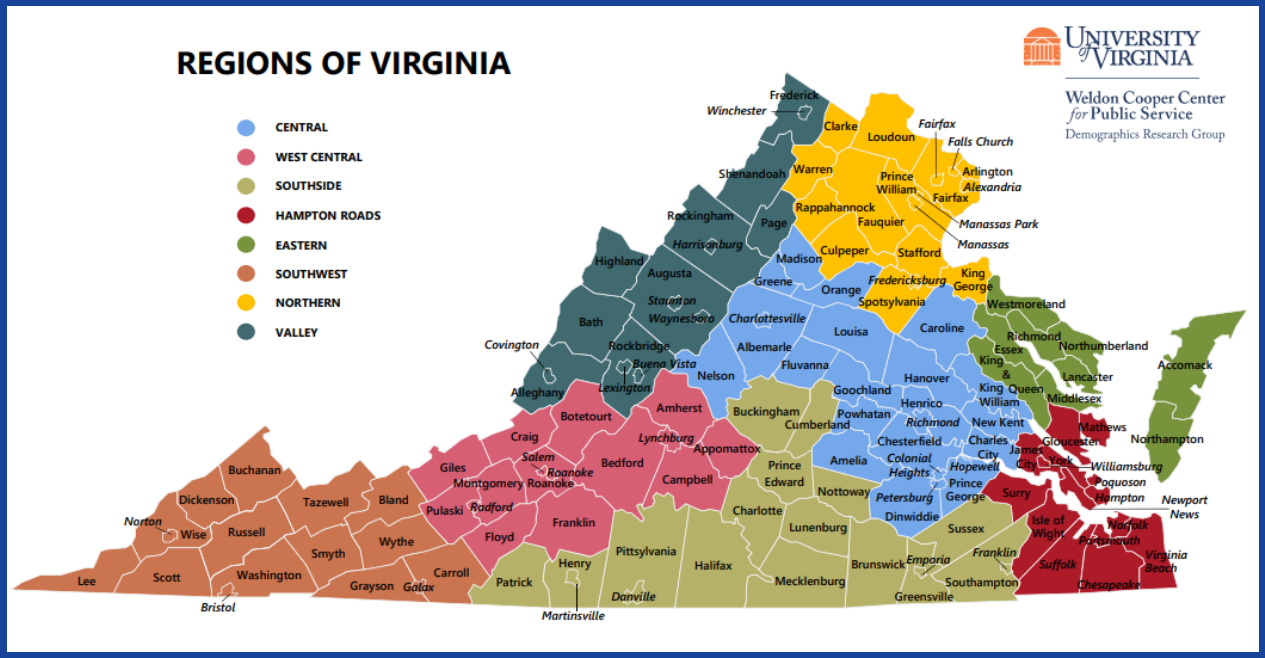
Other efforts

- Supporting expanded social respite for people living with ADRD
- Advocating for Dementia Care Specialists at AAAs

Dementia Capable VIRGINIA

CCOA Overview

CCOA
COMMONWEALTH COUNCIL ON AGING



Membership Structure

As of July 1, 2026: 18 Members

- 13 full voting members
  - 4 will be AAA Directors
  - 2 are Legislative Members
- 5 ex-officio members

Standing Committees

01



Best Practices Awards

The Best Practices Awards Committee recognizes and encourages the replication of model programs, particularly those that foster aging in place, livable communities, and home and community-based services.

02



Legislative Committee

The Legislative Committee develops the Council's Legislative priorities and proposals to be approved by the full Council and ultimately sent to the Governor as a CCOA Legislative Recommendations.

03



Executive Committee

The Executive Committee is made up of 5 members, two of which are Officers (Chair/Vice-Chair) and may exercise powers of the full Council between meetings.

CCOA
COMMONWEALTH COUNCIL ON AGING

Lifespan Respite Voucher Program

Overview

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

2021-2026 Respite Grant

Goals:

- Expand and enhance respite care services to all caregivers across the Lifespan
- Improve statewide dissemination and coordination of respite care services
- Improve access and quality of respite care services
- Reduce family caregiver strain
- **Goal was to serve at least 1,000 caregivers**

- Expansion of the Lifespan Respite Voucher Program to include **Grandfamilies and Kinship Caregivers**, added in February of 2024

- Received over 1,900 applications from caregivers as of March 2026

Program Guidelines

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- Provides **up to $595 in reimbursement for respite costs**
- **Self Directed**-Caregivers choose, hire, train, and pay their respite providers directly
- Applicants must be a **Virginia resident** and live **at least part-time** with the care recipient
- Care recipient must have **verifiable documentation** of a significant disability or medical condition
- **Kinship Expansion:** Supports grandfamilies and kinship caregivers with costs for childcare and recreational camps
- Kinship caregivers must **live in Virginia**, be **raising a minor child**, and have **legal custody** of the child(ren)

Caregiver Snapshot:

-Caregivers are overwhelmingly female
-Average Age: early 50s
-Caring for: spouse, child, or parent
-Who has a diagnosis of:
1. dementia and related disorders
2. autism spectrum disorder with intellectual or behavioral comorbidities (ID/DD, ADHD, ODD, Anxiety)

-And need assistance with: personal care, household, and supervision or companionship

VA Insurance Counseling & Assistance Program

HELPING YOU NAVIGATE MEDICARE

Virginia Counseling & Assistance Program

VA Insurance Counseling & Assistance Program (VICAP)

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- VICAP is part of a national network of programs called **SHIP, State Health Insurance Assistance Program**, that offers one-on-one counseling and education to Medicare beneficiaries, their families, and caregivers to help them make informed decisions about their care and benefits. Services are free, unbiased and confidential.
- SHIP and MIPPA are grant funded through the Administration for Community Living (ACL). The MIPPA grant is additional funding to better target (beyond the activities done under the SHIP grant) the hard-to-reach beneficiaries, i.e. rural, low-income, Native American, under age 65 with disabilities, and limited English speaking.
- In addition to the grant funds, VICAP receives $600,000/yr from the state. These funds are allocated to the AAAs to hire more VICAP staff.
- ALL VICAP services are provided at the local level through the Area Agencies on Aging (AAAs).
- Counselor training and certification is completed through the SHIP TA Center

VICAP
VA Insurance Counseling & Assistance Program
HELPING YOU NAVIGATE MEDICARE

VA Insurance Counseling & Assistance Program (VICAP)

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- Approximately 80% of the grant funds are allocated to the AAAs to provide the VICAP services.
- VICAP counselors also work collaboratively with the *Senior Medicare Patrol* program to help educate and empower beneficiaries to take an active role in detecting and preventing health care fraud and abuse.
- Biggest obstacles to success – volunteer retention and lack of funding to hire adequate staff at the local programs.
- **2025 Performance** –
  - 30,809 beneficiaries
  - 17,966 through outreach events
  - 5,890 under age 65 with disabilities
  - 20,699 hard-to-reach contacts
  - 25,382 enrollment contacts
- Savings through Low-income Subsidy and Medicare Savings Program application submissions
  - 383 LIS application submissions = **$1,991,600 est savings**
  - 109 MSP application submissions = **$241,980 est savings**

VICAP
VA Insurance Counseling & Assistance Program
HELPING YOU NAVIGATE MEDICARE

Farm Market Fresh
Senior & WIC Farmers' Market Nutrition Program (S/FMNP)

Farm Market Fresh

Farm Market Fresh

Senior & WIC Farmers' Market Nutrition Program (S/FMNP)

Farm Market Fresh (also called Farmers Market Nutrition Program) is a USDA-funded Nutrition Assistance Grant Program that connects older adults to direct market farmers selling locally grown fruits and vegetables.

What:

- $50 annual benefit to purchase locally grown fruits and vegetables

Who:

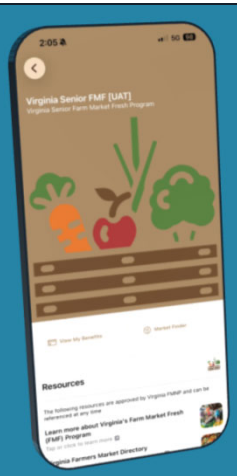
- Low-income older adults (60+),
- Virginia produce farmers,
- WIC families



A look at 2025:

- Total Older Adults Served: **17,872**
- Total Spent by Recipients: **$530,337.91**
- Number of Transactions Made: 36,711
- Number of people spending benefits: 12,105
- Benefits not used: 5,688
- Average value of single purchases: $14.42
  - Agency's Averages ranged widely from $8.60 to $25.60 per transactions

All new data in 2025



Farm Market Fresh uses a platform called **Healthy Together** to provide the program across the state.

The benefits on the *Healthy Together* platform come in two (2) options:

1. Digital Benefit (via mobile app)
2. Physical Card



The Benefit:

Farm Market Fresh uses a benefit card that participants can use year over year. Eligible, approved participants receive $50 on their benefit account to spend with Virginia authorized FMF farmers.

New Program Capabilities w/ Electronic System:

- Streamlined program enrollment process with online application,
- Increased available program data,
- Easier program monitoring,
- Allows more practical spending habits (spend down to penny)
- Farmers market map w/ quick directions
- Raises the ceiling, allowing for continued program growth.

Matthew Wasikiewicz
Matthew.Wasikiewicz@dars.virginia.gov
(804) 774-9067

farmmarketfresh.org

Virginia GrandDriver

What is Virginia GrandDriver?

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

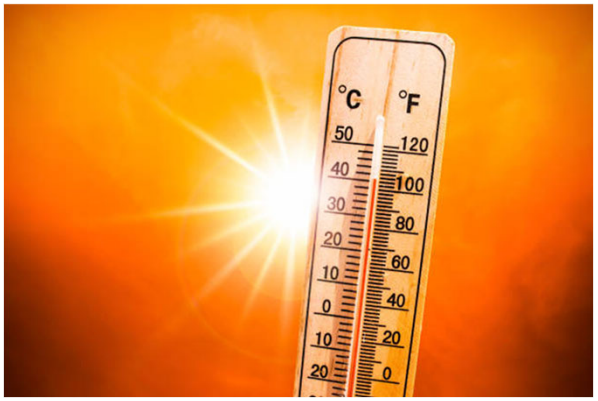
- A public awareness campaign
- Targeted to senior drivers and their caregivers
- Designed to help keep seniors mobile, safe and independent for as long as possible
- An initiative of the Virginia Department for Aging & Rehabilitative Services (DARS) and Department of Motor Vehicles (DMV)

www.granddriver.net

Multi-layered Approach

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- Informational Website
  - Self-Assessment Tools
  - News and Events
  - Safety Tips
  - Driving Resources
- Presentations and Exhibits
- Media Campaign
- CarFit Events
  - www.car-fit.org
  - Designed to ensure drivers are safe and equipment is properly functioning
- Comprehensive Driver Assessments
  - Conducted with a Certified Driving Rehabilitation Specialist



Senior Cool Care

Overview

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- Dominion Energy sponsors the Senior Cool Care program by providing funding to the Area Agencies on Aging across the Commonwealth of Virginia for the purchase of:
  - Fans
  - Window A/C units
  - Portable A/C units
- DARS Coordinates the distribution of funds to the participating Area Agencies on Aging and tracks distribution of cooling devices.
- The program begins May 1st and concludes on October 31st 2025





Dominion Energy®

SCC Program's Purpose

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- **The Senior Cool Care Program is designed to be a resource for low-income older adults in need of relief from hot summer temperatures**
  - The Virginia Department of Emergency Management lists older adults as the most at-risk group for health complications due to exposure to extreme heat
  - Older adults with pre-existing health conditions are even more vulnerable to health consequences from inadequate cooling and relief from hot temperatures
- **Senior Cool Care Recognizes the Cost Associated with Cooling Devices:**
  - Older adults living on minimal income often face financial hardships; including paying utility bills, paying for medications and healthcare expenses, transportation, groceries, household and living expenses.
  - The budget model 8,000 BTU A/C units cost $190-$270.00
  - The budget model 12,000 BTU A/C units cost $249-349.00

No Wrong Door Virginia

AAA Directors' Meeting
March 5, 2026

VIRGINIA No Wrong Door
ACCESS. OPTIONS. ANSWERS.

EasyAccess.Virginia.Gov

Our Team



Dr. Felencia McGee

Director



Erika Okonsky

Project Specialist



Val Murphy

Coordinator



Christy Miller

HCBS IT Operations Manager



Sarah Arnold

Public Relations Specialist



Melissa Armstead

Training & Options Counseling Specialist



David Baker

IT Operations Specialist

What is No Wrong Door?

An **initiative** that supports older adults, individuals with disabilities, veterans, caregivers, and their communities in making informed choices about long-term care by providing accessible information, person-centered support and streamlined access to Virginia's network of public and private service providers.

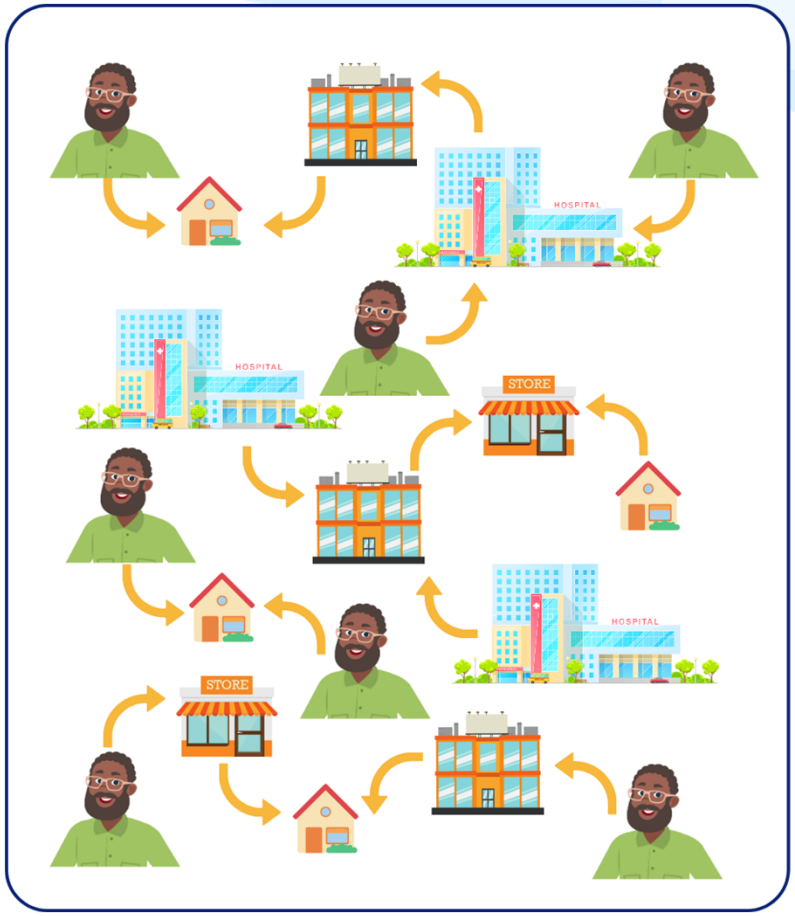
ACL Administration for Community Living

CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

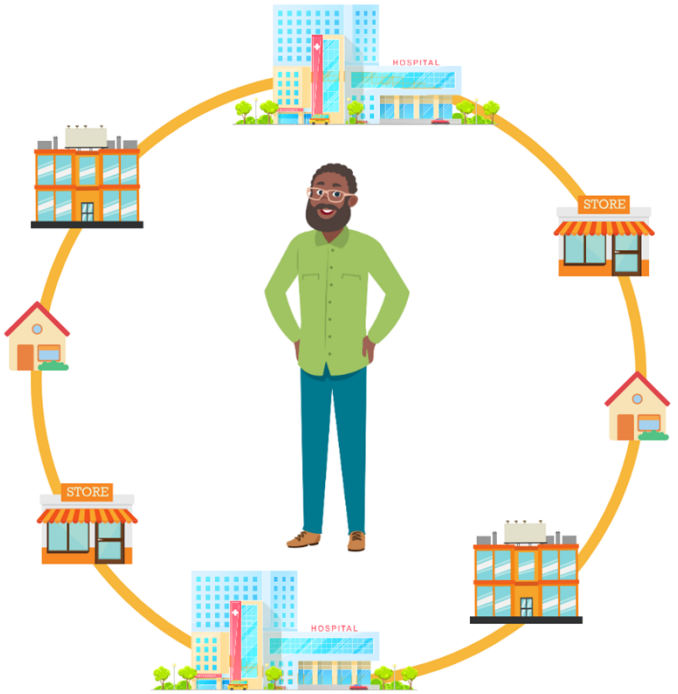
VA U.S. Department of Veterans Affairs

VIRGINIA No Wrong Door ACCESS. OPTIONS. ANSWERS.

Without No Wrong Door

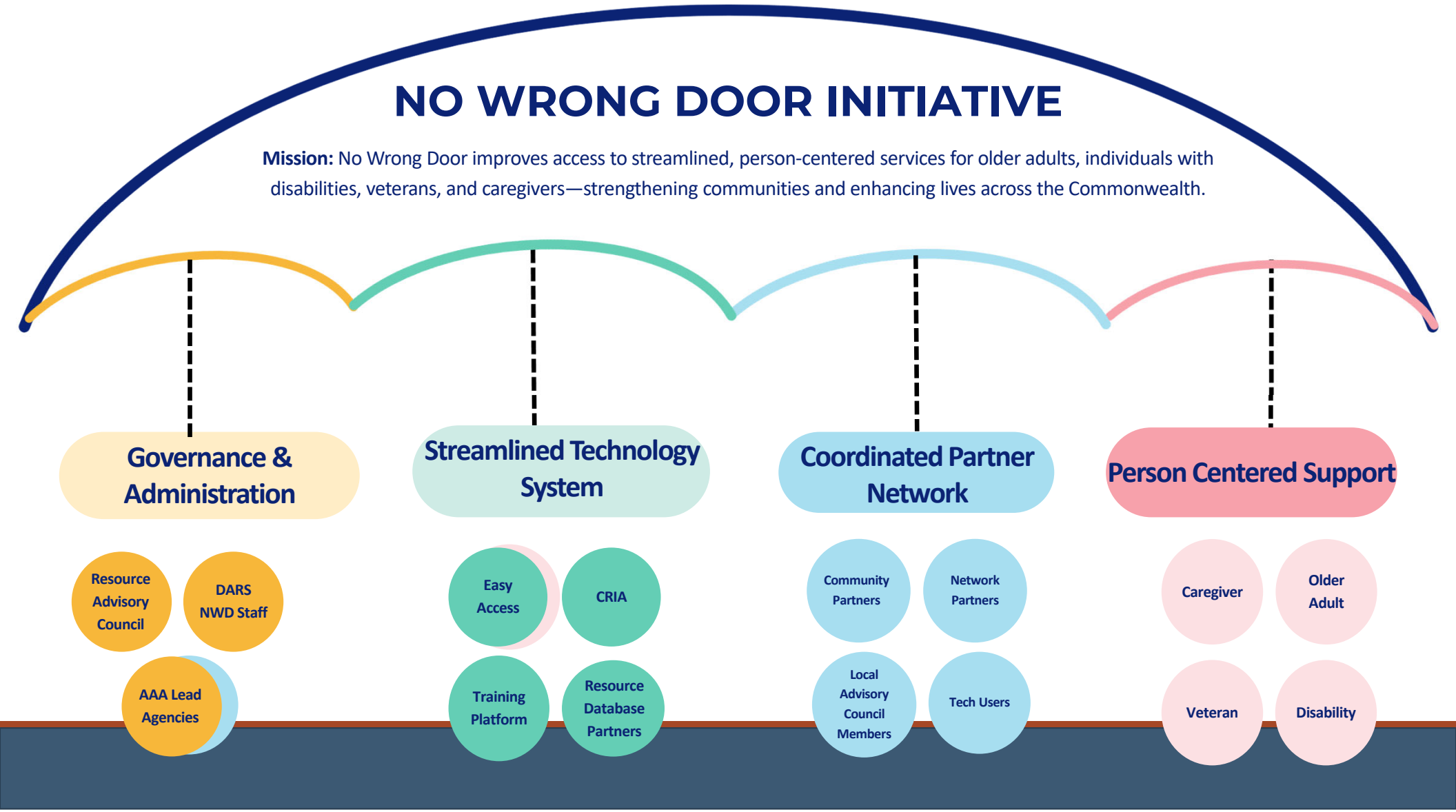


With No Wrong Door



NO WRONG DOOR INITIATIVE

Mission: No Wrong Door improves access to streamlined, person-centered services for older adults, individuals with disabilities, veterans, and caregivers—strengthening communities and enhancing lives across the Commonwealth.



Governance and Administration

Statewide Oversight

DARS Aging Services

- Administration
- Training & Technical Support
- Coordination

State Resource Advisory Council (RAC)

- Private + Public Partnerships
- Sustainability
- Policy and Guidance

Local Implementation

Area Agencies on Aging

- Direct Services to adults 60+
- Options counseling & referrals to adults 60+ or adults 18+ with a disability
- Streamlined Local Support via Network of Service Partners (local advisory councils)
- NWD Coordinator & NWD IT Admin

Streamlined Technology System

No Wrong Door Virginia maintains a group of web-based technology designed to streamline access to long term services and supports.

Our technology system are used by **Professionals (supported path)** and the **Public (self-directed path)**.

Professionals

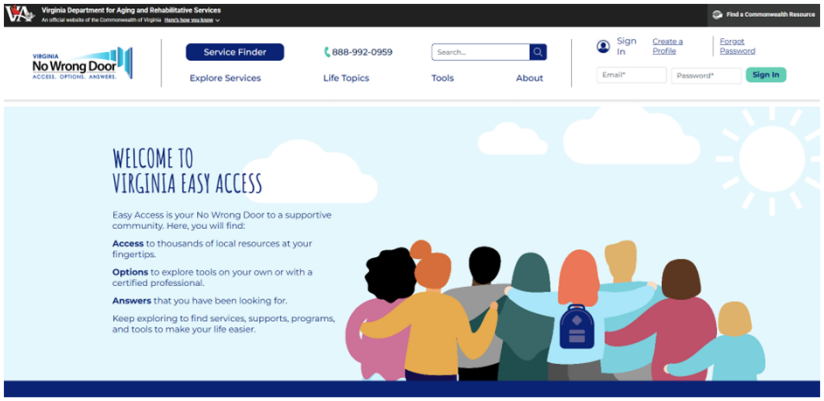
- Virginia Easy Access
- Training Platform
- CRIA (PeerPlace Module)

Public

- Virginia Easy Access
- Training Platform

Virginia Easy Access

- An online access point for finding services, benefits, and local support across the Commonwealth.
- Leverages technology and partnerships with two statewide resource databases: 211 Virginia and VirginiaNavigator
- Easy to use features:
  - Service Finder
  - Direct Connect
  - Live Chat & Toll-Free Number
  - Life Topics
  - Save Links to Profile



https://www.easyaccess.virginia.gov

Communication, Referral, Information, Assistance (CRIA)

- CRIA lets providers send and receive client referrals, securely share basic client information with their permission, document care coordination and record services provided.
- CRIA is offered as a module in PeerPlace, a private software company.

  - Client Profile
  - Encounters
  - Resource database
  - Referrals (send/receive)
  - Client notes & Shared notes
  - Follow-up reminders
  - Client contacts
  - Onscreen report views
  - Downloadable reports
  - Units of service



Coordinated Partner Network

Councils Inform Coordinated Efforts

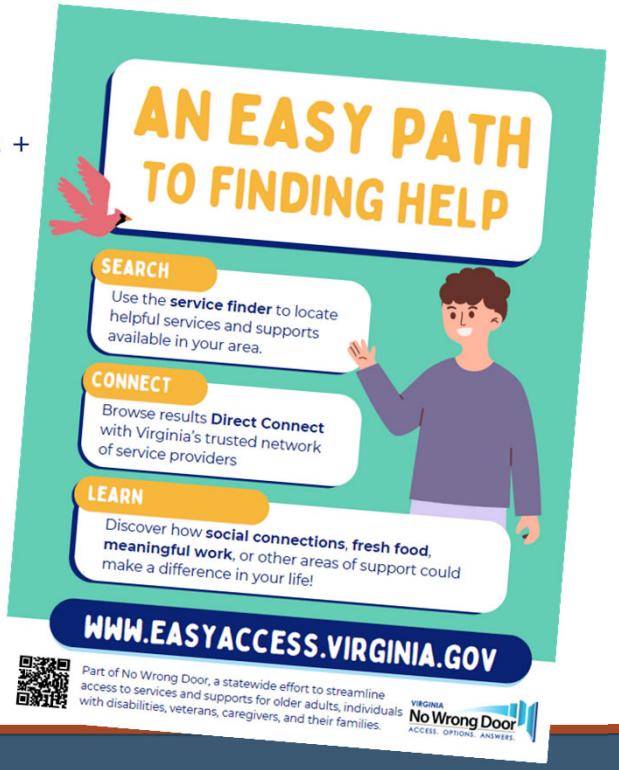
- Standalone or Embedded in Agency Advisory Councils
- Monthly, bimonthly or quarterly
- At least 30-60 min dedicated to NWD items
- Outreach with local partners, gather client & community feedback, use of PeerPlace, promotion of Easy Access, training opportunities, PCOC
- Collaborations and special projects, partner sharing

Some LAC highlights…

Crater District LAC – Built upon connections to launch Easy Access + Public Library outreach pilot

Arlington/Alexandria LAC – Combined councils and quarterly meetings to increase innovation and impact with shared stakeholders

Greater RVA LAC – Monthly meetings strengthened partnerships that resulted in successful funding for the Elder Justice Initiative



Person-Centered Options Counseling

Why is PCOC important for No Wrong Door?
Area Agencies on Aging and No Wrong Door partners play a critical role as trusted access points in the community.

By integrating PCOC:

- You help empower consumers to make informed choices about their care.
- You reduce confusion and anxiety around long-term care decisions.
- You enhance coordination of services and better connect people to supports that align with their goals.

Finding Your Path

No Wrong Door Virginia makes it easy to discover your unique path to accessing the services & supports you need.

Your path may be supported, self-directed or a combination of both!

Supported

- Direct services from a AAA or Community-based Partner
- Person-Centered Options Counseling from AAA

Self-Directed

- Virginia Easy Access
- Direct Connect (Self-referral links request to the NWD Partner's referral queue on PeerPlace)
- 211 Live chat & toll-free support via Virginia Easy Access

No Wrong Door Virginia

SUMMIT MAY 5-7 2026

Register for the NWD Summit!

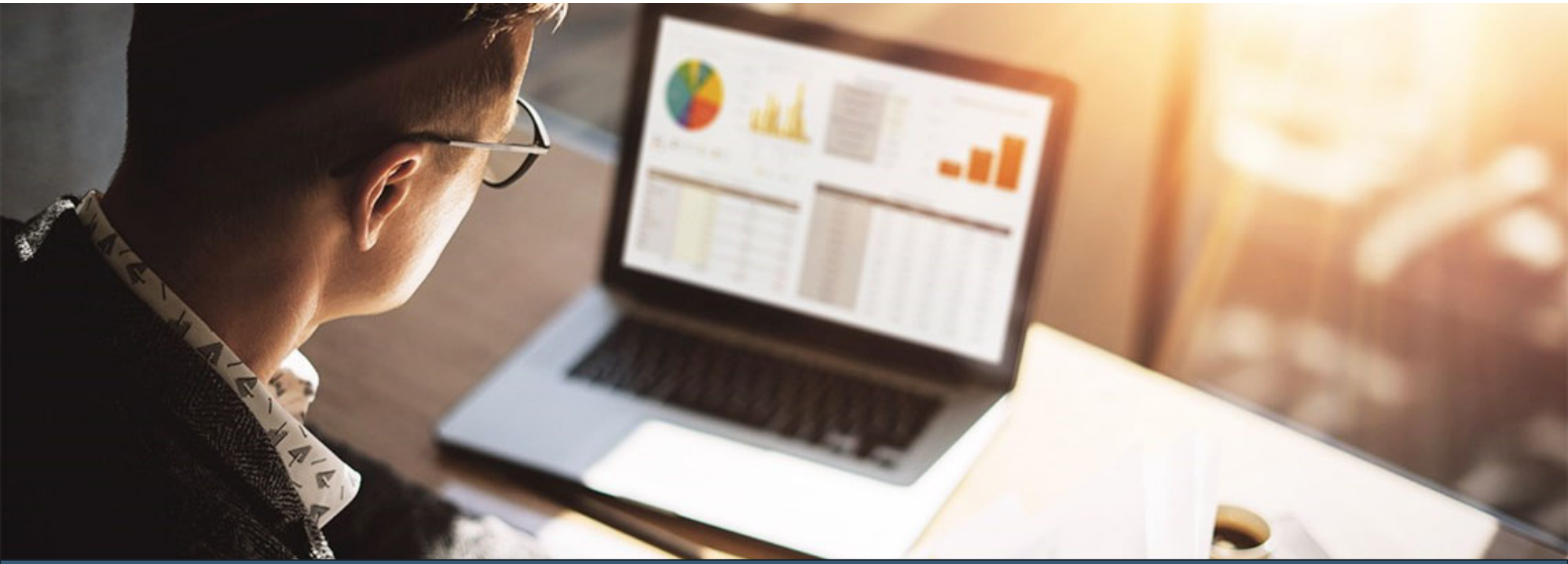
Bella Vista Hotel

Lynchburg, VA

Thank You!

Felencia McGee

Felencia.mcgee@dars.virginia.gov



Peer Place:
Helpful Reports

AAA Service Summary/Sub-Contractor

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- The "AAA Service Summary/Sub-Contractor" report in PeerPlace is used to complete the AMR
  - The tab labeled as "Page3" on this report will contain the individuals served, service units and Caregiver numbers

- The "AAA Service Summary Client Details" report in PeerPlace is used to provide client level details regarding units, individuals served and Caregivers
  - This report can be run to see the client level service unit details for any one single row within the AAA Service Summary/Sub-Contractor report
  - This report can be useful to identify any opportunities for corrections in data entry when numbers on the AAA Service Summary/Sub-Contractor report are not as expected

EXAMPLE - AMR Title III Tab

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AAA Service Summary/Sub-Contractor

CRIA2 AAA AMR Report
FOR TITLES III AND VII OF THE OLDER AMERICANS ACT
FOR THE PERIOD 10/01/2024 - 04/30/2025 : AAA-PSA SUMMARY

Area Agency: Southern Area Agency on Aging

Service Title III (Excluding Title III-E)	Units	Persons (Unduplicated)
Adult Day Care		
Assistive Technology / DME / PERS - Devices	13.00	13
Assistive Technology / DME / PERS - Payments	413.00	66
Assisted Transportation		
Care Coordination - Title III		
Checking		
Chore	73.00	16
Chronic Disease Self Management Education (CDSME)		
Congregate Nutrition (NSIP Certified)	7,442.00	443
Congregate Nutrition - Grab and Go		
Consumable Supplies	4.00	4

Page1 | Page2 | Page3 | Page4 | Page5 | Certify | Rural_Classification | Definitions Pg 1

AMR Title III

PSA: Southern Area Agency on Ag	
Month: April	
YTD Expenditures	
Funding Source	Congregate
Older Americans Act	
In-Kind Amount	12,990
Service Data:	
Actual Number of Units	7,442
Unit Defined as:	Eligible Meals
Unit Cost	$33.69
Actual Persons Served	443

EXAMPLE - AMR Title III-E Tab

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AAA Service Summary/Sub-Contractor

Title III-E	Units	Clients Served with Caregiver	Clients Served without Caregiver	Caregivers Served	Caregivers Benefited	Grandparents and Other Elderly Caregivers	Individuals
Adult Day Care - Respite	15,692.25	102			109		211
Assistive Technology / DME / PERS - Devices							
Assistive Technology / DME / PERS - Payments							

AMR Title III-E

PSA: Appalachian Agency for Senio
Month: April

Expenditures

Funding Source	Adult Day Care (Out of Home)
In-Kind Amount	
Service Data:	
Actual Units of Service	15,692
Unit Defined as:	Individual Hours
Unit Cost	$18.30
Actual Persons Served with a Caregiver	102
Actual Caregivers Served	
Actual Number of Caregivers Benefited	109

AAA Service Summary/Sub-Contractor Report

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- The AAA Service Summary/Sub-Contractor report should be run for a date span of 10/01 of the current Federal Fiscal Year through the last day of the reporting month
  - Example: Running it for April 2026 would mean a report date span of 10/01/2025 to 04/30/2026
- It is critical that the numbers on the AMR match the numbers listed on the AAA Service Summary/Sub-Contractor report, since the numbers from PeerPlace are used for the end of year report, regardless of what is submitted on the AMR
- For agencies who have at least one linked sub-contractor, the report must be run with the “Include Sub-Contractor Data” option set to “Yes”

Service and Units Summary Report with Subcontractor Data

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- The "Service and Units Summary Report with Subcontractor Data" report in PeerPlace will show similar data as the "AAA Service Summary/Subcontractor" report but it will also include service units and individuals served across **all** service categories and not just those related to AMR services

- The "Service and Units Summary Report with Subcontractor Data" report includes multiple tabs which can be used to see the same service units data categorized in different ways

- The "Service and Units Summary Report with Subcontractor Data" report includes tabs where the linked subcontractor data is separated as well as "rolled-up"

EXAMPLE – Non-AMR Services

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Service and Units Summary Report with Subcontractor Data
Agency: Valley Program for Aging Services, Inc.
Program: VPAS-Adult Day Care
From: 10/01/2025 To: 01/31/2026
Report run date: 02/23/2026
All Clients

State Service Type	Clients Served (Duplicated)	Clients Served (Unduplicated)	Units	Units without NAPIS Group, "Local AA
Local AAA	1,035	520	3,248.30	0.00
Total:	8,058	2,296	49,883.85	46,609.55
Total excluding NAPIS Group, "Local AAA":	6,997	2,021	46,609.55	46,609.55
Percentage and Total Units keyed 42 days after service delivered:		0.00%	194.00	

Napis_Group | Napis_Group_Roll_Up | State_Service_Type | State_Service_Type_Roll_U ...

EXAMPLE – Multiple Tabs

DARS | Virginia Department for Aging and Rehabilitative Services
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Service and Units Summary Report with Subcontractor Data
Agency: Southern Area Agency on Aging
Program: Southern AAA-Caregiver Services
From: 10/01/2024 To: 04/30/2025
Report run date: 02/23/2026
All Clients

Agency / Program Name	Funding Source	Clients Served (Duplicated)	Clients Served (Unduplicated)	Units	Units without NAPIS Group, "Local AAA"
Southern Area Agency on Aging / Southern AAA-Congregate Nutrition	ARP	41	18	469.00	469.00
Southern Area Agency on Aging / Southern AAA-Home Delivered Meals	ARP	26	17	398.00	398.00
Southern Area Agency on Aging / Southern AAA-Care Transitions	Care Transitions	84	44	84.00	84.00
Support to Eliminate Poverty (STEP), Inc. / STEP-Program Services	Southern Title III-B	147	39	1,482.00	1,482.00
Support to Eliminate Poverty (STEP), Inc. / STEP-Program Services	Southern Title III-C(1)	751	130	1,820.00	1,820.00
Support to Eliminate Poverty (STEP), Inc. / STEP-Program Services	Southern Title III-C(2)	1,032	136	15,806.00	15,806.00
Southern Area Agency on Aging / Southern AAA-CCEVP-1	State	3	1	45.00	45.00
Southern Area Agency on Aging / Southern AAA-Personal Care	State	65	14	2,444.00	2,444.00



Napis_Group | Napis_Group_Roll_Up | State_Service_Type | State_Service_Type_Roll_Up | Program | Service | Funding_Source | County | Definitions

EXAMPLE – Subcontractor Units

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DIVISION FOR AGING SERVICES

AAA and Linked Subcontractor Separate

Service and Units Summary Report with Subcontractor Data
Agency: Southern Area Agency on Aging
Program: Southern AAA-Caregiver Services
From: 10/01/2024 To: 04/30/2025
Report run date: 02/23/2026
All Clients

Agency / Program Name	State Service Type	Clients Served (Duplicated)	Clients Served (Unduplicated)	Units	Units without NAPIS Group, "Local AAA"
Southern Area Agency on Aging / Southern AAA-Congregate Nutrition	Congregate Nutrition	1,564	314	5,794.00	5,794.00
Support to Eliminate Poverty (STEP), Inc. / STEP-Program Services	Congregate Nutrition	579	130	1,648.00	1,648.00
	Total:	13,206	2,639	101,519.00	101,519.00
	Total excluding NAPIS Group, "Local AAA":	13,206	2,639	101,519.00	101,519.00
	Percentage and Total Units keyed 42 days after service delivered:		0.00%	995.00	

Napis_Group_Roll_Up | State_Service_Type | State_Service_Type_Roll_Up | Program

AAA and Linked Subcontractor Roll-Up

Service and Units Summary Report with Subcontractor Data
Agency: Southern Area Agency on Aging
Program: Southern AAA-Caregiver Services
From: 10/01/2024 To: 04/30/2025
Report run date: 02/23/2026
All Clients

State Service Type	Clients Served (Duplicated)	Clients Served (Unduplicated)	Units	Units without NAPIS Group, "Local AA
Congregate Nutrition	2,143	443	7,442.00	7,442.00
Total:	13,206	2,639	101,519.00	101,519.00
Total excluding NAPIS Group, "Local AAA":	13,206	2,639	101,519.00	101,519.00
Percentage and Total Units keyed 42 days after service delivered:		0.00%	995.00	

Napis_Group_Roll_Up | State_Service_Type | State_Service_Type_Roll_Up | Program

Detailed Demographics Report

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

- The “Detailed Demographics” report in PeerPlace includes the ability to run the report for one single program or for “All Program” within your agency which provides you with both a program level option as well as an agency level option for the report
- The “Detailed Demographics” report includes a listing of unduplicated individuals served during the designated date span with their demographic information
- The “Detailed Demographics” report pulls data from the Client Profile and is color coded to identify the corresponding Client Profile section for each data element
- The “Detailed Demographics” report is a useful report which can help with identifying both the number of individuals served at your agency by demographic category as well as identify those where critical demographic information is missing

EXAMPLE – Client Profile Data

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Detailed Demographics

Agency: Central Virginia Area Agency on Aging

Program: All Programs

From: 10/01/2024 To: 02/27/2026

Report run date: 02/27/2026

CP / Basic Demographics										CP / Financial	
CP ID	CP Name	Address	Zip Code	Phone	Residence County	Gender	DOB	Client Screen Alert	Client Screen Alert Date	Poverty (Yes/No)	Poverty Leve
1221895	Demo,Demo	420 Knightline Ave., Lynchburg, VA - 23022	23022	540-123-4567	Lynchburg - 680	Male	04/02/1942	Active		No	
1072004	Demo,Demo	1610 Forest Ave., Richmond, VA - 23412	23412	804-662-9321	No Consent	No Consent	No Consent	No Consent	No Consent	No Consen	No Consent
2184453	Demo,Demo	1610 Forest Ave, Richmond, VA - 23229	23229	804-556-7817		Female	08/15/1942	Active			
1542823	Demo,Demo	2219 South Bend Road, Glen Allen, VA - 23060	23060	804-662-9321	Henrico - 087	Unspecified	01/01/1971	Active		No	
1080184	Demo,Demo	2021 Vision Ave., Richmond, VA - 23060	23060	804-555-1122			01/01/1920	Active		No	
1072677	Demo,Demo	1219 Sinclair Blvd., Richmond, VA - 23229	23229	804-555-5555				Active		No	
2586998	Harris,Jane	1610 Forest Ave., Richmond, VA - 23229	23229	804-662-9321	Henrico - 087			Active			

Report

Data on report is housed in the Demo environment and does not represent real data

EXAMPLE – Filtering Report

DARS | Virginia Department for Aging and Rehabilitative Services
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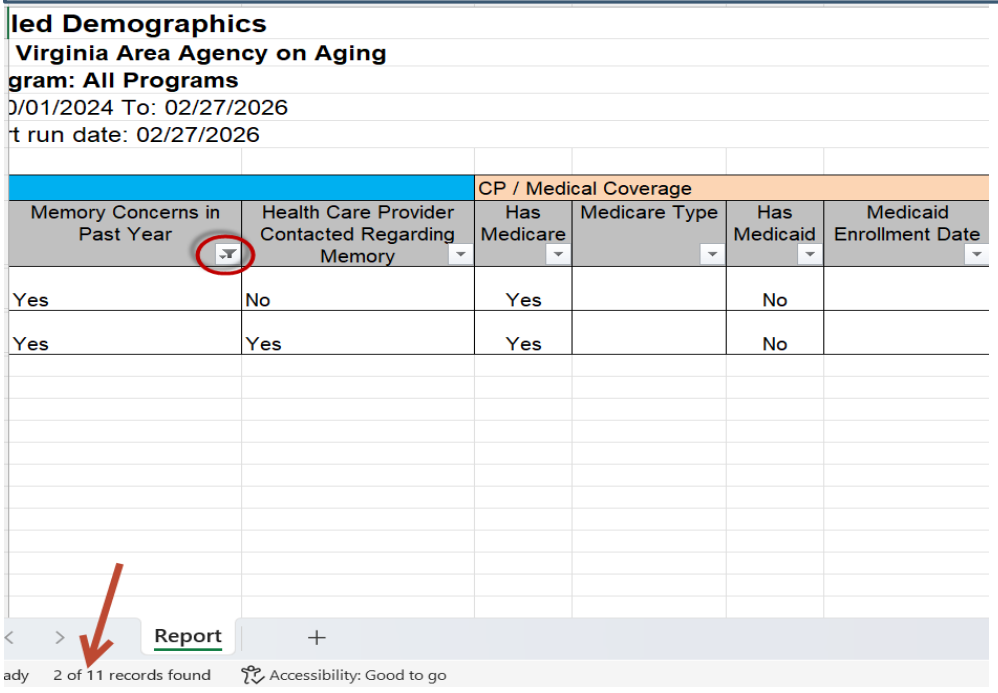
Filter for Specific Demographic

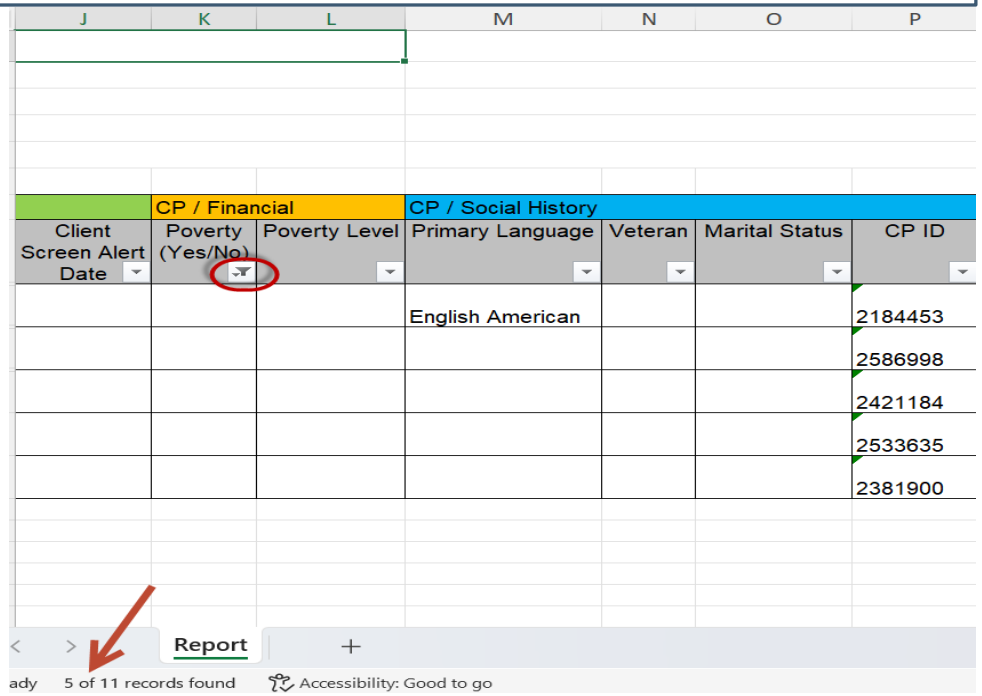


led Demographics
Virginia Area Agency on Aging
gram: All Programs
)/01/2024 To: 02/27/2026
t run date: 02/27/2026

		CP / Medical Coverage			
Memory Concerns in Past Year	Health Care Provider Contacted Regarding Memory	Has Medicare	Medicare Type	Has Medicaid	Medicaid Enrollment Date
Yes	No	Yes		No	
Yes	Yes	Yes		No	

Report
ady 2 of 11 records found Accessibility: Good to go

Filter for Missing Demographic



	CP / Financial		CP / Social History			
Client Screen Alert Date	Poverty (Yes/No)	Poverty Level	Primary Language	Veteran	Marital Status	CP ID
			English American			2184453
						2586998
						2421184
						2533635
						2381900

Report
ady 5 of 11 records found Accessibility: Good to go

Data on report is housed in the Demo environment and does not represent real data

CRIA Unmet Needs Client Detail

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- The “CRIA Unmet Needs Client Detail” list is a View Builder than can only be run your CRIA2 program since Unmet Needs and associated Waitlists are tracking in CRIA Encounters within your CRIA2 program – A user guide is being provided for you which details both online data entry and the corresponding View Builder
- The “CRIA Unmet Needs Client Detail” View Builder includes client id / name, unmet needs information and waitlist information
- The “CRIA Unmet Needs Client Detail” View Builder includes the ability to sort, filter and export to Excel
- The hyperlink provided for each row will take the user directly into the Unmet Needs / Waitlist record where updates to the Waitlist can easily be made when individuals come of off the waitlist

EXAMPLE – Data Categories

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DIVISION FOR AGING SERVICES

PeerPlace
Empowering Care

DEMO SITE

User Name:	christy.miller.va
Program:	CVAAA-CRIA2
User Role:	Program Admin

View Builder - CRIA Unmet Needs Client Detail

CRIA Encounter | CRIA Communication | Community Log | My Views | Search | Queue | Logout

Type: CRIA Unmet Needs Client Detail | Date Range: Past Year | Date Range Start (mm/dd/yyyy): 02/27/2025 | Date Range End (mm/dd/yyyy): 02/27/2026 | Sort By: Client Name | Sort Ascending: | Sort Descending:

Go | Export to Excel | Cancel

View Filters | Add Another Filter

Select Field (1): Select One | Relation: Equal to | Choose or Enter Value: Select One | and / or | Remove Filter (1):

Select Field (2): Select One | Relation: Equal to | Choose or Enter Value: Select One | Remove Filter (2):

Filter | Save to My Views

3 Results

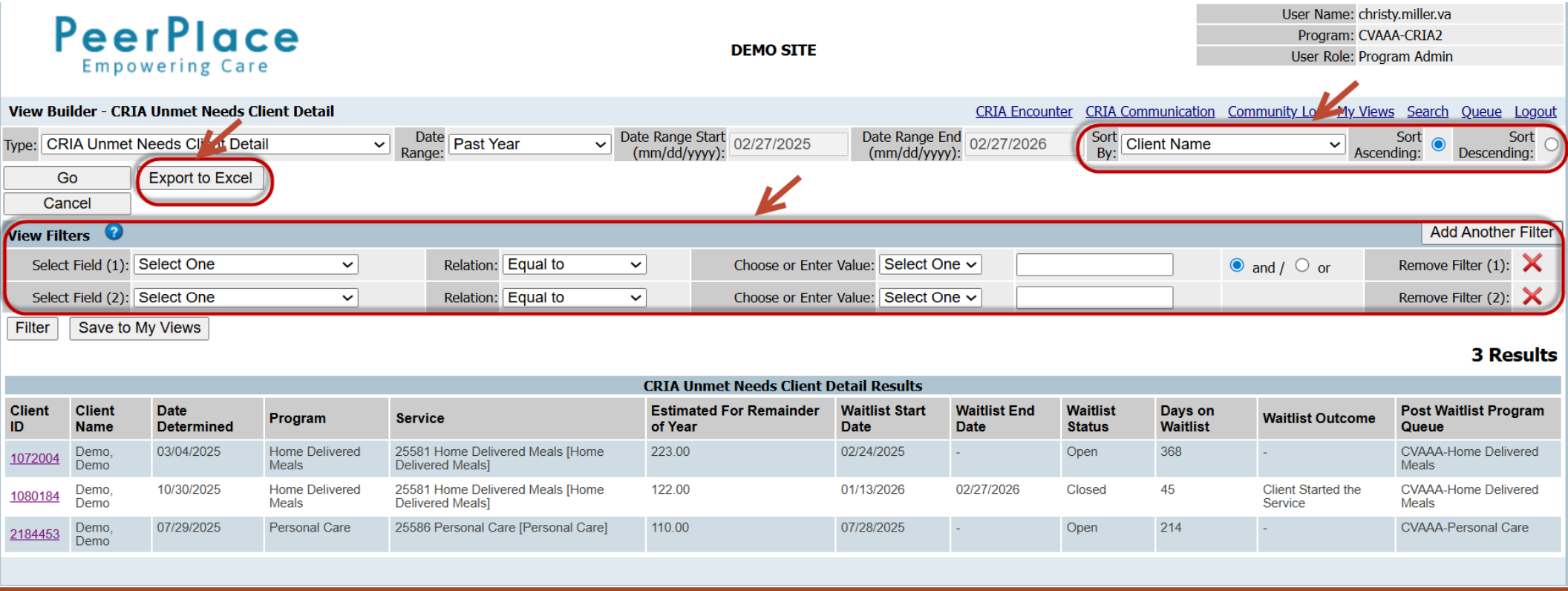
CRIA Unmet Needs Client Detail Results

Client ID	Client Name	Date Determined	Program	Service	Estimated For Remainder of Year	Waitlist Start Date	Waitlist End Date	Waitlist Status	Days on Waitlist	Waitlist Outcome	Post Waitlist Program Queue
1072004	Demo, Demo	03/04/2025	Home Delivered Meals	25581 Home Delivered Meals [Home Delivered Meals]	223.00	02/24/2025	-	Open	368	-	CVAAA-Home Delivered Meals
1080184	Demo, Demo	10/30/2025	Home Delivered Meals	25581 Home Delivered Meals [Home Delivered Meals]	122.00	01/13/2026	02/27/2026	Closed	45	Client Started the Service	CVAAA-Home Delivered Meals
2184453	Demo, Demo	07/29/2025	Personal Care	25586 Personal Care [Personal Care]	110.00	07/28/2025	-	Open	214	-	CVAAA-Personal Care

Data on report is housed in the Demo environment and does not represent real data

EXAMPLE – Sort, Filter & Export

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES



Client ID	Client Name	Date Determined	Program	Service	Estimated For Remainder of Year	Waitlist Start Date	Waitlist End Date	Waitlist Status	Days on Waitlist	Waitlist Outcome	Post Waitlist Program Queue
1072004	Demo, Demo	03/04/2025	Home Delivered Meals	25581 Home Delivered Meals [Home Delivered Meals]	223.00	02/24/2025	-	Open	368	-	CVAAA-Home Delivered Meals
1080184	Demo, Demo	10/30/2025	Home Delivered Meals	25581 Home Delivered Meals [Home Delivered Meals]	122.00	01/13/2026	02/27/2026	Closed	45	Client Started the Service	CVAAA-Home Delivered Meals
2184453	Demo, Demo	07/29/2025	Personal Care	25586 Personal Care [Personal Care]	110.00	07/28/2025	-	Open	214	-	CVAAA-Personal Care

Data on report is housed in the Demo environment and does not represent real data

EXAMPLE – Hyperlink to Record

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Client Id Hyperlink will Open Record

Edits Can Be Made to Record

PeerPlace
Empowering Care

DEMO SITE

View Builder - CRIA Unmet Needs Client Detail

Type: CRIA Unmet Needs Client Detail | Date Range: Past Year | Date Range Start (mm/dd/yyyy): 02/27/2025

Go | Export to Excel | Cancel

View Filters

Select Field (1): Select One | Relation: Equal to | Choose or Enter V

Select Field (2): Select One | Relation: Equal to | Choose or Enter V

Filter | Save to My Views

CRIA Unmet Needs Client De

Client ID	Client Name	Date Determined	Program	Service	Estimated For Remainder of Year
1072004	Demo, Demo	03/04/2025	Home Delivered Meals	25581 Home Delivered Meals [Home Delivered Meals]	223.00
1080184	Demo, Demo	10/30/2025	Home Delivered Meals	25581 Home Delivered Meals [Home Delivered Meals]	122.00
2184453	Demo, Demo	07/29/2025	Personal Care	25586 Personal Care [Personal Care]	110.00

CRIA Unmet Needs / Waitlist

CRIA Unmet Needs / Waitlist

Required fields are marked with an * asterisk.

Date Determined *: 07/29/2025

Category *: Underserved / Unserved

Unmet Needs Service Name

Select an Unmet Need Service from the List of Services Provided by Your Agency (For AAAs, Unmet Need Based on Required Assessment

Service *: 25586 Personal Care [Personal Care]

OR enter an Unmet Need Service Description of Service Not Provided by Your Agency

Unmet Needs Program Category and Units Total

Complete the Following Section to Categorize, Quantify and Calculate the Unmet Needs Units

Program *: Personal Care

Unit Quantity Needed This Month *: 10.00

Unit Type *: Hour

Will This Service Occur Every Month? *: No / Yes

Unit Quantity Needed Every Month *: 20.00

Estimated for Remainder of Year: 110.00

After Calculation Unmet Need - Add Unmet Need to Waitlist

Waitlist Start Date (mm/dd/yyyy) *: 07/28/2025

Waitlist End Date (mm/dd/yyyy):

Waitlist Outcome Client Will Be Taken Off Waitlist Because *: Select One

Planned Program Queue After Waitlist: CVAAA-Personal Care

Data on report is housed in the Demo environment and does not represent real data

Thank You!

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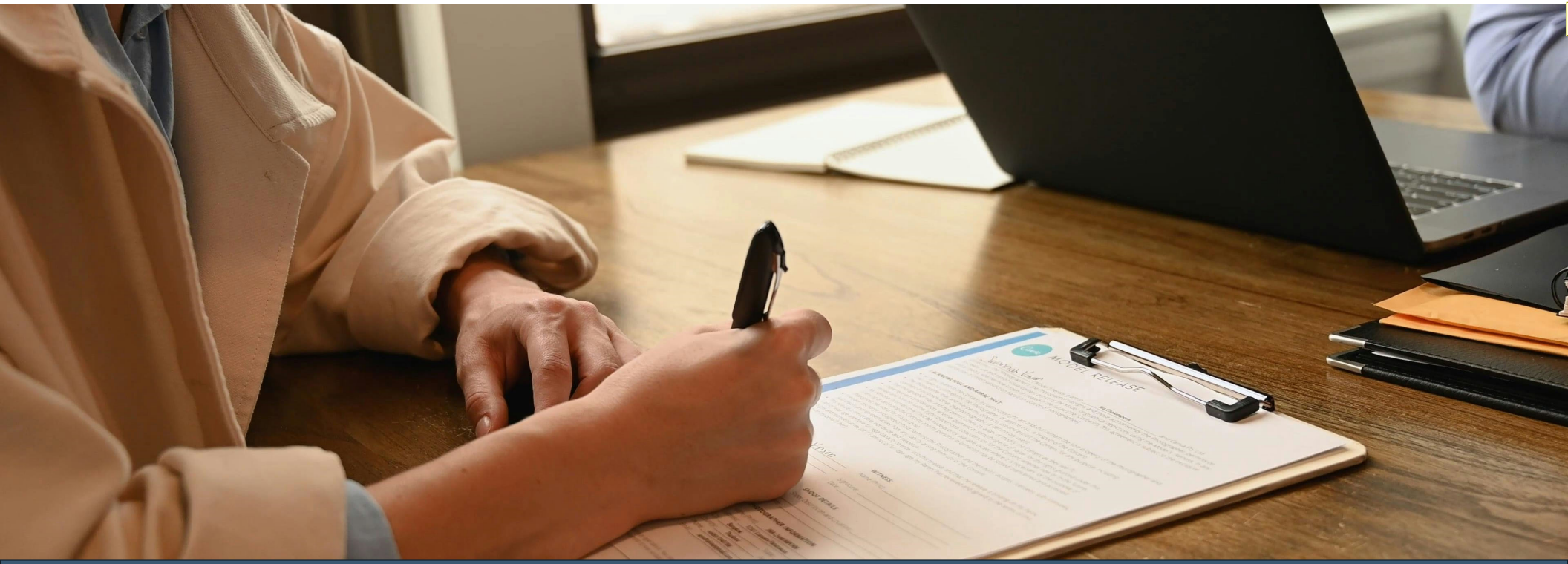
- Two handouts have been provided
  - Helpful Reports and View Builders
  - CRIA Unmet Needs

- For any questions about these reports or anything related to PeerPlace usage and reporting, please contact the helpdesk at:

NWDHelp@dars.virginia.gov



Monitoring Overview

Slide 228

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Monitoring Overview

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Monitoring is the periodic review of the ongoing of an organization ensuring the organization adheres to the internal policies, federal requirements, applicable laws and regulations, and industry standards.

Some of the benefits of monitoring are:

- Ensures compliance to federal standards, regulations, and the AAA contract.
- Assists in evaluating the quality and efficiency services provided by the AAA.

Monitoring Team

DARS | Virginia Department for Aging and Rehabilitative Services
DIVISION FOR AGING SERVICES

Milroy Stevenson (MilroyStevenson@dars.virginia.gov 804-662-9347) -Administrative, Governance, and Finance

Kelly Wright, (kelly.wright@dars.virginia.gov 804-662-9319) - Nutrition Counseling, Home Delivered Meals, Congregate Meals, Socialization and Recreation, Disease Prevention and Health Promotion Programs, Health Education, and Farm Market Fresh.

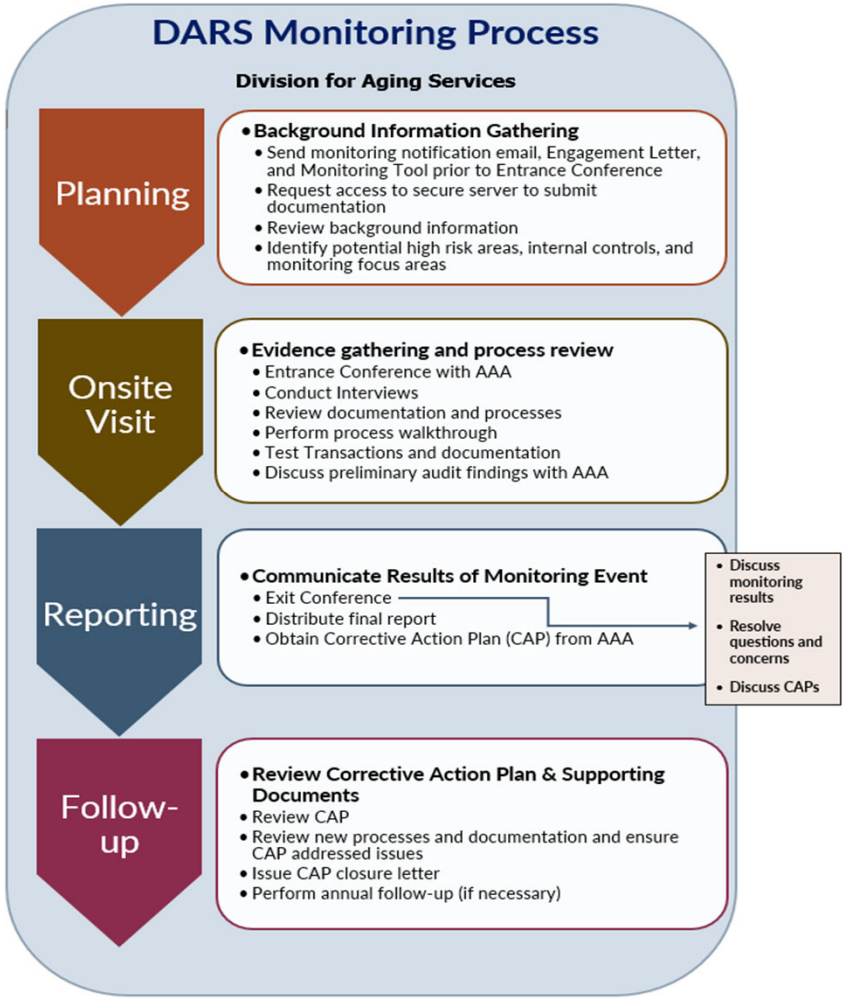
Madeline Burnham, (madeline.burnham@dars.virginia.gov 804-662-7507) - Transportation, Options Counseling, Home Renovation/Repair, and VICAP)

Kim Vivaldi, (Kim.Vivaldi@dars.virginia.gov 804-662-7650) - Adult Day Center (ADC), Checking, Care Coordination, Chore, Personal Care Services, Caregiver Support, Homemaker Services, and Chore Services.

Monitoring Phases

There are four (4) different phases of the Monitoring event These phases are:

- Planning
- Onsite Visit
- Reporting
- Follow-up



Planning Phase

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During the Planning Phase, the monitoring team will:

- Send monitoring notification email, Engagement Letter, and Monitoring Tool to AAA.
- Request access to secure Crush server to submit documentation.
- Review background information.
- Identify potential high-risk areas, internal controls, and monitoring focus areas.

Secure “Crush” Server

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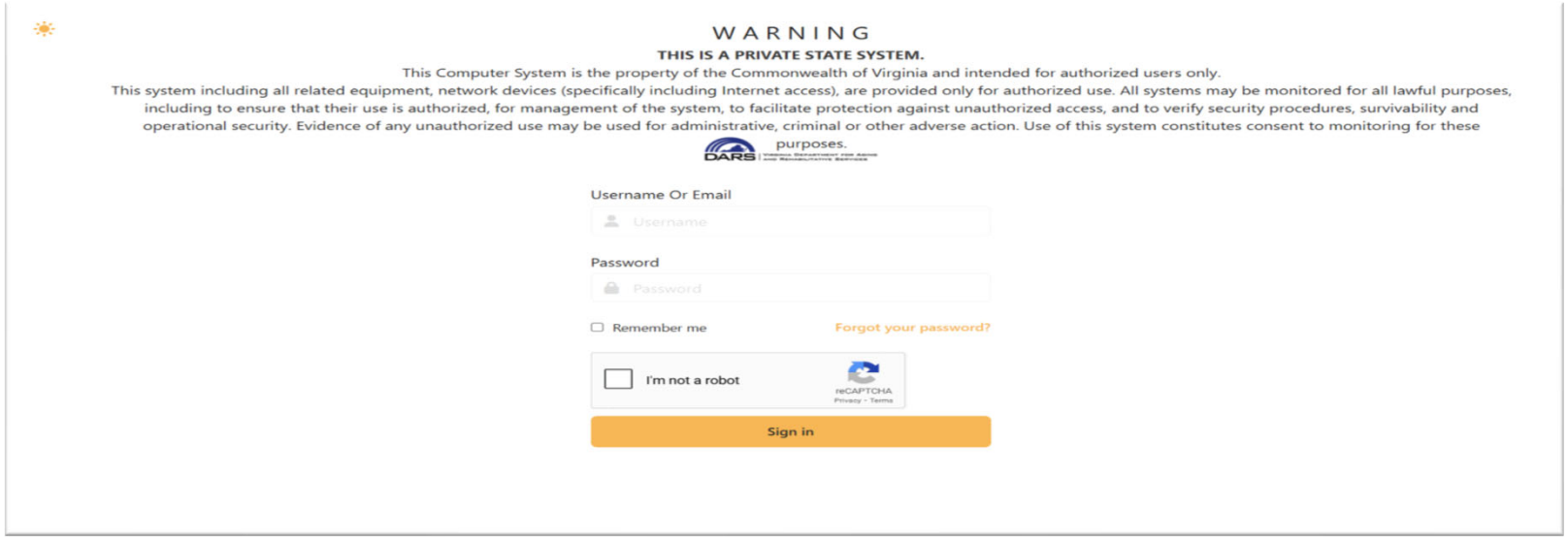
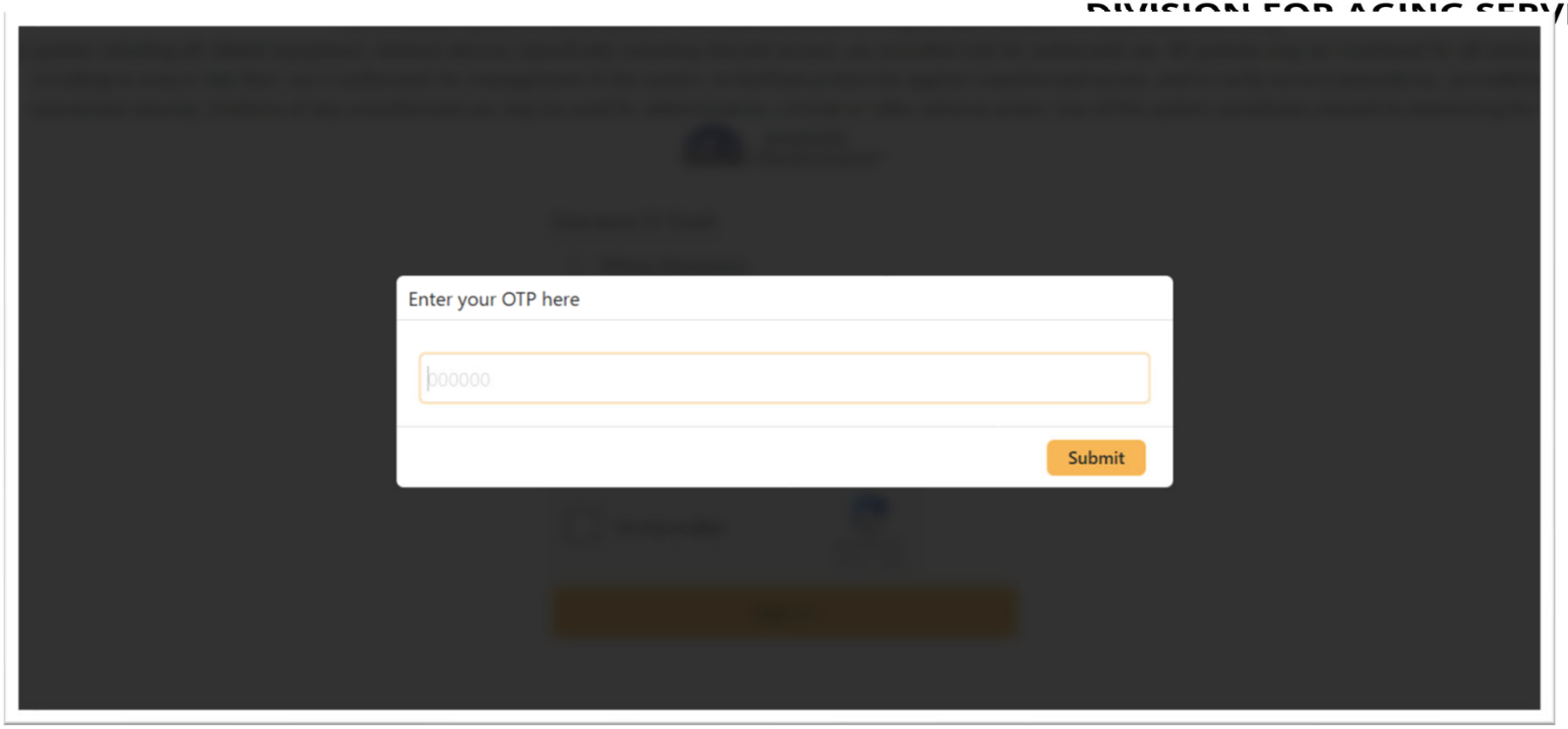


Crush Server OTP Code



Crush Folders

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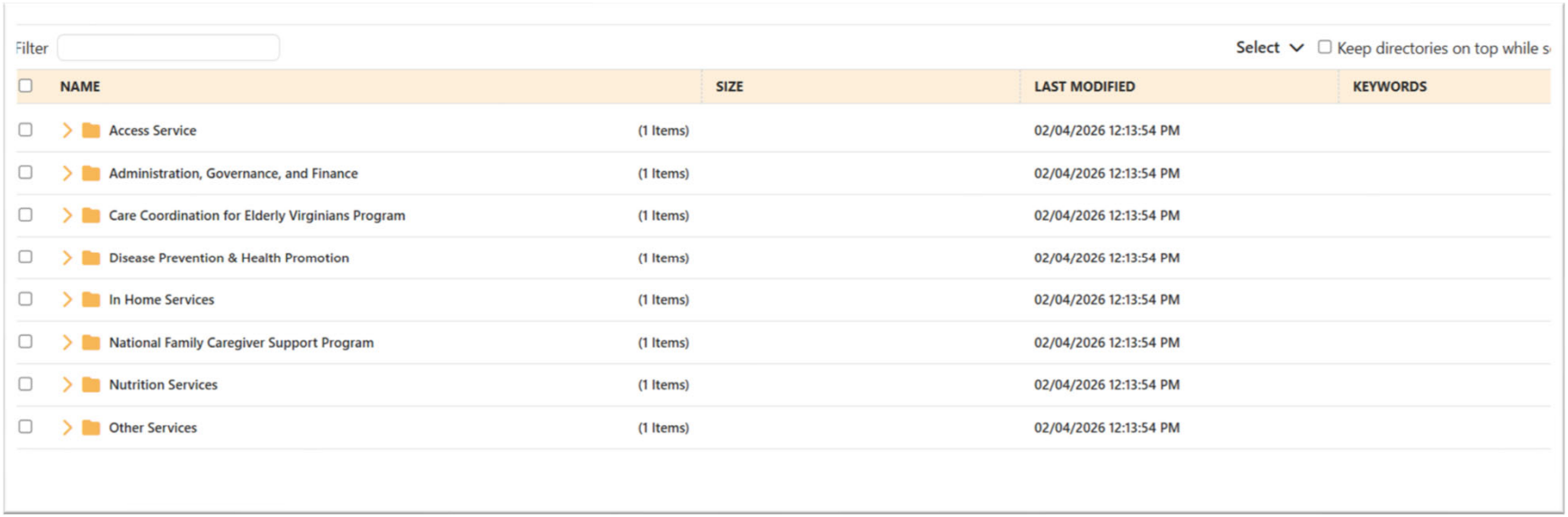

Folders Cont.

DARS | Virginia Department for Aging and Rehabilitative Services
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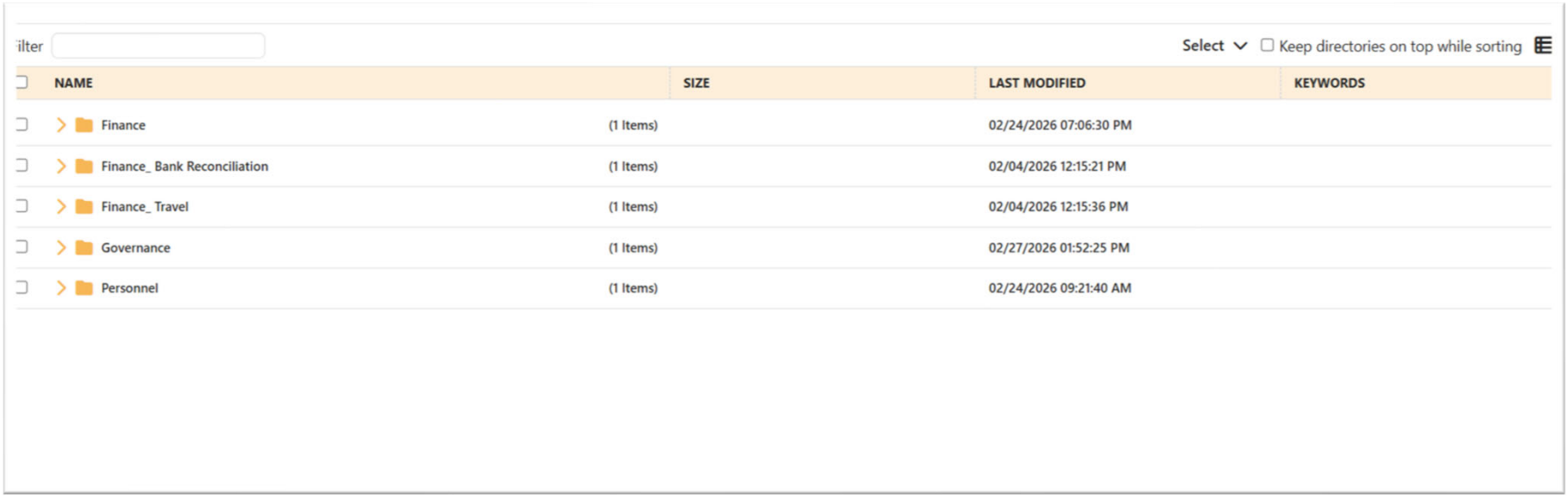

Onsite Visit

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DIVISION FOR AGING SERVICES

During this phase, the monitoring team will:

- Conduct Entrance Conference with AAA.
- Interview key Process owners and other AAA personnel.
- Review program documentation and process overview.
- Perform program and data evaluation.
- Perform process walkthroughs.
- Discuss preliminary audit findings with AAA.

Reporting Phase

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DIVISION FOR AGING SERVICES

During the reporting phase, DARS will:

- Hold the Exit Conference and discuss any potential finding or observations
    - Discuss monitoring results with AAA.
    - Resolve questions and concerns.
- Distribute the final report to the AAA.
- Obtain Corrective Action Plan (CAP) from AAA.

Report Definitions

DARS | Virginia Department for Aging and Rehabilitative Services
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Finding: A process or procedure that is not compliant with the requirements found in the Older Americans Act, State Law, Federal or State Regulations, DARS Service Standards, Generally Accepted Accounting Principles, and internal agency policies. This includes compliance requirements with federal, state, or local funding of other programs not funded through DARS. All findings require a Corrective Action Plan.

Corrective Action: When the report identifies a Corrective Action, a Corrective Action Plan (CAP) must be completed which addresses every finding, within 60 days of receiving the monitoring report, however, if the issue involves a matter of safety or is time-sensitive, a shorter response time may be required. Often the finding states the required corrective action. The agency must follow the required action or propose an alternative action within the CAP that will bring any findings into full compliance. The corrective action plan must be fully implemented with all corrections addressed within 8 months of receiving the monitoring report. DARS will review the proposed Corrective Action Plan.

Report Definitions Cont.

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Observation: Observations may be positive, neutral, or negative. Negative observations involve one of the following: 1) a process or procedure (or lack thereof) not specified in any authoritative pronouncement or not a direct violation; or 2) a new requirement where DARS has discretion in the timeframe of its implementation. If a negative observation is not corrected by the following monitoring review, the observation will generally become a finding. Neutral observations describe a process or situation that was examined during the course of the review.

Recommendation: Recommendations are provided for negative observations. Suggested actions that can improve a management practice or unregulated activity, service program, and/or improve agency operations. Agencies are not required to provide DARS with a formal response to the recommendation, but the agency must seriously consider the recommendation or identify an alternative action to correct a negative observation.

Best Practice: A project or practice worthy of recognition and sharing with other agencies for replication.

Follow-Up

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During the follow-up phase, DARS will perform the following:

- Review Corrective Action Plan & Supporting Documents.
- Review new processes and documentation and ensure CAP addressed issues.
- Issue CAP closure letter.
- Perform annual follow-up (if necessary).

2026 Monitoring Updates

DARS | Virginia Department for Aging and Rehabilitative Services
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The DARS monitoring team updated and streamlined and reduced the Monitoring Self Assessment tool from 53 to 37 pages.

DARS has added three (3) new area that will be included in the review during the monitoring event. The new areas are:

- VICAP
- Options Counseling
- Home Repair/Renovation

2026 Monitoring Updates

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Monitoring Team Training

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The Monitoring Team will provide training to the AAA for pervasive issues noted during monitoring.

The subject of the training will depend on inefficiencies, waste, and control weaknesses noted during monitoring.

The training sessions will address compliance gaps before they become findings and ensure the AAA are in line with regulations, and the DARS Service Standards.

Upcoming Training Topics

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DARS is developing training for the following topics:

- Subcontractor monitoring
- Operational and Financial internal controls
- Peer Place
- Uniform Assessment Instrument (UAI)
- Nutrition Site Visit Expectations

Mid-Cycle Review

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The Monitoring Team will conduct a mid-cycle review (15-18 months after previous monitoring event).

The mid-cycle review will focus on the high-risk areas of non-conformance noted during most recent monitoring event.

This will ensure the corrective action plan (CAP) has been fully implemented and addressed the issue.

2026 Monitoring Schedule

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Here are the AAAs that we will visit in 2026:

Crater
Lake Country
Piedmont Senior Resources
CVACL
Healthy Generations
JABA
Eastern Shore
Fairfax
Loudon
Peninsula
LOA
MEOC

2027 Monitoring Schedule

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Here are the AAAs that we will visit in 2027:

Appalachian
Encompass
Southern
Senior Connections
Rappahannock
Bay
Eastern Shore
Prince William

2028 Monitoring Schedule

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Here are the AAAs that we will visit in 2028:

District Three
NRV
VPAS
Shenandoah
Alexandria
Arlington
CVACL
SSSEVA



Q&A
Hot Topics
Sharing



Share your feedback on today's training and any topics you'd like covered in future sessions:

JW

Wrap Up

Slide 251

JW1 Add QR for survey

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