



# CFO Touch Base Session

April 30, 2025



**DARS**

VIRGINIA DEPARTMENT FOR AGING  
AND REHABILITATIVE SERVICES

**DIVISION FOR AGING SERVICES**

# Agenda

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- Welcome/Opening/Agenda Review
- Federal Updates
- Area Plan and Budget Timeline
- SharePoint Uploading Tutorial
- Expenditure Analysis
- FY25 Carry-over into FY26
- Program Spotlight – VA GrandDriver
- Question and Answer



# Federal Updates

# As a Reminder: FFY 2025



- In mid-March, the House and Senate passed a continuing resolution (CR) to extend federal funding through Sept. 30, 2025 (the end of the federal fiscal year), avoiding a federal government shutdown
- The CR had the following impacts for ACL and the Medicare Improvement for Patients and Providers Act (MIPPA)
  - The CR provided level funding generally for OAA programs
  - The CR included a reduction of \$29,268,000 in earmarked funding for the Administration for Community Living (ACL)
  - The CR included an extension of MIPPA through September 30, 2025, and the full-year funding for each of the entities that administer MIPPA

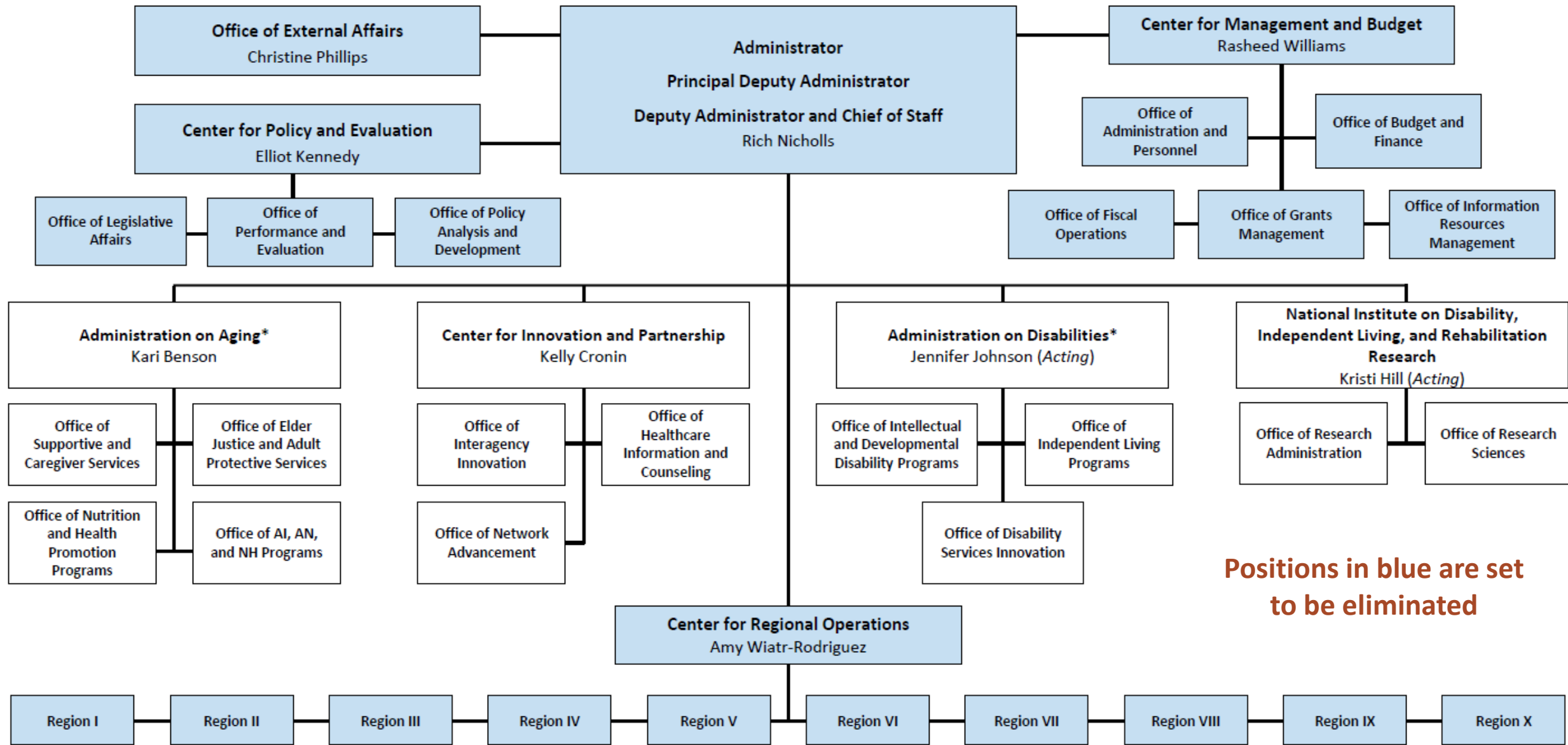


# ACL Staffing Updates



- On April 1, a substantial number of ACL staff received reduction in force (RIF) notifications
  - The affected staff included all individuals from the ACL front office, Regional Offices, Office of Policy and Evaluation, Office of External Affairs, and the Office of Management and Budget
- As of April 4, affected staff from the Regional Offices, Office of Policy and Evaluation, and Office of Management and Budget were temporarily reinstated to resume support for mission critical activity
  - After critical activities have been transitioned, staff may be placed on administrative leave for the remainder of their employment through June 2

## Administration for Community Living Organizational Chart



**Positions in blue are set to be eliminated**

# Other Agency Updates

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- Within ACF:
  - The team that stands up the Social Services Block Grant (SSBG) was eliminated
    - In Virginia, SSBG is partially used for Adult Protective Services/Adult Services
  - The team that stands up the Low-Income Home Energy Assistance Program (LIHEAP) was eliminated
- CMS is expected to lose 300 staff
  - According to initial information, many staff from the Medicare-Medicaid Coordination Office (MMCO) received RIF notices
  - Staff in the Program for All-Inclusive Care for the Elderly (PACE) have moved under the CMS Innovation Center

# Congressional Negotiations



- The House and Senate have both passed budget resolutions providing instructions to their respective committees on minimum amounts they must cut from their programs over a 10-year period
- The House and Senate resolutions differ in their instructions and will need to be aligned during the next step of legislative development
- Relevant committees of jurisdiction for aging and disability programs:
  - House Committee on Education and Workforce
  - Senate Committee on Health, Education, Labor and Pensions (HELP)



# Congressional Negotiations



- Congress was in recess, returned April 28
- House staffers had been working to draft legislation
- Twelve Republican Representatives (including Kiggans and Wittman from Virginia) sent a letter pushing back on cuts that would reduce Medicaid coverage
- House committees may be expected to submit their proposals to the Budget Committee by May 9
  - There is uncertainty about future funding for a variety of mandatory aging and disability-related programs
  - Some cuts to these programs are expected in the forthcoming legislative drafts

# FY 2026 Proposed Budget



- Also happening: The Trump administration is preparing its proposed FFY 2026 Budget for Congressional consideration
- In doing so, a leaked “passback” document between HHS/OMB released with the past 10 days that identified structural changes for federal agencies and some programmatic cuts/eliminations for aging and disability programs
- The document can be found [here](#)
- USAging, ADvancing States, and other organizations are analyzing the potential impacts
- We are monitoring activities at the federal level and encourage AAAs to stay plugged-in as the situation unfolds

# Leaked Document

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- Pre-decisional, not finalized, with outstanding questions remain regarding many of the proposed changes
- Draft budget for DHHS 2026 budget proposal leaked to reporters
- Includes a new budget line item labelled 'ACL Program Admin Shift to CMS'
- Note: Agencies are permitted to request changes to the budget; however, they are unable to change the bottom line – reported by an anonymous official

# ACL to CMS Transfer (1)

Item	2026 HHS Budget Proposal	Original 2025 ACL Budget Request	FY 2024 CR	FY 2023
	<i>Budget in Millions USD</i>			
	<b>\$2,363</b>	<b>\$2,488</b>	<b>\$2,389</b>	<b>\$2,385</b>
<b>Home and Community Based Supportive Services</b>	<b>\$410</b>	<b>\$410</b>	<b>\$410</b>	<b>\$410</b>
<b>Aging Network Support Activities</b>	<b>\$13</b>	<b>\$40</b>	<b>\$30</b>	<b>\$30</b>
<b>Family Caregiver Support Services</b>	<b>\$207</b>	<b>\$205</b>	<b>\$205</b>	<b>\$205</b>
<b>Native American Caregiver Support Services</b>	<b>\$12</b>	<b>\$12</b>	<b>\$12</b>	<b>\$12</b>
<b>Alzheimer's Disease Supportive Services</b>	<b>\$17</b>	<b>\$32</b>	<b>\$32</b>	<b>\$32</b>

# ACL to CMS Transfer (2)

Item	2026 HHS Budget Proposal	Original 2025 ACL Budget Request	FY 2024 CR	FY 2023
	<i>Budget in Millions USD</i>			
	<b>\$2,363</b>	<b>\$2,488</b>	<b>\$2,389</b>	<b>\$2,385</b>
<b>Prevention of Elder Abuse and Neglect</b>	<b>\$5</b>	<b>\$5</b>	<b>\$5</b>	<b>\$5</b>
<b>ACL Program Admin Shift to CMS</b>	<b>\$11</b>			
<b>HCFAC Senior Medicare Patrol</b>	<b>\$35</b>	<b>\$35</b>	<b>\$35</b>	<b>\$35</b>
<b>MIPPA (Medicare Improvements for Patients and Providers Act)</b>	<b>\$50</b>	<b>\$50</b>	<b>\$50</b>	<b>\$47</b>



# ACL to ACF Transfer



Item	2026 HHS Budget Proposal	Original 2025 ACL Budget Request	FY 2024 CR	FY 2023
<i>Budget in Millions USD</i>				
	<b>\$2,363</b>	<b>\$2,488</b>	<b>\$2,389</b>	<b>\$2,385</b>
<b>Senior Nutrition Program - Congregate Nutrition Services</b>	<b>\$565</b>	<b>\$622</b>	<b>\$540</b>	<b>\$540</b>
<b>Senior Nutrition Program - Home-Delivered Nutrition Services</b>	<b>\$381</b>	<b>\$448</b>	<b>\$366</b>	<b>\$366</b>
<b>Senior Nutrition Program - Nutrition Services Incentive Program</b>	<b>\$112</b>	<b>\$80</b>	<b>\$160</b>	<b>\$160</b>
<b>Native American Nutrition and Supportive Services</b>	<b>\$38</b>	<b>\$38</b>	<b>\$38</b>	<b>\$38</b>
<b>Traumatic Brain Injury</b>	<b>\$13</b>	<b>\$13</b>	<b>\$13</b>	<b>\$13</b>
<b>Independent Living</b>	<b>\$453</b>	<b>\$132</b>	<b>\$128</b>	<b>\$128</b>
<b>Assistive Technology</b>	<b>\$40</b>	<b>\$40</b>	<b>\$40</b>	<b>\$40</b>

# Proposed Eliminations



- Preventive Health Services
- Elder Falls Prevention
- Lifespan Respite Voucher
- Long-Term Care Ombudsman
- Chronic Disease Self-Management
- Elder Rights Support Activities
- Elder Justice/APS
- Aging & Disability Resource Centers
- State Health Insurance Assistance Programs
- State Councils on Developmental Disabilities
- DD Protection Advocacy
- DD National Projects
- Paralysis Resource Center
- Limb Loss Resource Center
- Voting Access for People with Disabilities

# Federal Reconciliation Process



- Congressional procedure that allows for easier passage of tax and spending changes. It can change existing taxes, create new taxes, or repeal existing taxes or it can similarly change existing spending, create new spending, or repeal existing spending.
- Typically applied to revenue and mandatory spending.
- Medicaid – work requirements, reduce matching funds used for Medicaid expansion, 90/10 federal medical assistance % (FMAP)
- Other entitlement programs being assessed – SNAP and SSBG

# Virginia's Current Funding



- DARS is waiting to receive the final Notice of Awards (NOAs) documents for the FFY 2025 from ACL
- ACL had indicated that Virginia should receive our outstanding NOAs in the first part of May
- Once DARS receives the outstanding FFY 2025 NOAs, the agency can then calculate the estimated allocations for the AAAs for FFY 2026 and notify the AAAs of their allocations
- AAAs will need those figures to complete their FFY 2026 Area Plans

# DARS' Allocation Process



- Continuing Resolution
  - Three Activities:
    1. Estimated Allocations to AAAs
    2. Obligations to AAAs
    3. Actual Reimbursement to AAAs
1. Allocations:
    - Delay in FFY 2025 Allocation/NOAs to States
  2. Obligations
    - Contracting with AAAs
  3. Actual Reimbursement to AAAs
    - Steps to Issue Dollars to AAAs
    - PMS Updates



# Payment Mgmt System (PMS)



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- DOGE introduced new scrutiny placed on states dealing with requested federal funds and the justification for their use
- Executive Order 14222
- Example: NSIP – “The payment justification provided...is not sufficient to determine whether the expenses requested are consistent with the purpose(s) of the program funded with this grant award.”
- Request additional detail of expenses claimed
  - What the award is for, what the funds will be used for, why it is necessary – and a detailed note of what the funds s/h/b used for and prohibited uses (i.e. nutrition education or state/local admin costs)

# DARS Response

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- Develop template for each grant and grant year specific to the requirements and use of each award
- Thank you, Charlotte!
- Uploaded the clarification and received confirmation on Friday that the grant funds were disbursed to DARS
- Sustainability of template justification

# New Lessons Learned

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- Please remember AMRs (and OCs) are due by the 12<sup>th</sup> of each month
- AMRs received after this date may not be processed timely potentially causing delay in funds
- Please ensure if your Agency is claiming dollars for a service area, the associated units are entered on the AMR and are accurately represented
- If help is needed, please reach out to Tanya, Justin, or John



# Area Plan and Budget

Timeline Review

# What Makes Up the Area Plan?



## 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 45 CFR § 1321.65



# Initial Area Plan Rollout

- March 14 Email Sent to Executive Directors and Seconds-in-Command
- Documents Found in the Aging Services Provider Portal under Area Plan

## Distribution

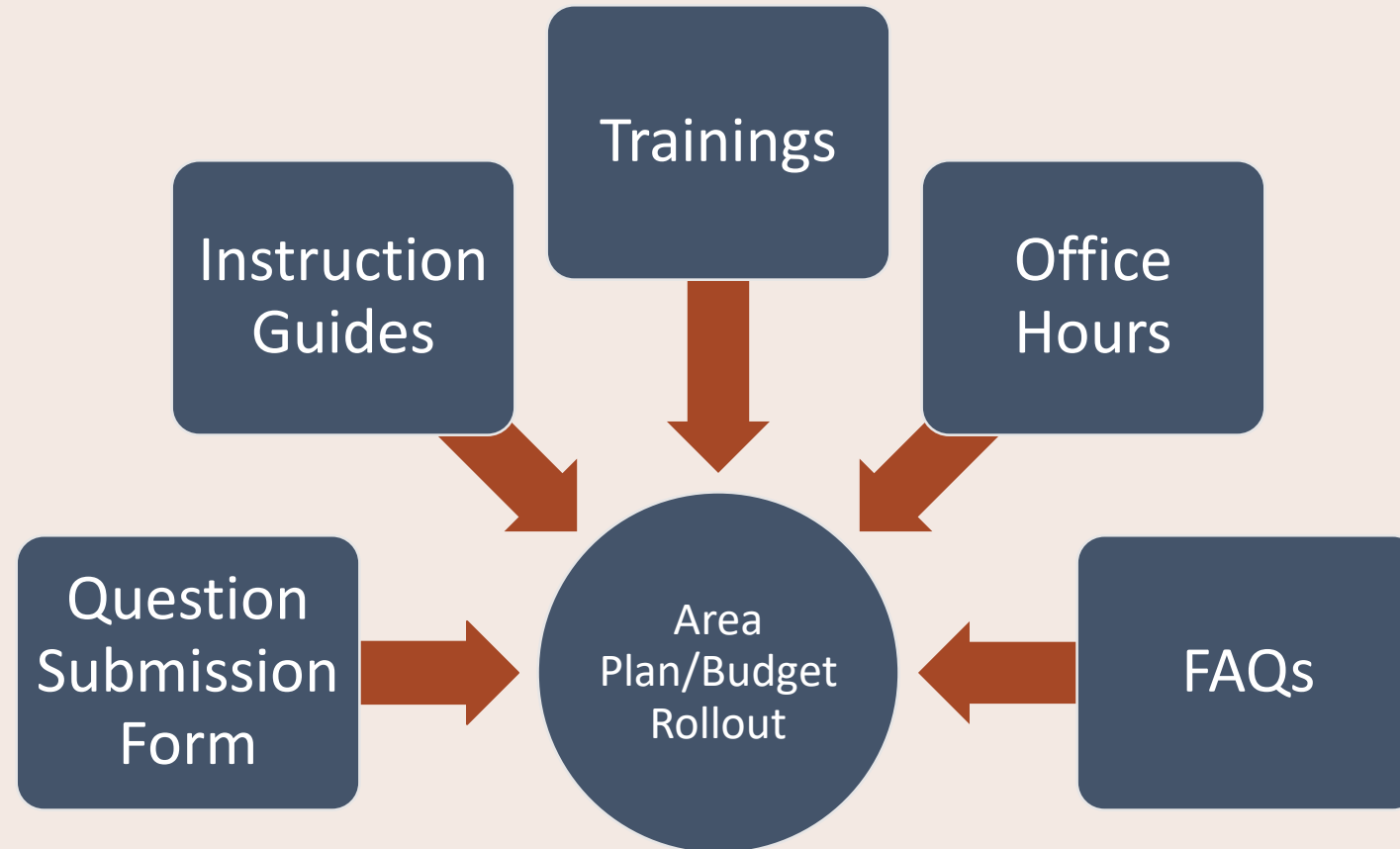


- Area Plan Program Template
- Area Plan Training Matrix
- Area Plan Training and Rollout Timeline
- Area Plan Training Summary
- Microsoft Online Form to Submit Questions (Link)

## Documents



# Rollout Modalities



# DARS Area Plan Rollout



## March 14

- Release the Area Plan Program Template
- Open Link to a Microsoft Form for AAAs to Submit Questions to DARS
- Launch Links for Training Webinars and Zoom Meeting Office Hours

## April – May – June

- Release Area Plan Program Instruction Guide
- Host Area Plan Program Trainings
- Host Area Plan Program Office Hours

## June

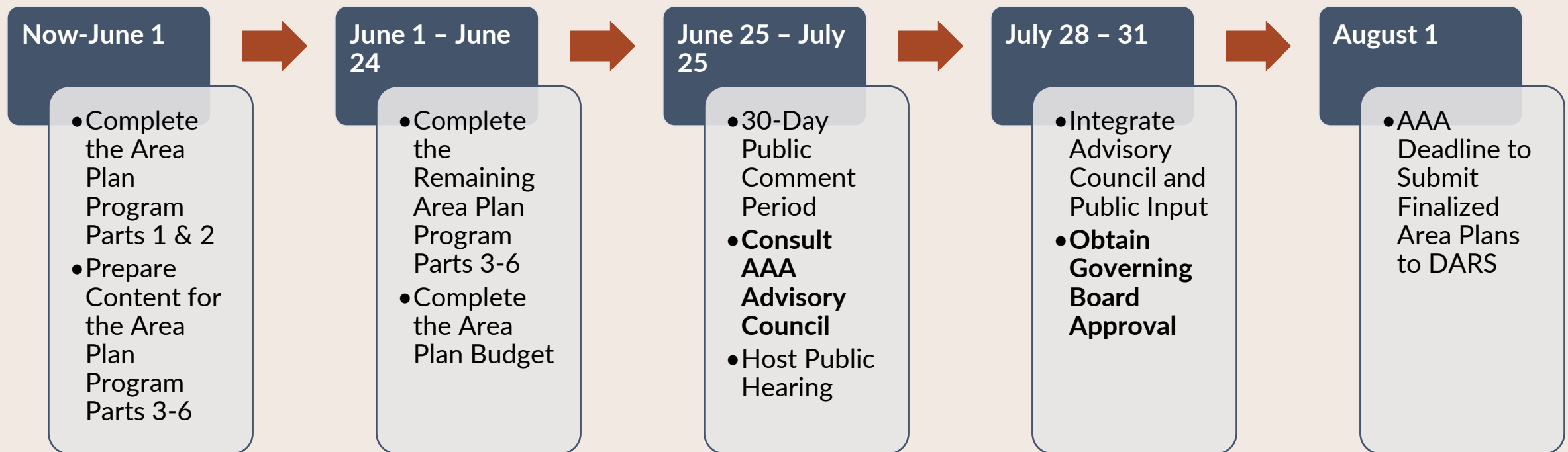
- Release Area Plan Budget Instruction Guide
- Release Each AAA's Budget Allocations
- Host Area Plan Budget Training
- Host Area Plan Budget Office Hours

FAQs will be released periodically from April - June

# AAA Area Plan Development



AAAs should follow the timeline outlined below to develop their Area Plans:



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

# Other AAA Documents Rollout



## DARS Rollout

- July 1: Release the Annual Documents and Emergency Preparedness Tools
- These documents are NOT subject to the Area Plan public input process

## July – August

- Host Annual Documents & Emergency Preparedness Tools Training
- Host Annual Documents & Emergency Preparedness Tools Office Hours

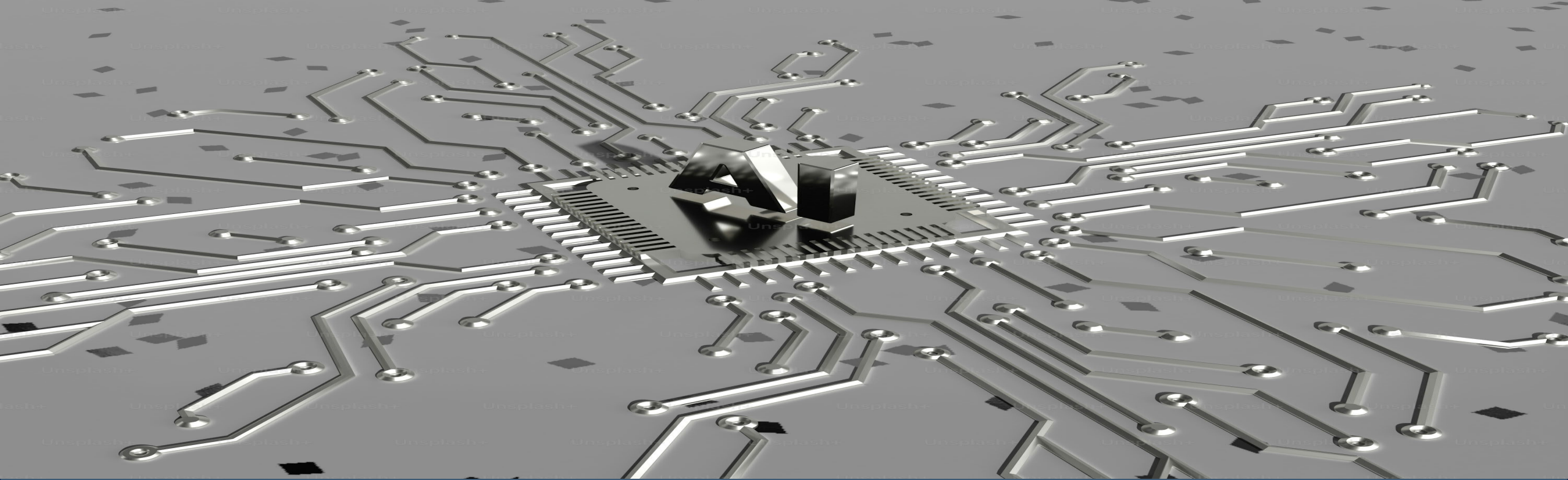
## October 1

- Emergency Preparedness Documents are due October 1 each year (starting in 2025)

## February 1

- AAA Annual Documents are due February 1 each year (starting in 2026)



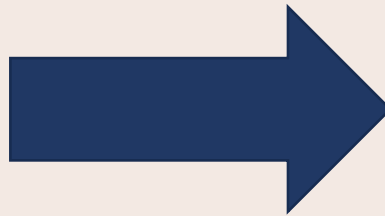


# SharePoint

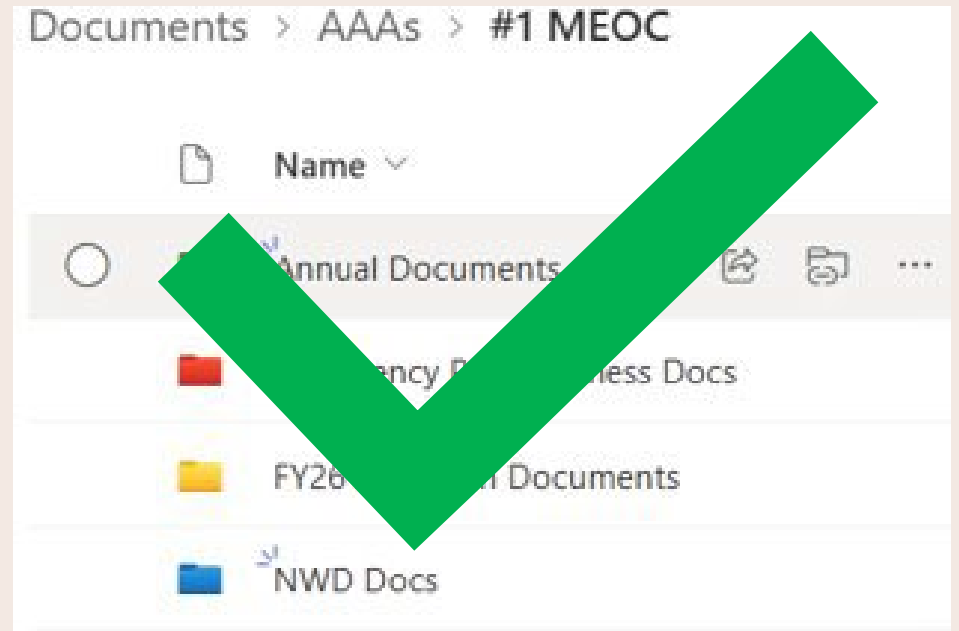
# Submitting Area Plan Documents

## Old Way

Email to Tanya Brinkley



## New Way



# Submit to the SharePoint Folder



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## FFY26 Area Plan

**AUGUST 1**

Area Plan Program

Area Plan Budget

Any Supporting  
Documents

## Emergency Preparedness Documents

**OCTOBER 1**

Continuity of Operations  
Plan

All-Hazards Emergency  
Response Plan

All-Hazard Risk  
Assessment

## Annual Documents: AAA Operations

**FEBRUARY 1**

AAA Information Form

Governing Board Docs

Advisory Council Docs

Organizational Chart

Staff Listing

## Annual Documents: No Wrong Door\*

**FEBRUARY 1**

NWD Local Advisory  
Council Information  
(Members and Structure)

NWD Local Standards  
(Matrix)

\*For 2025, DARS will collect updated versions this spring/summer - stay tuned for more information

# SharePoint Access


Everyone that requested access should have received an email granting access to your Agency's folders



**Burnham, Madeline (DARS) invited you to edit a folder**

You have been granted access to the DARS/AAA Sharepoint folders!



 This invite will only work for you and people with existing access.

Open

Share

This email is generated through Commonwealth of Virginia's use of Microsoft 365 and may contain content that is controlled by Commonwealth of Virginia.

# Opening SharePoint

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- Please click on the “Open” button or AAA folder image
- Some users may need to login with an email address once the webpage is loaded
- Please note if a user needs access, please email [madeline.burnham@dars.virginia.gov](mailto:madeline.burnham@dars.virginia.gov)
- Once the link is open, please bookmark the site for future use

# Example View

Each AAA will only have access to the folders assigned to your Agency

DD

DARS-AAA Document Sharing-External

+ New

Upload

Edit in grid view

Share

Sync





Copy link

Documents > AAAs

	Name	Modified	Modified By
	#1 MEOC	December 20, 2024	Jones, Matt (DARS)
	#2 Appalachian (AASC)	December 20, 2024	Jones, Matt (DARS)
	#3 District 3	December 20, 2024	Jones, Matt (DARS)
	#4 New River Valley (NRVAA)	December 20, 2024	Jones, Matt (DARS)
	#5 LOA	December 20, 2024	Jones, Matt (DARS)
	#6 Valley Program	December 20, 2024	Jones, Matt (DARS)

# Document Submission

- There are 4 folders for you to upload documents
- Please upload them as appropriate based on the folder title
- Submitted documents should be either PDF or Excel formats.

	Annual Documents
	Emergency Preparedness Docs
	FY26 Area Plan Documents
	NWD Documents

**\*\*\*Please do not merge your various documents together.**

**The formatting *will* come undone, and we *will not* be able to view your entire document.\*\*\***



# Document Submission



## Naming Conventions

Please submit as your PSA number and the document attached.

Examples:

AP Program PSA 01 – Part A.pdf

AP Program PSA 01 – HDM-IDwaiver.pdf

AP Program PSA 01.xlsx

If you are working on a document, meaning it is not completed, but it is in your folder, please indicate “DRAFT” following the Program.

Once completed, simply rename the document and remove the “DRAFT”

Example:

AP Program PSA 01 – Checking\_DRAFT

# Document Submission

- AAA Information Forms
- Key Staff Document
- Governing Board Information
- Advisory Council Information



Annual Documents



# Document Submission



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Emergency Preparedness Docs

- Emergency Response Plans
- Training and Exercises
- Community Outreach



- Education
- Hazard Assessments
- Infrastructure Improvements

- Life Safety
- Incident Stabilization
- Property Preservation
- Evacuation & Mass Care

- Economic Recovery
- Debris Management
- Housing
- Health/Social Services

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

# Document Submission



- All Documents for AP Program Parts A and B should be included in this folder
- Waivers, Supporting Documents, and Other Services Pages will be included here in sub-folders\*
- \*\*\*\*Area Plan Budgets should be submitted in this folder



FY26 Area Plan Documents

We will add two sub-folders titled:

1. "Waivers and Supporting Docs"
2. "Other Services Pages"

Put your respective documents in their sub-folders.

# Document Submission



NWD Documents

- NWD Local Advisory Council Information (Members and Structure)
- NWD Local Standards (Matrix)



More information about this will be relayed by the DARS NWD Team in the near future.

# Document Submission



If your Agency has waivers, please place them in the folder titled “Waivers and Supporting Docs” and include those documents there. Please name the waivers as specified in previous slides.



# Expenditure Analysis



# Balance of FY2024 OAA Funds



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■ III-B Supportive Services	\$64,069
■ III-C1 Congregate Meals	\$156,988
■ III-C2 Home Delivered Meals	\$493,663
■ III-D Preventative Health	\$79,877
■ III-E Family Caregiver	\$347,524
■ VII-G Elder Abuse	\$3,768
■ VII Ombudsman	\$0
■ Total	\$1,145,889

# Balance of FY2025 OAA Funds



VIRGINIA DEPARTMENT FOR AGING  
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■ III-B Supportive Services	\$7,913,903
■ III-C1 Congregate Meals	\$4,337,519
■ III-C2 Home Delivered Meals	\$6,488,582
■ III-D Preventative Health	\$387,203
■ III-E Family Caregiver	\$3,034,081
■ VII-G Elder Abuse	\$51,471
■ VII Ombudsman	\$186,262
■ Total	\$22,399,021

# Other Federal FY2025 Funds



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■ NSIP	\$418,963
■ DMAS Ombudsman	\$74,488
■ Public Health Workforce	\$34,252
■ DOL Title V	\$395,021
■ VICAP	\$55,361
■ MIPPA Priority 1	\$106,355
■ MIPPA Priority 2	\$156,454
■ MIPPA Priority 3	\$193,319
■ Total	\$1,434,213

# Balance State Funds

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■ OAA General	\$835,451
■ Community Based	\$1,038,047
■ Transportation	\$347,751
■ HDM	\$895,410
■ Care Coordination	\$516,525
■ Respite	\$180,870
■ Ombudsman Program	\$68,070
■ Supplemental Nutrition	\$298,492
■ VICAP	\$209,242
■ Total	\$4,394,887



# Additional Financial Items

# Carryover

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- The Code of Virginia 22VAC30-60-440 states: *“Carry-over funds may represent obligated but unspent funds. For such funds to be available for expenditure in a subsequent fiscal year, the Virginia Department for Aging and Rehabilitative Services must reauthorize in the subsequent area plan such funds for an area agency to obligate and expend. An Area Agency on Aging shall request authority for such reauthorization of funds.*
- *This 10% carry-over policy does not apply to Virginia general fund moneys*

# Carry-over Form



**DARS**

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10% Federal award  
carryover limit is waived  
for FY2025 OAA funds

Please submit a waiver  
form requesting carryover  
in excess of 10%

The waiver is due by  
August 1, 2025

## CARRYOVER OAA FUNDS ABOVE 10% REQUEST WAIVER

The Virginia Administrative Code [22VAC30-60-440](#) states: "Carryover funds may represent obligated by unspent funds. For such funds to be available for expenditure in a subsequent fiscal year, the Virginia Department for Aging and Rehabilitative Services must reauthorize in the subsequent area plan such funds for an area agency on aging to obligate and expend. An Area Agency on Aging shall request authority for such reauthorization of funds. In general, carryover balances from Titles III-B, III-C(1), III-C(2), and III-D should not exceed 10% of the federal obligation for the new fiscal year, computed separately. This 10% carryover policy does not apply to Virginia general fund moneys; all of the general fund moneys must be spent by June 30 of the fiscal year in which they have been awarded. Approval of the use of such federal carryover funds shall be granted by the Department for Aging and Rehabilitative Services only for specific uses and for a specified period of time."

DARS will authorize carryover funds in excess of 10% obligation for OAA funds in the current Federal Fiscal Year (FFY) into the next FFY. In order to assist in planning, tracking, and monitoring the FFY grant and associated activities, **complete the following and submit with the agency's area plan documentation into the area plan waiver folder consistent with the Area Plan submission process.**

PSA#:	Area Agency on Aging:
Total Estimated Amount of Requested Carryover:	
Total Percent of Carryover Request:	
Which title(s) do the funds represent?	
How does the AAA plan to spend these funds; ensuring award exhaustion by the close of the next FFY? Provide a detailed response below:	



# Carry-over Submission

- All Documents for AP Program Parts A and B should be included in this folder
- Waivers, Supporting Documents, and Other Services Pages will be included here in sub-folders\*
- \*\*\*\*Area Plan Budgets should be submitted in this folder



FY26 Area Plan Documents

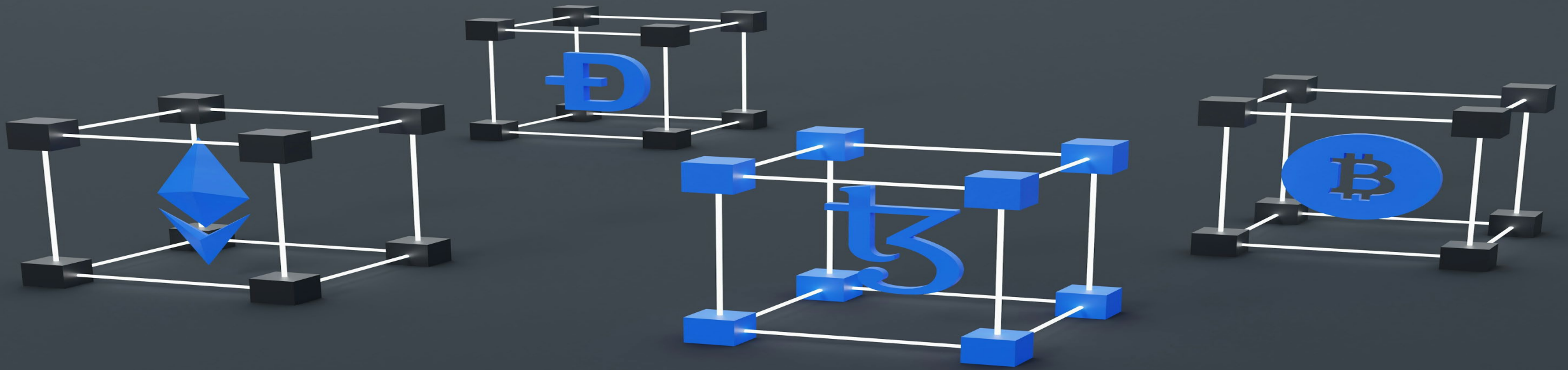
Please use the subfolder labeled:  
1. “Waivers and Supporting Docs”  
for Carry-over Waivers

# No Cost Extension (NCE)

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- A NCE is an extension of time to a project period and/or budget period to complete the work of the grant under that extension period, without additional Federal funds
- Only pertains to Administration on Aging formula grant awards
- Awards that received an NCE in the past are not eligible for an additional NCE
- An approved NCE will extend the performance period for 12 months
- No information is available at this time for NCE submissions



# Additional Financial Items

# Budget and Funding

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- State budget remains in process
- Final ACL awards pending
- DARS continues to actively monitor the situation at ACL and the federal level
- DARS was informed by the ACL Regional Administrator to expect the current FFY final allocations by 1st or 2nd week of May.
- This should allow us to continue on our expected Area Plan development timeline.

# Upcoming Activities

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- 6/1: Area Plan Budget Guide Released
- 6/9: Area Plan Budget Training
- 6/17: Area Plan Budget Office Hours
- 7/7: Annually Required Documents and Emergency Preparedness Plans Training
- 7/15: Annually Required Documents and Emergency Preparedness Plans Office Hours
- Next AAA Input Session: Wednesday, May 14 from 3-4:00 PM

# AP and Budget Documents

For more information about the Area Plan and Budget, please visit the Area Plan 2026 folder on the Providers Portal

VDA Providers

## Documents ▸ Area Plan 2026

Documents   Adult Day Care <b>Area Plan</b> ...				Find a file	
✓	📁	Title	Name	Category	
	📁	Area Plan Trainings	Area Plan Trainings	...	Area Plan
	📄	Area Plan - Part A	FY26 Area Plan Programs Part A	...	Area Plan
	📄	Area Plan - Part B	FY26 Area Plan Programs Part B	...	Area Plan
	📄	Area Plan - Parts A & B Combined	FY26 Area Plan Final	...	Area Plan
	📄	Area Plan Companion Manual 2025	Area Plan Companion Manual 2025	...	Area Plan
	📄	Area Plan Direct Service Waiver	Direct Service Waiver Form	...	Area Plan
	📄	Area Plan FAQs 4-11-2025	FY2026 Area Plan FAQs_4.11.2025	...	Area Plan
	📄	Area Plan Other Services Page	Other AAA Services Page	...	Area Plan
	📄	HDM ID Plan	HDM ID Plan	...	Area Plan
	📄	HDM ID Waiver	HDM ID Waiver Form	...	Area Plan
	📄	HDM Transition Plan	HDM ID Transition Plan	...	Area Plan
	📄	Training Matrix	Area Plan Trainings Matrix	...	Area Plan
	📄	Training Summary	Area Plan Training Summary Descriptions	...	Area Plan
	📄	Training Timeline	Area Plan Training and Rollout Timeline	...	Area Plan

# Questions