

Next State Plan Needs Assessment: NCI-AD

NCI-AD Survey: March Update

- As of Friday, March 20:
 - **172 completed interviews (29% of the 577 needed)**
- VCU reports a challenge with individuals not realizing they are receiving OAA services
- DARS is working with VCU to:
 - Pull new data from PeerPlace for a newer/updated survey sample (happening this week)
 - Update the Engagement Letters (sent to VCU & posted in the portal)
 - Includes a reference to "Meals on Wheels" in addition to "home delivered meals"

VCU Making Contact

- The timing is: NOW
- VCU is making phone calls to the selected AAAs

If VCU Makes Contact	If VCU Cannot Make Contact
<ul style="list-style-type: none"> • Upon contact, VCU will try to schedule and complete the survey by phone with the AAA clients • AAA clients can pick the date and time that works best with their schedules • AAA clients can have someone they know with them during the survey if they want 	<ul style="list-style-type: none"> • VCU will leave a voicemail • VCU calls 3 times before marking the AAA client as non-responsive and moving on to another AAA client in the sample

Successes:

VCU Activities

- VCU reports OAA sampling is underway and going well
- There has been a higher response rate for OAA participants compared to Medicaid

- Promotional materials are helping and much appreciated by the surveyors!

Engagement with AAAs & DARS

- DARS is receiving a few calls per month from mostly interested participants asking about completing the survey
- A few unmet needs have been identified, and AAAs have been very responsive to VCU on those – thank you!

Challenges:

- Majority of calls are resulting in no response or a decline to participate
- Other challenges include:
 - Some individuals may not realize they are receiving OAA services
 - Potential for cognitive impairment and living alone
 - Hearing loss/hard of hearing

Promotional Materials:

<https://sharepoint.wvrc.net/VDaproviders/SitePages/Home.aspx>



VDA Providers

**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 Taniya.brinkley@dars.virginia.gov for assistance.

Area Plan	DAA New Regulations
Forms/Reports	Programs
Governance & Management Guidance/Training	Remittance
NCL-AD Survey Materials	

Preparing & Making Contact:

How AAAs can help at this stage: (all forms can be found on the DARS AAA Provider's Portal)

- Let your AAA staff and volunteers know about the NCI-AD survey
- Post the NCI-AD survey flyer in your AAA offices, congregate meal sites, senior centers, and adult day centers
- Print and include the ½ page flyer in home delivered meals
- Post information about the surveys on social media

Area Plan Year 4 Rollout

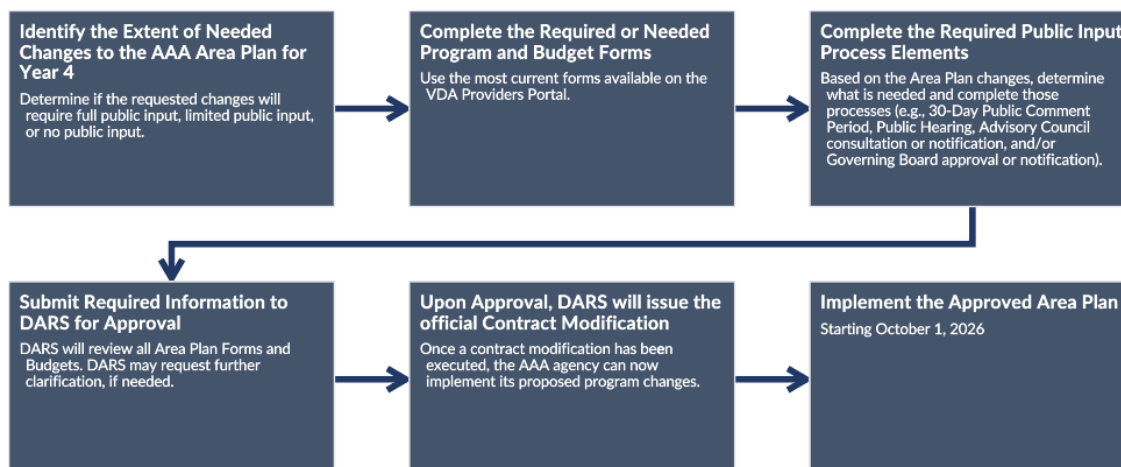
General Overview

- AAAs are not required to complete a full new Area Plan for Year 4.
- AAAs do not need to submit an updated Part 1 or Part 2 of the Area Plan, which was completed last year.
- As needed, AAAs will be required to make updates to their previously approved Area Plan (*in place for October 1, 2025 through September 30, 2026*).
- AAAs will use the same submission process (*i.e., the SharePoint Two-Way Portal*) that DARS established for last year’s Area Plan.
- All AAAs will receive a Contract Modification from DARS.

Submission Documents

All AAAs	Some AAAs (as needed)
<ul style="list-style-type: none"> • Submit Updated Area Plan Budget for Year 4 (October 1, 2026 – September 30, 2027) • NEW: Area Plan Cover Sheet (to identify changes from the prior year) 	<ul style="list-style-type: none"> • Service Pages: New or Updates to Existing • Waiver Request: New or Updates to Existing • Discontinuation Forms: <ul style="list-style-type: none"> • Service • Waiver • Home Delivered Meals Infrequent Delivery (HDM ID) Forms

Process Steps



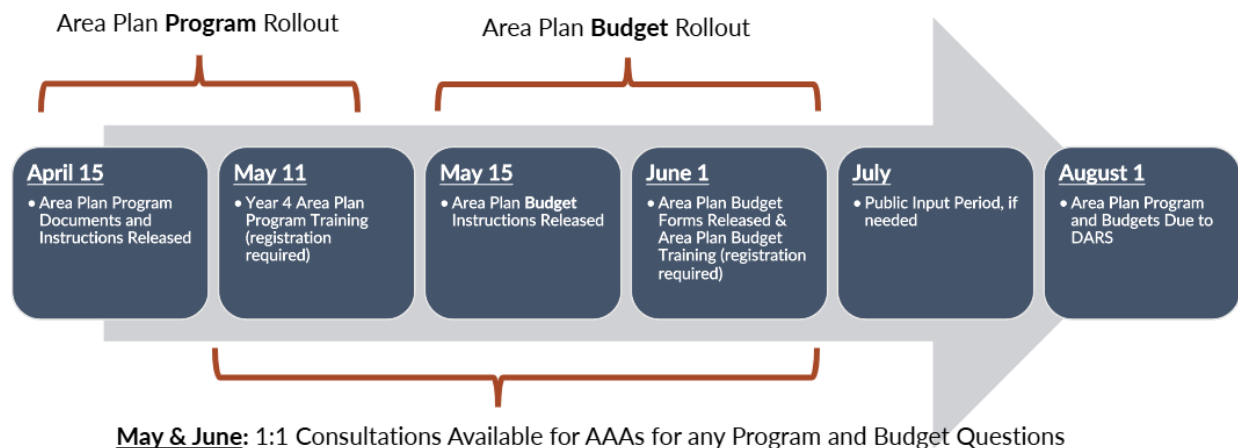
Public Input Process

Full Public Input	Limited Public Input	No Public Input
<ul style="list-style-type: none"> • Type 1 Amendments, which include: <ul style="list-style-type: none"> • MAP Waivers • Substantial or Numerous Changes* • Requires: <u>Public Hearing</u>, <u>30-Day Public Comment Period</u>, <u>Advisory Council Consultation</u> & <u>Governing Board Approval</u> 	<ul style="list-style-type: none"> • Type 2 Amendments, which include: <ul style="list-style-type: none"> • All Other Waivers • Addition/Removal of a Service • Moderate or Various Changes* • Requires: <u>30-Day Public Comment Period</u>, <u>Advisory Council Consultation</u> & <u>Governing Board Approval**</u> 	<ul style="list-style-type: none"> • Modifications, which include: <ul style="list-style-type: none"> • Annual Budgeting Changes • Transfer Requests • Tweaks to Existing Services • Requires, at a minimum: <u>Advisory Council Notification</u> & <u>Governing Board Notification**</u>

*Consult DARS to determine if your planned changes meet this criteria/threshold

**Local Government AAAs may use a designated approved. The designated approved must be submitted to/approved by DARS before the Area Plan process.

Process Timeline



Area Plan Document Access

Reminder: Year 3 Full Area Plan	Year 4 Area Plan
<ul style="list-style-type: none"> • This should already be in place. • AAAs must implement one of two options: <ul style="list-style-type: none"> • 1. AAAs can post the Area Plan Core Documents directly on the website <u>OR</u> • 2. AAAs can instruct the public how they can obtain a copy of the Area Plan Core Documents on the website. • Please review the Area Plan Program Companion Manual for details on which Area Plan documents must be posted online or available to the public upon request. 	<ul style="list-style-type: none"> • Draft Plan: Based on what level of public input process will be required for your Year 4 Area Plan Updates, make the required documents available. • Final Plan: Once approved by DARS, make the applicable final Area Plan documents available as required. • Consult with the Year 4 Area Plan Update Instructions for information on which documents must be posted.

Area Plan Rollout Trainings & Forms

- Area Plan PROGRAM
 - Program Forms and Instructions Released on April 15
 - TRAINING: Monday, May 11 from 2:00-3:30pm
- Area Plan BUDGET
 - Budget Instructions Released on May 15
 - Budget Forms Released on [Tentative] June 1
 - TRAINING: Monday, June 1 from 2:00-3:30pm
- Microsoft Form for AAAs to Submit Questions
 - FAQ Document will be issued periodically as needed
- Microsoft Form for AAAs to Request Consultation
 - 1:1 Consultations for AAAs (no Office Hours this year)
- Use this link to access the Area Plan 2027 Folder:
 - <https://sharepoint.wvrc.net/VDProviders/Shared%20Documents/Forms/Area%20Plan.aspx?id=%2FVDProviders%2FShared%20Documents%2FArea%20Plan%202027>

Waitlists and Unmet Needs

Waitlist Discussion

Why We're Revisiting Waitlist Tracking

- Continued emphasis from federal and state partners on tracking, data quality, and ROI
- Recent inquiry from the Deputy Secretary of HHR about Meals on Wheels waitlists
- Opportunity to reconnect on how AAAs are capturing unmet need
- This topic was last reviewed two years ago – time for a refreshed conversation

What We've Done So Far

- Held discussions with AAAs and DAS on waitlists and unmet needs
- Conducted a survey to understand current tracking practices
- Shared findings and gathered more in-depth input
- Made PeerPlace improvements: Added waitlist tracking enablement; Created a one-click New Encounter button; Developed supporting user guides
- Analyzed post-implementation usage and trends

What We're Seeing

- New PeerPlace features are not being used as expected
- Utilization decreased from 2024 to 2025
- Not aligned with anticipated increases due to declining ARPA funds

What We Need From You

- We're asking again for your perspective and insights
- Questions to consider for the upcoming discussion:

- How can DAS better support consistency and uniformity?
- Would additional PeerPlace training help?
- Should we formalize an annual waitlist reporting form?
- What other solutions or needs do you see?

Regulatory Expectations

What the OAA Final Rule Requires (1321.65(b)(3))

- AAAs must submit objectively collected, and where possible statistically valid, data on unmet need
- Applies to: Supportive Services, Nutrition Services, Evidence-based disease prevention & health promotion, Family caregiver support, Multipurpose senior centers
- Evaluation must consider all services, regardless of funding source

How DARS Interprets This (1321.65(b)(3))

- As part of the Area Plan, AAAs must provide a narrative/analysis of unmet need using
- PeerPlace data (as available)
- Other objective datasets (e.g., DARS Community Assessment Survey, local data sources)
- AAAs have flexibility in format and approach
- DARS **does not** prescribe a specific methodology, but expects clear data sources and evaluative conclusions

What's in Current Area Plan Guidance

- Summarize unmet needs in the PSA
- Use PeerPlace plus external datasets

- Cite all data sources clearly
- Identify unmet needs by service category (and by specific services where possible)
- Unmet needs should inform: The AAA's service menu and Planning and strategy for the FFY area plan cycle

Next Steps

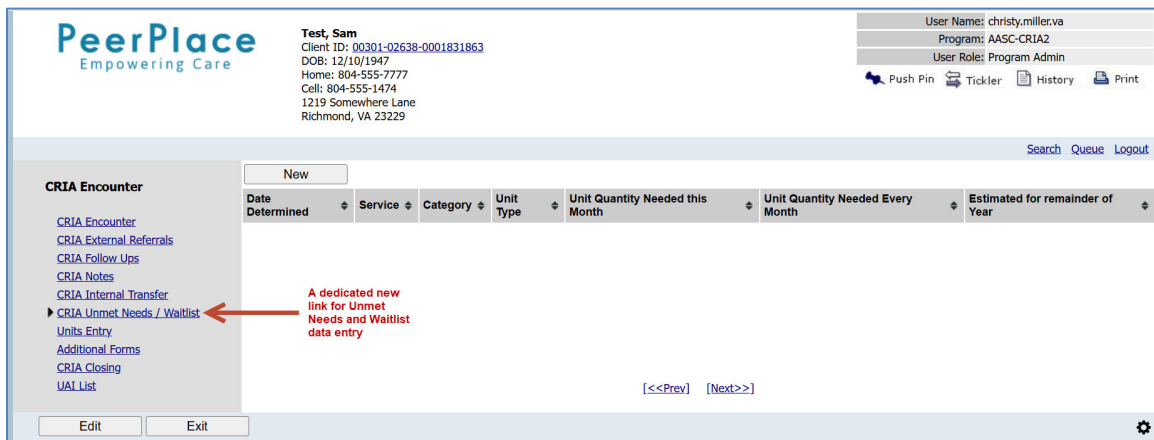
- Waitlist is one objective piece for assessing unmet need.
- DARS shared expectations from a regulatory perspective [1321.65\(b\)\(3\)](#)
- V4A Prepping for conversation, including outline April meeting

NWD CRIA Unmet Needs Data Entry

This document pertains to Agencies which document Unmet Needs.

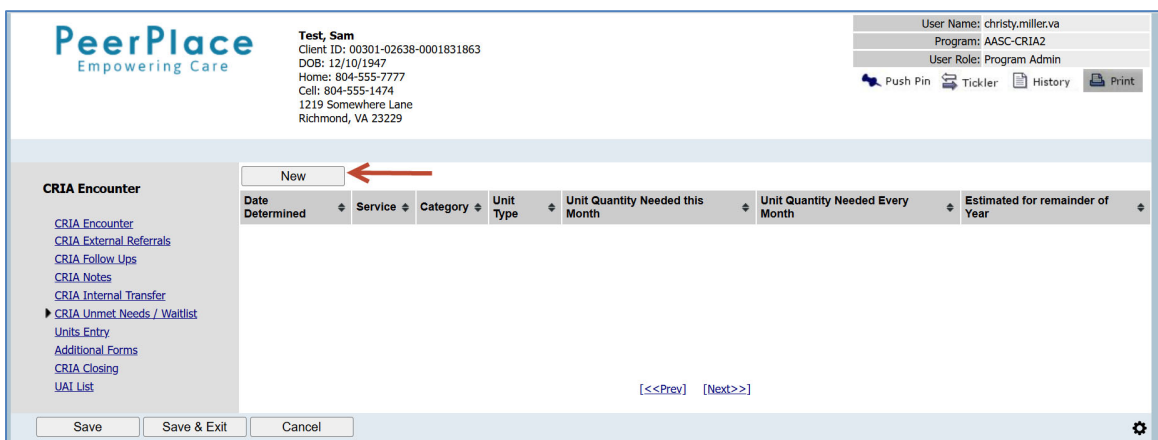
New Unmet Needs / Waitlist Link in CRIA2

A new link has been provided within the CRIA Encounter where Unmet Needs and Waitlist data can be entered and tracked. The Unmet Needs link that previously existed under Additional Forms has been removed. This change was put in place to allow for easier access to the data entry screen for Unmet Needs and Waitlist items.



Unmet Needs Data Entry Changes

1. Within a CRIA Encounter, click on the new CRIA Unmet Needs / Waitlist link
2. Click on the New button to enter a new Unmet Need / Waitlist





3. Complete the following data entry:
 - a. Enter Date Determined (this will default to today's date but can be edited to match the actual date determined)
4. Select either Underserved or Unserved
5. Select a Service from the dropdown of services provided by your agency
 - a. "Other Service" has been added to allow for entry of Unmet Needs for services which are not provided by your agency and when "Other Service" is selected, a textbox will appear for the description of the other service being entered
6. Select a Program that matches up with the Service being entered
 - a. These Programs match back to the AAA AMR values
7. Select a Unit Type that matches up with the Service being entered
 - a. A blue question has been provided if assistance is needed with determining what Unit Type to select based on the Service entered
8. Select Yes or No to indicate if the Service will occur every month
9. Enter the number of units needed every month (if the Service will be needed every month)
10. Click Save or simply hit the tab key to enable the system to perform the calculation of Unmet Needs in terms of units needed for the remainder of the year
11. Enter a Waitlist Start Date if this Unmet Need needs to be added to the Waitlist
12. Enter a Planned Program Queue After Waitlist if it is known where the Service will be provided at the end of the Waitlist

PeerPlace Empowering Care

Test, Sam
 Client ID: 00301-02638-0001831863
 DOB: 12/10/1947
 Home: 804-555-7777
 Cell: 804-555-1474
 1219 Somewhere Lane
 Richmond, VA 23229

User Name: christy.milleva
 Program: AASC-CRUA2
 User Role: Program Admin

Push Pin Ticker History Print

CRIA Unmet Needs / Waitlist

► CRIA Unmet Needs / Waitlist

Required fields are marked with an * asterisk.

Date Determined *: 12/10/2024

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 #: 22053 Home Delivered Meals [Home Delivered Meals]

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 #: Home Delivered Meals

Unit Quantity Needed This Month *: 10.00

Unit Type #: Meal

Will This Service Occur Every Month? *: No Yes

Unit Quantity Needed Every Month *: 30.00

Estimated for Remainder of Year: 10

After Calculation Unmet Need - Add Unmet Need to Waitlist

Waitlist Start Date (mm/dd/yyyy) #: 12/10/2024

Waitlist End Date (mm/dd/yyyy) #:

Waitlist Outcome Client Will Be Taken Off Waitlist Because #:

Planned Program Queue After Waitlist: AASC-Home Delivered Meals

Save Save & New Save & Exit Cancel

13. Click Save and Exit to save the record and exit the screen or Save and New to save the record and enter another Unmet Need Waitlist item



Example of data entry where the service being entered for the Unmet Need is not one provided at your agency:

View Builder Changes:

(*note - none of the screen changes which are part of this change, impacted the overall existing functionality of any reports, and reports containing unmet needs data will function the same way with the new changes)

CRIA Unmet Needs Client Detail:

In looking at the example above for data screen entry, where data was entered and flagged as a waitlist item you can see that the data entered for unmet needs as well as waitlist values is now captured in the updated version of the CRIA Unmet Needs Client Detail list.

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	Client Last Name
1831863	Test, Sam	12/10/2024	Home Delivered Meals	22053 Home Delivered Meals [Home Delivered Meals]	10.00	12/10/2024	-	Open	16	-	AASC-Home Delivered Meals	Test
1831863	Test, Sam	12/10/2024	Homemaker	Home Assistance	5.00	-	-	-	-	-	-	Test

The date for which the item was added to the waitlist is captured as well as a calculated value using the date when the item was added to the waitlist against



the current date. The planned program queue is also added for clarity for where the individual will be transferred when the waitlist is complete.

The following highlighted items have also been added as filters for the View Builder to assist with managing waitlists and identifying data for outcomes and other analytical purposes. When using these filters and then using the Export to Excel, the filters will remain intact.

The screenshot shows the PeerPlace software interface. At the top, the PeerPlace logo is displayed. The user information is: User Name: christy.miller.va, Program: AASC-CRIA2, User Role: Program Admin. The main heading is "View Builder - CRIA Unmet Needs Client Detail". There are navigation links: CRIA Encounter, CRIA Communication, Community Log, My Views, Search, Queue, Logout. The search criteria are: Type: CRIA Unmet Needs Client Detail, Date Range: Enter a Date Range, Date Range Start: 12/10/2024, Date Range End: 12/10/2024, Sort By: Client Name, Sort: Ascending. There are buttons for Go, Cancel, and Export to Excel. Below the search criteria is the "View Filters" section with two filters: "Client Last Name" and "Client Last Name", both with a relation of "Equal to". A dropdown menu is open showing "Client Last Name", "Days on Waitlist", "Post Waitlist Program Queue", "Waitlist End Date", "Waitlist Outcome", "Waitlist Start Date", and "Waitlist Status". The results section is titled "CRIA Unmet Needs Client Detail Results" and shows 2 Results. The table has columns: Client ID, Client Name, Program, Service, Estimated For Remainder of Year, Waitlist Start Date, Waitlist End Date, Waitlist Status, Days on Waitlist, Waitlist Outcome, Post Waitlist Program Queue, and Client Last Name. The data rows are: 1831863, Test, Sam, 22053 Home Delivered Meals (Home Delivered Meals), 10.00, 12/10/2024, -, Open, 16, -, AASC-Home Delivered Meals, Test; and 1831863, Test, Sam, Home Assistance, 5.00, -, -, -, -, -, -, Test.

Funding Formula Factors & Carryovers

Funding Formula Factors

Required Funding Factors

Must include the following, per 45 CFR 1321.49

- Geographic distribution: share of older adults aged 60+ within each Planning and Service Area (PSA)
- Greatest economic need: concentration of low-income older adults in each area
- Greatest social need: includes factors such as rurality, minority status, and low-income
- III-D (disease prevention/health promotion): allocation targets medically underserved areas with high need

Workflow

- Collect and analyze PSA data: population, ethnicity, rurality, and medical need
- Apply weights to each factor and calculate each PSA's share of the federal and state dollars (pending receipt of awards)
- Assess and apply minimum funding thresholds (base)
- Issue equitable, data-driven, transparent allocations for budgeting the Area Plan services

2027 Funding Formula Factors

- Based on the 2018-2022 American Community Survey (ACS) Special Tabulation on Aging
- III-D calculations updated due the changes in Medically Underserved Areas (MUAs)
- Health Resources and Services Administration (HRSA)

- Washington, Montgomery, and Prince Edward County no longer classified as an MUA
- Highland County newly designated as an MUA

Data Elements

1. **2027 Formula:** This tab shows the final FFY2027 allocation percentage by PSA derived from the 2018-2022 ACS data. It lists each PSA's share or distribution of allocations based on demographic data.
2. **III-D Calculation:** This is the detailed breakdown of the evidence-based disease prevention and health promotion practices. It uses the same core factors and weights as the Intrastate Funding Formula and adds a Medically Underserved Area adjustment at the locality level.
3. **2022 ACS Formula:** This is the base (non-III-D) funding formula workbook. It applies the factor mix and weights and provides the PSA level rollups and resulting shares as well as itemizing the totals in each jurisdiction.
4. **Rural-Urban:** Tab documents rural status by jurisdiction, with square miles, total population, density (persons per square mile), and a Y/N flag for whether the locality is considered rural. A jurisdiction is treated as rural if it's not within a Metropolitan Service Area (MSA) or if its density is <50 people per square mile, aligning with Office of Management and Budget (OMB) Bulletin No. 23-01
5. **Edited Table:** The tab compares PSA totals to jurisdictional totals for key counts of population aged 60+, 60+ in poverty, and 60+ minority below poverty. It verifies the roll-ups are consistent with the raw jurisdiction data and that the PSA shares are correctly derived from the statewide totals.
6. **2022 Raw Data Tables:** This tab contains the underlying 2018-2022 ACS 5-year data used to compute factors at the jurisdiction and PSA levels. It confirms that PSA totals match jurisdiction totals and provides the counts used to calculate the weighted formula.
7. **Age Orig Table – VAS21003:** This is the ACS S21003 Age table (2018-2022) for Virginia and sub-geographies. It shows total population and age brackets (55-59, 60-64, 65-69, 70-74, 75-79, and

80+) with standard errors and supports the population 60+ values used throughout the spreadsheet.

8. Poverty & Minority Ori-VAS21040: This is the source for minority in poverty demographics used in the funding formula. The tab provides the jurisdictional level data that calculates the funding formula's 60+ minority below poverty factor.

Carryover for FFY 2026 Awards

Carryover Waived

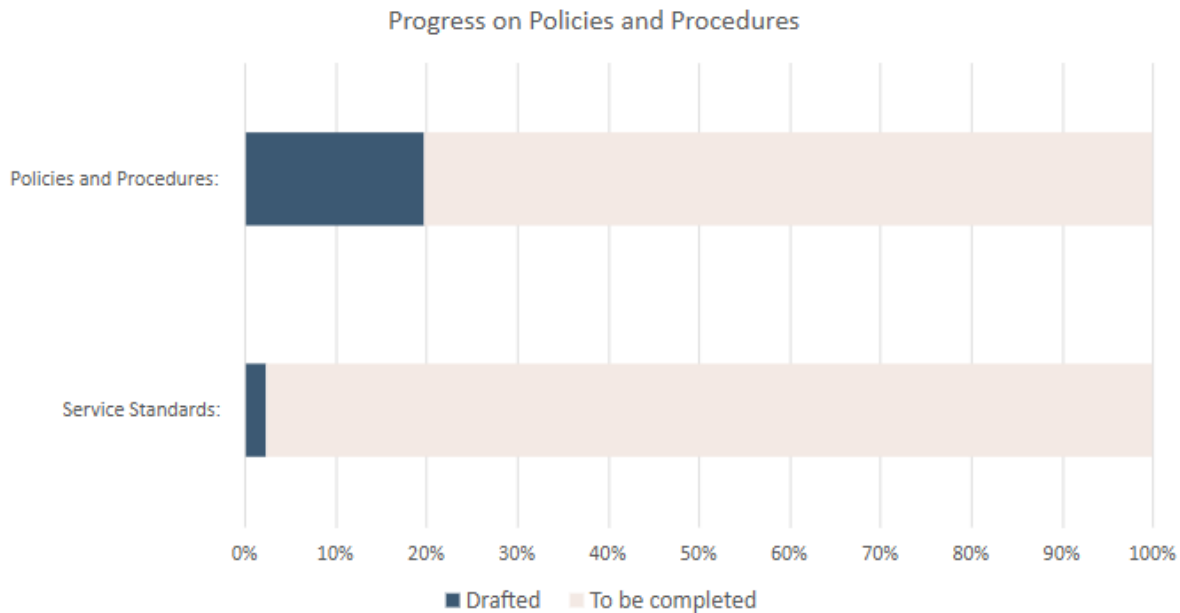
- 10% of each award - waived
- Additional flexibility permits a greater portion of unspent funds to be carried into FY2027
- Address cost increases (food, fuel, etc.), support service continuity, and reduce the need for budget modifications/de-obligation
- Carryover request form will be provided with the upcoming budget package

HDM-ID

- No changes in the eligibility of Home Delivered Meal-Infrequent Delivery (HDM-ID) Waivers
- Area Plan Training will cover the expectations related to HDM-ID as we enter the final year of the Area Plan
- DAS will be connecting with those AAAs that currently use HDM-ID in preparation for the Area Plan

Policies and Procedures Updates

Policies and Procedures Update



Service Standards Updates

- To be implemented on 10/1/2027 when the new area plan cycle takes effect
- Anticipated simplification of some program names
- Some services that are not being utilized by AAAs may be discontinued
- The National Family Caregiver Support Programs Guidance will be absorbed into new service standards for programs like Support Groups, Individual Counseling, Caregiver Training and Other Respite
- Care Coordination, Service Coordination Level 2 and Service Coordination Level 1 will be combined into one single standard with differentiation between program requirements where necessary

Services Standards On the Drafting Table:

- Chore
- CRIA
- Options Counseling
- Legal Assistance
- Adult Day Center

Current Focus: Standardizing organization across all standards, condensing background check and program income sections, instead inserting language to refer to those policies. Clarifying content around service delivery, administration and quality assurance.

Monitoring Process Changes

Updated Monitoring Tool

- DARS has updated the Monitoring Self Assessment tool and reduced the number of pages from 53 to 37 pages.
- The Monitoring Self Assessment tool is located on page #2 of the [Providers Portal](https://sharepoint.wvrc.net/VDaproviders/SharedDocuments/Forms/FormsReports.aspx) Forms/Reports page:
<https://sharepoint.wvrc.net/VDaproviders/SharedDocuments/Forms/FormsReports.aspx>

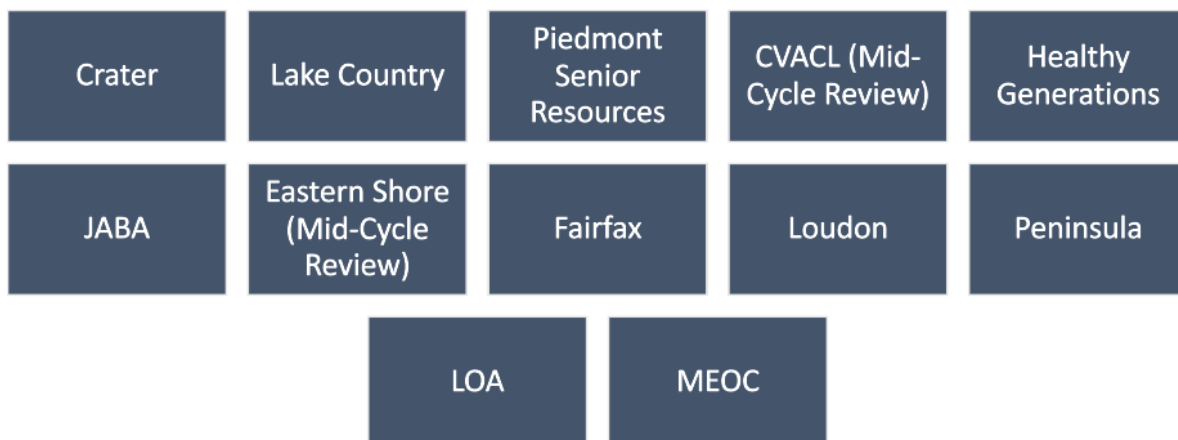
Upcoming Training

DARS is developing training for the following topics:

- Operational and Financial Internal Controls (April CFO call)
- Subcontractor monitoring (May 2026)
- PeerPlace (Schedule coming soon)

2026 Monitoring Schedule

Here are the AAAs that we will visit in 2026:



2027 Monitoring Schedule

Here are the AAAs that we will visit in 2027:

Appalachian	Encompass	Southern	Senior Connections
Rappahannock	Eastern Shore	Prince William	

2028 Monitoring Schedule

Here are the AAAs that we will visit in 2028:

District Three	NRV	VPAS	Shenandoah
Alexandria	Arlington	CVACL	SSSEVA

2025-2030 Dietary Guidelines

Continue current operations while beginning the planning process.

- Assess how current menus already align with the new guidelines
- Identify areas that will require changes
- Develop a realistic, phased implementation timeline
- Address practical considerations like contract modifications, vendor capabilities, and budget impacts



Resources:

- <https://acl.gov/senior-nurition>
- <https://realfood.gov>