**NC DIVISION OF AGING AND ADULT SERVICES**

**NC AREA AGENCIES ON AGING**

**LTSS OUTREACH TO UNDERSERVED TARGET POPULATIONS**

**MONITORING TOOL**

**Part I: Program Verification**

Provider Agency:

Review Date:       State Fiscal Year:

Agency Staff Interviewed:

Signature of Reviewer(s):

1. Policies include that the agency conducts outreach [ ]  Yes [ ]  No

to older adults aged 60 and older or persons acting

on their behalf to provide information that will connect

them to existing services and benefits across funding

sources. (Administrative Letter # 22-02, p. 24)

 Documentation reviewed/Comments:

1. Policies indicate that outreach activities include outreach [ ]  Yes [ ]  No

to underserved target populations identified in the OAA

(Older individuals with greatest economic and social

need with particular attention to low-income older

adults, including low-income minority older adults,

older adults with limited English proficiency, and

older adults in rural areas.) (Administrative Letter # 22-02, p. 24)

 Documentation reviewed/Comments:

1. ZGA 546 reflects that agency tracks and reports [ ]  Yes [ ]  No

in ARMS the monthly count of one-on-one contacts

between the agency and individual older adults or

persons acting on their behalf. (Note: activity

that involves contact with multiple current or potential

clients are only counted if it is possible to do a head

count or there is a sign-in sheet.)

(Administrative Letter # 22-02, pp. 24-25)

 Documentation reviewed/Comments:

1. Agency maintains a log of individual and group outreach [ ]  Yes [ ]  No

contacts between the agency and the older adults or

 persons acting on their behalf. (Administrative Letter # 22-02, p. 24)

 Documentation reviewed/Comments:

1. Outreach log includes, at a minimum, date of contact, [ ]  Yes [ ]  No

name of individual or group event, and information or

 resources shared. (Administrative Letter # 22-02, p. 24)

 Documentation reviewed/Comments:

1. Supporting documentation of outreach events is kept [ ]  Yes [ ]  No

on file (e.g., sign-in sheets, newspaper ads/articles,

 online media postings, flyers, etc.). (Administrative Letter # 22-02, p. 24)

 Documentation reviewed/Comments:

1. Documentation reflects outreach efforts [ ]  Yes [ ]  No

to target older individuals 60+ or people acting

on behalf of persons 60+ with greatest economic and

social need (with attention to low-income older adults,

including low-income minority older adults, older adults

with limited English proficiency, and older adults residing

 in rural areas). (Administrative Letter # 22-02, p. 24)

 Documentation reviewed/Comments:

**Please explain any questions with extenuating circumstances:**

**Notes:**

#### Part II: Fiscal Verification

Agency:       Date:

Agency Staff Interviewed:

Signature of Reviewer:

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1. Agency budget shows monies used to Yes [ ]  No [ ]  N/A [ ]

 support the LTSS Outreach service

 *(e.g., DAAS 732 A).*

 Documentation reviewed/Comments:

2. If positions are funded, Agency budget shows LTSS Yes [ ]  No [ ]  N/A [ ]

Outreach designated position(s) and % of position(s)

funded for LTSS Outreach *(e.g., DAAS 732 A1).*

 Documentation reviewed/Comments:

1. If the agency has collected consumer contributions, Yes [ ]  No [ ]  N/A [ ]

the ZGA 370 YTD matches the agency’s YTD

financial records.

 Documentation reviewed/Comments:

1. At the time of the review, the % utilization rate is Yes [ ]  No [ ]  N/A [ ]

consistent with budget projections for the fiscal year.

*(E.g., ZGA 370 YTD)*

Documentation reviewed/Comments:

 If not, describe any extenuating circumstances and/or

 planned adjustments.

5. Outreach costs are in line with allowable Yes [ ]  No [ ]  N/A [ ]

 expenditures and can be attached to a function

of the LTSS Outreach service (e.g., staffing, travel,

equipment, printing, billboards, online resources,

translation services for outreach materials, etc.).

*(Select a month of reimbursement in ARMS*

 *and document that reimbursement correlates with*

 *actual expenses (e.g., payroll records, agency’s*

 *general ledger, agency’s expense account).*

 Documentation reviewed/Comments