**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