



PROGRAM REPORTING
QUICK
REFERENCE GUIDE

Title III Older Americans Act Services

February 2023

Table of Contents

IIIB Aging & Disability Resource Network (ADRN) Access Package	2
IIIB Counseling	4
IIIB Telephone Reassurance	4
IIIB Friendly Visiting	5
IIIB Transportation	6
IIIB Legal Services	6
IIIB Community Connections Collaborative	7
IIIC Congregate and Home Delivered Meals	8
IIID Disease Prevention and Health Promotions.....	10
IIIE Caregiver Resource Center and Caregiver Counseling Center	11

IIIB Aging & Disability Resource Network (ADRN) Access Package

Service	Unit Definition	Service Activity Example	Units to Report/Where
Information & Assistance (I&A)	One Contact	Staff <u>assists client in person</u> at the office with a housing application. Staff later makes a <u>phone call to the housing complex</u> w/a question on client's behalf. Staff <u>calls client</u> to discuss status of application and learns client needs resources for food. <u>A list of food pantries is mailed to the client.</u>	4 units under I&A
Outreach	One Contact. Outreach units are based on one-on-one contacts by a service provider.	Staff <u>conducts outreach call</u> to an older adult not previously known to the agency and discusses services and resources available.	1 unit under Outreach
Options Counseling	One Contact. See additional guidance under "Other Helpful Information."	Client needs assistance obtaining permanent affordable housing and isn't sure where to start so Options Counseling is provided. <u>Staff have 10 contacts with client in 3 months related to initial goal of obtaining housing</u> , which included 3 phone calls with the soon-to-be-landlord.	10 units under Options Counseling
Flexible Community Services (FCS)	One person=One Unit FCS persons and units should always be the same number	Client needs assistance with rental assistance. Provider pays the overdue rental payment. Note: Client may also be receiving assistance for FCS via I&A or Options Counseling. Report units as indicated above.	1 unit under FCS

IIIB Aging & Disability Resource Network (ADRN) Access Package (Continued)

Other Helpful Information:

- Persons should be reported as unduplicated by service, by year. Example: If there are 5 I&A contacts with Fred Rogers in one fiscal year, he is reported as 1 person for the whole fiscal year who received 5 units of service.
- Units for I&A, Outreach and Options Counseling may be counted for active methods of contact with clients such as: phone calls or virtual assistance (e.g. Zoom), in-person assistance, chat messaging, active referrals or follow ups to another service provider made on behalf of a client, and outgoing mail or email to clients with information and resources. Incoming emails, faxes, letters, or requests received on your website/social media may not be counted as units. A unit of service cannot be counted until the provider actively provides information back to the client (or person contacting on their behalf).
- If a worker begins providing I&A and then turns the same interaction with a client into Options Counseling, then I&A CANNOT be counted in addition to Options Counseling, since Options Counseling is the primary service being provided. However, if the worker schedules a separate appointment with the client for Options Counseling, then the initial interaction can be counted as I&A.
- Once Options Counseling has begun with the client, follow up contacts with or on behalf of the client will be counted as Options Counseling units while the case is open and active. If the client contacts you after the Options Counseling case has been closed, then you would count the contact (unit) under the appropriate service (for example, I&A). However, if the issue/need is related to their previous Option Counseling case or it seems appropriate again to offer Options Counseling – then you can count those contacts as Options Counseling units.

IIIB Counseling

Service	Unit Definition	Service Activity Example	Units to Report/Where
Counseling	One Contact=One Unit	A client receives 10 sessions of counseling of 45 minutes each during the quarter.	10 units under Counseling
	One person attending educational event, session, or workshop=One Unit	An attendee of a mental health concern educational event or workshop such as identifying depression.	1 unit under Counseling
		A client attends a working through loss group therapy session.	1 unit under Counseling

Other Helpful Information: If Billie was a counseling client who attends the loss group therapy and has one-on-one therapy, she would be one person for the entire fiscal year, but each contact would be a unit.

IIIB Telephone Reassurance

Service	Unit Definition	Service Activity Example	Units to Report/Where
Telephone Reassurance	Each telephone reassurance call placed or received by a participant.	Mr. Singh enrolls on January 10th. In January, the coordinator makes <u>2 calls</u> to Mr. Singh to check in on him while working on matching him with a volunteer. Once matched with volunteer Jeevan, the coordinator schedules a 3-way meet & greet phone call (<u>1</u>). Jeevan begins calling Mr. Singh in February and they have <u>7 calls</u> . In March, they have <u>8 calls</u> .	18 units under Telephone Reassurance (1 unduplicated person)

Other Helpful Information: Persons should be reported as unduplicated by service, by year. Example: If there are 40 units of service provided to Mr. Singh in one fiscal year, he is reported as 1 person for the whole fiscal year who received 40 units of service. If Mr. Singh continues with the program into the next fiscal year, he again becomes a new unduplicated person, and the units of service count starts over again.

IIIB Friendly Visiting

Service	Unit Definition	Service Activity Example	Units to Report/Where
Friendly Visiting	One hour of staff/volunteer time expended on behalf of a participant constitutes one unit of service.	Ms. Johnson enrolls on April 5th. In April, the coordinator spends <u>3 hours</u> with Ms. Johnson to start services including matching her with Betty, a volunteer. In May, Betty spends <u>4 hours</u> visiting plus <u>2 hours</u> travel time. In June, Betty spends <u>6.5 hours</u> visiting plus <u>2 hours</u> travel time.	17.5 units under Friendly Visiting (1 unduplicated person)

Other Helpful Information:

- Units of service based upon one hour of staff/volunteer time expended on behalf of a participant include the time necessary for preparation, travel, and case documentation.
 1. Examples of activities that can be included in your unit of service count: conducting interviews and completing intake. Forms with participants, participant/volunteer matching, administering Loneliness scales, documenting case notes, travel to/from a participant's home, making a referral to a local service agency on the participant's behalf, etc.
- Units of service do not include administrative activities such as preparation of reports and grant applications.
- Units should be measured to the nearest quarter hour.
- Persons should be reported as unduplicated by service, by year. Example: If there are 35 units of service expended on behalf of Ms. Johnson in one fiscal year, she is reported as 1 person for the whole fiscal year who received 35 units of service. If Ms. Johnson continues with the program into the next fiscal year, she again becomes a new unduplicated person and the units of service count starts over again.

IIIB Transportation

Service	Unit Definition	Service Activity Example	Units to Report/Where
Transportation	Each one-way trip to or from community locations per participant constitutes one unit of service. A round trip equals two units.	A participant takes <u>2 one-way trips</u> in October, <u>3 one-way trips</u> in January, and <u>6 one-way trips</u> at other times during the fiscal year.	11 units under Transportation (1 unduplicated person)

Other Helpful Information:

- The service unit does not include any other activity, and a participant must be transported to or from a community-based location.
- Persons should be reported as unduplicated by service, by year. Example: If there are 11 units of service provided to a participant in one fiscal year, they reported as 1 person for the whole fiscal year who received 11 units of service. If a participant continues with the program into the next fiscal year, they again become a new unduplicated person and the units of service count starts over again.
- If a family caregiver, grandchild, or adult child with developmental disabilities accompanies an older adult participant on a ride, only the older adult participant is counted as an unduplicated person for reporting purposes.

IIIB Legal Services

Service	Unit Definition	Service Activity Example	Units to Report/Where
Legal	One hour of time spent by one person working (Attorney, Paralegal and/or Law Student) on a case equals one unit of service.	A client needs a consultation on a dispute they are having with their landlord. Staff conducts a one hour meeting with client to advise on next steps. Staff conducts a one hour presentation at a senior center on legal services available. It took one hour to prepare the presentation and one hour to travel back and forth to center.	1 unit under Legal 3 units under Legal

Other Helpful Information: Unit includes case documentation, preparation, and travel time.

IIIB Community Connections Collaborative

Service	Unit Definition	Service Activity Example	Units to Report/Where
Education	One attendance at an educational lecture, event or workshop = One Unit	A client attends a how to recycle event in the morning, then attends a how to write a will workshop in the afternoon.	2 units under Education
		A person attends A Matter of Balance 6 out of the 8 sessions.	6 units under Education
Health Screenings and Evaluations	One session per participant=One Unit	A person attends a podiatry visit once a month during the quarter.	3 units under Health Screenings and Evaluations.
		A person attends an annual vision and hearing screening.	2 units under Health Screenings and Evaluations.
Recreation	1 hour of staff or consultant's time spent on behalf of the participant=One Unit	A certified yoga instructor arrives ½ hour early to set up the room, leads the group of 10 for the 1-hour yoga session, then spends an additional ½ hour disassembling the equipment and/or room. 2 hours total.	2 units under Recreation.
		A staff person shops for materials for a craft class, 1 hour, spends ½ hour setting up the room, leads the group of 8 for 1 hour, then cleans up the room for ½ hour after. 3. hours total.	3 units under Recreation.

Other Helpful Information: One person can be counted once in each of these service areas without being considered a duplicate person. For instance, if Billie attends a recycling event under education and a craft meeting under recreation, she would be counted as one person under education and one person under recreation. However, if she attends weekly crafting classes, she would be counted as once person under recreation for the entire fiscal year, but then as a new person at the beginning of the next fiscal year.

IIIC Congregate and Home Delivered Meals

Service	Unit Definition	Service Activity Example	Units to Report/Where
Congregate Meal	One meal	<p>A hot or other appropriate meal served in a center strategically located to maximize access by older persons within a community.</p> <p>An older adult had a meal (breakfast, lunch, or dinner) at a restaurant or a senior center in the Congregate dining program.</p>	1 unit under Congregate meal
Congregate - Shelf stable meal	One meal	<p>A meal consisting of canned and dried foods not requiring refrigeration or freezing, ready to eat with minimal preparation (i.e., heating soup) and intended to be used during inclement weather or other emergencies making delivery of meals not feasible.</p> <p>An older adult received a 3-pack of shelf stable meals while participating in the Congregate dining program at the park district or other approved congregate dining sites.</p>	3 units under Congregate shelf stable meals
Home Delivered Meal (HDM)	One meal	<p>A meal which is hot, cold, frozen, dried, or canned served to older persons who are home bound.</p> <p>An older adult received a delivery of 5 meals in one week; or an older adult received a delivery of 7 meals in one week (weekend meals)</p>	5 units under type (hot, cold, or frozen); or 7 units under type (hot, cold, or frozen)
HDM Hot meal	One meal	<p>A meal which is hot when delivered and eaten.</p> <p>An older adult received 1 (hot) home delivered meal and 4 (frozen) home delivered meals during a Monday delivery.</p>	1 unit under HDM Hot and 4 units under HDM Frozen

IIIC Congregate and Home Delivered Meals (Continued)

Service	Unit Definition	Service Activity Example	Units to Report/Where
HDM Cold Meal	One meal	<p>A meal delivered cold that may be eaten cold, such as a sandwich or salad meal, or may require reheating to be eaten hot.</p> <p>An older adult received an entrée salad or sandwich for home delivered meals.</p>	1 unit under HDM cold
HDM Frozen meal	One meal	<p>A meal delivered frozen and required heating before being eaten.</p> <p>An older adult received 1 (hot) home delivered meal and 2 (frozen) home delivered meals during a Friday delivery.</p>	1 unit under HDM hot 2 units under HDM frozen
HDM shelf stable meal	One meal	<p>A meal consisting of canned and dried foods not requiring refrigeration or freezing, ready to eat with minimal preparation and intended to be used during inclement weather or other emergencies making delivery of meals not feasible.</p> <p>An older adult received 5-pack HDM shelf stable meals.</p>	5 units under HDM shelf stable
HDM MCO	One meal	<p>A meal referred by Managed care organization.</p> <p>An older adult received 4 HDM meals (could be hot, cold or frozen meal) in one week.</p>	4 units under HDM MCO

IIIC Congregate and Home Delivered Meals (Continued)

Other Helpful Information:

Unduplicated persons are the number of different eligible persons who have consumed a meal during the current fiscal year (AgeGuide).

If there are 7 people attending a weekly education or counseling session, then the unit count would be 7, the unduplicated count of people served is 7. If during the second weekly educational or counseling session, 4 people return from the first meeting and 4 new people join, then the unit count for the month to date would be 15 (7 sessions in 1st week + 8 sessions in 2nd week), and the unduplicated count of people served is 11 (7 people in 1st week + 4 new people in 2nd week). (IDOA 603.20 D)

Nutrition Unit of Service: Each meal provided to an eligible person constitutes one unit of service (IDOA 603.20 D). Partial meals are not counted as a unit. Second meals can be counted as a unit for reporting and record-keeping purposes only if a complete meal is served (AgeGuide).

Nutrition service providers are eligible to receive Administration on Aging (AoA) cash assistance in the form of a funding allocation for meals served through AoA's NSIP Nutrition Program for the Elderly. Allocated funding may be claimed for meals that meet the dietary guidelines as specified by the Illinois Department on Aging and are served to eligible participants, which include persons 60 years of age or older, their spouses, disabled persons and volunteers as described in Section IV G 1 & 2 above. **NSIP reimbursement may NOT be claimed for meals served to guests or staff under 60 years of age.**

Title IIID Disease Prevention and Health Promotions

Service	Unit Definition	Service Activity Example	Units to Report/Where
Disease Prevention and Health Promotion	One session per participant=One Unit	A person attends A Matter of Balance 6 out of the 8 sessions.	6 units
		A person attends Bingocize 14 out of the 20 sessions	14 units

IIIE Caregiver Resource Center and Caregiver Counseling Center

Service	Unit Definition	Service Activity Example	Units to Report/Where
Access Assistance	One Contact=One Unit	5 phone calls to complete TCare Screen, set up TCare Appointment, Call to arrange Gap Filling Service with the utility company, Follow up to TCare Assessment, Phone Call to make referral to Food Pantry	5 units under Access Assistance
Gap Filling	One Person=One Unit Persons and units should always be the same number (1:1 ratio)	Caregiver needs assistance with a utility company. Provider pays the utility bill. Caregiver makes 6 phone calls to arrange payment of utility bill	1 unit under Gap Filling 6 units under Access Assistance
ADRD Gap	One Person=One Unit Persons and units should always be the same number (1:1 ratio)	A caregiver for an older adult with Alzheimer's needs assistance with respite care while he or she is away on vacation. The provider helps the client by providing them with assistance funds that will be used to cover the cost of that respite care.	1 unit under ADRD
Respite Services	Hour of Service (both by provider staff and respite provided)=One Unit	Provider Staff make 10 phone calls, processes the respite contract, totally 3 hours to arrange for respite care. Nursing Home provides 96 hours of respite services.	3 units under Respite 96 units under Respite
Counseling	One session per participant=One Unit	A caregiver receives 10 sessions of counseling, of 45 minutes each during the quarter.	10 units under Counseling
Training and Education	One session per participant=One Unit	A caregiver attends a Stressbusters session, 9 weeks, 8 sessions during that 9 weeks	8 units under Training and Education
Support Group	One session per participant=One Unit	Caregiver attends an ongoing support group 6 times during the quarter	6 units under Support Groups

Other Helpful Information: Persons should be reported as unduplicated by service, by fiscal year. If Jane Smith receives Access, Gap, and Counseling, she is reported once as a person in each service during the fiscal year. If Jane receives Access Services 10 times in one fiscal year, she is reported as 1 person for the whole fiscal year who received 10 units of service.