

## MEMORANDUM

**NOTICE #: 071717-1-I-SWCBS**

TO: Area Agency on Aging (AAA) Executive Directors

FROM: Jeffrey S. Bragg, Secretary

DATE: July 17, 2017

SUBJECT: Notice of Instruction: Reporting Requirement for OAA and LSP Nutrition Services

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The purpose of this notice is to inform AAAs that the Department is changing the reporting requirements for nutrition services. Effective January 1, 2018, the following nutrition services provided through Local Services Program (LSP) and Older Americans Act Title IIIC (O3C1 and C2) funding will require monthly aggregate reporting by client:

- Congregate Meals Screening (NTSC);
- Congregate Meals (CNML, CNMLB, CNMLS, and CNMLM);
- Home Delivered Meals (HDM, HDMF, and HDMH);
- Nutrition Counseling (NUCOI); and
- Nutrition Education (NTED).

Per the service reporting requirements located in the Department's Programs and Services Handbook, monthly aggregate reporting by client requires the following:

- a) Each client must be enrolled; and
- b) Individual service units are entered monthly at a minimum for each client. If the service has a variable cost, the billed amount is required.

From January 1, 2018, forward, each client receiving nutrition services funded through Local Services Program (LSP) and Older Americans Act Title IIIC (O3C1 and O3C2) will be:

1. Entered in CIRTS with the following required information:
  - a. Client's first and last name;
  - b. Client's Social Security Number (SSN);

4040 Esplanade Way, Tallahassee, FL 32399-7000  
Phone: (850) 414-2000 | Fax: (850) 414-2004 | TDD: (850) 414-2001

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- c. Owner ID;
  - d. County of service;
  - e. Client's date of birth; and
  - f. Client's address, including street, city, state, and ZIP code;
2. Enrolled in LSP, O3C1 and O3C2; and
  3. Reported by SSN or pseudo ID for nutrition services received by program. The number of units provided to the client will be entered at least once a month by client.

Reporting requirements for eligible individuals, not enrolled as clients are as follows:

- A "guest" is an individual eligible to receive meals, but has not yet been assessed and enrolled as a client. A guest may be:
  - an individual who is a spouse of a client age 60 or older;
  - an individual with disabilities who resides at home with a client;
  - an individual with disabilities who resides in a housing facility occupied primarily by older individuals where congregate nutrition services are provided; or
  - an individual age 60 or older who is not a client.
- A "guest" will be assessed, enrolled, and reported as a client after receiving three meals within 30 days. (Note a guest may become a client prior to receiving three meals.) To become a client, an individual will be entered in CIRTS, enrolled in LSP or OAA IIC1 or C2, and reported by SSN or pseudo ID. If under age 60, the individual will be enrolled with the new CIRTS eligibility code, UN60 (under 60).
- Meals provided to guests will be recorded in CIRTS using the new CIRTS service code, CNMLG (Congregate Meals Guest) or HDMG (Home Delivered Meal Guest). The services will be reported under the SSN of the enrolled client, the person associated with the guest (either a spouse or an individual with disabilities who resides at home with a client). Supporting documentation would include congregate site sign-in logs or meal delivery sheets.
- The new CIRTS service code, CNMLG will be used to aggregately report meals served to meal site guests who reside in a housing facility occupied primarily by older individuals where congregate nutrition services are provided; or guests age 60 or older who are not associated with an enrolled client. Supporting documentation would include congregate site sign-in logs.
- The new CIRTS service code, CNMLV (Congregate Meals Volunteers) will be used to aggregately report meals served to volunteers regardless of age who provide essential services on a regular basis during meal hours at congregate meal sites. Supporting documentation would include a record of the volunteer's attendance, work hours, and applicable background screening information.

The DOEA Assessment Form 701C is used to complete initial assessments and annual reassessments for individuals receiving congregate meals screening, congregate meals, nutrition education, and nutrition counseling services in the OAA Title IIIC1 program. The 701A is used to complete initial assessments and annual client reassessments for individuals receiving home delivered meals, nutrition education, and nutrition counseling services in the OAA Title IIIC2 program, and LSP services that are operated under OAA standards. The service “Screening and Assessment” is the OAA service that is billed in CIRTS to conduct initial and annual reassessments in LSP and OAA Title IIIC2.

Each AAA is responsible for providing timely CIRTS access and training to program providers to facilitate client registration and invoicing for services provided beginning January 1, 2018. If providers have independent systems for registering clients and tracking services provided, and their systems allow for electronic data interchange (EDI), the data they collect in their systems can be uploaded monthly to CIRTS. However, to facilitate this monthly upload, AAAs will need to contact their Department contract managers and request CIRTS EDI access for their providers. As LSP funds are general revenue appropriated on the state fiscal year, it is acceptable that this result is partial year reporting for the January 1, 2018, implementation period. Therefore, half of the January – December 2018 reporting period will include aggregately reported data, while in the latter half of the year, data will be reported by client.

Your assistance and cooperation are appreciated in implementing this change. The Department anticipates that this change in reporting requirements, as recommended by the Inspector General, will enhance AAA program administration, increase service provider accountability, and improve the accuracy of the data submitted to the National Aging Programs Information System (NAPIS). If there are any questions, please do not hesitate to contact your contract manager.