



RICK SCOTT
GOVERNOR

MEMORANDUM

NOTICE #: 102914-1-I-SWCBS

TO: Area Agencies on Aging (AAAs)

FROM: Charles T. Corley, Secretary

DATE: October 29, 2014

SUBJECT: Notice of Instruction: Reporting Requirements for Older Americans Act Non-Registered Transportation Services

CHARLES T. CORLEY
SECRETARY

The purpose of this Notice is to notify the AAAs that the Department is changing the reporting requirements for non-registered transportation services provided through the Local Services Program (LSP) and Older Americans Act Title IIIB (OA3B). Effective January 1, 2015, monthly aggregate reporting by client will be required. This method of reporting was recommended by the Inspector General and will improve the Department's reporting of National Aging Programs Information System (NAPIS) data.

Currently, clients receiving non-registered transportation services through LSP and OA3B are not required to be entered into the Client Information and Registration Tracking System (CIRTS) because non-registered transportation services are reported using the Monthly Aggregate Reporting method. As a result, it is difficult to identify and determine the number of individuals served.

Current reporting requirements are located in the Department's Programs and Services Handbook. The current CIRTS reporting methods include:

1. Monthly Aggregate Reporting by Client:

- a. Each client must be enrolled.
- 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.

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2. Monthly Aggregate Reporting:

- a. Total units for all services are entered, not requiring by client reporting.
- b. These entries are made on the “Services by Provider – Aggregate” screen.
- c. If the service has a variable cost, the billed amount is required. Clients only receiving services which require aggregate reporting do not need to be in CIRTS.

3. Monthly Aggregate Reporting – Annual Unduplicated Count: For programs and services requiring an unduplicated client count:

- a. Each client must be enrolled. If the client is already enrolled, verify demographics and enrollment information.
- b. To count a client as unduplicated on the “Services by Client” or Services by Provider – Individual SSN” screen, enter the SSN, program and service received once per fiscal year (October through September for federal programs or July through June for state programs). Enter "0" in the Units field.
- c. Actual units of service are entered monthly on the “Services by Provider – Aggregate” screen.

Beginning January 1, 2015, transportation services provided through LSP and OA3B must be reported using the Monthly Aggregate Reporting by Client method. With the implemented change for LSP and OA3B, each client receiving transportation services will be:

- 1. Entered into CIRTS with the following required information:
 - a. Client’s first and last name;
 - b. Client’s Social Security Number (SSN);
 - 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 and/or OA3B; and
- 3. Reported monthly by SSN for transportation services received by program. The number of trips provided to the client will be entered at least once a month by client.

This change **will not** require an initial or annual assessment for clients who receive **only** transportation services.

The AAAs will provide CIRTS access and training to program providers regarding the change in reporting requirements for LSP and OA3B. Currently, some transportation providers have their own systems for registering clients and tracking services provided. If their systems allow for electronic data interchange (EDI), the data they collect in their systems can be uploaded on a monthly basis to CIRTS. Please contact your Contract Manager at the Department to request CIRTS EDI access for providers as needed. The AAAs are encouraged to begin

working with their local transportation providers in order to register all clients into CIRTIS before the January 2015 invoicing.

Please direct any questions regarding this policy change to your Contract Manager. Thank you for your assistance and cooperation.