Training/communication plan:
State Program Report (SPR) Important Deadlines:

September 30, 2020 (by the end of the business day)
- Email the name(s) and contact information of those responsible for data entry and correction of consumer records, services, and units received. Additionally, if the AAA staff person responsible for completion of your 148/150 report is not the
individual to contact concerning expenditures reported in the SPR – please communicate the name of the fiscal representative too. (Email to rodney.b.schroeder@dhssoha.state.or.us)

September 30, 2020 (by the end of the business day)
- FINAL fiscal year-end 2020 (July 1, 2019 – June 30, 2020) 148/150 report emailed to rodney.b.schroeder@dhssoha.state.or.us and to brenda.s.stuivenga@dhssoha.state.or.us. Final must be indicated by selecting the checkbox on page one of the 150.
- Unit and Expenditure reconciliation must be completed. An expenditure must be present for each relevant service line on Form 150, page 2 and the 148 page.

October 31, 2020 (by the end of the business day)
Due to the migration/conversion from OACCESS to GetCare, data reconciliation and corrections to your individual SPR data will need to be completed in GetCare after the October 1st migration to GetCare. AAAs can choose to review and make changes to SPR data in OACCESS, before the September 25th start of migration, if they are more comfortable completing in OACCESS.

Training will occur to help AAAs become knowledgeable where and how the source data is input and corrected in GetCare. Additionally, we will remain with data reporting and compilation based on the state fiscal year and move to the federal fiscal year in the fall of 2021 when all states and AAAs need to move to the new OAAPS reporting tool currently being developed and implemented by ACL.
- All requested corrections have been made and your individual SPR reflects the correct numbers (based on your 7/1/2019 – 6/30/2020 148/150 data).
- Enter the Management Information, including staffing numbers and accomplishments, in GetCare.
- September 2020 units entered into GetCare.

December 31, 2020 (by the end of the business day)
- Your agency’s written explanation for any services with a 10% or more increase or decrease in expenditures, clients served, or units provided is emailed to rodney.b.schroeder@dhssoha.state.or.us.
- Final Signed and Audited Form 148/150 report (Final and Audited boxes should be selected and signatures should be present at the bottom of Form 150, page 1). Form is to be emailed to rodney.b.schroeder@dhssoha.state.or.us and brenda.s.stuivenga@dhssoha.state.or.us.
- Annual Financial Report compliant with 2 CFR 200 (Super Circular) is to be emailed to rodney.b.schroeder@dhssoha.state.or.us and brenda.s.stuivenga@dhssoha.state.or.us.

NOTE: Your agency is contractually required to meet this deadline, however, should your agency not be able to – you are required to communicate this to the
CSSU. Please provide reason for missing the deadline and estimate of when Report will be submitted.

**Local/branch action required:** Yes

**Central office action required:**

**Field/stakeholder review:**  
☐ Yes  ☒ No

*If yes, reviewed by:*

**Filing instructions:**

*If you have any questions about this policy, contact:*

<table>
<thead>
<tr>
<th>Contact(s): Rodney Schroeder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone: 541-305-3489</td>
</tr>
<tr>
<td>Email: <a href="mailto:rodney.b.schroeder@dhsoha.state.or.us">rodney.b.schroeder@dhsoha.state.or.us</a></td>
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