

# ADRC Program Monitoring Form

## 2023-2025 Biennium

For use with [online survey form](#)

### Contact

1. Contact information
  - Name
  - Agency
  - Email Address
  - Phone Number

### Information and Referral (I&R)

2. How many staff perform I&R, including part-time and full-time employees? How much FTE does your agency dedicate to providing I&R? Only enter numbers in the fields below. Please do not enter any text.

“How many staff” = a headcount of the number of staff performing the work. “FTE” = One full-time position corresponds to an FTE of 1.0. Accordingly, 5 full-time positions result in an FTE of 5.0. A part-time position (20 hours) corresponds to an FTE of 0.5.

Example: Number of staff: 5 Total FTE:4

The total FTE is less than the number of staff because three staff work full time and 2 staff work part-time.

- Number of staff (including part-time staff)
  - Total FTE (Full-time equivalent aggregate number)
3. Are all I&R staff certified through Inform USA (formerly AIRS) or actively working toward certification?
    - Yes

- No
4. How much funding did your agency use to provide I&R during the 2023-25 biennium?  
Only enter numbers in the fields below. Please do not enter any text.
- ADRC General Funds (GF)
  - ADRC OMAC Federal Medicaid Match
  - Other Federal Medicaid Match
  - Title XIX Admin
  - Federal Older Americans Act (OAA) Funds
  - Local Funds (Ex: City/County funds, local grants, etc.)
  - Other Funds (Ex: Federal grants, donations, fundraising, etc.)
  - Total Funds (Sum of all funding sources)
5. How many unique consumers received I&R each quarter during the 2023-25 biennium?  
To find this information, go to the internal Power BI ADRC Dashboard QA Summary Report and use the date picker to view data for 7/1/2023 through 6/30/2025.
- Y1, Q1 – 7/1/2023 through 9/30/2023
  - Y1, Q2 – 10/1/2023 through 12/31/2023
  - Y1, Q3 – 1/1/2024 through 3/31/2024
  - Y1, Q4 – 4/1/2024 through 6/30/2024
  - Y2, Q1 – 7/1/2024 through 9/30/2024
  - Y2, Q2 – 10/1/2024 through 12/31/2024
  - Y2, Q3 – 1/1/2025 through 3/31/2025
  - Y2, Q4 – 4/1/2025 through 6/30/2025
  - Total number of unique consumers served during the biennium (sum of all quarters reported above)
6. How many I&R contacts were recorded in GetCare each quarter during the 2023-25 biennium?

To find this information, go to the internal Power BI ADRC Dashboard QA Summary report and use the date picker to view data for 7/1/2023 through 6/30/2025.

- Y1, Q1 – 7/1/2023 through 9/30/2023
- Y1, Q2 – 10/1/2023 through 12/31/2023
- Y1, Q3 – 1/1/2024 through 3/31/2024
- Y1, Q4 – 4/1/2024 through 6/30/2024
- Y2, Q1 – 7/1/2024 through 9/30/2024
- Y2, Q2 – 10/1/2024 through 12/31/2024
- Y2, Q3 – 1/1/2025 through 3/31/2025
- Y2, Q4 – 4/1/2025 through 6/30/2025
- Total number of I&R contacts recorded during the biennium (sum of all quarters reported above)

7. How many I&R contacts with OMAC Element were recorded in GetCare each quarter during the 2023-25 biennium?

To find this information, go to the internal Power BI ADRC Dashboard QA Summary report and use the date picker to view data for 7/1/2023 through 6/30/2025.

- Y1, Q1 – 7/1/2023 through 9/30/2023
- Y1, Q2 – 10/1/2023 through 12/31/2023
- Y1, Q3 – 1/1/2024 through 3/31/2024
- Y1, Q4 – 4/1/2024 through 6/30/2024
- Y2, Q1 – 7/1/2024 through 9/30/2024
- Y2, Q2 – 10/1/2024 through 12/31/2024
- Y2, Q3 – 1/1/2025 through 3/31/2025
- Y2, Q4 – 4/1/2025 through 6/30/2025
- Total number of I&R contacts with OMAC Element recorded during the biennium (sum of all quarters reported above)

8. Are these counts comparable to what you'd expect to see documented in GetCare for Medicaid claimable activities performed by ADRC staff?

See pages 15-18 of [OMAC guide](#) for list of claimable activities.

- Yes
  - No
  - N/A – My agency doesn't participate in OMAC
  - If you answered no, please explain
9. Please describe any trends or changes in the number of I&R contacts and unique consumers served during the biennium. What do you think may have contributed to these trends and/or changes in your counts?
10. What efforts did your agency make to try to increase the number of I&R contacts and unique consumers served during the biennium?
11. Do you record all I&R in the GetCare I&R module, including I&R funded with federal OAA dollars?
- Yes
  - No
  - If you answered no, please explain why not
12. Do staff routinely conduct follow-ups with consumers who received I&R?
- Yes
  - No
  - If you answered yes, please describe your process, including the number or percent of follow-ups conducted. If you answered no, please explain why and share if you have considered having staff perform follow-ups in the case of vulnerable consumers and/or to measure consumer satisfaction.
13. What was the % complete RealD elements for I&R records for the 2023-25 biennium?

To find this information, go to the internal Power BI ADRC Dashboard RealD Elements Report.

Select "I&R data" at the top of the report and use the date picker to enter the date range of the biennium (7/1/2023 through 6/30/2025). In the green portion of the columns labeled "Complete," you'll see the percentage. This represents the percentage of responses that have an answer other than unknown, don't know, don't want to answer, or declined to state.

- Race
- Race detail
- Gender
- Veterans Status
- Blindness
- Communicating
- Concentration decisions
- Deafness
- Dressing/Bathing
- Learning
- Mood/Behavior
- Shopping/Errands
- Walking/Stairs

## Options Counseling (OC)

14. How many staff perform options counseling (OC), including part-time and full-time employees? How much FTE does your agency dedicate to providing OC? Only enter numbers in the fields below. Please do not enter any text.

"How many staff" = a headcount of the number of staff performing the work. "FTE" = One full-time position corresponds to an FTE of 1.0. Accordingly, 5 full-time positions result in an FTE of 5.0. A part-time position (20 hours) corresponds to an FTE of 0.5.

Example: Number of staff: 5 Total FTE:4

The total FTE is less than the number of staff because three staff work full time and 2 staff work part-time.

- Number of staff (including part-time staff)
- Total FTE (Full-time equivalent aggregate number)

15. How much funding did your agency use to provide OC during the 2023-25 biennium?

Only enter numbers in the fields below. Please do not enter any text.

- ADRC General Funds (GF)
- ADRC OMAC Federal Medicaid Match
- Other Federal Medicaid Match
- Title XIX Admin
- Federal Older Americans Act (OAA) Funds
- Local Funds (Ex: City/County funds, local grants, etc.)
- Other Funds (Ex: Federal grants, donations, fundraising, etc.)
- Total Funds (Sum of all funding sources)

16. How many new OC enrollments were recorded in GetCare each quarter during the 2023-2025 biennium?

To find this information, go to the internal Power BI ADRC Dashboard QA Summary Report and use the date picker to view data for 7/1/2023 through 6/30/2025.

- Y1, Q1 – 7/1/2023 through 9/30/2023
- Y1, Q2 – 10/1/2023 through 12/31/2023
- Y1, Q3 – 1/1/2024 through 3/31/2024
- Y1, Q4 – 4/1/2024 through 6/30/2024
- Y2, Q1 – 7/1/2024 through 9/30/2024
- Y2, Q2 – 10/1/2024 through 12/31/2024
- Y2, Q3 – 1/1/2025 through 3/31/2025
- Y2, Q4 – 4/1/2025 through 6/30/2025
- Total number of new OC enrollments recorded during the biennium (sum of all quarters reported above)

17. Please describe any trends or changes in the number of new OC enrollments during the biennium. What do you think may have contributed to these trends and/or changes in your counts?
18. What efforts did your agency make to try to increase the number of new OC enrollments during the biennium?
19. How many OC enrollments had OMAC elements recorded in GetCare each quarter during the 2023-2025 biennium?

To find this information, go to the internal Power BI ADRC Dashboard QA Summary Report. Use the date picker to enter the date range of the biennium (7/1/2023 through 6/30/2025). Find the “OC enrollments with Medicaid” counts.

- Y1, Q1 – 7/1/2023 through 9/30/2023
  - Y1, Q2 – 10/1/2023 through 12/31/2023
  - Y1, Q3 – 1/1/2024 through 3/31/2024
  - Y1, Q4 – 4/1/2024 through 6/30/2024
  - Y2, Q1 – 7/1/2024 through 9/30/2024
  - Y2, Q2 – 10/1/2024 through 12/31/2024
  - Y2, Q3 – 1/1/2025 through 3/31/2025
  - Y2, Q4 – 4/1/2025 through 6/30/2025
  - Total number of new OC enrollments with an OMAC Element recorded during the biennium (sum of all quarters reported above)
20. Are these counts comparable to what you’d expect to see documented in GetCare for Medicaid claimable activities performed by ADRC staff?

See pages 15-18 of [OMAC guide](#) for list of claimable activities.

- Yes
- No
- N/A – My agency doesn’t participate in OMAC
- If you answered no, please explain

21. Do you record all OC in GetCare, regardless of the funding source(s) used to provide the services?

- Yes
- No
- If you answered no, please explain why not

22. What was the % completed RealD elements for OC records for the 2023-2025 biennium?

To find this information, go to the internal Power BI ADRC Dashboard RealD Elements report.

Select "OC data" at the top of the report and use the date picker to enter the date range of the biennium (7/1/2023 through 6/30/2025). In the green portion of the columns labeled "Complete," you'll see the percentage. This represents the percentage of responses that have an answer other than unknown, don't know, don't want to answer, or declined to state.

- Race
- Race detail
- Gender
- Veterans Status
- Blindness
- Communicating
- Concentration decisions
- Deafness
- Dressing/Bathing
- Learning
- Mood/Behavior
- Shopping/Errands
- Walking/Stairs

23. What was the % complete for these required components of OC records for the 2023-2025 biennium?



To find this information, go to the internal Power BI ADRC Dashboard OC QA Elements Report.

Use the date picker to enter the date range of the biennium (7/1/2023 through 6/30/2025). Use the % complete in green for “assessment status” and “action plan” columns.

- Assessment
- Action Plan

24. How many open options counseling enrollments have not had a progress note recorded in 90 days or more?

To find this information, go to the internal Power BI ADRC Dashboard Enrollments w/out 90 Day Progress Notes Report. Select “No” and count the number of OC progress notes in the list. Do not include notes marked with “Yes” in your count.

## Care Transitions

25. Does your ADRC provide Care Transitions (CT)?

26. Do your staff use an evidence-based model to provide Care Transitions (CT)?

- Yes
- No
- If yes, which model

27. How many staff perform Care Transitions (CT), including part-time and full-time employees? How much FTE does your agency dedicate to providing CT? Only enter numbers in the fields below. Please do not enter any text.

“How many staff” = a headcount of the number of staff performing the work. “FTE” = One full-time position corresponds to an FTE of 1.0. Accordingly, 5 full-time positions result in an FTE of 5.0. A part-time position (20 hours) corresponds to an FTE of 0.5.

Example: Number of staff: 5 Total FTE:4

The total FTE is less than the number of staff because three staff work full time and 2 staff work part-time.

- Number of staff (including part-time staff)

- Total FTE (Full-time equivalent aggregate number)

28. How much funding did your agency use to provide CT during the 2023-2025 biennium?

Only enter numbers in the fields below. Please do not enter any text.

- ADRC General Funds (GF)
- ADRC OMAC Federal Medicaid Match
- Other Federal Medicaid Match
- Title XIX Admin
- Federal Older Americans Act (OAA) Funds
- Local Funds (Ex: City/County funds, local grants, etc.)
- Other Funds (Ex: Federal grants, donations, fundraising, etc.)
- Total Funds (Sum of all funding sources)

29. How many new CT enrollments were recorded in GetCare each quarter during the 2023-2025 biennium?

To find this information, go to Operations> Reporting> Reports> Client Reports> Quality Assurance Report for Caretool Programs.

Enter the date range of the quarter, choose Care Transitions in the “Services” field, select your Agency if necessary, and leave everything else as it is. Click Run Report. Once the report is delivered, add the “Number of New Enrollments” for each quarter below.

- Y1, Q1 – 7/1/2023 through 9/30/2023
- Y1, Q2 – 10/1/2023 through 12/31/2023
- Y1, Q3 – 1/1/2024 through 3/31/2024
- Y1, Q4 – 4/1/2024 through 6/30/2024
- Y2, Q1 – 7/1/2024 through 9/30/2024
- Y2, Q2 – 10/1/2024 through 12/31/2024
- Y2, Q3 – 1/1/2025 through 3/31/2025
- Y2, Q4 – 4/1/2025 through 6/30/2025

- Total number of new CT enrollments recorded during the biennium (sum of all quarters reported above)

30. How many progress notes had an OMAC Element recorded for CT records in GetCare each quarter during the 2023-2025 biennium?

To find this information, go to Operations> Reporting> Reports> Client Reports> Options Counseling OMAC/NWD Report (it's ok that it's called "Options Counseling" report, you will pull for Care Transitions).

Enter the date range of the quarter, select your Agency if necessary, and choose Care Transitions in the "Services" field. You will need to pull a separate report for each quarter.

Once the report is delivered, add the "Number of PN's with a Medicaid elements" for each quarter below.

- Y1, Q1 – 7/1/2023 through 9/30/2023
- Y1, Q2 – 10/1/2023 through 12/31/2023
- Y1, Q3 – 1/1/2024 through 3/31/2024
- Y1, Q4 – 4/1/2024 through 6/30/2024
- Y2, Q1 – 7/1/2024 through 9/30/2024
- Y2, Q2 – 10/1/2024 through 12/31/2024
- Y2, Q3 – 1/1/2025 through 3/31/2025
- Y2, Q4 – 4/1/2025 through 6/30/2025
- Total number of progress notes with OMAC Element recorded on CT records during the biennium (sum of all quarters reported above)

31. Do you record all CT in GetCare, regardless of the funding source(s) used to provide the service?

- Yes
- No
- If you answered no, please explain why not

32. What % completed RealD elements for CT records for the 2023-2025 biennium?

To find this information, go to Operations> Reporting> Reports> Client Reports> Client Demographic Report.

Enter the date range for the biennium and, if necessary, choose Region/Contractor and Provider. Select Care Transitions in the “Service Name” field. Then, scroll down to the bottom of the page and select Run Report.

Once the report is delivered, find the section for each of the fields below. In the first set of columns labeled “Identified Consumers”, you’ll see the percentage of Unknown or Unknown/Declined to State responses. If both options exist, as in Ethnicity, add the two together.

- Race
- Race detail
- Gender
- Veterans Status
- Blindness
- Communicating
- Concentration decisions
- Deafness
- Dressing/Bathing
- Learning
- Mood/Behavior
- Shopping/Errands
- Walking/Stairs

## **Resource Database Management**

33. Does your agency manage resource listings in the ADRC resource database for your service area?

If you answered no, do you routinely convey information to the CSSU when you learn of new agencies/resources or changes to existing agencies/resources in your area so that

staff can make appropriate updates to the listings in the resources database? Please explain.

34. How many staff manage your resource database records, including part-time and full-time employees? How much FTE does your agency dedicate to managing your resource database records? Only enter numbers in the fields below. Please do not enter any text.

“How many staff” = a headcount of the number of staff performing the work. “FTE” = One full-time position corresponds to an FTE of 1.0. Accordingly, 5 full-time positions result in an FTE of 5.0. A part-time position (20 hours) corresponds to an FTE of 0.5.

Example: Number of staff: 5 Total FTE:4

The total FTE is less than the number of staff because three staff work full time and 2 staff work part-time.

- Number of staff (including part-time staff)
- Total FTE (Full-time equivalent aggregate number)

35. How much funding did your agency use to support resource database management during the 2023-2025 biennium? Only enter numbers in the fields below. Please do not enter any text.

- ADRC General Funds (GF)
- ADRC OMAC Federal Medicaid Match
- Other Federal Medicaid Match
- Title XIX Admin
- Federal Older Americans Act (OAA) Funds
- Local Funds (Ex: City/County funds, local grants, etc.)
- Other Funds (Ex: Federal grants, donations, fundraising, etc.)
- Total Funds (Sum of all funding sources)

36. How many active listings does your agency manage for your REI?

To find this information, go to the internal Power BI ADRC Dashboard Resource Formal Update Report.

Add the numbers in green and grey for your REI from the Count of Updated Listings by Region report. This count represents the total number of active listings for your REI.

37. What % of your resource listings have been formally updated within 12 months?

To find this information for your REI, go to the internal Power BI ADRC Dashboard Resource Formal Update Report.

## **Marketing and Outreach – Promotion of ADRC services**

38. Does your agency's local website include the ADRC toll-free number and a link to the ADRC website?

- ☐ Yes
- ☐ No
- ☐ Please provide the link to your agency's website page where the ADRC information is included

39. Please provide an estimated number of outreach efforts conducted in promotion of ADRC services (I&R and OC) during the 2023-2025 biennium.

Note: These counts should include direct outreach efforts only and should not include indirect marketing efforts being asked about in the next question.

- ☐ # of outreach events tabled (without giving presentation)
- ☐ # of outreach presentations

40. Please provide an estimated number of marketing initiatives conducted in promotion of ADRC services during the 2023-2025 biennium.

Note: These counts should include indirect marketing efforts only and should not include direct outreach efforts being asked about in the previous question.

- ☐ Social Media ads
- ☐ Billboards
- ☐ Transit
- ☐ Television
- ☐ Radio

- Theaters
- Print advertising – newspapers
- Print advertising – posters/flyers/newsletters/brochures
- Print advertising – Other
- Direct Mailing
- Other

41. How much funding did your agency use to support the promotion of ADRC services during the 2023-2025 biennium? Only enter numbers in the fields below. Please do not enter any text.

- ADRC General Funds (GF)
- Other Federal Medicaid Match
- Title XIX Admin
- Federal Older Americans Act (OAA) Funds
- Local Funds (Ex: City/County funds, local grants, etc.)
- Other Funds (Ex: Federal grants, donations, fundraising, etc.)
- Total Funds (Sum of all funding sources)

42. What can we (APD/CSSU) do to better support ADRC marketing and outreach in your local area?

43. Does your agency collect consumer satisfaction information for consumers who received ADRC services?

- Yes
- No
- If yes, please explain

44. Does your agency conduct quality assurance on ADRC consumer records in GetCare?

- Yes
- No
- If yes, please explain your QA process, including frequency

## HIPAA Compliance

45. Does your agency follow all requirements of your responsibility as a Business Associate of ODHS regarding HIPAA? (OAR 943-014-0400 through OAR 943-014-0465 and 45 CFR 164.502 and 164.504)
46. Does your agency provide HIPAA training for all staff and subcontractors providing ADRC services?

If no, how do you ensure all staff and subcontractors receiving HIPAA training?

## Background Checks

47. Does your agency verify that each of your employees, volunteers and subcontractors has not been convicted of any of the following crimes prior to them performing contracted services: child or elder abuse, offenses against persons, sexual offenses, child neglect or any other offense bearing a substantial relation to the qualifications, functions or duties of each such person?
- Yes
  - No
48. Do you complete background checks for employees, volunteers and subcontractors prior to them performing contracted services, upon a promotion or a significant change in work duties and if there is a reasonable basis to believe a new background check may be needed?
- Yes
  - No
49. Which approved method does your agency use for verification?
- Employee, volunteer or subcontractor applies for and receives a fingerprint-based national criminal records check from a local Oregon State Police (OSP) office.
  - Utilizes a fingerprint-based background check approval, provided within the last two years, by a federal or State of Oregon agency to demonstrate the contractor's employee, volunteer or subcontractor's fitness to provide services under the ODS contract.



- Utilizes a third-party vendor accredited by the Professional Background Screeners Association (PBSA) who provides a national criminal records check that includes review of criminal history from each state the individual has lived, studied or worked in and the National Sex Offender Public Website (NSOPW).
- Our agency doesn't use any of these approved methods.

## Invoicing

50. Does your agency submit quarterly invoices no later than 60 days after the end of a quarterly billing period?

- Yes
- No
- Sometimes
- If no or sometimes, please explain why

51. Did you invoice for your total general fund allocation during the 2023-2025 biennium?

- Yes
- No
- If no, please explain why not

52. What percentage of your general fund allocation did you invoice for during the 2023-2025 biennium?

53. What was the total OMAC federal fund match dollar amount you claimed during the 2023-2025 biennium?

Note: This information can be found on the ADRC NWD invoices provided by Jeremiah Vosler and submitted to ODHS by your agency.

54. What was your Medicaid match % rate (calculated using RMS/RDSS or 100% timekeeping) each quarter during the 2023-2025 biennium? Enter zero (0) if you did not have any claimable time.

Note: This information can be found on the ADRC NWD invoices provided by ODHS staff and submitted to ODHS by your agency.

- Y1, Q1 – 7/1/2023 through 9/30/2023

- Y1, Q2 – 10/1/2023 through 12/31/2023
- Y1, Q3 – 1/1/2024 through 3/31/2024
- Y1, Q4 – 4/1/2024 through 6/30/2024
- Y2, Q1 – 7/1/2024 through 9/30/2024
- Y2, Q2 – 10/1/2024 through 12/31/2024
- Y2, Q3 – 1/1/2025 through 3/31/2025
- Y2, Q4 – 4/1/2025 through 6/30/2025

If you select “Ok” or “Next” and it re-populates the same questions again, select “Ok” or “Next” or “Done” a second time to submit the survey. It may take a couple tries before the survey submits. Thanks for your patience,

55. Do these percentages seem reasonable based on the amount of Medicaid claimable activity ADRC staff recorded in GetCare?

- Yes
- No
- If you answered no, please share any thoughts or observations you have regarding this

56. What actions has your agency taken to try to increase your RMS% rate?

### **Successes/Best Practices and Plans to Address any Identified Gaps**

57. Please note any successful strategies, tools or best practices that your agency feels are worth celebrating and might be willing to share with other ADRCs.

58. Please identify any areas where your ADRC is not fully meeting the standards, need assistance to meet the standards or need to take further steps to reach a program goal.

Include the question number, the proposed plan or steps your agency will take, the responsible person(s) and goal completion dates.