



\* 4. How much funding did your agency use to provide I&R during the 2021-23 biennium?

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

General Funds (GF)	<input type="text"/>
Federal Medicaid Match (OMAC)	<input type="text"/>
Federal Older Americans Act (OAA) Funds	<input type="text"/>
Local Funds	<input type="text"/>
Other Funds	<input type="text"/>
Total Funds (Sum of all funding sources)	<input type="text"/>

\* 5. How many unique consumers received I&R each quarter during the 2021-23 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 7/1/21 through 6/30/23.

Y1, Q1 - 7/1/21 through 9/30/21	<input type="text"/>
Y1, Q2 - 10/1/21 through 12/31/21	<input type="text"/>
Y1, Q3 - 1/1/22 through 3/31/22	<input type="text"/>
Y1, Q4 - 4/1/22 through 6/30/22	<input type="text"/>
Y2, Q1 - 7/1/22 through 9/30/22	<input type="text"/>
Y2, Q2 - 10/1/22 through 12/31/22	<input type="text"/>
Y2, Q3 - 1/1/23 through 3/31/23	<input type="text"/>
Y2, Q4 - 4/1/23 through 6/30/23	<input type="text"/>
Total number of unique consumers served during the biennium (sum of all quarters reported above)	<input type="text"/>

\* 6. How many I&R contacts were recorded in GetCare each quarter during the 2021-23 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 7/1/21 through 6/30/23.

Y1, Q1 - 7/1/21  
through 9/30/21

Y1, Q2 - 10/1/21  
through 12/31/21

Y1, Q3 - 1/1/22  
through 3/31/22

Y1, Q4 - 4/1/22  
through 6/30/22

Y2, Q1 - 7/1/22  
through 9/30/22

Y2, Q2 - 10/1/22  
through 12/31/22

Y2, Q3 - 1/1/23  
through 3/31/23

Y2, Q4 - 4/1/23  
through 6/30/23

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 2021-23 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 7/1/21 through 6/30/23.

Y1, Q1 - 7/1/21  
through 9/30/21

Y1, Q2 - 10/1/21  
through 12/31/21

Y1, Q3 - 1/1/22  
through 3/31/22

Y1, Q4 - 4/1/22  
through 6/30/22

Y2, Q1 - 7/1/22  
through 9/30/22

Y2, Q2 - 10/1/22  
through 12/31/22

Y2, Q3 - 1/1/23  
through 3/31/23

Y2, Q4 - 4/1/23  
through 6/30/23

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:  
<https://www.oregon.gov/odhs/providers-partners/community-services-supports/adrcdocuments/omac-guide-allowable-adrc-activities.pdf>

- Yes
- No
- N/A - My agency doesn't participate in OMAC

If you answered no, please explain:





\* 15. How much funding did your agency use to provide OC during the 2021-23 biennium?

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

General Funds (GF)	<input type="text"/>
Federal Medicaid Match (OMAC)	<input type="text"/>
Federal Older Americans Act (OAA) Funds	<input type="text"/>
Local Funds	<input type="text"/>
Other Funds	<input type="text"/>
Total Funds (Sum of all funding sources)	<input type="text"/>

\* 16. How many new OC enrollments were recorded in GetCare each quarter during the 2021-23 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 7/1/21 through 6/30/23.

Y1, Q1 - 7/1/21 through 9/30/21	<input type="text"/>
Y1, Q2 - 10/1/21 through 12/31/21	<input type="text"/>
Y1, Q3 - 1/1/22 through 3/31/22	<input type="text"/>
Y1, Q4 - 4/1/22 through 6/30/22	<input type="text"/>
Y2, Q1 - 7/1/22 through 9/30/22	<input type="text"/>
Y2, Q2 - 10/1/22 through 12/31/22	<input type="text"/>
Y2, Q3 - 1/1/23 through 3/31/23	<input type="text"/>
Y2, Q4 - 4/1/23 through 6/30/23	<input type="text"/>
Total number of new OC enrollments recorded during the biennium (sum of all quarters reported above)	<input type="text"/>

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 2021-23 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 (7/1/21 through 6/30/23). Find the "OC enrollments with Medicaid" counts.

Y1, Q1 - 7/1/21  
through 9/30/21

Y1, Q2 - 10/1/21  
through 12/31/21

Y1, Q3 - 1/1/22  
through 3/31/22

Y1, Q4 - 4/1/22  
through 6/30/22

Y2, Q1 - 7/1/22  
through 9/30/22

Y2, Q2 - 10/1/22  
through 12/31/22

Y2, Q3 - 1/1/23  
through 3/31/23

Y2, Q4 - 4/1/23  
through 6/30/23

Total number of 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:  
<https://www.oregon.gov/odhs/providers-partners/community-services-supports/adrcdocuments/omac-guide-allowable-adrc-activities.pdf>

- 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 service?

- Yes
- No

If you answered no, please explain why not:

\* 22. What was the % complete RealD elements for OC records for the 2021-23 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 (7/1/21 through 6/30/23). 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	<input type="text"/>
Race detail	<input type="text"/>
Gender	<input type="text"/>
Veterans Status	<input type="text"/>
Blindness	<input type="text"/>
Communicating	<input type="text"/>
Concentration decisions	<input type="text"/>
Deafness	<input type="text"/>
Dressing/Bathing	<input type="text"/>
Learning	<input type="text"/>
Mood/Behavior	<input type="text"/>
Shopping/Errands	<input type="text"/>
Walking/Stairs	<input type="text"/>

\* 23. What was the % complete for these required components of OC records for the 2021-23 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 (7/1/21 through 6/30/23). Use the % complete in green for "assessment status" and "action plan" columns.

Assessment	<input type="text"/>
Action Plan	<input type="text"/>

\* 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.

Aging and Disability Resource Connection (ADRC) Program Monitoring for 2021-Biennium

Care Transitions

\* 25. Does your ADRC provide Care Transitions (CT)

Aging and Disability Resource Connection (ADRC) Program Monitoring for 2021-Biennium

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

Yes

No

If yes, which model:

\* 27. How many staff provide 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.

FTE: A 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. More information: <https://www.indeed.com/hire/c/info/full-time-equivalent>

Number of staff

Total FTE

\* 28. How much funding did your agency use to provide CT during the 2021-23 biennium?

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

General Funds (GF)	<input type="text"/>
Federal Medicaid Match (OMAC)	<input type="text"/>
Hospital Contracts	<input type="text"/>
Local Funds	<input type="text"/>
Other Funds	<input type="text"/>
Total Funds (Sum of all funding sources)	<input type="text"/>

\* 29. How many new CT enrollments were recorded in GetCare each quarter during the 2021-23 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 - 7/1/21 through 9/30/21	<input type="text"/>
Y1, Q2 - 10/1/21 through 12/31/21	<input type="text"/>
Y1, Q3 - 1/1/22 through 3/31/22	<input type="text"/>
Y1, Q4 - 4/1/22 through 6/30/22	<input type="text"/>
Y2, Q1 - 7/1/22 through 9/30/22	<input type="text"/>
Y2, Q2 - 10/1/22 through 12/31/22	<input type="text"/>
Y2, Q3 - 1/1/23 through 3/31/23	<input type="text"/>
Y2, Q4 - 4/1/23 through 6/30/23	<input type="text"/>
Total number of new CT enrollments recorded during the biennium (sum of all quarters reported above)	<input type="text"/>

\* 30. How many progress notes had an OMAC Element recorded for CT records in GetCare each quarter during the 2021-23 biennium?

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

Enter the date range for 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 element" for each quarter below.

Y1, Q1 - 7/1/21  
through 9/30/21

Y1, Q2 - 10/1/21  
through 12/31/21

Y1, Q3 - 1/1/22  
through 3/31/22

Y1, Q4 - 4/1/22  
through 6/30/22

Y2, Q1 - 7/1/22  
through 9/30/22

Y2, Q2 - 10/1/22  
through 12/31/22

Y2, Q3 - 1/1/23  
through 3/31/23

Y2, Q4 - 4/1/23  
through 6/30/23

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 was the % complete RealD elements for CT records for the 2021-23 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	<input type="text"/>
Race detail	<input type="text"/>
Gender	<input type="text"/>
Veterans Status	<input type="text"/>
Blindness	<input type="text"/>
Communicating	<input type="text"/>
Concentration decisions	<input type="text"/>
Deafness	<input type="text"/>
Dressing/Bathing	<input type="text"/>
Learning	<input type="text"/>
Mood/Behavior	<input type="text"/>
Shopping/Errands	<input type="text"/>
Walking/Stairs	<input type="text"/>

Aging and Disability Resource Connection (ADRC) Program Monitoring for 2021-2 Biennium

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 resource database? Please explain.

Aging and Disability Resource Connection (ADRC) Program Monitoring for 2021-Biennium

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

FTE: A 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. More information: <https://www.indeed.com/hire/c/info/full-time-equivalent>

Number of staff

Total FTE

\* 35. How much funding did your agency use to support resource database management during the 2021-23 biennium? Only enter numbers in the fields below. Please do not enter any text.

General Funds (GF)

Federal Medicaid Match (OMAC)

Federal Older Americans Act (OAA) Funds

Local Funds

Other Funds

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.

## Aging and Disability Resource Connection (ADRC) Program Monitoring for 2021-Biennium

### 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 2021-23 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 2021-23 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	<input type="text"/>
Billboards	<input type="text"/>
Transit	<input type="text"/>
Television	<input type="text"/>
Radio	<input type="text"/>
Theaters	<input type="text"/>
Print advertising - Newspapers	<input type="text"/>
Print advertising - posters/flyers/newsletters/brochures	<input type="text"/>
Print advertising - Other	<input type="text"/>
Direct Mailing	<input type="text"/>
Other	<input type="text"/>

\* 41. How much funding did your agency use to support the promotion of ADRC services during the 2021-23 biennium? Only enter numbers in the fields below. Please do not enter any text.

General Funds (GF)	<input type="text"/>
Federal Medicaid Match (OMAC)	<input type="text"/>
Federal Older Americans Act (OAA) Funds	<input type="text"/>
Local Funds	<input type="text"/>
Other Funds	<input type="text"/>
Total Funds (Sum of all funding sources)	<input type="text"/>

\* 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:

## Aging and Disability Resource Connection (ADRC) Program Monitoring for 2021-Biennium

### HIPPA compliance

45. Does your agency follow all requirements of your responsibility as a Business Associate of DHS regarding HIPAA? (OAR 943-014-0400 through OAR 943-014-0465, and 45 CFR 164.502 and 164.504)

⬆  
⬇  
⬆

46. Does your agency provide HIPPA training for all staff and sub-contractors providing ADRC services?

⬆  
⬇  
⬆

If no, how do you ensure all staff and sub-contractors receive HIPPA 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.

\* 50. Does your agency submit quarterly invoices no later than 45 days after the end of a billing period?

- Yes
- No
- Sometimes

If no or sometimes, please explain why:

\* 51. Did you invoice for your total general fund allocation during the 2021-23 biennium?

- Yes
- No

If no, please explain why not:

\* 52. What percentage of your general fund allocation did you invoice for during the 2021-23 biennium?

\* 53. What was the total OMAC federal fund match dollar amount you claimed during the 2021-23 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 2021-23 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 Jeremiah Vosler and submitted to ODHS by your agency.

Y1, Q1 - 7/1/21 through 9/30/21	<input type="text"/>
Y1, Q2 - 10/1/21 through 12/31/21	<input type="text"/>
Y1, Q3 - 1/1/22 through 3/31/22	<input type="text"/>
Y1, Q4 - 4/1/22 through 6/30/22	<input type="text"/>
Y2, Q1 - 7/1/22 through 9/30/22	<input type="text"/>
Y2, Q2 - 10/1/22 through 12/31/22	<input type="text"/>
Y2, Q3 - 1/1/23 through 3/31/23	<input type="text"/>
Y2, Q4 - 4/1/23 through 6/30/23	<input type="text"/>

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?

Aging and Disability Resource Connection (ADRC) Program Monitoring for 2021-Biennium

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.