

NORTH CAROLINA DIVISION OF AGING
LTSS OUTREACH TO UNDERSERVED TARGET
POPULATIONS MONITORING TOOL FY24

Part I: Program Verification

Provider Agency:

Review Date: State Fiscal Year:

Agency Staff Interviewed:

Signature of Reviewer(s):

1. Policies include that the agency conducts outreach to older adults aged 60 and older or persons acting on their behalf to provide information that will connect them to existing services and benefits across funding sources. ☐ Yes ☐ No

(Administrative Letter # 22-02, p. 24)

Documentation reviewed/Comments:

2. Policies indicate that outreach activities include outreach to underserved target populations identified in the OAA (Older individuals with greatest economic and social need with particular attention to low-income older adults, including low-income minority older adults, older adults with limited English proficiency, and older adults in rural areas.) ☐ Yes ☐ No

(Administrative Letter # 22-02, p. 24)

Documentation reviewed/Comments:

3. ZGA 546 reflects that agency tracks and reports in ARMS the monthly count of one-on-one contacts between the agency and individual older adults or persons acting on their behalf. (Note: activity that involves contact with multiple current or potential clients are only counted if it is possible to do a head count or there is a sign-in sheet.) ☐ Yes ☐ No

(Administrative Letter # 22-02, pp. 24-25)

Documentation reviewed/Comments:

4. Agency maintains a log of individual and group outreach contacts between the agency and the older adults or persons acting on their behalf. ☐

Yes ☐ No

(Administrative Letter # 22-02, p. 24)

Documentation reviewed/Comments:

5. Outreach log includes, at a minimum, date of contact, name of individual or group event, and information or resources shared. ☐ Yes ☐ No

(Administrative Letter # 22-02, p. 24)

Documentation reviewed/Comments:

6. Supporting documentation of outreach events is kept on file (e.g., sign-in sheets, newspaper ads/articles, online media postings, flyers, etc.). ☐ Yes ☐ No

(Administrative Letter # 22-02, p. 24)

Documentation reviewed/Comments:

7. Documentation reflects outreach efforts to target older individuals 60+ or people acting on behalf of persons 60+ with greatest economic and social need (with attention to low-income older adults, including low-income minority older adults, older adults with limited English proficiency, and older adults residing in rural areas). ☐ Yes ☐ No

(Administrative Letter # 22-02, p. 24)

Documentation reviewed/Comments:

Please explain any questions with extenuating circumstances:

Notes:

Part II: Fiscal Verification

Agency:

Date:

Agency Staff Interviewed:

Signature of Reviewer:

1. Agency budget shows monies used to support the LTSS Outreach service (e.g., DAAS 732 A). Yes ☐ No ☐ N/A ☐

Documentation reviewed/Comments:

2. If positions are funded, Agency budget shows LTSS Outreach designated position(s) and % of position(s) funded for LTSS Outreach (e.g., DAAS 732 A1).

Yes ☐ No ☐ N/A ☐

Documentation reviewed/Comments:

3. If the agency has collected consumer contributions, the ZGA 370 YTD matches the agency's YTD financial records.

Yes ☐ No ☐ N/A ☐

Documentation reviewed/Comments:

4. At the time of the review, the % utilization rate is consistent with budget projections for the fiscal year. (e.g., ZGA 370 YTD)

Yes ☐ No ☐ N/A ☐

Documentation reviewed/Comments:

If not, describe any extenuating circumstances and/or planned adjustments.

5. Outreach costs are in line with allowable expenditures and can be attached to a function of the LTSS Outreach service (e.g., staffing, travel, equipment, printing, billboards, online resources, translation services for outreach materials, etc.). *(Select a month of reimbursement in ARMS and document that reimbursement correlates with actual expenses (e.g., payroll records, agency's general ledger, agency's expense account)).*

Yes ☐ No ☐ N/A ☐

Documentation reviewed/Comments