

Policies, Technical Guidance and Forms					Section 21-PTF
Review Section:	Requirement Reference	Available On-site	Review Questions	Compliance Yes/No	On-site Training Area: If "No" identify issue, list Training, and set Outcome (Outcome is what needs to be implemented)
D21-PTF-01	PO.AD.01 Participant Appeals	Determine through staff interview and documentation	Did the AAA attempt to resolve any participant appeals at the local AAA level before contacting ICOA?		Issue: Training: Outcome:
D21-PTF-02	PO.AD.01 Participant Appeals	Determine through staff interview and documentation	When the dispute remains unresolved, did the AAA file the complaint with the ICOA within 30 days so the ICOA can establish a complaint file?		Issue: Training: Outcome:
D21-PTF-03	PO.AD.01 AAA Appeals	Determine through staff interview and documentation	Did the AAA attempt to resolve any disagreement with the ICOA informally first by email, phone or a face to face visit?		Issue: Training: Outcome:
D21-PTF-04	PO.AD.01 AAA Appeals	Determine through staff interview and documentation	If the complaint is unresolved after the informal complaint, Did the AAA submit an appeal letter along with any supporting documentation to ICOA within 30 days from when the administrative decision was made?		Issue: Training: Outcome:
D21-PTF-05	PO.AD.04.1.A Withdrawal of AAA Designation OAA Sections 305(b) (5) (C) ((i) through (iv)	Determine through staff interview and documentation	Does the AAA meet the requirements of the OAA of 1965, as amended?		Issue: Training: Outcome:
D21-PTF-06	PO.AD.04.1.B Withdrawal of AAA Designation OAA Sections 305(b) (5) (C) ((i) through (iv)	Determine through staff interview and documentation	Is the Area Plan or amendments to the plan approved by the ICOA?		Issue: Training: Outcome:
D21-PTF-07	PO.AD.04.1.C Withdrawal of AAA Designation OAA Sections 305(b) (5) (C) ((i) through (iv)	Determine through staff interview and documentation	Does the AAA provide and administer the approved Area Plan to comply with any provisions, policies and procedures established by the ICOA?		Issue: Training: Outcome:
D21-PTF-08	PO.AD.04.1.D Withdrawal of AAA Designation OAA Sections 305(b) (5) (C) ((i) through (iv)	Determine through staff interview and documentation	Are the activities of the AAA consistent with the statutory mission described in the OAA and not in conflict with the requirement that it function as an AAA?		Issue: Training: Outcome:

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D21-PTF-09	PO.AD.05.1 AAA Policies and Procedures OAA Sections 305(b) (5) (C) (ii) through (iv)	Determine through staff interview and documentation	Did the AAA develop and maintain written policies and procedures for programs and services for contract management, and agency functions and responsibilities?		Issue: Training: Outcome:
D21-PTF-10	PO.AD.05.2 AAA Policies and Procedures OAA Sections 305(b) (5) (C) (iii) through (iv)	Determine through staff interview and documentation	Did the AAA serve as the regional focal point for aging programs and services?		Issue: Training: Outcome:
D21-PTF-11	PO.AD.05.3 AAA Policies and Procedures OAA Sections 305(b) (5) (C) (ii) through (iv)	Determine through staff interview and documentation	Did the AAA develop and implement an ICOA -approved Area Plan?		Issue: Training: Outcome:
D21-PTF-12	PO.AD.05.4 AAA Policies and Procedures OAA Sections 305(b) (5) (C) (iii) through (iv)	Determine through staff interview and documentation	Did the AAA administer programs and services through contract agreements or directly provide services as described in the AAA Area Plan?		Issue: Training: Outcome:
D21-PTF-13	PO.AD.05.5 AAA Policies and Procedures OAA Sections 305(b) (5) (C) (iii) through (iv)	Determine through staff interview and documentation	Did the AAA make records of services rendered and monies expended in the provision of those services available at the request of the ICOA?		Issue: Training: Outcome:
D21-PTF-14	PO.AD.08.1 Confidential Records IDAPA 15.01.01 IDAPA 15.01.02	Determine through staff interview and documentation	During the course of an Adult Protection investigation, does the AAA keep information and records obtained confidential?		Issue: Training: Outcome:
D21-PTF-15	PO.AD.08.2 Confidential Records IDAPA 15.01.01 IDAPA 15.01.02	Determine through staff interview and documentation	During the course of an Adult Protection case, does the AAA prohibit the release of confidential records to any member of the public, except as provided in ICOA Confidential Records Policy?		Issue: Training: Outcome:

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D21-PTF-16	PO.AD.09 Public Records Request	Determine through staff interview and documentation	Did the AAA grant or deny a public records request within 3 working days of the receipt of the records request. Did the Agency respond in a timely, accurate and courteous manner.		Issue: Training: Outcome:
D21-PTF-17	TG.AD.01 Cost Sharing for Respite IDAPA 15.01.01.025	Determine through staff interview and documentation	Did the AAA implement Cost Sharing for Respite?		Issue: Training: Outcome:
D21-PTF-18	TG.AD.02.1 State and Federal Cost Sharing IDAPPA 15.01.01.025.03 and.08	Determine through staff interview and documentation	Did the AAA follow the State requirements for Cost Sharing?		Issue: Training: Outcome:
D21-PTF-19	TG.AD.02.2 State and Federal Cost Sharing OAA Section. 315	Determine through staff interview and documentation	Did the AAA follow the Federal requirements for Cost Sharing?		Issue: Training: Outcome:
D21-PTF-20	TG.AD.02.3 State and Federal Cost Sharing IDAPPA 15.01.01.025.08	Determine through staff interview and documentation	Did the AAA maintain accounting records of all cost sharing payments and contributions and of all monies expended from these sources?		Issue: Training: Outcome:
D21-PTF-21	TG.AD.03 Authorized ADRC Logo Usage	Determine through staff interview and documentation	Did the AAA feature the ADRC logo on all print, electronic and advertising materials?		Issue: Training: Outcome:
D21-PTF-22	TG.AD.04 Allowable Cost for Sub-Granting	Determine through staff interview and documentation	Did the AAA follow the allowable costs to achieve project goals for ICOA discretionary grants? (SMP, MIPPA, VD-HCBS)		Issue: Training: Outcome:
D21-PTF-23	TG.AD.05 Appeals from Denials of Subcontract with AAA IDAPA 15.01.20.042.04	Determine through staff interview and documentation	Did the AAA develop a fair and impartial hearing procedure that provides the opportunity for a hearing to any individual or entity to which it has denied a subcontract.		Issue: Training: Outcome:
D21-PTF-24	TG.NU.01 Home Delivered Meal Program Compliance	Determine through staff interview and documentation	Did the AAA notify the client or client representative that due to food safety and sanitary issues a meal cannot be left at the HDM address if no one is home?		Issue: Training: Outcome:

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D21-PTF-25	TG.NU.01 Home Delivered Meal Program Compliance	Determine through staff interview and documentation	Did the AAA notify the HDM client or representative that they are required to call to cancel a meal if they will not be home to receive?		Issue: Training: Outcome:
D21-PTF-26	TG.NU.01 Home Delivered Meal Program Compliance	Determine through staff interview and documentation	Did the AAA develop a fair and equitable policy as to how many times a provider can attempt to deliver a meal before an action would be taken?		Issue: Training: Outcome:
D21-PTF-27	TG.NU.01 Home Delivered Meal Program Compliance	Determine through staff interview and documentation	Did the AAA include the meal delivery policy in the HDM provider's scope of work to ensure there are no conflicts or confusion regarding provider reimbursement		Issue: Training: Outcome:
D21-PTF-28	GU.NU.01.A Voluntary Contributions/ Donations	Determine through staff interview and documentation	Did the AAA ensure that each Nutrition Provider provide program participants with the opportunity to make voluntary donations or contributions to the Nutrition Services Program		Issue: Training: Outcome:
D21-PTF-29	GU.NU.01.B Voluntary Contributions/ Donations	Determine through staff interview and documentation	Did the AAA ensure that each nutrition Provider adheres to the minimum requirements regarding voluntary donations or contributions?		Issue: Training: Outcome:
D21-PTF-30	GU.NU.02. Eligible and Ineligible Participants	Determine through staff interview and documentation	Did the AAA follow the examples that describe the eligible and ineligible participants?		Issue: Training: Outcome:
D21-PTF-31	GU.NU.03.1 Commodity/ Donated Food Program	Determine through staff interview and documentation	Did the AAA ensure that whatever practice they use to offer participants the opportunity to contribute, there is no reference to a suggested monetary donation that relates to the meal cost?		Issue: Training: Outcome:
D21-PTF-32	GU.NU.03.2 Commodity/ Donated Food Program	Determine through staff interview and documentation	Did the AAA ensure that if a Nutrition Provider accepts donated foods from a donated food program, they may not charge a fee to any eligible participant but may charge a non-eligible participant the cost of the meal?		Issue: Training: Outcome:
D21-PTF-33	PO.NU.01 NSIP Meal Counts in SAMS State Code: 67-5007	Determine through staff interview and documentation	Did the AAA complete all meal counts in SAMS data base by the November 1st cutoff date?		Issue: Training: Outcome:

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D21-PTF-34	PO.NU.02 Congregate Meal Site Reimbursement IDAPA 15.01.01.021 OAA Section. 339.(2)(H)and (I)	Determine through staff interview and documentation	Did the AAA enter the required data into the ICOA's management information system in order to ensure that Congregate Meal Sites are reimbursed for all meals for eligible participants?		Issue: Training: Outcome:
D21-PTF-35	FO.AD.03 Release of Information Form	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-36	FO.AD.04 Standard Income Declaration	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-37	FO.AP.07: SLUMS Exam: Cognitive Vulnerability	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-38	FO.AP.08 Report to Licensing and Certification SNF	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-39	FO.AP.09 Report to Licensing and Certification RALF	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-40	FO.AP.10 Report to Licensing and Certification CFH	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-41	FO.NU.03 Meal Frequency Waiver	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-42	FO.OM.10 Statewide Facility Visit Checklist	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-43	GU.AD.01 Sliding Fee Scale (2015)	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-44	GU.AD.02 Poverty Guidelines	Determine through staff interview and documentation	Did the AAA follow these guidelines?		Issue: Training: Outcome:
D21-PTF-45	GU.AP.09 Idaho AP Standards	Determine through staff interview and documentation	Did the AAA follow these Standards for Consistency in Investigate Determinations?		Issue: Training: Outcome:

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D21-PTF-46	RP.AP.02 AAA Substantiated Case Report	Determine through staff interview and documentation	Did the AAA fill out this report?		Issue: Training: Outcome:
D21-PTF-47	RP.AD.02 AAA Developmental Accomplishments and Staff Profile Annual Report	Determine through staff interview and documentation	Did the AAA fill out this report?		Issue: Training: Outcome:
D21-PTF-48	RP.AP.01 Report to Law Enforcement Form	Determine through staff interview and documentation	Did the AAA fill out these forms?		Issue: Training: Outcome:
D21-PTF-49	FO.AD.10 Contract Approval Form	Determine through staff interview and documentation	Did the AAA fill out this form?		Issue: Training: Outcome: