



AAA Bulletin 22-01

Date: September 1, 2022

To: Area Agencies on Aging Directors
Area Agencies on Aging Finance Directors
Area Agencies on Aging System Administrators

From: Access and Eligibility Services Program Policy

Subject: Service Definitions for Area Agencies on Aging – Federal Fiscal Year 2023

This information is shared with Area Agencies on Aging (AAA) directors. Please distribute to all staff and contractors/subrecipients, as applicable.

Please direct any questions regarding the policy information in this bulletin to the AAA Help Desk (AAA.Help@hsc.state.tx.us).

Active bulletins are posted on the following website:

- [Area Agencies on Aging \(AAA\)](https://hhs.texas.gov/doing-business-hhs/provider-portals/long-term-care-providers/area-agencies-aging-aaa) at <https://hhs.texas.gov/doing-business-hhs/provider-portals/long-term-care-providers/area-agencies-aging-aaa>.

Service Definitions for Area Agencies on Aging – Federal Fiscal Year 2023

Background

The *Service Definitions for Area Agencies on Aging* provides the approved list of services the AAAs may provide under their contracts with the Texas Health and Human Services Commission. The *Service Definitions for Area Agencies on Aging* also provides service-specific requirements for AAAs and service providers to collect and report data for the State Program Report (SPR). The SPR is the approved administrative data set for the Older Americans Act (OAA) programs.

This bulletin provides an overview of the updates and changes made to the *Service Definitions for Area Agencies on Aging – Federal Fiscal Year (FFY) 2023*.

General Updates

The Service Definitions for Area Agencies on Aging for FFY 2023, are updated for clarity and consistency.

Additional updates include the following:

- The addition of links and references to the *Area Agency on Aging Policies and Procedures Manual (AAAPPM)*, AAA Program Instructions, AAA Technical Assistance memos, and AAA forms where appropriate.
- The reformatting of the information provided in the 'Method of Service Provision and Approval to Provide a Service Directly' column.
- A 'Notes' section is added at the end of the document for additional clarifying information.

New Service Definitions

The following new service definitions are added to expand the allowable services the AAAs may provide.

Service Definition - Assisted Transportation

Assistance and transportation, including escort or other appropriate assistance, to a person who has difficulties (physical or cognitive) using regular vehicular transportation.

A unit of service is a one-way trip.

Service Definition – Outreach

Interaction with a person initiated by the AAA to identify potential participants (or their caregivers) and to encourage the use OAA services and benefits.

A unit of service is one contact.

Note: This service does not include outreach activities already identified under legal outreach (Legal Awareness), HICAP Outreach or MIPPA Outreach.

[Service Definition - Public Information Services](#)

A service that provides information to groups of current and potential participants about the resources and services available for older adults in their communities.

Includes activities such as providing information at senior fairs, handing out publications and answering questions, and initiating targeted mass media campaigns, including targeted internet websites.

A unit of service is one activity.

Updated Service Definitions

The following service definitions are updated for clarity and consistency.

[Service Definition - Area Agency Administration](#)

Activities to ensure the development and implementation of a comprehensive and coordinated system to serve older adults and family caregivers within the AAA's planning and service area.

Responsibilities include being the focal point for aging services; providing advocacy for older people in their service area; evaluating regional strengths and local resources; identifying service gaps, including people with the greatest economic and social need; developing and implementing an area plan based on the OAA; procuring services funded with federal and state funds; negotiating and managing contracts; reporting; reimbursement; accounting; auditing; monitoring; and quality assurance.

[New Policy](#)

Clarifies the service definition by removing "outreach" and including examples of allowable activities.

[Service Definition - Care Coordination \(Case Management\)](#)

A service to assess the needs of an older person and effectively plan, arrange, coordinate and follow up on services which most appropriately meet the identified needs as mutually defined by the older person, the access and assistance staff, and where appropriate, a family member(s) or other caregiver(s).

[New Policy](#)

Clarifies that travel time, staff training and program publicity may be considered as 'other expenses' under the reimbursement methodology.

[Service Definition - Caregiver Counseling](#)

A service designed to support caregivers to improve their emotional well-being and assist them in their decision-making and problem solving.

[New Policy](#)

Clarifies the requirements for professionals providing Caregiver Counseling services. Counselors must have appropriate education and experience in counseling and have a license to practice in Texas.

[Service Definition - Caregiver Information Services](#)

A service that allows for the dissemination of accurate, timely and relevant caregiver related information through public group activities such as handing out publications, conducting group presentations, seminars, health fairs and mass media.

[New Policy](#)

Clarifies that the service is for activities directed to a group of current or potential caregivers.

[Service Definition - Caregiver Support Coordination \(Caregiver Case Management\)](#)

An ongoing service provided to a caregiver to assess the needs of a caregiver to effectively plan, arrange, coordinate and follow up on services which most appropriately meet the identified needs of the caregiver, as mutually defined by the caregiver, the care recipient, and the access and assistance staff.

[New Policy](#)

Clarifies that the caregiver assessment focuses on the needs of the caregiver. Also clarifies that travel time, staff training and program publicity may be considered as 'other expenses' under the reimbursement methodology.

[Service Definition - Caregiver Support Groups](#)

A service to facilitate caregivers to discuss their common experiences and concerns and develop a mutual support system. Support groups are typically held on a regularly scheduled basis and may be conducted in person, over the phone, or online.

[New Policy](#)

Clarifies the requirements for professionals leading Caregiver Support Groups.

[Service Definition - Chore Maintenance](#)

A service to perform heavy household tasks which an older person is not able to perform on their own, such as heavy cleaning (e.g., scrubbing floors, washing walls, or washing windows inside and outside), moving heavy furniture or maintenance such as yard or sidewalk maintenance.

[New Policy](#)

Clarifies the service definition to align with the SPR.

Clarifies that Chore Maintenance is to assist with 'heavy' household tasks which an older person is not able to perform on their own.

[Service Definition - Congregate Meal](#)

A hot or other appropriate meal served to an older person who is eligible in a congregate setting.

[New Policy](#)

Includes the requirement to complete a Nutritional Risk Assessment as required by policy. (AAAPPM D-1060)

Adds a link for AAA-PI 312 Data Management Guide to the method of service provision column for services authorized through Data Management.

[Service Definition - Data Management](#)

Activities directly related to data entry and reporting for services not directly provided by the AAA.

[New Policy](#)

Clarifies that Data Management is for data entry and reporting for services not directly provided by the AAA.

Adds a link for AAA-PI 312 Data Management Guide.

[Service Definition - Day Activity and Health Services](#)

Services provided in a congregate, non-residential setting for an older person who needs supervision but does not require institutionalization. Services may include any combination of social and recreational activities, health maintenance, transportation, meals and other supportive services. The unit of service is *a day*, which is defined as 8 hours.

[New Policy](#)

The unit of service is changed from *day* to *hour*.

AAAs report the unit of service as *hour(s)*. Partial hours may be reported using two decimal places. For example, 15 minutes is reported as 0.25 hours.

[Service Definition - Emergency Response](#)

Services for an older person who is homebound or frail to establish an automatic monitoring system which links to emergency medical services when the person's life or safety is in jeopardy. ERS services include the installation of the individual monitoring unit, key lockbox, training associated with the use of the system,

periodic checking to ensure that the unit is functioning properly, equipment maintenance calls, response to an emergency call by a medical professional, para-professional or volunteer, and follow up with the older person.

New Policy

Clarifies that a Consumer Needs Evaluation is required. AAAPPM D-1040

Service Definition - Evidence Based Intervention (Health Promotion)

Activities related to the prevention and mitigation of the effects of chronic disease (including osteoporosis, hypertension, obesity, diabetes, and cardiovascular disease), infectious disease, vaccine-preventable disease, prevention of sexually transmitted diseases, as well as alcohol and substance abuse reduction, chronic pain management, smoking cessation, weight loss and control, stress management, falls prevention, physical activity and improved nutrition.

New Policy

Clarifies the service definition to align with the SPR and the 2020 reauthorization of the OAA. Adds specific examples of activities related to the prevention and mitigation of the effects of chronic disease.

Adds a link to AAA-PI 309 Health Promotion Services.

Service Definition - Health Maintenance (Health Promotion)

Services that include one or more of the following activities:

- Medical treatment by a health professional.
- Health education and counseling services for persons or groups about lifestyles and daily activities.
- Home health services include, but are not limited to, nursing, physical therapy, speech, or occupational therapy.
- Provision of medications, nutritional supplements, glasses, dentures, hearing aids or other devices necessary to promote or maintain the health or safety of the older person.

New Policy

Adds links to AAA-PI 309 Health Promotion Services and AAA-TA 06-09 Unit of Health Maintenance.

Service Definition - Health Screening and Monitoring (Health Promotion)

Activities to assess the level of health and wellness of an older person and ensure the eligible person is made aware of health services available in their community for appropriate follow-up care. Services may be provided in senior centers, nutrition sites, health fairs or other community settings or in a person's home.

[New Policy](#)

Adds a link to AAA-PI 309 Health Promotion Services.

[Service Definition - Home Delivered Meals](#)

Hot, cold, frozen, dried, canned, fresh or supplemental food (with a satisfactory storage life) delivered to a person who is eligible in their place of residence.

[New Policy](#)

Adds the requirements to complete the Nutritional Risk Assessment and the [Form 2278](#), Determination of Type of Meal.

Adds a link to AAA-PI 312 Data Management Guide to the method of service provision column.

[Service Definition - Homemaker](#)

Services provided by trained and supervised homemakers involving the performance of light housekeeping tasks and home management.

[New Policy](#)

Aligns the service definition with the SPR. Clarifies the service is for 'light' housekeeping tasks and home management for an older person who requires assistance with these activities.

[Service Definition - Homemaker – Voucher](#)

A service provided through the consumer directed services option whereby an individual provider is chosen by the older person.

[New Policy](#)

Aligns the service definition with the SPR. Clarifies the service is for 'light' housekeeping tasks and home management for an older person who requires assistance with these activities.

[Service Definition - Information, Referral and Assistance](#)

A service that includes:

- assessing a person's needs and appropriate response modes;
- evaluating appropriate resources;
- identifying organizations capable of meeting those needs;
- providing enough information about each organization to help inquirers make an informed choice;
- locating alternative resources when services are unavailable; and
- when necessary, participating in linking the person to needed services and following up on referrals to ensure the service was provided.

New Policy

Clarifies that an intake (Form 2276) is not required for Information, Referral and Assistance.

Service Definition - Legal Assistance – 60 years and older

Advice or representation by an attorney, including assistance by a paralegal or law student under the supervision of an attorney, or assistance provided by a certified benefits counselor to an older person, or their caregiver with economic and social needs.

New Policy

Clarifies that the provision of counseling or representation by a non-lawyer, such as a certified benefits counselor, where permitted by law is referring to assistance provided by a certified benefits counselor.

Clarifies that 'Representation' refers to services provided by an attorney of an older person or class of older people in either the state or federal court systems. 'Benefits counseling', 'representative payee' and 'guardianship' are identified as 'legal assistance' services.

Adds 'Fixed unit rate plus other expenses' and 'cost reimbursement' as options for reimbursement.

Service Definition - Mental Health Services (Health Promotion)

Assessment by a mental health professional to determine a need for mental health service(s) (diagnosis or screening) or the provision of services to support and improve the emotional well-being of a person.

New Policy

Adds a link to AAA-PI 309 Health Promotion Services.

Service Definition - Nutrition Counseling

Providing personalized advice or guidance about options and methods for improving nutritional status performed one-on-one by a registered dietitian to an older person at nutritional risk due to health or nutritional history, dietary intake, medications, or chronic illness.

New Policy

Adds the requirement to complete the Nutritional Risk Assessment.

Service Definition - Nutrition Education

The provision of information to an older person to promote nutritional well-being and to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior.

New Policy

Adds the requirement for nutrition education materials to be developed and approved by a dietitian or a person with equivalent education and training.

Service Definition - Ombudsman

Services to protect the health, safety, welfare, and rights of residents of nursing facilities and assisted living facilities, including identifying, investigating, and resolving complaints that are made by, or on behalf of, residents.

New Policy

Clarifies the method of service provision to specify that the service may be provided directly by a certified ombudsman of a local ombudsman entity within the AAA or by a certified ombudsman of a local ombudsman entity housed within a subrecipient of the AAA.

Service Definition - Participant Assessment – Access and Assistance

Activities directly related to the initial assessment and required reassessment of an older person for supportive services provided directly by a AAA.

New Policy

Clarifies the definition by adding that the completion of all forms necessary to determine eligibility is an example of an activity directly related to the initial assessment and required reassessment of an older person for supportive services. Adds examples of the forms necessary to determine eligibility.

Service Definition - Participant Assessment – Nutrition Services

Activities directly related to the initial assessment and required reassessment of a person for congregate and home delivered meals.

New Policy

Clarifies the definition by adding that the completion of all forms necessary to determine eligibility is an example of an activity directly related to the initial assessment and required reassessment of a person for congregate and home delivered meals. Adds examples of the forms necessary to determine eligibility.

Adds a link to AAA-PI 312 Data Management Guide to the method of service provision column.

Service Definition - Personal Assistance

Services to assist an older person who has difficulty performing a minimum of two activities of daily living as identified in the assessment process, with tasks a person would typically perform if they were able. This includes assistance in all activities of daily living and health-related tasks.

[New Policy](#)

Clarifies that the service also includes assistance with health-related tasks, to align with the SPR.

[Service Definition - Physical Fitness \(Health Promotion\)](#)

Physical activities that sustain or improve physical and mental health. This may include exercise to increase endurance (e.g., cardiovascular and muscular), strength, flexibility, balance, or coordination and agility.

[New Policy](#)

Adds a link to AAA-PI 309 Health Promotion Services.

[Service Definition - Recreation \(Health Promotion\)](#)

Activities, such as sports, performing arts, games, and crafts, where an older person participates as a spectator or performer, and which are facilitated by a provider.

[New Policy](#)

Adds a link to the AAA-PI 309 Health Promotion Services.

[Service Definition - Residential Repair](#)

Services consisting of repairs or modifications of a dwelling occupied by an older person that are essential for the health and safety of the older person.

[New Policy](#)

Adds the requirement to complete the Consumer Needs Evaluation.

Adds a note to the allowable funds column to clarify housing bond funds must be used to expand service capacity. Also clarifies that housing bond funds for home repairs or modifications cannot exceed \$2,500 per dwelling.

Adds a reference to the Scope of Services Related to Housing Bonds in the AAA contract for specific requirements.

[Service Definition - Transportation](#)

Services that provide or arrange for taking an older person from one location to another. Does not include any other activity. There are two types of transportation service: 'demand or response' and 'fixed route.' The reimbursement methodology is 'fixed unit rate per one-way trip.'

[New Policy](#)

Adds a link to the AAA-PI 312 Data Management Guide.

Clarifies and expands the reimbursement methodology. Clarifies 'Fixed unit rate' is for public transportation and adds 'Variable unit rate' as an option for reimbursement.

Clarifies the unit of service by noting that each one-way trip is considered as one unit of service.

[Service Definition - Transportation – Voucher](#)

A service which allows an eligible person to choose an individual or commercial private or non-profit transportation provider. The rate and transportation schedule are negotiated with the provider by the eligible person. Service activity includes taking an eligible person from one location to another. Does not include any other activity. The unit of service is a singular one-way trip.

[New Policy](#)

Clarifies the unit of service by noting that each one-way trip is considered as one unit of service.

Correspondence

The Consumer Needs Evaluation (CNE) Instructions are updated to include Emergency Response and Residential Repair as services that require the completion of the CNE and adds the eligibility requirements for a caregiver to qualify for respite care and supplemental services funded by Title III-E.

The *Service Definitions for Area Agencies on Aging – Federal Fiscal Year 2023* document is posted on the AAA Procedures webpage.

Policies and Procedures Manual

The Area Agency on Aging Policies and Procedures Manual is currently scheduled to be updated in the December 2022 revision.

Effective Date

This policy is effective October 1, 2022.