—PROGRAM INSTRUCTION—

Texas Department of Aging and Disability Services (DADS) – Access and Intake Division

TITLE:	Data Management Guide	NUMBER:	AAA-PI 312
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The Department is revising the program instruction (PI) to adjust information to the *Service Requirements for Activities Associated with Managing and Reporting Client Data* chart related to allowable activities and costs associated with the DADS statewide database. The implementation and management of the statewide database has led the Department to reassess whether certain activities can be specifically attributable to Data Management.

Budgets, expenditures reporting and funding source must be based on the service the data management activities are supporting. Some functions and associated costs are not clearly attributable to a specific service. The combination of the activity, the service provided, and who is performing the activity defines whether a function meets Data Management criteria. The attached chart provides a description of the activities associated with maintaining the statewide system by the Area Agency on Aging (AAA), as well as the managing and reporting of program participant data performed by AAA staff or service providers. The chart also provides the approved service classification for specific activities and the activities not considered a function of Data Management.

When Data Management functions occur at the AAA level, the staff position and the activities performed must be identified in the AAA's area plan and budget. When Data Management functions occur at the contractor level, the name of the contactor and the activities performed must be identified in the AAA's area plan. Information submitted to DADS must comply with the directions for preparing a budget or an area plan.

Service Requirements for Activities Associated with Managing and Reporting Client Data

Description	Administration	Care Coordination - Caregiver Support Coordination	Data Management	Participant Assessment
Service authorization, and/or document verification, and/or data entry into DADS state-wide database, **by AAA Staff or Service Provider** for Congregate Meals, Home Delivered, Transportation. Direct and indirect costs associated with this category are allowable in proportion to actual AAA Staff time spent in this activity.			X	
Completion of client forms (Intake, CNE, etc.), service authorization, and documentation of activities related directly to a client into the DADS state-wide database **by AAA Staff** for services other than nutrition and transportation. **Note:** If **AAA staff** perform all three of these functions for nutrition or transportation services it is classified as Care Coordination.		X		
Completion of client forms (Nutritional Risk Assessment, Intake, CNE, etc.) **by Service Provider** for services requiring an assessment. **Note**: The AAA may include this cost in the contracted service cost.				X
Validation of complete and accurate data in the DADS statewide system and report preparation by **AAA Staff** in support of the annual State Program Report (SPR) submitted to ACL using NAPIS.			X	
Validation of complete and accurate data in the DADS statewide system and report preparation by **AAA Staff** in support of the QPR submitted to DADS.			X	
Preparation of RfR/RfAJ by **AAA Staff**	X			
Preparation of AAA Budget by **AAA Staff.**	X			
Information technology services performed by designated database administrator including oversight of software updates, report building and running using Advanced Reporting, reports review and analysis to validate data to support projections, staffing and budgeting, ongoing database administration duties, or support of the DADS statewide database by **AAA Staff.**			X	
Preparation of Performance Measure Testing (PMT) data and reports by **AAA Staff**.	X			
Training of staff or service providers in the use of the statewide system and in the use of new releases of the software by **AAA Staff**.	X			