The Department is revising the program instruction (PI) to remove the Client Documents Required for Services matrix from the PI allowing the matrix to be revised without causing a revision of the PI. No substantive changes were made to the PI.

The matrix (Client Documents Required for Services) identifies all required documentation for a specific service provided through the Older Americans Act. The Client Documents Required for Services matrix can be found on the AAA website.

AAAs must also follow the items listed below:

- When a program participant uses a mark, such as an “X” as their signature, the service provider must sign as witness.
- All documents and forms must be dated.

Definitions:

- **Client Contact Report** – a Centers for Medicare and Medicaid Service report supporting contact with a client (program participant) such as an individual client contact report on SHIPTalk / NPR.

- **Estimated Audience** – documentation supporting audience participation or target audience, such as activity log, sign-in sheet, estimated number of attendees at a group event, or a AAA designed event summary log which includes an agenda, description, and estimated number of participants.

- **Follow Up / Monitoring** – activities performed to confirm the individual for whom service was approved, received the service and found it acceptable.

- **Record of Units Provided** – any documentation supporting the units provided to the program participant such as a timesheet, IR&A Activity Log, rosters, sign-in sheets.

For questions or comments, please direct them to the Help Desk at T3AHelp@dads.state.tx.us.