



## **Area Agencies on Aging Broadcast 2021-03**

**Date:** May 17, 2021

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

**From:** Office of Area Agencies on Aging

**Subject:** **1. Area Agencies on Aging (AAA) Annual Customer Satisfaction Survey**  
**2. Monthly Harmony Advanced Report (HAR) Validation Process**

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This information is being shared with Area the Agencies on Aging (AAA) directors who must distribute to all staff and contractors.

Please direct any questions regarding this information to the AAA Help Desk ([AAA.Help@hhsc.state.tx.us](mailto:AAA.Help@hhsc.state.tx.us)).

### **1. AAA Annual Customer Satisfaction Survey**

#### **Background**

A recent Health and Human Services Commission (HHSC) internal audit conducted on the Office of the Area Agencies on Aging (OAAA) cited the OAAA for not having documented processes and procedures for conducting annual customer satisfaction surveys as required in Texas Administrative Code (TAC), Title 26, §213.151.

The corrective action plan required the OAAA to develop processes and procedures to implement a standardized process to conduct annual customer service satisfaction surveys to ensure the Area Agencies on Aging and subcontractors' delivery of services is adequate and delivered as required.

The AAAs must follow the processes and procedures below to conduct annual customer satisfaction surveys.

## **New Processes and Procedures**

The AAA is required to send and ensure, at a minimum, a survey for each of the following ten (10) services, if applicable, is completed on at least an annual basis.

- Benefits Counseling
- Care Coordination
- Caregiver Support Coordination
- Congregate meals
- Evidence Based Intervention (EBI)
- Home Delivered Meals
- Homemaker
- Personal Assistance
- Residential Repair
- Transportation

**Exception:** A survey is not required for consumer directed services (voucher services).

## **Survey Requirement**

All surveys must:

- Have at least five (5) questions but no more than ten (10) questions, unless it contradicts with the programs fidelity requirements.
- Include a comment box.
- For *on-going services*, be sent to a *statistical sampled size*.
- For a *one-time service*, be sent to a *statistical sampled size* and provided to the client within 30 calendar days of the received service for the month being surveyed.
- Be provided both English and Spanish.

The survey can be completed via mail, telephone, electronic, face-to-face or by a third-party.

## **Monitoring**

The AAA must have written policies and procedures to ensure:

- The survey information is used to improve or expand services.
- That valid issues and/or concerns are resolved.
- When requested by the AAA's of their subcontractors or HHSC-AES of the AAA's, a summary of the survey information must be provided.

## **Documentation**

Documentation must include the following:

- Steps taken to resolve valid issues and/or concerns from a client.
- Survey responses if the survey is not completed by the participant (i.e., telephone, face-to-face).

## **Record Management**

The AAA must retain the survey records for a minimum of 7 years (AAA Attachment E UTC Grant v. 2.16.1).

## **Glossary**

**Benefits Counseling** – Includes HICAP assistance and legal assistance.

**One-time service** – Services that happen only once (i.e., residential repair, an EBI course).

**On-going services** – Services that are not one-time services (i.e., home delivered meals).

**Statistical sample size** – No less than 10 percent of the total population being surveyed.

**Subcontractor** – A purveyor of goods or services engaged by a primary contractor to provide goods, services or both through a procurement relationship generally available to any purchaser for a stated price.

**Valid** – A reasonable concern from a program participant.

## **Effective Date**

This is effective May 17, 2021 for any new survey being created on or after this date.

## 2. Monthly Harmony Advanced Report (HAR) Validation Process

### Background

Currently, the Office of Area Agencies on Aging (OAAA) prepares for the annual State Program Report (SPR) and fiscal closeout activities by generating several iterations of HAR data validation reports to notify Area Agencies on Aging (AAAs) of data issues requiring corrections. This process of generating, analyzing, and distributing reports to the AAAs for review and corrections cause delays in the completion of the SPR and closeout reconciliation activities.

### New Processes and Procedures

Effective June 15, 2021, the AAAs must generate the following four HAR validation reports:

- Cluster 1 missing NAPIS
- Cluster 2 missing NAPIS
- Missing Fund ID
- Intake Report Under 60 ONLY with USDA Eligibility reports

The AAAs must implement a monthly requirement to generate the HAR reports using the *Instructions to Generate HAR Reports* document (attached) for each of the HAR reports.

On the 15<sup>th</sup> of every month (or the following workday if a weekend or holiday), the AAAs must review these reports for discrepancies and complete corrections of the data in SPURS. After the AAA reviews and corrects all the data discrepancies identified, the AAA must complete and submit the **AAA Monthly HAR Template** (attached) to AAA Help Desk ([AAA.Help@HHSC.state.tx.us](mailto:AAA.Help@HHSC.state.tx.us)) on or before the end of the month (or the following workday if a weekend or holiday).

### Forms

*Instructions to Generate HAR Reports* and **AAA Monthly HAR Template**.

### Effective Date

These processes and procedures are effective June 15, 2021.