



Federal Fiscal Year 2027 Service Definitions for Area Agencies on Aging

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. (AAAPPM Section B-1010 and Section C-1010)	N/A	• N/A	• Title III-B • Title III-C1 • Title III-C2 • Title III-E • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Assisted Transportation	Services or activities that provide or arrange for the travel, including travel costs , of individuals from one location to another. This service includes escort or other appropriate assistance for a person who has difficulties (physical or cognitive) using regular vehicular transportation. Does not include any other activity.	One, one-way trip Note: Each one-way trip from one location to another counts as a unit. For example, a 'roundtrip' is equal to two units of service.	SPR • Unduplicated Persons • Units - One one-way trip QPR • Unduplicated Persons • Units - One one-way trip	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue

Care Coordination Case Management	A service provided to an older adult, at the direction of the older adult or family member, by an individual who is trained or experienced in case management skills to assess needs and arrange, coordinate, and monitor a package of services that meets the individual's needs. This service includes activities and coordination such as: 1) a comprehensive assessment of the individual, including physical, psychological and social needs, 2) develop, implement monitor and adjust a service plan in conjunction with the individual that uses formal services, including those from other plans, as well as informal services to meet the needs of the individual identified in the assessment 3) coordinate and monitor service deliveries, 4) advocate on behalf of the individual for needed services or resources and, 5) conduct periodic reassessment, as required. A Consumer Needs Evaluation (CNE) is required. (AAAPPM Section D-1040).	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75) A unit is the time spent by staff, or a qualified designee, engaged in working with an eligible person. A unit of service does not include travel time, staff training, program publicity, or direct services other than care coordination. These items may be considered as "other expenses"	SPR • Unduplicated Persons • Units – One hour of service OAA Assessments • ADL/IADL - CNE QPR • Unduplicated Persons • Units – One hour of service	• Title III-B • Disaster Relief as approved by HHSC • State General Revenue
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
		under the reimbursement methodology.		
Caregiver Counseling	A service designed to support caregivers and assist them in their decision-making and problem solving. Counselors are service providers that are degreed and/or credentialed as required by the State of Texas policy, trained to work with older adults and families and specifically to understand and address the complex physical, behavioral, and emotional problems related to their caregiver roles. This includes counseling to individuals or group sessions. Counseling is a separate function apart from support group activities or training (see also <i>Caregiver Support Group, Caregiver Education and Training</i>).	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR • Unduplicated Persons • Units – One hour of service • Relationship to Care Recipient QPR • Unduplicated Persons • Units – One hour of service	• Title III-E • Title III-E ORC • Title VII-EAP • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Caregiver Information Services	A service that provides 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. Developing a resource library and other informational resources for use in the dissemination of caregiver information is a component of this service. Note: Service units are for activities directed to a group of current or potential caregivers. (A group setting refers to a scenario involving more than one individual being recognized as part of a collective environment. Two or more people form a group setting.)	One Activity Count only one activity for each event. If provided in a group meeting or an event such as a health fair, each person receives a service; therefore, each eligible person is counted towards the estimated audience. Required documentation: • Who conducted the presentation? • What was discussed related to Caregivers? • When was the event held? • Where was the event held?	SPR • Estimated Audience • Units – One activity QPR • Estimated Audience • Units – One activity	• Title III-E • Title III-E ORC • Title VII-EAP • Disaster Relief as approved by HHSC • State General Revenue

Caregiver Support Coordination Caregiver Case Management	A service provided to a caregiver, at the direction of the caregiver: • by an individual who is trained or experienced in the case management skills that are required to deliver the services and coordination described in subparagraph; and • to assess the needs, and to arrange, coordinate, and monitor an optimum package of services to meet the needs, of the caregiver; and Includes services and coordination such as— Includes services and coordination such as: • comprehensive assessment of the caregiver (including the physical, psychological, and social needs of the individual); • development and implementation of a service plan with the caregiver to mobilize the formal and informal resources and services identified in the assessment to meet the needs of the caregiver, including coordination of the resources and services—	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75) A unit is defined as the time which is spent by the caregiver specialist, or qualified designee, engaged in working with an eligible caregiver. A unit of service does not include travel time, staff training, program publicity or direct services other than caregiver support coordination. These items may	SPR • Unduplicated Persons • Units – One Hour • Relationship to Care Recipient QPR • Unduplicated Persons • Units – One Hour	• Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
		be considered as "other expenses" under the reimbursement methodology.		
Cont'd	○ with any other plans that exist for various formal services; and ○ with the information and assistance services provided under the Older Americans Act; ○ coordination and monitoring of formal and informal service delivery, including coordination and monitoring to ensure that services specified in the plan are being provided; ○ periodic reassessment and revision of the status of the caregiver; and ○ in accordance with the wishes of the caregiver, advocacy on behalf of the caregiver for needed services or resources. A Form 2270, Caregiver Intake, is required. (AAAPPM Section D-1030) A Caregiver Assessment Questionnaire is required. (AAAPPM Section D-1050)			

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. Support groups are led by a trained person, moderator or professional licensed to practice in Texas, such as a social worker, counselor, or therapist. This service does not include “caregiver education groups,” “peer-to-peer support groups,” or other groups primarily aimed at teaching skills or meeting on an informal basis without a facilitator who possesses training or the required credentials.	Session A session is typically 30 (0.50) minutes to one hour.	SPR • Estimated Audience • Units – Sessions QPR • Estimated Audience • Units - Sessions	• Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Caregiver Training	A service that provides family caregivers with instruction to improve knowledge and performance of specific skills relating to their caregiving roles and responsibilities. Skills may include activities related to health, nutrition, and financial management, providing personal care, and communicating with health care providers and other family members. Training may include the use of evidence-based programs, be conducted in-person or online, and be provided in individual or group settings.	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR • Unduplicated Persons • Units – One hour • Relationship to Care Recipient QPR • Unduplicated Persons • Units – One Hour	• Title III-E • Title III-E ORC • Title VII-EAP • Disaster Relief as approved by HHSC • State General Revenue
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. A CNE is required. (AAAPPM Section D-1040)	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR • Unduplicated Persons • Units – One hour of service OAA Assessments • ADL/IADL-CNE QPR • Unduplicated Persons • Units – One hour of service	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Congregate Meals	A hot or other appropriate meal served to an older person who is eligible in a congregate setting. Such as community centers, schools, restaurants, faith-based locations, and other community gathering places — sometimes including virtual settings. Congregate Meals provide opportunities for social engagement, learning, and volunteering. Grab and Go meals must follow OAAA procedures and must not exceed 25% of the Title III C1 Congregate Meals funding. AAAs must document sub-service as C1 – Grab and Go. F-1100 Congregate Meals Texas Health and Human Services A Nutritional Risk Assessment is required. (AAAPPM D-1060) Nutrition Services (45 CFR 1321.87)	One Meal	SPR • Unduplicated Persons • Units – One meal • Number of unduplicated persons at high nutritional risk • Nutrition Risk Assessment QPR • Unduplicated Persons • Units – One meal	• Title III-C1 • Title III-C1 Grab and Go • Disaster Relief as approved by HHSC • State General Revenue • NSIP [Note: NSIP to be used for the purchase of food only. No units should be applied to NSIP funding.]

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Data Management	Activities directly related to data entry and reporting for services not directly provided by the AAA. Includes activities directly related to the direct purchase of service, service authorization and document verification to support the provision, tracking and reporting of congregate meals, home delivered meals and transportation services. Also includes the validation of complete and accurate data in the HHS statewide system and report preparation by AAA staff in support of the annual SPR and the QPR.	N/A	N/A	- Title III-B - Title III-C1 - Title III-C2 - Title III-E - Disaster Relief as approved by HHSC - State General Revenue
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. A CNE is required. (AAAPPM Section D-1040)	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR - Unduplicated Persons - Units – One hour of service OAA Assessments - ADL/IADL-CNE QPR - Unduplicated Persons - Units – One hour of service	- Title III-B - Disaster Relief as approved by HHSC - State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. Emergency Response System (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. A CNE is required. (AAAPPM Section D- 1040)	One Month of ERS service Report one unit for each month of service if an older person received services at any time during the month. If an installation fee is charged, a separate unit rate may be established for this charge.	SPR • Unduplicated Persons • Units – One Month of service QPR • Unduplicated Persons • Units – One Month of Service	• Title III-B • Title III-E • Disaster Relief as approved by HHSC • State General Revenue

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. Activities must meet the Administration for Community Living (ACL)'s definition for an evidence-based program. Activities and expenditures directly related to an evidence-based intervention program: • Staffing • Training • Procurement of supplies, publications, etc. • Ensure and maintain fidelity per NCOA Evidence-Based Programs and Fidelity Evaluation of ACL's Evidence-Based Programs. Evidence-based disease prevention and health promotion services (45 CFR	One Contact Record one contact each time an older person participates in an activity that is a component of an evidence-based intervention program.	SPR • Unduplicated Persons QPR • Unduplicated Persons • Units – One contact	• Title III-B • Title III-D [Note: Only activities and expenditures directly related to specific approved programs. Caregivers under age 60 may not receive evidence-based services using Title III-D funds.] • Title III-E [Note: Including services to caregivers under 60 if Title III-E eligibility requirements are met.] • Title III-E ORC • State General Revenue
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
	<u>132.89)</u>			

Health Maintenance (Health Promotion)	Services that include one or more of the following activities: • Medical treatment by health professional • Health education and counseling services for persons or groups about lifestyles and daily activities. Activities may include, but are not limited to: - o Art and dance – movement therapy - o Programs in prevention or reduction of the effects of chronic disabling conditions - o Alcohol and substance abuse - o Smoking cessation - o Weight loss and control - o Stress management • 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. • provision of dosage alert systems and the purchase of software, technical support, and materials that connect an eligible older person to free or reduced cost prescription medication services.	One Contact Record one contact each time an older person receives a health service as described.	SPR • Unduplicated Persons QPR • Unduplicated Persons • Units – One contact	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
	Evidence-based disease prevention and health promotion services (45 CFR 132.89)			
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. Activities may include the following: • Blood pressure • Hearing • Vision • Dental • Podiatry • Nutritional status • Blood tests • Urinalysis • Home injury control safety • Depression • Oral Health • Mental and Behavioral Health • Falls Prevention Evidence-based disease prevention and health promotion services (45 CFR 132.89)	One Contact Record one contact each time an older person receives a health service as described.	SPR • Unduplicated Persons QPR • Unduplicated Persons • Units – One contact	• Title III-B • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
HICAP Assistance and Outreach	Counseling or representation services provided by a non-lawyer such as a certified benefits counselor, where permitted by law, to Medicare beneficiaries, family members, caregivers or others working on behalf of an eligible person. The allowable topics that can be discussed for one-on-one assistance are: • Original Medicare (Parts A & B) • Medigap and Medicare Select • Medicare Advantage (MA and MA-PD) • Medicare Part D • Medicare Part D Marketing Sales Complaints & Issues • Part D Low Income Subsidy (LIS Extra Help) • Other Prescription Assistance • Medicaid Application Assistance • Medicaid Application Submission* • Medicaid Recertification* • MSP Application Assistance • MSP Application Submission* • MSP Recertification* STARS Manual Chapter 4-Beneficiary Contacts.	One Contact Contacts may be conducted over the phone, in person (on site), in person (at home), or through mail, e-mail, fax, web- based one-on-one chat sessions (where technology permits) or video-based real-time interactions over the web. Note: Postal mail, email, or fax to be selected when this is the only means of contact with the beneficiary. The Beneficiary Contact Form (BCF) for allowable ACL SHIP service requires reporting of one topic and total time spent with a person per day.	• N/A	• HICAP/SHIP

Cont'd	There are three types of Group Outreach and Education: 1. An interactive presentation to the public either in-person or via electronic means, such as video conference, webinar, or teleconference; 2. A booth or exhibit at a conference, or other public event, such as a health fair, senior fair, or community event; or 3. An enrollment event where team members are on hand to help the beneficiary submit an application online or by paper. A media outreach activity is one where general program or Medicare information is shared through a type of media which may include: • billboard • mass email • magazine • newsletter • social media • television • website • Other: mailing postcards, distributing flyers, brochures to partner locations like libraries. STARS Manual Chapter 5: Group Outreach and Education and Media Outreach and Education forms.	One Contact One contact is one outreach activity with the estimated number of attendees recorded. The Group and Media (GAM) form also requires reporting of total time spent on the event. Units generated under these activities must be reported using the GAM form. If a GAM event results in a benefits counselor providing HICAP Assistance to a person, a BCF must also be completed.		
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. AAAPPM Chapter F; Section D-1040 and Section D-1070). A CNE is required. (AAAPPM Section D- 1040) A Nutritional Risk Assessment is required. (AAAPPM D-1060) For participants receiving multiple meals in one delivery, a Determination of Type of Meal is required. (AAAPPM D-1070). Nutrition Services (45 CFR 1321.87)	One Meal	SPR • Unduplicated Persons • Nutrition Risk Assessment • Units – One meal OAA Assessments- • ADL/IADL - CNE with score 20 or greater QPR • Unduplicated Persons • Units – One meal	• Title III-C2 • Title III-E • Disaster Relief as approved by HHSC • State General Revenue • NSIP [Note: NSIP to be used for the purchase of food only. No units should be applied to NSIP funding.]

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Homemaker	Services provided by trained and supervised homemakers involving the performance of light housekeeping tasks and home management. Activities may include the performance of light housekeeping, home management, meal preparation, escort tasks, and shopping assistance. The objective is to help the older person sustain independent living in a safe and healthful home environment. A CNE is required. (AAAPPM Section D-1040)	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR • Unduplicated Persons • Units – One hour of service OAA Assessment • ADL/IADL - CNE QPR • Unduplicated Persons • Units – One hour of service	• Title III-B • Disaster Relief as approved by HHSC • State General Revenue
Income Support	Assistance in the form of a payment to a third-party provider for services or goods that support the basic needs of the person, on behalf of an older person or their caregiver.	One Contact The definition of the contact is a single payment to a provider on behalf of the older person or their caregiver.	SPR • Unduplicated Persons • Units – One contact QPR • Unduplicated Persons • Units	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • Housing Bond • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Information, Referral and Assistance	A service that includes: • provides the individuals with current information on opportunities and services available to the individuals within their communities, including information relating to assistive technology; • assesses the problems and capacities of the individuals; • links the individuals to the opportunities and services that are available; • to the maximum extent practicable, ensures that the individuals receive the services needed by the individuals, and are aware of the opportunities available to the individuals, by establishing adequate follow-up procedures; and • serves the entire community of older individuals, particularly— ○ older individuals with greatest social need; ○ older individuals with greatest economic need; and ○ older individuals at risk for institutional placement. Completion of Form 2276, Intake, is not required. (AAAPPM D-1020)	One Contact Count one contact for every communication with or on behalf of an eligible person, regardless of the type of contact (initial, follow-up, accessing services). Count only the initial inquiry during a reporting month from an older person, caregiver or a person calling on behalf of an older person or caregiver.	SPR • Unduplicated Persons/Estimated Audience • Units – One contact QPR • Unduplicated Persons/Estimated Audience • Units – One contact	• Title III-B • Title III-E • Title III-E ORC • Title VII-EAP: Information, referral and assistance concerning elder abuse, neglect, and exploitation. • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Instruction and Training	Services that provide experience or knowledge to people or professionals working with older people to acquire skills in formal or informal individual or group settings.	One Contact Each eligible person in a training session is counted as one contact.	SPR • Unduplicated Persons/Estimated Audience • Units – One contact QPR • Unduplicated Persons/Estimated Audience • Units – One contact	• Title III-B • Title VII-EAP: Instruction and training concerning elder abuse, neglect, and exploitation. • State General Revenue

Legal Assistance – 60 years and older <i>Services identified as “Legal Assistance Services” are Benefits Counseling, Representative Payee, Guardianship.</i>	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. Legal assistance activities include the following: • Advice or Counseling: A recommendation made to an older person regarding a course of conduct, or how to proceed in a matter, given either on a brief or one-time basis, or on an ongoing basis. May be given by phone or in person. • Document Preparation: Personal assistance given to an older person which helps with the preparation of necessary documents relating to public entitlements, health care, long-term care, individual rights, planning and protection options, and housing and consumer needs. • Representation: Advocacy on behalf of an older person in protesting or complaining about a procedure, or seeking special considerations by appealing an administrative decision, or representation by an attorney of an older person or class of older people in either the state or	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75) Record units of service for all people who are 60 or older in the eligible person’s case narrative, regardless of funding source. A unit of service does not include travel time, staff training, program publicity, or direct services other than legal assistance.	SPR • Units – One hour of service QPR • Unduplicated Persons • Units – One hour of service	• Title III-B • Title III-E • Title III-E ORC • Title VII-EAP • Disaster Relief as approved by HHSC • State General Revenue
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
	federal court systems. Legal Assistance (45 CFR 1321.93)			
Legal Awareness (Legal Outreach)	A service that provides for the dissemination of accurate, timely, and relevant information, eligibility criteria, requirements, and procedures to an older person about public entitlements, health and long-term care services, individual rights, planning and protection options, and housing and consumer needs. Legal Assistance can be counted if a One/-on-One happens during the event. An intake is required. The count should be reported in the LAUT Tool. Completion of Form 2276, Intake, is required see above. (AAAPPM D-1020)	One Contact If provided in a group meeting or an event such as a health fair, each person receives a service; therefore, each eligible person is counted as one contact.	SPR • Estimated Audience • Units – One contact QPR • Estimated Audience • Units – One contact	• Title III-B • Title VII-EAP • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. Mental health services shall be provided for a person who has mental health, emotional or socialization needs. The person may require support services, treatment, and additional referrals to address these needs. Such support services may include education, prevention, screening, referral, and intervention. Evidence-based disease prevention and health promotion services (45 CFR 132.89)	One Contact	SPR • Unduplicated Persons QPR • Unduplicated Persons • Units – One Contact	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
MIPPA Outreach and Assistance	A service that provides for the dissemination of accurate, timely, and relevant information, eligibility criteria, requirements, and procedures to current or prospective Medicare beneficiaries and their caregivers specifically regarding Medicare Savings Programs (MSP), Low-Income Subsidy (LIS) and Medicare Preventive Benefits. Contacts generated under these activities must be reported using a BCF or the GAM form. A BCF is entered when a person receives application assistance, and the completed application is submitted in the same contact.	One Contact Provided for one person through application assistance and submission, resulting in a BCF: or to a group of people receiving general education and awareness, resulting in a GAM. If provided in a group meeting or an event such as a health fair, each eligible person is counted as one contact.	N/A	• MIPPPA Priority One • MIPPA Priority Two
Nutrition Consultation	Providing information or services related to nutrition by a licensed dietitian or other qualified person to a AAA or nutrition provider. Such services do not include the AAA responsibilities for monitoring.	N/A	N/A	• Title III-C1 • Title III-C2 • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. (AAAPPM Section F- 1340) A Nutritional Risk Assessment is required. (AAAPPM F-1320) Nutrition Services (45 CFR 1321.87)	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR • Unduplicated Persons • Units – One hour of service QPR • Unduplicated Persons • Units – One hour of service	• Title III-C1 • Title III-C2 • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. All material must be developed and approved by a dietician or person with equivalent education and training. (AAAPPM Section F-1330) Nutrition Services (45 CFR 1321.87)	One Session per person A session is counted for each eligible person attending a nutrition education session which may be conducted in a group or one-on-one. A session is counted for each eligible person attending a nutrition education session that is at least 15 minutes. Other options are virtual and webinar.	SPR • Unduplicated Persons/Estimated Audience • Units – One session per person QPR • Unduplicated Persons/Estimated Audience • Units – One session per person	• Title III-C1 • Title III-C2 • State General Revenue
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. (Older Americans Act, Section 712)	N/A	QPR • Number of active Certified Ombudsman	• Title III-B • Title VII-EAP • Title VII-OM • Disaster Relief as approved by HHSC • State General Revenue • OMB ALF • Ombudsman GR Rider96

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Outreach – Older Americans Act Services Only	Interaction with a person initiated by the AAA to identify potential participants (or their caregivers) and to encourage them to use OAA services and benefits.	One Contact Individual, one-on-one contact between the AAA and an older person or caregiver.	SPR • Unduplicated Persons • Units – One contact QPR • Unduplicated Persons • Units – One contact	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue
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. This service includes the completion of all the forms necessary to determine eligibility, which include: • Caregiver Intake (AAAPPM D-1030) • CNE (AAAPPM D-1040) • Intake (AAAPPM D-1020)	One Contact One complete assessment or reassessment is one contact.	SPR • Unduplicated Persons/Estimated Audience • Units – One contact QPR • Unduplicated Persons/Estimated Audience • Units – One contact	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Participant Assessment – Nutrition Services	Activities directly related to the initial assessment and required reassessment of a person for congregate and home delivered meals. (AAAPPM Section F-1320 and Section D-1060) This service includes the completion of all the forms necessary to determine eligibility, which include: • Caregiver Intake (AAAPPM D-1030) • CNE (AAAPPM D-1040) • Determination of Type of Meal (D-1070) • Intake (AAAPPM D-1020) • Nutritional Risk Assessment (AAAPPM D-1060).	One Contact One complete assessment or reassessment is one contact.	SPR • Unduplicated Persons/Estimated Audience • Units – One contact QPR • Unduplicated Persons • Units – One contact	• Title III-C1 • Title III-C2 • Title III-E (Home Delivered Meals only) • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. A CNE is required. (AAAPPM Section D-1040)	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75) Does not include travel time, unless it is directly related to the older person's care plan.	SPR • Unduplicated Persons • Units – One hour of service OAA Assessment • ADL/IADL-CNE QPR • Unduplicated Persons • Units – One hour of service	• Title III-B • Disaster Relief as approved by HHSC • State General Revenue
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. Evidence-based disease prevention and health promotion services (45 CFR 132.89)	One Contact Each eligible person in a physical fitness session is counted as one contact.	SPR • Unduplicated Persons/Estimated Audience • Units – One contact QPR • Unduplicated Persons/Estimated Audience • Units – One contact	• Title III-B • Title III-E • Title III-E ORC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Public Information Services – Older Americans Act Services Only	A service that provides information to groups of current and potential participants on the resources and services available for older adults in their communities. Activities include providing information at senior fairs, handing out publications and answering questions, and initiating targeted mass media campaigns, including targeted internet websites. Unlike Information and Assistance, this service is not tailored to the specific needs of the person.	One Activity An activity initiated by the AAA that involves contact with multiple current or potential participants (e.g., publications, publicity campaigns and other mass media activities).	SPR • Estimated Audience • Units – One activity QPR • Estimated Audience • Units – One activity	• Title III-B • Disaster Relief as approved by HHSC • State General Revenue
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. Evidence-based disease prevention and health promotion services (45 CFR 132.89)	One Contact Each eligible person in a recreation activity is counted as one contact.	SPR • Unduplicated Persons/Estimated Audience • Units – One contact QPR • Unduplicated Persons/Estimated Audience • Units – One contact	• Title III-B • Title III-E • Title III-E ORC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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. A CNE is required. (AAAPPM Section D-1040) Follow the allowable thresholds for purchases (State of Texas Procurement and Contract Management Guide).	One unduplicated dwelling unit occupied by an older person. A unit of service includes all the services committed to repairing and modifying one unit in one program year. Note: Caregivers may serve more than one care recipient, resulting in more units of service than the number of unduplicated persons.	SPR • Unduplicated Persons • Units – Unduplicated dwelling unit per program year QPR • Unduplicated Persons • Units – Unduplicated dwelling unit per program year	• Title III- B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • Housing Bond [Note: Housing Bond funds must be used to expand service capacity. Home repairs or modifications cannot exceed \$2,500 per dwelling. Reference Scope of Services Related to Housing Bonds in the AAA contract.] • State General Revenue

Respite In Home	Temporary services for an eligible dependent care recipient for the relief of a caregiver provided in the eligible caregiver's home or the home of the care recipient on a short term, temporary basis while the primary caregiver is unavailable or needs relief. In addition to supervision, services may include meal preparation, housekeeping, assistance with personal care, and social and recreational activities. An eligible older Care Recipient must: • be unable to perform a minimum of two activities of daily living identified through the CNE; or • require substantial supervision due to a cognitive or other mental impairment which causes them to behave in a manner that poses a serious health or safety hazard to themselves or to another person. A CNE is required. (AAAPPM Section D-1040) Note: AAAs must document sub-service includes Respite Voucher. The term voucher identifies type of payment. Services are provided on an intermittent or temporary basis while the primary	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR • Unduplicated Persons • Units – One hour of service • Relationship to Care Recipient OAA Assessment • ADL/IADL - CNE QPR • Unduplicated Persons • Units – One hour of service	• Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
	caregiver is unavailable or needs temporary relief. Family Caregiver Support Services (45 CFR 1321.91)			

Respite Out of Home	Temporary respite services provided in settings other than the caregiver or care recipient's home, including activity and health services facility, senior center, or other non- residential setting (or, in the case of older relatives raising children, day camps), that allows the caregiver time away to do other activities and where an overnight stay does not occur. An eligible older Care Recipient must: • be unable to perform a minimum of two activities of daily living identified through the CNE or • require substantial supervision due to a cognitive or other mental impairment which causes them to behave in a manner that poses a serious health or safety hazard to themselves or to another person. A CNE is required. (AAAPPM Section D-1040) Note: AAAs must document sub-service includes Respite Voucher. The term voucher identifies type of payment. Services are provided on an intermittent or temporary basis while the primary caregiver is unavailable or needs temporary relief.	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR • Unduplicated Persons • Units – One hour of service • Relationship to Care Recipient OAA Assessment • ADL/IADL - CNE QPR • Unduplicated Persons • Units – One hour of service	• Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
	Family Caregiver Support Services (45 CFR 1321.91)			

Respite Out of Home, Overnight	Temporary respite services provided in residential settings such as nursing homes, assisted living facilities, and adult foster homes (or, in the case of older relatives raising children, summer camps), in which the care receiver resides in the facility (on a temporary basis) for a full 24-hour period of time. The service provides the caregiver with time away to do other activities. An eligible older Care Recipient must: • be unable to perform a minimum of two activities of daily living identified through the CNE; or • require substantial supervision due to a cognitive or other mental impairment which causes them to behave in a manner that poses a serious health or safety hazard to themselves or to another person. A CNE is required. (AAAPPM Section D-1040) Note: AAAs must document sub-service includes Respite Voucher. The term voucher identifies type of payment. Services are provided on an intermittent or temporary basis while the primary caregiver is unavailable or needs temporary relief.	Hour(s) Partial hours (minutes) should be rounded up to the nearest 15-minute increment (15, 30, or 45 minutes) and reported using a decimal value (0.25, 0.50, or 0.75)	SPR • Unduplicated Persons • Units – One hour of service • Relationship to Care Recipient OAA Assessment • ADL/IADL-CNE QPR • Unduplicated Persons • Units – One hour of service	• Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue
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Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
	Family Caregiver Support Services (45 CFR 1321.91)			
Senior Center Operations	The operation of community facilities where older people gather to pursue mutual interests, receive services and take part in activities which will enhance their quality of life, support their independence, and encourage their continued involvement in and with the community.	N/A	N/A	• Title III-B • Disaster Relief as approved by HHSC • State General Revenue
Social Reassurance	Providing regular contact and companionship for an older person by means of phone calls, texting, video chatting or instant messaging; and initiating necessary actions in the event the older person cannot be reached by phone calls, texting, video chatting or instant messaging.	One Contact	SPR • Unduplicated Persons • Units – One contact QPR • Unduplicated Persons • Units – One contact	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue
Special Initiative	As approved by HHSC, special activities or services, which do not fall under any other approved service definition, provided by the AAA to meet the needs of eligible people. Appropriate guidance will be provided by HHSC as needed. A Special Initiative does not include a request for Capital Equipment or Controlled Assets (CE/CA). CE/CA requests must be submitted following HHSC established processes.	N/A	QPR • As identified in HHSC guidance	• As identified in notification of funds available

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
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 services: • Demand or Response: Transportation designed to carry an older person from a specific origin to a specific destination upon request. An older person requests the transportation service in advance of their need, usually twenty-four to forty- eight hours prior to the trip. • Fixed Route: Transportation service that operates in a predetermined route that has permanent transit stops, which are clearly marked with route numbers and departure schedules. The fixed- route does not vary and the provider strives to reach each transit stop at the scheduled time. The older person does not reserve a ride as in a demand- response system; the person simply goes to the designated location and at the designated time to gain access to the transit system.	One one-way trip Note: Each one-way trip from one location to another counts as a unit. For example, a 'roundtrip' is equal to two units of service.	SPR • Units – One one-way trip QPR • Unduplicated Persons • Units – One one-way trip	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue

Service Name	Definition	Service Unit and Description	Reporting Requirements	Allowable Funds
Visiting	Meeting in-person with an older person to provide regular contact and companionship and to initiate appropriate action should the older person not respond.	One Contact	SPR • Unduplicated Persons • Units – One contact QPR • Unduplicated Persons • Units – One contact	• Title III-B • Title III-E • Title III-E ORC • Disaster Relief as approved by HHSC • State General Revenue

Acronyms

Acronym	Full Name
A&A	Access and Assistance
AAA	Area Agencies on Aging
ADL	Activities of Daily Living
ACL	Administration for Community Living
AAAPPM	Area Agency on Aging Program and Policy Manual
BCF	Beneficiary Contact Form
CAQ	Caregiver Assessment Questionnaire
CE/CA	Capital Equipment and Controlled Assets
CFR	Code of Federal Regulations
CNE	Consumer Needs Evaluation
EAP	Elder Abuse Prevent Program
GOE	Group Outreach and Education
GNG	Grab and Go Meals
HHSC	Texas Health and Human Services Commission
HICAP	Health, Information, Counseling, and Advocacy Program
IADL	Instrumental Activities of Daily Living
LAUT	Legal Assistance Upload Tool
MIPPA	Medicare Improvements for Patients and Providers Act
MOE	Media Outreach and Education
NCOA	National Council on Aging
NRA	Nutrition Risk Assessment
NSIP	Nutrition Services Incentive Program
OAA	Older Americans Act (Assessments for IADL/ADL)
OMB ALF	Ombudsman Assisted Living Facility
OMB	Ombudsman
ORC	Older Relative Caregiver
QPR	Quarterly Performance Report
SHIP	State Health Insurance Assistance Program
SPR	State Performance Report