

9549 Koger Blvd, Suite 100, St. Petersburg, FL 33702 • 727-570-9696 • www.aaapp.org

August 14, 2018

Mona Allen, Interim President/CEO
Neighborly Care Network
13945 Evergreen Avenue
Clearwater, FL 33762

Dear Ms. Allen,

Enclosed is the programmatic monitoring report for the Older Americans Act Title III-B/LSP (#18-34) Transportation program completed on July 11th, 17th, and 19th by Elizabeth Heyne, Program Manager.

This report is intended to provide an overview of the project's operations during the 2018 fiscal year. It should also be a useful instrument in the evaluation of your programs. Significant concerns regarding your agency's compliance with contractual and programmatic requirements were noted. A formal, written, Corrective Action Plan is required by September 17th, 2018 addressing each area identified within the report.

Additionally, AAAPP staff will conduct a follow up, on-site visit during your October billing process to observe how units are entered into CIRTIS for payment.

We look forward to working with you and your team to ensure the appropriate systems are put in place. Should you have any questions or comments concerning this report, please feel free to contact the Program Manager at (727) 570-9696, extension 271. Thank you for your continued commitment to serve the seniors of Pinellas County.

Sincerely,

A handwritten signature in black ink, appearing to read "Ann Marie Winter", with a long horizontal flourish extending to the right.

Ann Marie Winter
Executive Director

Enclosures

cc: Evelyn R. Bethell, Board Chair, NCN
Stephen Smith, Transportation Director, NCN



Area Agency on Aging of Pasco-Pinellas, Inc.
2018 LSP/ IIIB/III EG PROGRAMMATIC MONITORING CHECKLIST

PROVIDER	Neighborly Care Network
SERVICE(S)	OAA Title IIIB/LSP Transportation
DATE(S) OF VISIT	July 11 th , 17 th , and 19 th
PARTICIPANT(S)	Stephen Smith, Transportation Director Demetria Coleman, Office Supervisor Mona Allen, Interim President/CEO
MONITOR(S)	Elizabeth Heyne, Program Manager

CONTRACT COMPLIANCE AND SERVICE DELIVERY

STANDARD #1 – Previous Programmatic Monitoring

All issues from the previous programmatic monitoring have been resolved within an established and reasonable timeframe.

RESPONSE:

There were no unresolved issues from the October 11th, 2017 monitoring visit.

Achieved
 Partially Achieved
 Not Achieved
 Not Applicable
 Follow-up Necessary

STANDARD #2 – Targeting, Prioritization and Waitlist

A targeting plan with specific targeting objectives is in place:

- A. Provider has implemented the approved plan to target individuals with greatest economic need, older individuals with greatest social needs, older individuals at risk for institutional placement, older minority individuals, low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas (Pasco only).
- B. Provider is serving the proposed number and percentage of older individuals with greatest economic need, older minority individuals, older individuals at risk for institutional placement, low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas (Pasco only).
- C. Provider currently utilizes an Older Americans Act Prioritization Instrument in accordance with the Provider’s Prioritization Policy.
- D. A random sample of client files from the Assessed Prioritized Consumer List (APCL) in CIRTS will be requested for review during the monitoring visit. Please have all waitlist information, files, policies and procedures available.

RESPONSE:

A.) Provider outlined their plan to target individuals in their 2018 Continuing Application. Review of policies, procedures and client files reflected the plan is being implemented. However, due to the surplus of dollars and payback amount outlined in Standard #8, it is necessary for provider to increase its outreach efforts to ensure contract funds are fully expended.

Corrective Action Plan: Provider must submit a written plan by September 17th outlining how additional outreach will be conducted to ensure contract funds are fully expended.

B.) Per the current Quarterly Report (Qtr. 2), the provider has exceeded or is on track to serve the proposed number of clients:

OAA	Proposed	Achieved	LSP	Proposed	Achieved
Social Need	165	276	Social Need	95	367
Low income minority	89	64	Low income minority	58	82
Minority	127	104	Minority	80	133
Economic Need	260	196	Economic Need	149	235
Limited English	51	31	Limited English	29	47
At Risk	44	15	At Risk	25	20

C.) A prioritization policy is in place (S4-22 Prioritization Policy). Per the policy, all requests for services are prioritized ensuring services are provided to those in greatest need (economic, social, etc.) and priority is given to essential trips (congregate dining, ADC, grocery shopping, medical, etc.).

D.) N/A. There is no waiting list for transportation services at this time. Records are kept for denied trips and reported to the AAAPP (as requested) and to the Transportation Disadvantaged Program.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #3 – Staff Training

Provider staff has received training pertinent to the performance of required functions:

- A. Utilizing the appropriate DOEA Assessment Tool including the 701S, 701A and/or 701C (Registered Services only) in accordance with the DOEA Programs and Services Handbook.
 - Review of policies and procedures for DOEA Assessment Tools including the 701S, 701A, and/or 701C to ensure assessments are being completed as outlined in the DOEA Programs and Services Handbook.
 - Ensure requirements for face to face visits are being adhered to.
- B. Quality assurance activities to include use of the Assessment Instructions (DOEA 701D), direct observation, coaching, and training of screening staff to ensure the accuracy and quality of the screenings being conducted.
- C. DOEA standards for specific service training as outlined in the most current DOEA Program and Services Handbook is being utilized:
 - DOEA web-based training with receipt of a certificate of completion. The certificate must be submitted to the AAAPP for all 701 assessors and will be verified during monitoring.
 - DOEA 701S Training Webinar with appropriate documentation of completion is required per the AAAPP.
- D. Mandatory reporting of suspected abuse, neglect, self-neglect, and exploitation of the elderly training is conducted annually for all applicable program staff.

RESPONSE:

- A.) N/A. Transportation is not a registered service.
- B.) N/A. Transportation is not a registered service.
- C.) N/A. Transportation is not a registered service.
- D.) Program Manager verified, by review of training logs, that elder abuse training was conducted on January 17th, 2018 by AAAPP Victim Advocate Program Manager. Additional in-service trainings were held for transportation staff including Alzheimer's/dementia, CPR/AED, and fraud, waste and abuse training.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #4 – Programmatic Reporting

All required programmatic reports are accurate and submitted in a timely manner:

- A. Annual Outreach and Public Education Report
- B. Quarterly Reports
- C. Detailed meeting minutes from the agency Board of Director meetings are submitted regularly.
- D. Surplus/Deficit Reports

RESPONSE:

- A.) The Annual Outreach and Public Education Report was submitted in March 2018. No concerns noted.
- B.) All quarterly reports are submitted on time and are considered accurate.
- C.) Board of Director meeting minutes are submitted regularly to the AAAPP.
- D.) Surplus/Deficit reports are submitted by the 20th of each month and are considered accurate.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #5 – Outcome Measures

Outcome measures referenced in the current Standard Contract are achieved:
(OAA REGISTERED SERVICES ONLY)

The provider has implemented the strategies detailed in the current Service Provider Application including:

- using available CIRTS reports to track outcome achievement
- each exception is addressed on the outcome measures report monthly detailing the factors that enhance or inhibit ability to achieve outcome measures
- appropriate actions, including staff training to address outcomes which are not achieved, are included in the quarterly narrative of the outcome measures report

RESPONSE:

N/A. Transportation is not an OAA Registered Service.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #6 – Case Record Compliance

Using the AAAPP Client File Monitoring Tool, case records sampled showed:

- A. Compliance with requirements for client eligibility, intake, and service delivery.
- B. CIRT records of assessment/reassessment, program enrollment and received services are accurate, entered in CIRT in a timely manner and agree with client and project records:
 - 701S attempts are made within three business days after receipt of a client referral and completion of assessments are no later than 14 business days from initial contact.
 - Reassessments are completed 365 days after the prior assessment through the end of the month.

RESPONSE:

- A.) Please see **Attachment I.** for specific details of the client file review. Client files must have a full application on file. Of the ten (10) requested client files for review, six (6) of the clients did not have an application available on the day of the monitoring visit. Two (2) of the clients are active ADC clients and receive transportation as part of that service; therefore, a full application was not completed. The remaining four (4) applications were produced and submitted as a follow-up item.
- B.) CIRT program enrollments were accurate and entered into CIRT in a timely manner. Based on the audit trail month selected for review, nine (9) of the client files balanced with units entered in CIRT and the provider's internal recordkeeping. Please see Standard #8 for additional information regarding received services.

Transportation does not complete any 701 assessments or screening.

Corrective Action Plan:

1. Clients must have a full application on file and available for AAAPP review.
2. The application (NCN Customer Registration) must be signed by the client. Please submit a revised Customer Registration form to the AAAPP for review and final approval by **September 17, 2018.**
3. Once the revised application is approved, all new OAA/LSP enrollments (clients) must have a signed application (NCN Customer Registration) form on file to comply with requirements for client eligibility, intake, and service delivery.
4. Submit a plan/procedure to the AAAPP which will outline the registration/application process to include a signed application for all new enrollments. Additionally, please ensure the AAAPP that applications will be available for review for all existing clients.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #7 – CIRTS Exception Reports

CIRTS Exception Reports are reviewed on a regular basis and exemplify accuracy (OAA REGISTERED SERVICES ONLY). Specific Older Americans Act Reports include:

- *Assessment Due Report;*
- *ACTV, APPL, APCL Clients Moved To Another PSA;*
- *ACTV Clients Not Served In A Time Range (Defaults To 14 Months);*
- *Clients Served Not Enrolled;*
- *Consumer Age Verification;*
- *Possible Duplicate Clients;*
- *ACTV Pace Clients Who Are ACTV, APCL, Or APPL In Another Program;*
- *CIRTS Data Clean Up;*
- *ACTV MLTC Clients Who Are ACTV, APCL, Or APPL In Another Program, and*
- *Data Inconsistencies Found When Comparing Vital Statistics Death Certificates With CIRTS*

RESPONSE:

AAAPP Program Manager reviewed all CIRTS reports prior to the monitoring. All reports were clear with no exceptions. No concerns noted.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

AAAPP PROGRAM MANAGER REVIEWED ALL CIRTS REPORTS PRIOR TO THE MONITORING. ALL REPORTS WERE CLEAR WITH NO EXCEPTIONS. NO CONCERNS NOTED.

STANDARD #8 – Budgetary Compliance

Budgetary Compliance:

- A. Provider is serving or has a plan to serve the number of proposed units as identified in the service provider application.
- B. For the month of **MAY**, the provider has a clear audit trail for units of service entered in CIRTS as indicated by a review of client files, service logs, monthly summaries, and quarterly reports to the AAAPP.

RESPONSE:

- A.) The provider is not on track to serve the proposed number of units as identified in the 2018 Service Provider Application. Based on the most recent Surplus/Deficit report submitted, the provider has a projected OAA surplus. Per the June report, OAA expenditures were at 17.5% YTD.
- B.) A clear audit trail was not available. Reports printed for the audit trail review did not identify which system they were run from. It was unclear as to how the units were being entered in each system ("Q", Route Match and CIRTS).

In addition, when reviewing the audit trail, the use of bus passes was analyzed. Although bus passes are allowable per the approved application on file, when reviewing the back-up documentation provided, it was identified that for every bus pass provided, two (2) trips, each service day in the month, are being billed in CIRTS to OAA/LSP without verification of the number of actual trips taken per client. Further, the cost of the 30-day unlimited use PSTA bus pass is \$35.00 with the OAA/LSP trip unit rate of \$16.23. Therefore, to recoup the cost of the bus pass, 2 trips per client, is the approved amount to be reimbursed.

A complete review of all bus passes distributed in 2018 was conducted and can be found in Attachment III. For clients that had a bus pass receipt signed by the client, 2 trips were considered allowable. Any person who did not have a signed bus pass receipt was considered unallowable. All unallowed costs are also outlined in the Attachment. In total, \$24,085.32 in LSP and \$17,609.55 OAA are unallowed and must be paid back.

Continued on page 8

Standard #8 continued

Corrective Action Plan:

1. AAAPP staff will conduct a follow up visit during the provider's October billing operation, to observe how units are being entered. It is still unclear which systems are being utilized (Q or Route Match) to enter units in CIRTS. A formal procedure outlining the billing process must be submitted by September 17th and will be observed during the October on-site visit.
2. When requests for payment are submitted each month to the AAAPP, all supporting bus pass information must be provided (bus pass receipt with client signature) to verify only 2 trips were billed for the month. If additional trips were provided to the client outside of the bus pass, that back up documentation must also be submitted.
3. For the OAA unallowed costs, your reimbursement request will be reduced each month. Units will need to be entered utilizing the location code RPMT until the full amount is paid back. As the Local Service Program contract ended 6/30/18 the Local Service Program allocation for 2019 will be reduced by the unallowed charges. Your Transportation allocation for FY 2019 will be \$144,019.68. We will issue a contract in the amount of \$24,085.32 effective August 1st, 2018 at which time you will begin providing trips and will not request reimbursement under LS3B. This must be fully accomplished by 12/31/18. The Location Code to use for these services is RPMT. This will allow us to track the repayment of trips. Each client attributed to RPMT must be enrolled under LS3B in the enrollment screen with location code RPMT and services billed under LS3B location code RPMT.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

THIS SPACE INTENTIONALLY LEFT BLANK

STANDARD #9 – Consumer Satisfaction

Consumer satisfaction and effective delivery of service has been verified through:

- A. Policies and procedures related to consumer satisfaction detailing how satisfaction will be measured annually.
- B. Home visits and/or client interviews (including service observation, if possible) in order to reveal effective delivery of service.
- C. Client satisfaction surveys accompanied by a satisfaction survey summary report for the last fiscal year.
- D. Provide status on the timeframe for the client satisfaction survey in the current fiscal year (will vary depending on when monitoring visit occurs).

RESPONSE:

- A.) A policy is in place related to consumer satisfaction (S4-16 Customer Satisfaction Policy).
- B.) The Program Manager had the opportunity to shadow a driver on a scheduled medical trip; no concerns noted. The Program Manager also interviewed an active client receiving OAA funded transportation. Please see **Attachment II.** for specific details. Additionally, per the Transportation Director, Transportation Administration staff will periodically ride the bus for service observation purposes and drivers will often shadow other departments (ADC, congregate dining) to gain a better understanding of the programs/clientele.
- C.) 2018 survey results are being processed. The satisfaction survey summary report will be submitted upon completion, no later than **September 17, 2018.** Copies of ten (10) surveys were received.
- D.) Per the Customer Satisfaction Policy (S4-16), a survey will be conducted every six (6) months by mailing surveys to new clients and once a year to ADC and congregate dining clients that utilize Neighborly transportation services.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #10 – Grievances, Complaints, and Incidents

Consumer satisfaction and effective delivery of service has been verified through:

- A. Provider has approved grievance policies, procedures and logs, including documentation of the service provider’s response and resolution.
- B. Provider has approved complaint policies and procedures. Complaints are recorded using the appropriate AAAPP narrative and log which will include documentation of the service provider’s response and resolution.
- C. **(LEGAL PROVIDERS ONLY)** Provider has internal grievance policies and procedures that address both denial of service and complaints by clients about manner or quality of legal assistance.
- D. Provider has approved incident policies, procedures, and logs, including documentation of the service provider response and resolution.

RESPONSE:

- A.) A policy is in place regarding grievances (S4-17 Grievance Policy). No concerns noted. No grievances to date for this reporting period per grievance log provided.
- B.) A policy is in place regarding complaints (S4-20 Complaints). No concerns noted. No complaints to date for this reporting period per complaint log provided.
- C.) N/A
- D.) A policy is in place regarding incident reporting (S4-28 Incident Reporting). No concerns noted within the policy. However, the 2018 Incident/Accident Log provided had four (4) OAA incidents logged, but only two (2) of the four (4) incident reports could be located. Incident reports must be available to the AAAPP for review.

Corrective Action Plan:

- 1. Please provide the AAAPP with a written plan on how Neighborly Care Network will ensure compliance with your agency’s written policy (S4-28 Incident Reporting).

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

THIS SPACE INTENTIONALLY LEFT BLANK

STANDARD #11 – Voluntary Contributions

Provider has a voluntary contribution system in place conforming with the Older Americans Act:

- A. Approved Voluntary Contributions Policy/Procedure
- B. Sample letter and/or sign related to voluntary contributions which clearly convey that services are free of charge and all contributions shall be used to increase service availability.

RESPONSE:

- A.) A policy is in place regarding voluntary contributions (S4-4 Passenger Contributions). No concerns noted.
- B.) A brief statement regarding voluntary contributions is included with the registration forms which clearly state that there is no fee for services, although donations are accepted.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

THIS SPACE INTENTIONALLY LEFT BLANK

STANDARD #12 – Regulatory Compliance

OAA Provider is in Regulatory Compliance with:

- A. OAA services reviewed are being provided in accordance with the most current DOEA Program And Services Handbook and the most current approved Service Provider Application
- B. Provider complies with all regulations pertinent to the service being provided (I.E, fire, health inspections, licensure, etc.)
- C. Provider is acting in accordance with the Florida Statute 119.071 (5) requiring any agency that collects social security numbers to provide a written explanation to the individual the reason for collection.
- D. Health Insurance Portability and Accountability Act (HIPAA) requirements including policies/procedures.
- E. Provider is in compliance with the Provider Conflict of Interest Program Procedure (PR 132) issued 12/2017.
- F. Provider submits their Comprehensive Emergency Management Plan/Continuity of Operations Plan annually as required.

RESPONSE:

- A.) It appears that the transportation services provided directly by Neighborly Care Network are being provided in accordance with the most current DOEA Program and Services Handbook and the most current Service Provider Application. However, discrepancies were identified with the billing/reconciliation process of PSTA bus passes provided to OAA/LSP clients. Please see Standard #8 for specific details.
- B.) The provider is compliant with all regulations pertinent to the service provided. A copy of the April 17th, 2018 annual Transportation Disadvantaged/CTC audit, conducted by PSTA, was reviewed and received. PSTA states the audit was passed with no deficiencies.
- C.) A policy is in place regarding the collection of social security numbers (S4-26 Social Security Collection). No concerns noted.
- D.) A policy is in place regarding HIPAA requirements (S4-24 Health Insurance Portability and Accountability Act). Per the policy, a Notice of Privacy Practices is provided to each participant upon utilization of transportation services. Additionally, information regarding HIPAA is included on the Customer Registration (application).
- E.) The Provider Conflict of Interest Program Procedure (PR 132) was provided via email to the new Transportation Director on June 29th, 2018. Per the Transportation Director, there are no employees receiving OAA/LSP funded transportation services.
- F.) The agency's CEMP/COOP was submitted, as required, to the AAAPP Director of Planning.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #13 – Involvement with the ADRC

Provider is involved with the Aging and Disability Resource Center (ADRC) and abides by the no-wrong-door system:

- A. Maintains partnership with the ADRC, state, and community agencies to ensure that regardless of which agency people contact for help, they can access information about the options available across all the agencies and in their communities.
- B. Services not arranged through agency contracts should be obtained through referrals to other community resources (i.e. ADRC, volunteer agencies, informal networks and/or proprietary agencies that charge fees).
- C. If applicable, essential information is captured about the nature of the person's physical, mental and functional abilities, concerns, limitations or problems, as well as general background information during the 701S intake process to assist in screening for eligibility and applicable program and service referrals. Potential LTCC clients are referred to the ADRC for the appropriate screening measures.

RESPONSE:

- A.) The provider maintains a positive partnership with the ADRC and other community agencies to ensure referrals receive the assistance they need. If the provider receives a referral from someone in need of additional services, a referral is made to the ADRC.
- B.) The provider ensures referrals are made to community resources as appropriate. Clients that are identified as active in a Managed Long Term Care (MLTC) program are referred to the DART service at the Pinellas Suncoast Transit Authority and/or to their MLTC Case Manager. Additionally, any denied trips (ex. due to distance) are also referred to DART/PSTA for assistance.
- C.) N/A

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #14 – Subcontractors

Provider shall monitor, at least once per year, each of its subcontractors that are paid from OAA/LSP funds as required by the Standard Contract and will:

- A. Submit a copy of the programmatic monitoring record to the AAAPP upon completion to ensure contractual compliance.
- B. Submit a copy of all subcontracts to the AAAPP within thirty (30) days of execution of each subcontract agreement.

RESPONSE:

- A.) The Transportation Director is scheduled to monitor the subcontractor, United Taxi, in August and will submit a copy of the monitoring record to the AAAPP upon completion.
- B.) The provider has a current agreement in place with Bay Area Metro, LLC dba United Taxi to assist with providing transportation services throughout Pinellas County.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

STANDARD #15 – Volunteers

Provider has policies/procedures governing the utilization of volunteers and submits the Department of Elder Affairs Volunteer Activity Report annually as required.

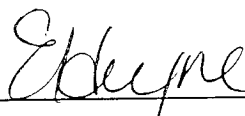
RESPONSE:

A policy is in place regarding the utilization of volunteers (S4-5 Volunteer Driver In-Kind Reporting). The DOEA Volunteer Activity Report is submitted to the AAAPP Director of Planning as required.

Achieved Partially Achieved Not Achieved Not Applicable Follow-up Necessary

Submitted by: Elizabeth Heyne

Date: August 9, 2018

Signature: 



Area Agency on Aging of Pasco-Pinellas, Inc. Client File Monitoring Tool for Unregistered Services

Organization: Neighborhood Care Network
Unregistered Service: Transportation

Questions	SB 1000118747	JD 1001188334	DG 1001673737	LR 100419548	MG 1001751324	JJ 1001339233	DL 1000755824	JM 1000101136	JR 1000890734	AV 1001536676	Comments
Was an intake/registration form completed and, if applicable, updated annually?	Y	Y	Y (ADC file)	Y (ADC file)	Y	Y	Y	Y	Y	Y	
Was client eligibility verified? (see "Service Eligibility for OAA Programs")	Y	Y	Y (ADC file)	Y (ADC file)	Y	Y	Y	Y	Y	Y	
Has OAA priority for service delivery been established using an approved prioritization tool?	Y	Y	Y (ADC file)	Y (ADC file)	Y	Y	Y	Y	Y	Y	
Did the worker obtain a signed Release of Information/HIPAA form?	Y (1)	Y (1)	Y (ADC file)	Y (ADC file)	Y (1)	Y (1)	Y (1)	Y (1)	Y (1)	Y (1)	HIPAA acknowledgement included in application. However, applications are not currently signed by the client. Please see Standard # 6 for specific details.
Was the client notified of why their SS# is being collected?	Y	Y	Y (ADC file)	Y (ADC file)	Y	Y	Y	Y	Y	Y	
Did the worker notify the client of their current Complaint Procedure?	Y	Y	Y (ADC file)	Y (ADC file)	Y	Y	Y	Y	Y	Y	
Based on the audit trail month selected for review, do the units entered in CIRTS balance with the provider's internal recordkeeping?	N (2)	Y	Y (ADC file)	Y (ADC file)	Y	Y	Y	Y	Y	Y	(2) - S.B. received a PSTA bus pass in May; units/trips could not be verified for this client. All other units were verified via reports/screen shots from RouteMatch and compared to CIRTS records.
Do notes within the client's file reflect the current status of the client?	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
If service frequency increased/decreased at any time during the fiscal year, were notes updated accordingly?	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Notes	C1	C1	ADC	ADC	Medical	Shopping	Medical	Shopping	Medical	Medical	Trip type



Area Agency on Aging
of Pasco - Pinellas, Inc.

OAA CLIENT INTERVIEW QUESTIONNAIRE

AGENCY & SERVICE: Neighborly Care Network – Transportation

1. How did you hear about the service you are currently receiving?
"From my mom, she uses them also"
2. How long have you been receiving services from this agency?
"About two years"
3. Do you have a particular contact person you speak with about services?
"I used to, but she's no longer there. I call when I need to schedule a trip."
4. Do you know how to contact him/her or the agency providing the service?
"Yes, I have the number."
5. How often do you receive this service?
"About twice a month, I use transportation for medical appointments."
6. Do you feel this service allows you to remain home independently?
"Yes"
7. Have you ever had to make a complaint about the services you receive or the person providing the services?
"No"
8. How do you rate the quality of the service you are currently receiving and/or the agency providing it?

Excellent	Good	Fair	Poor
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. What is the reasoning for your choice rating regarding question #8?
"They are on time for my appointments about 95% of the time. I understand that they can get busy or run into traffic. I'm patient and understanding of that. They have friendly staff. I have no complaints."
10. If you could change anything about the service you receive or the agency providing it, what would you change?
"I'm happy with the services. I wish this was available nationwide and to everyone."

INTERVIEWER OBSERVATIONS:

The interview was conducted via telephone with a 62 y/o client that uses Neighborly Care Network's transportation services as needed. The client was pleased with the services provided and mentioned that his mother also uses the service. The Program Manager discussed resources available through the Aging and Disability Resource Center and encouraged the client to call the ADRC for any additional information. The AAAPP agency brochure will be mailed to the client as requested.

Submitted by: Elizabeth Heyne

Date: 8/9/18

Attachment III

PROVIDER	CLIENT_ID	SERVICE	PROGRAM	SERVICE PROVIDED	UNITS PROVIDED	COST	CALCULATED AMOUNT	ALLOWABLE	UNALLOWABLE	UNALLOWED COST	FUNDING	Total LSP Un-allowed \$ by Client	Total OAA Un-allowed \$ by Client	Comments
51034	1000129253	TRS	LS3B	1/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000129253	TRS	LS3B	2/28/2018	38	16.23	616.74	2	36	\$ 584.28	LS3B			
51034	1000129253	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000129253	TRS	LS3B	4/17/2018	35	16.23	568.05	2	33	\$ 535.59	LS3B			
51034	1000129253	TRS	OA3B	4/30/2018	7	16.23	113.61	0	7	\$ 113.61	OA3B			Bus Pass Receipt provided for Jan, Feb, Mar, April, May and June
51034	1000129253	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			
51034	1000129253	TRS	OA3B	6/30/2018	42	16.23	681.66	2	40	\$ 649.20	OA3B			
51034	1000746206	TRS	LS3B	1/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000746206	TRS	LS3B	2/28/2018	38	16.23	616.74	0	38	\$ 616.74	LS3B			
51034	1000746206	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000746206	TRS	LS3B	4/17/2018	24	16.23	389.52	2	22	\$ 357.06	LS3B			
51034	1000746206	TRS	OA3B	4/30/2018	18	16.23	292.14	0	18	\$ 292.14	OA3B			Bus Pass Documentation Rec'd Jan, March, April and May only. None for Feb or June
51034	1000746206	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			
51034	1000746206	TRS	OA3B	6/30/2018	42	16.23	681.66	0	42	\$ 681.66	OA3B			
51034	1000118747	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000118747	TRS	LS3B	4/25/2018	25	16.23	405.75	0	23	\$ 373.29	LS3B			
51034	1000118747	TRS	OA3B	4/30/2018	18	16.23	292.14	0	18	\$ 292.14	OA3B			Bus Pass Receipt provided for March, April and May. Need June.
51034	1000118747	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			
51034	1000118747	TRS	OA3B	6/30/2018	43	16.23	697.89	0	43	\$ 697.89	OA3B			
51034	1000919651	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000919651	TRS	LS3B	4/25/2018	25	16.23	405.75	2	23	\$ 373.29	LS3B			
51034	1000919651	TRS	OA3B	4/30/2018	18	16.23	292.14	0	18	\$ 292.14	OA3B			Bus Passes provided March, April, May and June
51034	1000919651	TRS	OA3B	5/31/2018	7	16.23	32.46	0	0	\$ 0	OA3B			
51034	1000919651	TRS	OA3B	6/30/2018	1	16.23	16.23	1	0	\$ 0	OA3B			
51034	1000128623	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000128623	TRS	LS3B	4/17/2018	26	16.23	421.98	2	24	\$ 389.52	LS3B			
51034	1000128623	TRS	OA3B	4/30/2018	18	16.23	292.14	0	18	\$ 292.14	OA3B			Bus Passes provided March, April, May and June
51034	1000128623	TRS	OA3B	5/31/2018	42	16.23	681.66	2	40	\$ 649.20	OA3B			
51034	1000128623	TRS	LS3B	6/30/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1001311384	TRS	LS3B	1/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1001311384	TRS	LS3B	2/28/2018	38	16.23	616.74	2	36	\$ 584.28	LS3B			
51034	1001311384	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1001311384	TRS	LS3B	4/9/2018	12	16.23	194.76	2	10	\$ 162.3	LS3B			
51034	1001311384	TRS	OA3B	4/30/2018	30	16.23	486.9	0	30	\$ 486.9	OA3B			Bus pass provided Feb, Mar, Apr, May and June. No documentation submitted for January
51034	1001311384	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			
51034	1001311384	TRS	OA3B	6/30/2018	42	16.23	681.66	2	40	\$ 649.20	OA3B			
51034	1001041773	TRS	LS3B	2/28/2018	1	16.23	16.23	1	0	\$ 0	LS3B			
51034	1001041773	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1001041773	TRS	LS3B	4/25/2018	43	16.23	697.89	2	41	\$ 655.43	LS3B			
51034	1001041773	TRS	OA3B	5/31/2018	2	16.23	32.46	2	0	\$ 0	OA3B			Bus pass provided Mar, Apr, June
51034	1001041773	TRS	OA3B	6/30/2018	2	16.23	32.46	2	0	\$ 0	OA3B			
51034	1000589907	TRS	LS3B	1/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000589907	TRS	LS3B	2/28/2018	38	16.23	616.74	2	36	\$ 584.28	LS3B			
51034	1000589907	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			Bus Pass rec'd January, February, March, 2 In May, 3/29 covered April and 5/1 covered May and 5/25 June.
51034	1000589907	TRS	OA3B	4/17/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			
51034	1000589907	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			
51034	1000589907	TRS	OA3B	6/30/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			
51034	1000873922	TRS	LS3B	2/28/2018	32	16.23	519.36	2	30	\$ 486.9	LS3B			
51034	1000873922	TRS	LS3B	3/31/2018	44	16.23	714.12	2	42	\$ 681.66	LS3B			
51034	1000873922	TRS	LS3B	4/11/2018	13	16.23	210.99	2	11	\$ 178.53	LS3B			
51034	1000873922	TRS	OA3B	4/30/2018	30	16.23	486.9	2	28	\$ 454.44	OA3B			Bus Pass rec'd Feb, Mar, 2 In May, 3/29 covered April and 5/1 covered June.
51034	1000873922	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			
51034	1000873922	TRS	OA3B	6/30/2018	46	16.23	746.58	2	44	\$ 714.12	OA3B			
51034	1000515207	TRS	LS3B	1/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000515207	TRS	LS3B	2/28/2018	8	16.23	129.84	2	6	\$ 97.38	LS3B			
51034	1000515207	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000515207	TRS	LS3B	4/9/2018	42	16.23	681.66	2	40	\$ 649.20	LS3B			
51034	1000515207	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	\$ 681.66	OA3B			Bus Pass rec'd Jan, Feb, Mar, Apr,

51034	1000515207	TRS	OA3B	6/20/2018	42	16.23	681.66	2	40	649.2	OA3B	1,330.86	May and June
51034	1000101022	TRS	LS3B	1/31/2018	42	16.23	681.66	2	40	649.2	LS3B		Bus Pass rec'd January only,
51034	1000101022	TRS	LS3B	2/28/2018	16	16.23	259.68	16	0		LS3B	649.20	attends CNMtl. Trips in Feb appear
51034	1001393318	TRS	LS3B	1/31/2018	42	16.23	681.66	0	42	681.66	LS3B		
51034	1001393318	TRS	LS3B	2/28/2018	38	16.23	616.74	2	36	584.28	LS3B		
51034	1001393318	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	649.2	LS3B		
51034	1001393318	TRS	LS3B	4/17/2018	18	16.23	292.14	2	16	259.68	LS3B		
51034	1001393318	TRS	OA3B	4/30/2018	24	16.23	389.52	2	22	357.06	OA3B		Bus Pass rec'd Feb, Mar, April 2,
51034	1001393318	TRS	LS3B	5/31/2018	1	16.23	16.23	1	0		LS3B		4/2 covered April and 4/28 covers
51034	1001393318	TRS	OA3B	5/31/2018	44	16.23	714.12	1	43	697.89	OA3B	2,174.82	May, May 30 covers June. No Doc
51034	1001393318	TRS	OA3B	6/30/2018	44	16.23	714.12	2	42	681.66	OA3B		for Jan
51034	1000598093	TRS	LS3B	2/28/2018	1	16.23	16.23	1	0		LS3B		
51034	1000598093	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	649.2	LS3B		
51034	1000598093	TRS	LS3B	4/25/2018	13	16.23	210.99	2	11	178.53	LS3B		
51034	1000598093	TRS	OA3B	4/30/2018	30	16.23	486.9	0	30	486.9	OA3B		Bus Pass rec'd March, April and
51034	1000598093	TRS	OA3B	5/31/2018	2	16.23	32.46	2	0		OA3B	827.73	May.
51034	1000598093	TRS	OA3B	6/30/2018	1	16.23	16.23	1	0		OA3B		
51034	1000104484	TRS	LS3B	1/31/2018	40	16.23	649.2	2	38	616.74	LS3B		
51034	1000104484	TRS	LS3B	2/28/2018	38	16.23	616.74	2	36	584.28	LS3B		
51034	1000104484	TRS	LS3B	3/31/2018	36	16.23	584.28	2	34	551.82	LS3B		
51034	1000104484	TRS	LS3B	4/9/2018	12	16.23	194.76	2	10	162.3	LS3B		
51034	1000104484	TRS	OA3B	4/30/2018	30	16.23	486.9	2	28	454.44	OA3B		
51034	1000104484	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	681.66	OA3B	1,915.14	Bus Pass rec'd Jan, Feb, Mar, April,
51034	1000104484	TRS	OA3B	6/29/2018	42	16.23	681.66	0	42	681.66	OA3B		May. Nothing rec'd for June.
51034	1000783503	TRS	LS3B	1/31/2018	42	16.23	681.66	0	42	681.66	LS3B		
51034	1000783503	TRS	LS3B	2/28/2018	38	16.23	616.74	2	36	584.28	LS3B		
51034	1000783503	TRS	LS3B	3/31/2018	42	16.23	681.66	2	40	649.2	LS3B		
51034	1000783503	TRS	LS3B	4/9/2018	12	16.23	194.76	2	10	162.3	LS3B		
51034	1000783503	TRS	OA3B	4/30/2018	30	16.23	486.9	0	30	486.9	OA3B		Bus Pass rec'd Feb, Mar, April,
51034	1000783503	TRS	OA3B	5/31/2018	44	16.23	714.12	2	42	681.66	OA3B	2,077.44	May. No documentation for Jan
51034	1000783503	TRS	OA3B	6/29/2018	42	16.23	681.66	0	42	681.66	OA3B		and June

LS38 Total OA3B Total
\$ 24,085.32 \$ 17,609.55

Grand Total \$ 41,694.87