

## SC Department on Aging Reports Schedule for AAAs

SCDOA Reports as of December 17, 2018

Report Type	Report Name	Due Date	Email	Correlating SCDOA Program	SCDOA Staff	Helpful Information
Annual	Family Caregiver Support Program: Annual Report	By July 31	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Family Caregiver	Elizabeth Ford	
Annual	MUSRBUD – PSA budgeting tool	Early August before July PRFs are submitted.	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Finance	Finance	Must be run in July to update the unit cost and budgets for all reimbursable activities. It can be run throughout the year to update budgets.
Annual	Ombudsman Annual Report	By November 15	<a href="mailto:lkelly@aging.sc.gov">lkelly@aging.sc.gov</a>	Ombudsman	LaWandra Kelly	Annual Report should be a compilation of all data in the Ombudsman database. A short description of trends, barriers and successes should be included along with the most challenging case and its solution.
Annual	Area Plan Updates	Date set by SCDOA	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	
Annual	Quality Assurance Regional Analysis	By June 3rd	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	
Annual	SHIP Annual Resource Report	By May 15	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	SHIP	Crystal Strong	Current reporting period is 4/1/2016 – 3/31/2017: Regions should provide the number of certified counselors and sites by May 15, 2017.
Annual	Senior Medicare Patrol (SMP) SIRS data report	By January 31	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	SMP	Crystal Strong	Regions should ensure all data is kept current.
Annual	Region Specific Policies and Procedures Manual for Providers	By the first working day of the new state fiscal year.	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	An updated summary of the written policies and procedures shall be provided to the SCDOA annually on the first working day of the new state fiscal year.
Monthly	LG106alzn- Respite authorization report (for no names)	Run with PRF for verification	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Family Caregiver	Finance	This is to be run monthly during the PSA's verification of services process. It does not have to be submitted with the PRF.
Monthly	LG106rn- Respite authorization report	Run with PRF for verification	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Family Caregiver	Finance	This is to be run monthly during the PSA's verification of services process. It does not have to be submitted with the PRF.

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Monthly	LG106e- Respite authorization report	Run with PRF for verification	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Family Caregiver	Finance	This is to be run monthly during the PSA's verification of services process. It does not have to be submitted with the PRF.
Monthly	LG97c – Risk score report	Run with PRF for verification	<a href="mailto:AIMHelp@aging.sc.gov">AIMHelp@aging.sc.gov</a>	IT/Finance	Kevin Pundy	This is to be run monthly during the PSA's verification of services process. It does not have to be submitted with the PRF.
Monthly	LG108 – Caregivers without care receivers report	Monthly with PRF/MUSR	<a href="mailto:AIMHelp@aging.sc.gov">AIMHelp@aging.sc.gov</a>	IT/Finance	Kevin Pundy	This should be run monthly for auditing, data cleanliness and integrity. It does not have to be submitted with the PRF.
Monthly	PRF with reports	By the 21st	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Finance	Finance	PRF's must be reconciled against MUSRs for accuracy.
Monthly	MUSRNSIPIIIb-dm	Due with PRF	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Finance	Finance	Run dates coincide with the PRF dates and must be signed, scanned in, and included with the PRF submission.
Monthly	MUSRstaterm (Bingo and State HCBS)	Due with PRF	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Finance	Finance	Run dates coincide with the PRF dates and must be signed, scanned in and included with the PRF submission.
Monthly	MUSRResp	Due with PRF	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Finance	Finance	Run dates coincide with the PRF dates and must be signed, scanned in, and included with the PRF submission.
Monthly	MUSRiiiE	Due with PRF	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Finance	Finance	Run dates coincide with the PRF dates and must be signed, scanned in, and included with the PRF submission.
Monthly	Group Dining Site Menus	By last business day of the month.	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Nutrition/Policy	Gerry Dickinson	Next month's menus are expected by the last business day of the month.
Monthly	Group Dining Site Activity Calendars	By last business day of the month.	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Nutrition/Policy	Gerry Dickinson	Next month's activity calendars are expected by the last business day of the month.
Monthly	LG120A - Group Services	Monthly with PRF/MUSR	<a href="mailto:FinanceHelp@aging.sc.gov">FinanceHelp@aging.sc.gov</a>	Nutrition & IID	Denise Rivers Diane Buckner	
Other	HHS25a – Key missing assessment information report	Periodically	<a href="mailto:AIMHelp@aging.sc.gov">AIMHelp@aging.sc.gov</a>	AIM	AIM	Report should be run periodically to audit the assessment integrity.
Other	LG105 – Authorized budget by agency for caregivers	When budget is entered or changed on activity setup screen	<a href="mailto:AIMHelp@aging.sc.gov">AIMHelp@aging.sc.gov</a>	IT/Finance	Kevin Pundy	Run for verification as needed.
Other	I&R/A Staff Hiring	Within 3 business days of change	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	I&R/A	Jalawnda Bailey	

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Other	Change of I&R/A staff's employment status	Within 3 business days of change	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	I&R/A	Jalawnda Bailey	
Other	I&R/A Staff AIRS Certification	As necessary	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	I&R/A	Jalawnda Bailey	If the I&R/A Specialist, hired by the AAA/ADRC, does not meet the AIRS requirements to obtain AIRS certification within 15 months of hire, or if the I&R/A Specialist fails to complete 10 hours of continuing I&R/A education every two years to maintain AIRS certification, the AAA/ADRC must notify the SCDOA and the I&R/A Program Manager via the <a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>
Other	Area Plan	Date set by SCDOA	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	Submitted every four years.
Other	PSA contracts with providers	Within five business days of being executed.	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	When executed
Other	Contract Amendments	Within five business days of being amended.	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	When executed
Other	Regional Training Updates	As necessary	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Project Managers	Appropriate Project Manager	The AAA/ADRC will disseminate the results of the training plan to and stay in continuous communications with the appropriate SCDOA Program Managers.
Other	Procurement Notice	At least 30 days before the start of the procurement cycle	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	The AAA/ADRC must advertise the Request for Proposal (RFP) in legal ads in newspapers throughout the region and post information in a prominent spot on its website at least 30 days before the release of the RFP. The AAA/ADRC shall notify <a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a> so that the RFP can be posted on the SCDOA web site.
Other	Emergency or Weather Closings	As necessary	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	As stipulated in the Policies and Procedures Manual.
Other	Group Dining Site Sign-In Sheets	As requested by SCDOA	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	AAA should collect and submit to SCDOA upon request.
Other	Daily Home-Delivered Meal Trip Logs (signed by driver and site manager)	As requested by SCDOA	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	AAA should collect and submit to SCDOA upon request.

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Other	Certification for satisfactory completion of Evidenced-Based Leader Training for III-D	As leaders are trained	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Evidence-Based	Denise Rivers	As leaders are certified or recertified.
Other	System User Request	As needed by the PSA and the current copy of the Regional Staffing Sheet attached with the request.	<a href="mailto:user@aging.sc.gov">user@aging.sc.gov</a>	Data System	AIM and OLSA staffs	This form should be submitted for all add, remove, and change for user requests for all Aging Network programs (AIM, SHIP, SC Access, Ombud, Training, etc.). A NAPIS Budget Staffing Sheet must be submitted with the request. The System User Request form can be found on the SCDOA Web site under
Quarterly	HHS19a – Missing demographic data report	Last business day of quarter (Quarters: April, July, October, January)	<a href="mailto:AIMHelp@aging.sc.gov">AIMHelp@aging.sc.gov</a>	AIM	AIM	Report must be run and any issues addressed once the federal fiscal year data entry closes on the 11 <sup>th</sup> of October. The issues must be addressed by the end of November.
Quarterly	Family Caregiver Quarterly Reports	Submit by the 15th of the month following each quarter (October, January, April, and July)	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Family Caregiver	Elizabeth Ford	
Quarterly	Alzheimer's Voucher Quarterly Reports	Submit by the 15th of the month following each quarter (October, January, April, and July)	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Family Caregiver		Programming note: SCDOA uses this data to prepare a quarterly report for the Alzheimer's Association due on the 1st of the following month. Data is also used to prepare Legislative Annual Report using prior year data.
Quarterly	I&R/A Quarterly Reports	Quarterly Reports are due by the close of business on the 15th of the following month. (Quarters: April, July, October, January)	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	I&R/A	Jalawnda Bailey	0

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Quarterly	Ombudsman Case Data	October 1- December 31 reports due on January 15; January 1-March 31 reports due on April 15; April 1- June 30 reports due on July 15; and July 1-September 30 reports due on October 15	<a href="mailto:lkelly@aging.sc.gov">lkelly@aging.sc.gov</a>	Ombudsman	LaWandra Kelly	Includes cases opened and closed, number of complaints, and the number of Abuse, Neglect, and Exploitation (ANE) cases.
Quarterly	Ombudsman Friendly Visits	October 1- December 31 reports due on January 15; January 1-March 31 reports due on April 15; April 1- June 30 reports due on July 15; and July 1-September 30 reports due on October 15	<a href="mailto:lkelly@aging.sc.gov">lkelly@aging.sc.gov</a>	Ombudsman	LaWandra Kelly	Number of Friendly Visits made to facilities by the Ombudsmen.
Quarterly	Ombudsman Trainings	October 1- December 31 reports due on January 15; January 1-March 31 reports due on April 15; April 1- June 30 reports due on July 15; and July 1-September 30 reports due on October 15	<a href="mailto:lkelly@aging.sc.gov">lkelly@aging.sc.gov</a>	Ombudsman	LaWandra Kelly	Name and number of trainings conducted at facilities and in the community, along with the number of attendees. Name and number of trainings attended by the Ombudsman.
Quarterly	Ombudsman Consultations	October 1- December 31 reports due on January 15; January 1-March 31 reports due on April 15; April 1- June 30 reports due on July 15; and July 1-September 30 reports due on October 15	<a href="mailto:lkelly@aging.sc.gov">lkelly@aging.sc.gov</a>	Ombudsman	LaWandra Kelly	Number of consultations to individuals and facilities. (Separate categories; do not combine.)

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Quarterly	Ombudsman Number of Volunteers	October 1- December 31 reports due on January 15; January 1-March 31 reports due on April 15; April 1- June 30 reports due on July 15; and July 1-September 30 reports due on October 15	<a href="mailto:lkelly@aging.sc.gov">lkelly@aging.sc.gov</a>	Ombudsman	LaWandra Kelly	Report the number of Friendly Visitor volunteers and those volunteers awaiting training.
Quarterly	Ombudsman Volunteer Hours Completed	October 1- December 31 reports due on January 15 January 1-March 31 reports due on April 15 April 1- June 30 reports due on July 15 July 1-September 30 reports due on October 15	<a href="mailto:lkelly@aging.sc.gov">lkelly@aging.sc.gov</a>	Ombudsman	LaWandra Kelly	Number of visits to facilities made by the Friendly Visitor volunteer. This should include the number of residents visited and the amount of time spent with each resident.
Quarterly	Ombudsman Volunteer Trainings	October 1- December 31 reports due on January 15; January 1-March 31 reports due on April 15; April 1- June 30 reports due on July 15; and July 1-September 30 reports due on October 15	<a href="mailto:lkelly@aging.sc.gov">lkelly@aging.sc.gov</a>	Ombudsman	LaWandra Kelly	Name and number of trainings conducted by the Ombudsman for Friendly Visitors.
Quarterly	Permanent Improvement Project (PIP) Updates	By the last day of Quarter (March, June, September, December)	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	PIP	Gerry Dickinson	Required of all active PIP Projects.
Quarterly	Regional Aging Advisory Council Agenda/Minutes	Quarterly days of meeting)	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Policy	Gerry Dickinson	
Quarterly	SHIPTalk Data	1st quarter: 4/1-6/30 2nd quarter: 7/1-9/30 3rd quarter: 10/1-12/31 4th quarter 1/1-3/31	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	SHIP	Crystal Strong	Quarterly reporting periods for SHIPTalk data. Regions should ensure all data is kept current on SHIPTalk.B42
Semi-Annual	MIPPA Report	By April 15th	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	MIPPA	Crystal Strong	April 30 (covering the period October 1 through March 31): Regions should submit their information by April 15.

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Semi-Annual	MIPPA Report	By October 15th	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	MIPPA	Crystal Strong	October 30 (covering the period April 1 through September 30): Regions should submit their information by October 15.
Semi-Annual	SHIP Progress Report	By September 15	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	SHIP	Crystal Strong	Covering the period of April 1 through August 31: Regions should submit their information by September 15.
Semi-Annual	SHIP Progress Report	By April 15	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	SHIP	Crystal Strong	Covering the period of September 1 through March 31: Regions should submit their information by April 15.
Semi-Annual	Senior Medicare Patrol (SMP) Narrative progress report	By June 15	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	SMP	Crystal Strong	December 1- May 31: Regions should have reports submitted by June 15.
Semi-Annual	Senior Medicare Patrol (SMP) Narrative progress report	By December 15	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	SMP	Crystal Strong	June 1 -November 30: Regions should have reports submitted by December 15.
<b>Semi-Annual (Required)</b>	<b>NAPIS Staffing Sheets</b>	<b>By last working days of September and March, and as needed with staff changes.</b>	<b><a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a></b>	<b>Policy</b>	<b>Gerry Dickinson</b>	<b>Due twice annually on last working days of September and March, when requesting new system users, and when a staff change is made at the AAA.</b>
Semi-Annual	Title III-B Legal Assistance Report	By January for the July – December period and in August for the January – July period.	<a href="mailto:PSAHelp@aging.sc.gov">PSAHelp@aging.sc.gov</a>	Ombudsman/ Legal Services	Nicole Hair	Report is found on pages 27 -29 of the SCLADS manual. It has been emailed to all Regions including an excel spreadsheet template that can be filled in on computer. Every legal provider should be completing the report for the AAA and returning it to them. The information on the report should correlate with the provider's billing to the AAA.

Every attempt was made by SCDOA staff to prepare an all-inclusive list. However, the SCDOA reserves the right to add or amend the list as necessary, based on program development. As an open Excel spreadsheet, this document has all available sorting capabilities.

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