

Department of Human Services



ADMINISTRATION ON AGING



User Guide to Oregon ACCESS and RAIN For AoA NAPIS Reporting

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Department of Human Services



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1 INTRODUCTION

To meet the diverse needs of the growing numbers of older persons in the United States President Lyndon Johnson on August 14, 1965 signed into law the [Older Americans Act \(OAA\)](#). The OAA set out specific objectives for maintaining the dignity and welfare of older individuals and created the primary vehicle for organizing, coordinating and providing community-based services and opportunities for older Americans and their families.

The Oregon [Department of Human Services \(DHS\)](#) responded to the Federal reporting requirements for tracking and administering OAA funds by adding additional functionality to the Oregon ACCESS (OA) system. The [RAIN](#) system was developed to extract information from the Oregon ACCESS database and format it correctly for submission to the new [State Reporting Tool \(SRT\)](#). The [Administration on Aging \(AoA\)](#) uses this tool to gather OAA demographics, and financial and service data from the states and U.S. territories.

In 2006 the OAA act was reauthorized and updated, adding additional programs and reporting requirements.

States were mandated to implement the [NAPIS](#) reporting system. Oregon chose to modify [Oregon ACCESS \(OA\)](#) to include the ability to add NAPIS information. The goal was to create one system that would allow a case manager to see a client's current information and their interaction with AAAs and state services systems.

If you need the information in this guide, you are likely an employee or volunteer for one of the 17 [Area Agencies on Aging \(AAA\)](#) in the State of Oregon and one of 650 in the nation. The box within the chart below identifies where you are in the process of providing services to older Americans in the United States.

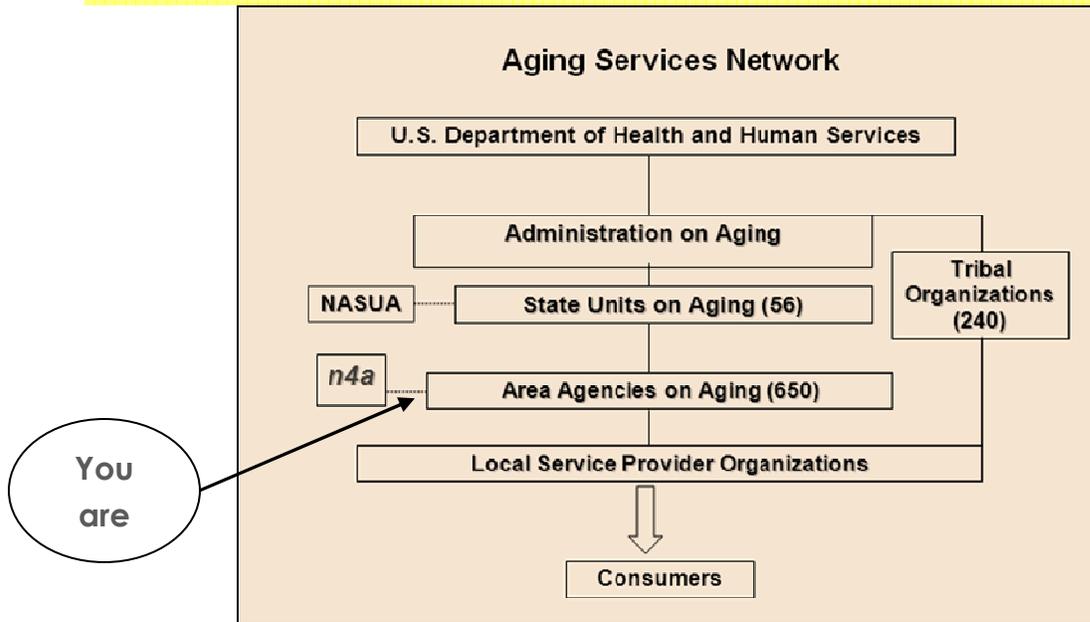


FIGURE 1 AGING SERVICES NETWORK

1.1 PHILOSOPHY

We have assumed that those using this guide are able to log on to Oregon ACCESS (OA) and are familiar with navigating through its screens. We are not providing a step by step data entry process, rather, we are concentrating on entering data into the fields specifically required for NAPIS reporting. However, there should be sufficient content for a field person to use it as the guide to working with daily maintenance needs of OA/RAIN and NAPIS.

This guide will be a living document as the reports and programs discussed within are continually updated in response to state and federal law changes. It will provide the reader with information about the federal reporting requirements and the process to input that information in Oregon ACCESS and RAIN.

The first section goes through the Federal NAPIS report explaining the types of information expected and the decision process used in OA and RAIN in selecting and reporting each type.

The second section will illustrate the screens in OA to enter Person and Services information. Provider, Service and Site maintenance are then discussed. We then conclude with the reports that are available in OA.

The third section is a guided tour through the RAIN screens including reports and input screens for NAPIS financial and accomplishments input.

This guide provides basic information about the systems; however, some topics are too large to fit within the context of this document. They will be available through Best Practices on the [State Unit on Aging \(SUA\)](#) website. Some examples might



include “**Using the Billing System**” and “**Batch Services Input**”. **Note that the SUA website is currently under construction. The link will be provided as soon as it's available.**

According to the AoA, when information is sent to the [State Reporting Tool \(SRT\)](#), there should be no more than 10% missing data.¹ One goal of this document is to provide [AAAs](#) with information about data fields which must be filled to comply with this goal. There are a number of documents available to the [AoA Data Community](#) which can further assist the reader in collecting and evaluating their information. [Appendix D](#) is an excerpt of one of these documents provided by AoA to help understand how missing data can affect the value of information we provide.

[Appendix E](#) includes a local Oregon FAQ. This will be continually updated and made available on the SUA website.

See also **Handbook for Employees of Oregon's Area Agencies on Aging**. The purpose of this Handbook is to serve as a general resource guide for employees of Oregon's Area Agencies on Aging, especially those new to their positions. It focuses on the roles, responsibilities and programs common to all Oregon AAAs – those associated with the Older Americans Act and Oregon Project Independence.

1.2 GLOSSARY

Following are the terms and acronyms that appear throughout the document. Usually this section would be included in an appendices, however, these terms are key in following the information following. It is suggested you spend some time reviewing the terms, check the referenced sections then continue with the rest of this Guide.

Acronym / Term	Term	Other
AAA	Area Agency on Aging (AAA)	The state-designated entity with which DHS contracts to meet the requirements of the OAA and ORS Chapter 410 in planning and providing services to the senior or senior and disabled population for a designated Planning and Service Area.
ADL	Activities of Daily Living	Activities which individuals need to perform or have provided on a daily basis to maintain themselves in an environment. They cluster in the areas of mobility, eating or cooking, bathing, toileting, grooming, dressing, behavior, and medications management.

¹<http://aodatacommunity.us/communities/What'sMissing-ReducingMissingData>

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Acronym / Term	Term	Other
AoA	Administration on Aging	US Dept of Health and Human Services department that oversees the Older Americans Act and Aging Network. http://www.aoa.gov
Branch	Branch	A Branch is a specific SPD or AAA office or location located within a District.
DB	Database	This is a collection of relational data that is stored in a logical fashion to make it easy to extract specific information and produce reports.
DHS	Department of Human Services	The umbrella agency responsible for administering Oregon's health and human service programs. DHS' mission is "helping people become independent, healthy and safe."
District	District	A District is a single or multiple counties assigned to a single AAA to administer AoA services.
Ethnicity	Ethnicity	Ethnic quality or affiliation; of or relating to large groups of people classed according to common racial, national, tribal, religious, linguistic, or cultural origin or background. For purposes of OAA information collection and reporting purposes, recipients of services are asked to self-identify where they are: (1) Hispanic or Latino, or (2) not Hispanic or Latino.
IADL	Instrumental Activities of Daily Living	These activities related to independent living and include preparing meals, managing money, shopping, doing housework, and using a telephone.
NAPIS	National Aging Program Information System	The National Aging Program Information Systems (NAPIS) State Program Reports are completed comply with AoA reporting requirements for submission of annual performance reports. Three principal types of data are included in the NAPIS design: (1) performance data on programs and services funded by the Older Americans Act (OAA) and non-federal sources; (2) demographic data of the target population of older individuals; and (3) descriptive data on the infrastructure of home- and community-based services in place to assist older persons.
Registration	NAPIS Registration Form	A form utilized to obtain NAPIS data from service recipients. Key demographics gathered are age, zipcode, gender, number in household, income range to determine poverty level, race and ethnicity.
NFCSP, FCSP	National Family Caregivers Support Program	The Family Caregiver Support Program (FCSP) is a program created as Title III-E of the 2000 Older Americans Act Reauthorization. The intent of the program is to serve caregivers – spouses, daughters, sons, grandparents, aunts, uncles, neighbors or other relationship – that have been providing care on an informal basis.

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Acronym / Term	Term	Other
Cluster 3	Non-registered Service	At present AoA does not require reporting of demographics for client recipients of Cluster 3 services. AAA's are encouraged to collect it for future reporting needs.
OA, OACCESS, Oregon ACCESS	Oregon Automated Computer Capture and Storage System	A single-entry data system used for gathering client demographic information, completing a comprehensive and complete client assessment, calculating the individual's service priority status, level of care and service payment rates, and accommodates client participation in care planning. Includes OAA National Aging Program Information System (NAPIS) data and client billing.
OAA	Older Americans Act	The federal Law providing services for older persons through programs and grants for social services, research and demonstration projects, and personnel training. Also authorizes the operation of Area Agencies on Aging.
	Class/Service	In OA, services are categorized as a Class or Service. You will generally see a drop-down box with the title Class when you wish to select a service. See Appendix A for a list of the services which are set up in the system. AoA categorizes registered services as cluster 1, 2, or 3 depending on the level of registration required.
	Race	A class or kind of people unified by a community of interests, habits, or characteristics. Within the human species (Homo sapiens), there are major subdivisions, or races. Members of the same race resemble one another more than do members of other races. For purposes of OAA information collection and reporting, racial groups are divided among American Indian or Alaskan Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White.
RAIN	Reporting & Analyzing Information for NAPIS	This is web-based DHS application to collect NAPIS information extracted from OA and provide AAA's modules to enter management data such as staffing, focal points, accomplishments, etc.
Cluster 1 Cluster 2	Registered Service	A NAPIS registration form must be provided and filled in to receive AoA registered services. Cluster 1 services require a detailed Client profile with full registration. Cluster 2 services only require a summary or simplified Client profile with a minimal registration.

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Acronym / Term	Term	Other
SPD	Seniors and People with Disabilities	A division of the State of Oregon's DHS. Is responsible for the administration of programs that increase the independence of, and help protect, seniors and people with disabilities. Its functions include abuse investigation, licensing of nursing facilities, help in arranging and paying for in-home services, Oregon Project Independence, and Lifespan Respite. Many of the services are provided to clients through local Area Agency on Aging (AAA) offices. SPD also handles in-home, group-home and crisis services for people with developmental disabilities. Another SPD function is eligibility determination for federal Social Security Disability benefits.
SRT	State Reporting Tool	This program accepts XML data extracted from RAIN. It validates the data and provides error reports that assist in correcting missing or invalid data. SPR User's Guide
SUA	State Unit on Aging	The administrative entity at the state level responsible for planning and administering OAA services within a state. DHS' Seniors and People with Disabilities is the SUA for Oregon.
Unit	Unit of Service	Each qualifier or service has a standard unit of service associated with it. It might be 1 hour, 1 Trip, 1 Meal, etc. See Appendix A for a table of standard units and their service description.
XML	Extensible Markup Language	XML is a general-purpose specification for creating custom markup languages.[1] It is an extensible language, because it allows the user to define the mark-up elements. XML's purpose is to aid information systems in sharing structured data, especially via the Internet, [2] to encode documents, and to serialize data.
YoY	Year-over-Year Report	The RAIN system has two reports that compare information from a year and the previous year. If the current year is selected as the first year, then it will report on accumulated data-to-date. Selecting a previously reported year will report on the completed information as submitted to the AoA. The two reports are Registered Service Profiles and Caregiver Profiles.

FIGURE 2 ACRONYMS



1.3 TYPOGRAPHICAL CONVENTIONS

The following conventions will be observed throughout this guide.

Text Type or Symbol	Meaning
Bold Text	Bold text indicates a field name; the name used to define information used as input on a screen.
Appendix A	Designates a hyperlink. It may be within the document or to an external URL.
"OAA Summary".	The name of a screen or tab or button within Oregon ACCESS or RAIN.
"Unknown"	A value set within the system.
	This box designates the primary points of interest on a report page or the fields of interest on an application screen. Generally these are the OAA Required fields.
	This white box designates the path to get to a specific input screen. It might take several clicks to get to the final screen/tab.
	This designates a button that may navigate to an optional screen.
<CTL>+<Shift>	Entries in <> signs are keyboard keys. The plus sign indicates that the first key is held while the second key is struck.
<Click>	Left mouse click.

FIGURE 3 DOCUMENT CONVENTIONS

1.4 SYSTEMS OVERVIEW

Computer systems can be very large and complex. Oregon ACCESS and RAIN are certainly no exception. Each computer system is intended to model or enhance business processes. At its very simplest, the following flowchart defines the business processes supported in this guide.

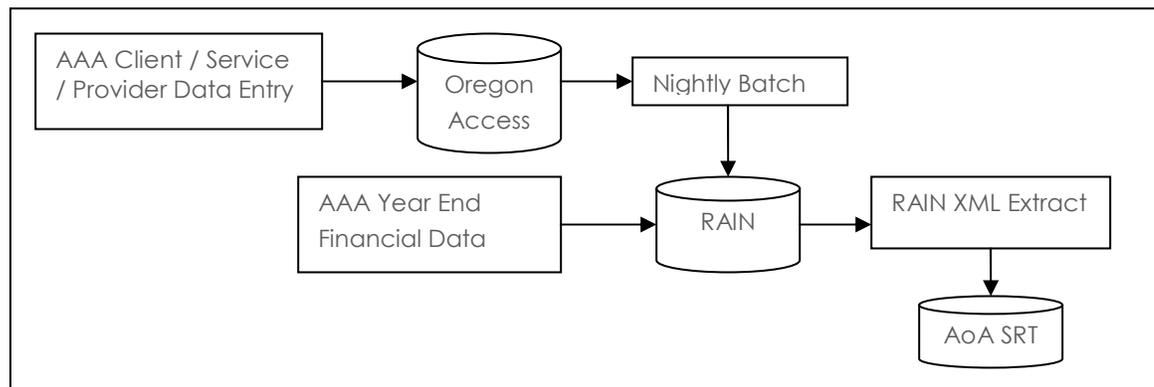


FIGURE 4 BUSINESS PROCESS FLOW

The chart below shows a more complete picture of the relationships between the various systems, data sources and outputs.

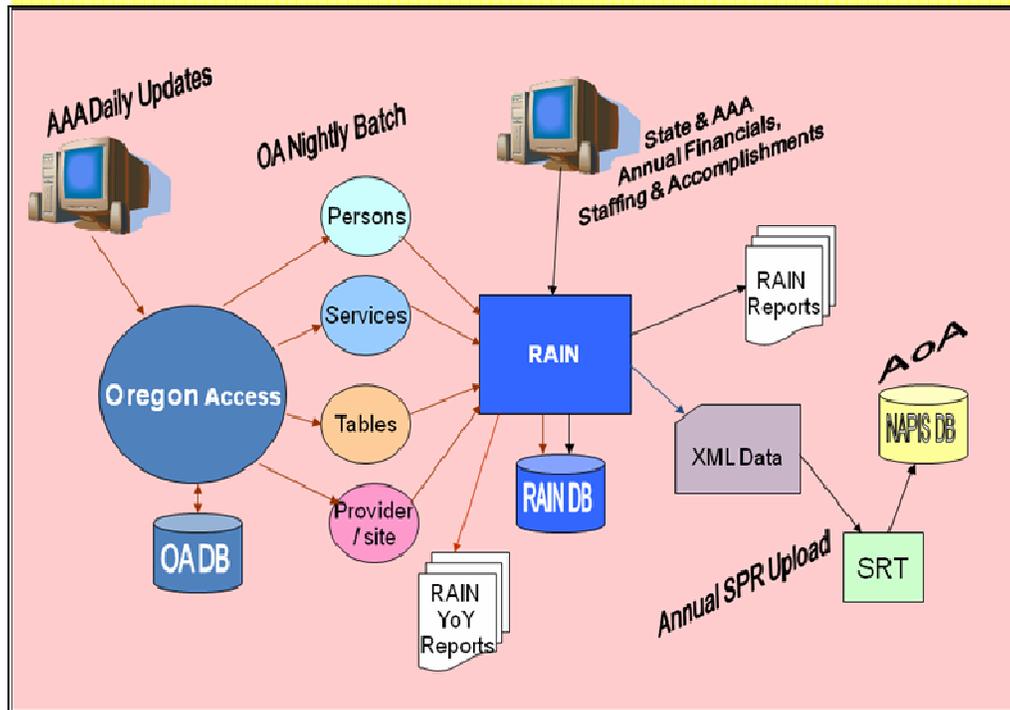


FIGURE 5 OAA DATA ENTRY & FLOW

Data collection begins with each AAA maintaining information about itself, service providers, services, locations and the people to whom they provide services within OA. The information stays in the OA DB (Oregon ACCESS Database) virtually forever.

Each evening, a batch job runs to extract AoA related information from the OA DB to an intermediate set of flat files (non-database) containing up to 5 years of data. Each person record, provider record, etc., is stored as an individual record capturing a snapshot of the state of these files as of that night. A second batch job reads these flat files then compiles the current year's NAPIS reports. In the RAIN DB, there is one record written for each line on the NAPIS report for the current year. The RAIN database contains the current year snapshot and the previous two years of NAPIS report information.

The RAIN system provides three types of output.

1. The SRT Preview report that mimics the actual NAPIS report.
2. The XML data sent by the state SUA to the State Reporting Tool, at year-end for validation.
3. RAIN reporting section that produces reports to compare two concurrent years (Year-over-Year).

While the SRT Preview and XML reports run from the RAIN database, the Year over Year reports are from the intermediate files extracted from the OA DB.



Once a NAPIS report is complete and certified, the year must be flipped by the SUA administrator before the next year's information begins to accumulate in the RAIN database.

There are several months when you cannot view current data in the SRT Preview reports until the report is certified. However, because that data is in the intermediate files, the Year-over-Year reports can provide an extensive set of reports to validate numbers coming from the OA DB.

After June 30 of each year, the AAAs log into the RAIN system and enter financial information as well as accomplishments and staffing information. **This information must match that provided on the final fiscal year 148/150 report as submitted to the SUA.**

[Appendix C](#) outlines the annual schedule of events that comprise the full NAPIS cycle. Several groups must perform critical tasks within a set timeframe for the reports to certify on time. As time goes on, it is likely that the federal requirements for submission will be tightened, perhaps even going to quarterly reporting rather than annually.

NOTE: All data shown in this guide is fictional. Any resemblance to a person, living or dead is purely coincidental.



2 NAPIS REPORTING



Why do we report NAPIS information?

- It is required – Title III & VII of Older Americans Act.
- It helps refine services in that the funding agencies can determine the effectiveness in delivering services to targeted demographics.
- It brings federal \$\$\$ back to the Oregon and AAAs when AoA and US Congress see the money being well spent and services effectively delivered.
- It is a service to the people we are trying to reach. If the funding dries up due to lack of reporting, the people will suffer the loss of provided services.
- It is made available to the public in a number of databases including the following:
 - [Federal Reporting Database](http://198.136.163.234/SPR_New.asp) (http://198.136.163.234/SPR_New.asp).
- See [Appendix D](#) for additional AoA guidelines on reporting.

The NAPIS report is comprised of four sections. The first section contains information about people receiving services and their demographics. The second section is about providers, services provided and the financial breakdown for the services. The third section includes provider demographics and agency staffing levels. Section 4 includes the top three accomplishments for Home and Community Based Programs and for a System of Elder Rights.

There are approximately 7,400 fields to be filled either automatically via data from OA or manually, through entry in the RAIN system. None of the fields are optional. Once the report is completed and the XML is submitted to the SRT, over 1,800 edits are preformed, checking for valid data as well as crosschecking from one report to the next to ensure consistency.

The first step in developing the NAPIS report is the collection of data on each of the recipients. That step begins when a recipient is handed and fills out a NAPIS Registration Record form. The current DHS forms can be retrieved from:

http://dhsforms.hr.state.or.us/forms/databases/FMPRO?-db=FormTbl.fp5&-lay=Main&-format=Findforms_FMP.htm&-findany



Search on **NAPIS** in “**Title contains the word or phrase:**” and it will take you to the current form. You will need to print it and hand-enter the information or have the client enter the information. We will tie the various sections of the form to the results as we go through this guide.

2.1 NAPIS DATA DEFINITION & GATHERING

2.1.1 RURAL DETERMINATION

The definition for Rural versus Urban is federally determined. The following descriptions illustrate the logic used in determining some of the demographics used in Section I reports.

How is the Person Rural indicator determined?

The information to determine urban or rural comes from *page 1, Section 2 - Address* on the NAPIS Registration Form.

Section 2-Address		
Street address		
City	State	Zipcode
Mailing address (if different)		
City	State	Zipcode

FIGURE 6 NAPIS FORM - ADDRESS

The nightly batch job uses a table containing zip codes and population 60+, from census information, to determine whether a person lives in a Rural or Urban area. These are actual or projected resident numbers based on the 10-year census.

Note: The OA nightly batch program only uses the first address entered into the system to evaluate Rural/Urban. Always attempt to enter the Residence address as Address 1.

If the first OA client address **Zip** is missing,

Rural is set to “Unknown” or missing

If there is a **Zip** then:

If **Rural_60_plus** > **Urban_60_plus** then **Rural** is set to "Yes" otherwise it is set to "No"

The table has the following structure:

ZIP_CODE	Total_60_plus	Urban_60_plus	Rural_60_plus
97523	1465	0	1465
97524	1700	635	1065
97525	1205	495	710
97526	8125	5240	2885

FIGURE 7 ZIP CODE TABLE



For instance, if the **Zip is 97524**,
Rural_60_plus (1065) > **Urban_60-plus** (635) is True so **Rural** is set to "Yes".

See [Appendix F](#) for additional discussion about Rural and Urban from the AoA Data Community website.

2.1.2 BELOW POVERTY

How is Below Poverty indicator determined?

Number in Household and Monthly Income are taken from *page 1, Section 1 - Person* of the NAPIS Registration form. Note that the table only supports one or two member households at this time.

When the client selects a range and there are more than 2 people in the household, you will have to make a best guess estimate at selecting the correct range in the **Income Level** select box. If the client provides a Monthly Household Income amount, you may use that to select the correct range.

Note: The following box contains example amounts. Refer to a current form for actual income ranges.

Number in household: _____	
Monthly Household Income: \$ _____	
<input type="radio"/> Single	<input type="radio"/> Married
<input type="radio"/> \$903 and Below	<input type="radio"/> \$1214 and Below
<input type="radio"/> \$904-\$1128	<input type="radio"/> \$1215-\$1518
<input type="radio"/> \$1129-\$1805	<input type="radio"/> \$1519-\$2428
<input type="radio"/> \$1806-\$2708	<input type="radio"/> \$2429-\$3643
<input type="radio"/> Over \$2708	<input type="radio"/> Over \$3643

FIGURE 8 NAPIS FORM - INCOME

The **Income Level** and **Number in Household** are on the "OAA Summary" screen.

If **Number in Household** is unknown,

Poverty is set to "Unknown" or Missing.

The **Number in Household** determines the amounts that display in the **Income Level** box.

If the selected client income is within the first range,



Poverty is set to “Yes” Otherwise, it is set to “No”.

For instance, if the **Number in Household** is 1 and the **Income Level** is “\$903 and Below”,
 this person is considered Below Poverty Level and **Poverty** is set to “Yes”.

Note that the other ranges are used by OPI case managers and have nothing to do with NAPIS.

See [Appendix B](#) for the Poverty Table for 2008 - 2009.

2.1.3 RACE AND ETHNICITY

Race and Ethnicity are taken from *page 1, Section 1 - Person* of the NAPIS Registration form. While these fields are not mandatory, effort should be made to obtain this information so tracking the use of services to different ethnic and racial groups can be accurately reported.

See [APPENDIX G](#) for AoA guidance and requirement to collect Race and Ethnicity information.

Race:

- Asian
- American Indian/Alaska Native
- Black/African American
- Native Hawaiian/Other Pacific Islander
- White
- Other
- Unknown/Not Reported

Ethnicity:

- Hispanic/Latino
- Not Hispanic/Latino
- Not Reported

FIGURE 9 NAPIS FORM – RACE/ETHNICITY

2.1.4 OTHER DEMOGRAPHICS

Other specific demographics are taken from *page 1, Section 1 - Person* of the NAPIS Registration form.

Date of birth _____

Gender Male Female

Primary language _____

Number in household _____

Monthly household income \$ _____

Single Married

FIGURE 10 NAPIS FORM – INCOME AND OTHER DEMOGRAPHICS

2.1.5 NUTRITIONAL RISK



Nutritional risk check boxes are taken from page 1, Section 3 – Nutrition Risk of the NAPIS Registration form. “Yes”, “No” or “Undetermined” are acceptable answers for entry into OA.

Section 3-Nutrition Risk
 Complete this section for clients who receive OAA/OPI case management, congregate meals, home delivered meals or nutrition counseling.
 (Mark as Yes, No or Undetermined)

1) I have an illness or condition that made me change the kind and/or amount of food I eat.

2) I eat fewer than 2 meals per day.

3) I eat few fruits, vegetables or milk products.

4) I have 3 or more drinks of beer, liquor or wine almost every day.

5) I have tooth or mouth problems that make it hard for me to eat.

6) I don't always have enough money to buy the food I need.

7) I eat alone most of the time.

8) I take 3 or more prescribed or over-the-counter drugs a day.

9) Without wanting to, I have lost or gained 10 pounds in the last six months.

10) I am not always physically able to shop, cook and/or feed.

Page 1 of 3
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FIGURE 11 NAPIS FORM – NUTRITION RISK ITEMS

2.2 NAPIS SECTION I - ELDERLY CLIENTS & CAREGIVERS

This data comes from “**OA Person Detail**” and “**Service Needs**” screens.

- Section I reports cover services and demographics.
- Section I reports 1 through 4 covers clients 60+.
- Section I report 5 covers NFCSP* caregivers serving the elderly.
- Section I report 6 covers NFCSP* caregivers serving children.

2.2.1 REPORT I.A

Elderly Client Counts

SECTION I. Elderly Clients and Caregivers
A. Elderly Client Counts
 State ID: _____
 Fiscal Year: _____

	Total
1. Unduplicated Count of Persons Served For Registered Services Supported by the OAA Title III	
2. Estimated* Unduplicated Count of Persons Served For Unregistered Services Supported by the OAA Title III	
3. Total Estimated Unduplicated Count of Persons Served Through Services Supported by OAA Title III	

* There is no prescribed method for developing this estimate.

FIGURE 12 NAPIS REPORT I.A

Department of Human Services



Line 1 is the total of unduplicated persons receiving registered services for the year. While a person might receive more than one service within a fiscal year, he/she counts only once.

Line 2 is the total of unduplicated persons receiving unregistered services for the year. While a person might receive more than one service within a fiscal year, he/she counts only once.

Line 3 is the unduplicated count of all persons served in a fiscal year in line 1 and line 2. For that reason, it will usually be less than the total of line 1 and line 2.

See [Appendix A](#) for a table designating registered and unregistered services.



2.2.2 REPORT I.B

General Characteristics of Elderly Clients Receiving Cluster 1 Registered Services and those Receiving Cluster 2 Registered Services

Report I.B has 4 pages, Total Registered Clients, Congregate Meals, Nutrition Counseling and Assisted Transportation. Notice the demographic information in the left column is consistent throughout the reports. The initial data comes from *Section 1 – Person* on the NAPIS Registration form.

Some sets of demographic numbers will add up to match the total client count. For instance:

- **Total with Age Reported** and **Age Missing** will equal the **Total** number.

Other sets will not equal the **Total** as one number is missing.

- **Rural Clients** and **Rural Missing** will not equal **Total** since the number for **Urban** is not reported.

See [Appendix D](#) for a complete discussion on checking demographic totals for Section I reports.



SECTION I. Elderly Clients and Caregivers
 B. General Characteristics of Elderly Clients Receiving Registered Services and Those Receiving Cluster 2 Registered Services
 State ID: _____ Fiscal Year: _____

___ Total Registered Clients ___ Congregate Meals ___ Nutrition Counseling ___ Assisted Transportation
 (Cluster 1 and Cluster 2)

	Total*	With Income Below Poverty	Age of Client		
			60-74	75-84	85+
Total Clients					
Total with Age Reported					
Age Missing					
Female					
Male					
Gender Missing					
Rural Clients					
Rural Missing					
Poverty Missing					
Live Alone					
Live Alone Missing					
Clients By Ethnicity					
Hispanic or Latino					
Not Hispanic or Latino					
Ethnicity Missing					
Clients By Race or Ethnicity					
White (Alone) ** – Non-Hispanic					
Total Minorities ***					
White (Alone) - Hispanic					
American Indian or Alaska Native (Alone)					
Asian (Alone)					
Black or African American (Alone)					
Native Hawaiian or Other Pacific Islander (Alone)					
Persons Reporting Some Other Race					
Persons Reporting 2 or More Races					
Race Missing					

NOTE: States are not required to report Unduplicated Client Counts By Characteristic for Unregistered Services. States are required to report unduplicated client counts by characteristic for all registered services. Registered services include: Personal Care, Homemaker, Chore, Home Delivered Meals, Adult Day Care/Health, Case Management, Assisted Transportation, Congregate Meals, and Nutrition Counseling.
 * Total clients includes OAA specified eligible meal participants under age 60.
 **“(Alone)” – when appended to a racial category - means that the individual designated only one race category.
 ***For this and subsequent tables, Total Minorities will be calculated by AoA sponsored State Reporting Tool software – will exclude White (alone) – Non-Hispanic and race/ethnicity missing.

FIGURE 13 NAPIS REPORT I.B

2.2.3 REPORT I.C

Detailed ADL Characteristics of Elderly Clients Receiving Cluster 1 Services

The initial data comes from *Section 1 – Person* on the NAPIS Registration form.

The information for this report comes from the Person Detail and Service Needs records in OA.

Report I.C has 7 pages, a Total page and one for each of the cluster 1 (registered) services, Personal Care, Homemaker, Chore, Home Delivered Meals, Adult Day Care/Health and Case Management.

- This report provides ADL information for the specified demographics.
- The demographic information is the same as report I.B.



2.2.4 REPORT I.D

Detailed IADL Characteristics of Elderly Clients Receiving Cluster 1 Services

The initial data comes from *Section 1 – Person* and *Section 4 – ADL/IADL* on the NAPIS Registration form.

The data for this report comes from the Person Detail and Service Needs records in OA.

Report I.D has 7 pages, a Total page and one for each of the cluster 1 (registered) services, Personal Care, Homemaker, Chore, Home Delivered Meals, Adult Day Care/Health and Case Management.

- This report provides IADL information for the specified demographics.
- The demographic information is the same as report I.B.



2.2.5 REPORT I.E

Summary Characteristics of Caregivers Serving Elderly Individuals (National Family Caregiver Support Program – Title III-E)

The initial data comes from *Section 1 – Person* on the NAPIS Registration form.

The data for this report comes from the Person Detail records and the “**FCSP**” screen in the “**Services Detail**” in OA.

- The same demographic information applies as with previous subsections.
- Note that on this report, the **Caregiver** age can be less than 60.
- The demographic information comes from the caregiver rather than the care recipient.
- Notice the **Caregiver** relationship categories in the box. The caregiver receives the services.

Department of Human Services



Section I. Elderly Clients and Caregivers

E. Summary Characteristics of Caregivers Serving Elderly Individuals (National Family Caregiver Support Program - Title III-E)

Note: Data is for Title III-E Group 1 Services only – See Section II-C for specifics.

State ID: _____ Fiscal Year: _____

Caregiver Characteristics	All Caregivers	Age of the Caregiver			
		Under 60	Age 60-74	Age 75-84	Age 85 +
Total Caregivers					
Caregivers with Age Data					
Age Missing					
Female					
Male					
Gender Missing					
Rural					
Rural Missing					
Caregivers by Ethnicity					
Hispanic or Latino					
Not Hispanic or Latino					
Ethnicity Missing					
Caregivers by Race or Ethnicity					
White (Alone) – Non-Hispanic					
Total Minorities					
White (Alone) –Hispanic					
Am. Ind./Alaska Native (Alone)					
Asian (Alone)					
Black or African American (alone)					
Native Hawaiian or Other Pacific Islander (Alone)					
Persons Reporting Some Other Race					
Persons Reporting 2 or More Races					
Race Missing					
Caregivers by Relationship					
Husband					
Wife					
Son/Son-in-Law					
Daughter/Daughter-in-law					
Other Relative					
Non-Relative					
Relationship Missing					

* The Older Americans Act was amended in 2008 to include family caregivers who assist persons under 60 years old with early onset dementia. Include on this worksheet.

FIGURE 16 NAPIS REPORT I.E



2.2.6 REPORT I.F

Summary Characteristics of Grandparents and Other Elderly Caregivers Serving Children (National Family Caregiver Support Program – Title III-E)

The initial data comes from *Section 1 – Person* on the NAPIS Registration form.

The selection criterion for this report comes from the Person Detail records and the “**FCSP**” screen in the “**Services Detail**”.

- The same demographic information applies as with previous subsections.
- The demographic information comes from the caregiver rather than the care recipient.
- The care recipient is a child 18 and younger or over 18 with a disability and is a relative of the Caregiver.
- Notice the possible caregiver categories in the box. The caregiver receives the services.



SECTION I. Elderly Clients and Caregivers

F. Summary Characteristics of Grandparents and Other Elderly Caregivers Serving Children (National Family Caregiver Support Program - Title III-E)

Note: Data is for Title III-E Group 1 Services only – See Section II-C for specifics.

Grandparent/Relative Caregiver Characteristics	All Caregivers	Age of the Caregiver		
		55-74	75-84	85+
Total Caregivers				
Caregivers with Age				
Age Missing				
Female				
Male				
Gender Missing				
Rural				
Rural Missing				
Caregivers by Ethnicity				
Hispanic or Latino				
Not Hispanic or Latino				
Ethnicity Missing				
Caregivers by Race or Ethnicity:				
White (Alone) – Non-Hispanic				
Total Minorities				
White (Alone) - Hispanic				
American Indian/Alaska Native (Alone)				
Asian (Alone)				
Black or African American (Alone)				
Native Hawaiian or Other Pacific Islander (Alone)				
Persons Reporting Some Other Race				
Persons Reporting Two or More Races				
Race Missing				
Caregivers By Relationship				
Grandparents				
Other Elderly Relative				
Other Elderly Non-Relative				
Relationship Missing				
Total Individuals Receiving Care (children 18 or younger)				

The Older Americans Act was amended in 2006 to define "child" to include individuals more than 18 years old with a disability and a relative caregiver.

FIGURE 17 NAPIS REPORT I.F



2.2.7 SELECTION CRITERIA AND RELATIONSHIPS FOR REPORT I.E AND I.F

The following table outlines the report placement of data based on relationship type on the “**FCSP**” screen.

Caregiver	Care Recipient	Report
Adult of any age	Person age 60 or older	I.E, II.B
Adult of any age	Alzheimer's (or related disorder) any age	(I.E, II.B)
Grandparent/Relative Caregiver, age 55 and older, does not include parent	Child age 18 or younger	I.F, II.C
Grandparent/Relative Caregiver, age 55 and older, does not include parent	Adult or Child w/Disabilities of any age	(I.F, II.C)

FIGURE 18 RELATIONSHIP TABLE

Note that the reporting lines with the report in parenthesis are not implemented in OA and RAIN.

Once the required changes have been made to OA and RAIN, there will be a checkbox to indicate a child is disabled and one to indicate that the care recipient has early onset dementia, such as Alzheimer's. These check boxes will be used in conjunction with the birth date to count the Caregiver and care recipient on the I.E, I.F, II.B and II.C reports.

2.3 NAPIS SECTION II – UTILIZATION AND EXPENDITURES PROFILES

This data comes from OA Person Detail, Service Needs and Provider detail.

2.3.1 REPORT II.A

Title III Utilization, Expenditure, and Program Income Profile (except Title III-E)

The AAAs manually enter expenditures for services in RAIN after the fiscal year-end from the final 148/150 report.

Department of Human Services



SECTION II. Utilization and Expenditure Profiles

A. Title III Utilization, Expenditure Profile (Except Title III-E)

State ID _____ Fiscal Year: _____

For Selected Services	Number of Providers	# of AAAs Direct Services Provision	Unduplicated Persons Served	# of Persons Served at High Nutrition Risk	Service Units	Title III Expenditure	Total Service Expenditure	Program Income Received	OAA Title III Expenditures (\$) by Part			
									B	C1	C2	D
Cluster 1: Registered Services - Requiring Detailed Client Profile												
1. Personal Care												
2. Homemaker												
3. Chore												
4. Home Delivered Meals												
4a. NSIP Home Delivered Meals*												
5. Adult Day Care/Health												
6. Case Management												
Cluster 2: Registered Services - Requiring Summary Client Profile												
7. Assisted Transportation												
8. Congregate Meals												
8a. NSIP Congregate Meals*												
9. Nutrition Counseling												
Cluster 3: Non-Registered Services - No Client Profile Required												
10. Transportation												
11. Legal Assistance												
12. Nutrition Education												
13. Information and Assistance												
14. Outreach												
15. Other Services												
Total (Unduplicated)												

Note: States are to report Title III-E in the next table: Section II. B-Title III-E Caregiver Utilization and Expenditure Profile

* States should report separate NSIP meal counts (items 4a and 8a) if different from the regular SPR numbers. If no NSIP number is reported, AoA will use the regular SPR figures (4 and 8). See definition in the Appendix.

FIGURE 19 NAPIS REPORT II.A

This report has sections for Cluster1, Cluster 2 and Cluster 3 services. Notice the services clustered under each heading on the above report.

The # of AAAs Direct Services Provision column is included in the Number of Providers column. To avoid over counting, the AAA should not mark themselves as the provider for services that a contractor provides. Old unused providers should be inactivated to ensure correct Provider counts.

A High Nutritional Risk person is an individual who scores six (6) or higher on the *Determine Your Nutritional Risk* checklist published by the Nutrition Screening Initiative. The Fifth column counts persons at high Nutrition risk.

Nutritional risk information is taken from page 1, Section 3 – Nutrition Risk of the NAPIS Registration form. The data for the report comes from the “**OA Service Needs**” / “**NutrRsk/ADL**” screen.

See the Cluster & Standard Unit table is in [Appendix A](#) for the standard Service units assigned to each of the services.

Use the RAIN “**Client Services**” Screen to enter financial data.



AAAs do not need to add NSIP meal counts. Those numbers are entered by SUA at year end.

2.3.2 REPORT II.B

Title III-E Utilization, Expenditure, and Program Income Profile For Caregivers Serving Elderly Individuals

This report shows the number of caregivers serving elderly by Group 1 and Group 2 support categories and the cost of those services.

Section II. Utilization and Expenditure Profiles
B. Title III-E Utilization, Expenditure, and Program Income Received Profile for Caregivers Serving Elderly Individuals

Caregiver Support Categories:	Title III-E Expenditures (Federal \$)	Total Service Expenditures (All Sources)	Program Income Received	# Caregivers Served	Units of Service	# of Providers (unduplicated)
Group 1				Unduplicated number of caregivers:		
1. Counseling/Support Groups/ Caregiver Training						
2. Respite Care						
3. Supplemental Services						
Group 2				Estimated unduplicated number of caregivers:		
4. Access Assistance						
5. Information Services				Estimated Audience size:	# Activities:	
Totals (unduplicated)						

FIGURE 20 NAPIS REPORT II.B

The Estimated Audience size is entered through the OA Batch system. It is the total number of individual guests reached with information.

AAAs enter content from the final 148/150 report, in the financial boxes through the RAIN “**Caregiver Serving Elderly**” entry screens at year end.

2.3.3 REPORT II.C

Title III-E Utilization, Expenditure, and Program Income Profile For Grandparents and Other Elderly Caregivers Serving Children

This report shows the number of grandparents and caregivers serving children by Group 1 and Group 2 support categories and the cost of those services. Note the services in the left hand column in the report below.

The AAAs manually enter costs for these services from the final 148/150 report, in RAIN after the fiscal year-end.



Section II. Utilization and Expenditure Profiles:

C. Title III-E Utilization, Expenditure, and Program Income Received Profile For Grandparents and Other Elderly Caregivers Serving Children

Caregiver Support Categories:	Title III-E Expenditures (Federal \$)	Total Service Expenditures (All Sources)	Program Income Received	# Caregivers Served	Units of Service	# of Providers (unduplicated)
Group 1				Unduplicated number of caregivers:		
1. Counseling/Support Groups/ Caregiver Training						
2. Respite Care						
3. Supplemental Services						
Group 2				Estimated unduplicated number of caregivers:		
4. Access Assistance						
5. Information Services				Estimated Audience size:	# Activities:	
Totals (unduplicated)						

FIGURE 21 NAPIS REPORT II.C

On the Information Services line, the Estimated Audience size is entered through the OAA Batch system. It is the total number of individual guests reached with information during the fiscal year. The Service Unit is one activity.

- If an activity is individual counseling, the audience size would be one.
- For a group meeting, the activity is still one unit but the audience size would be the number of caregivers attending that meeting.
- If someone were to contact you via email or phone and request information, the audience size would be one and one service unit.

The Estimated Audience size for the year would be the accumulation of all audiences contacted. This will be accumulated automatically by OA/RAIN from the services entered through OA.

Information in the financial boxes is entered through RAIN “**Caregiver Serving Children**” screen.

2.3.4 REPORT II.D

Title VII Expenditures by Chapter (Except Chapter 2. Ombudsman)

The AAAs using the RAIN “**Chapter**” screen enter costs for Elder Care services from the final 148/150 report at year-end.

SUA reports Legal Assistance (Chapter 4) at year-end.

Department of Human Services



SECTION II. Utilization and Expenditure Profiles
D. Title VII Expenditures by Chapter

C. Title VII Expenditures By Chapter	Title VII Expenditure	Total Service Expenditure
Chapter 3: Elder Abuse Prevention		
Chapter 4: Legal Assistance Development		

Note: OAA Title VII, Chapter 2, Ombudsman expenditures are reported separately in the National Ombudsman Reporting System (NORS).

FIGURE 22 NAPIS REPORT II.D

2.3.5 REPORT II.E

Title VII Expenditures by Chapter (Except Chapter 2. Ombudsman)

The AAAs using the RAIN “**Other Services**” screen enter costs for these services after fiscal year-end.

SECTION II. Utilization and Expenditures Profiles
E. Other Services Profile (Optional)

State ID: _____ Fiscal Year: _____

Service Name (Up to 30 Characters)	Service Unit Name (Up to 15 characters)	Mission/Purpose Category	OAA Service Expenditure Amount	Total Service Expenditure Amount	Estimated Unduplicated Persons Served	Estimated Service Units
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						
14.						
15.						
16.						
17.						
18.						
19.						
20.						
21.						
22.						
23.						
24.						
25.						

Mission/Purpose Codes:
A. Services which address functional limitations
B. Services which maintain health
C. Services which protect elder rights
D. Services which promote socialization/participation
E. Services which assure access and coordination
F. Services which support other goals/outcomes

There are no restrictions on the number of “other” services that may be reported.
 For each “other” service being reported, please provide all the data elements—name, unit name, mission code, expenditure data, persons served, and service units.

FIGURE 23 NAPIS REPORT II.E

2.4 NAPIS SECTION III – NETWORK PROFILES

Department of Human Services



The SUA enters FTE for Report III.A annually.

The AAAs enter FTE and counts for reports III.B and III.D annually.



2.4.1 REPORT III.A

State Unit on Aging Staffing Profile

The SUA enters FTE for Report III.A through the RAIN “**State Staff**” screen.

SECTION III. Network Profiles
A. State Unit on Aging Staffing Profile

State ID: _____ Fiscal Year: _____

SUA Personnel Categories	Total FTEs	Minority FTEs
1. Agency Executive/ Management Staff		
2. Other Paid Professional Staff (By Functional Responsibility)		
A. Planning		
B. Development		
C. Administration		
D. Service Delivery		
E. Access/Care Coordination		
F. Other		
3. Clerical/Support Staff		
4. Total SUA Staff		

Functional Responsibilities:

A. Planning—Includes needs assessment, plan development, budgeting/resource analysis, service inventories, standards development and policy analysis.

B. Development—Includes public education, resource development, training and education, research and development and legislative activities.

C. Administration—Includes bidding, contract negotiation, reporting, reimbursement, accounting, auditing, monitoring and quality assurance.

D. Service Delivery—Includes those activities associated with the direct provision of a service which meets the needs of an individual older person and/or caregiver.

E. Access/Care Coordination—Include outreach, screening, assessment, case management and I&R.

FIGURE 24 NAPIS REPORT III.A

2.4.2 REPORT III.B

Area Agency on Aging Staffing Profile

The AAAs enter FTE through the RAIN “**AAA Staff**” screen.

SECTION III. Network Profiles
B. Area Agency on Aging Staffing Profile

State ID: _____ Fiscal Year: _____ Total # of AAA's _____

AAA Personnel Categories	Total FTEs	Minority FTEs
1. Agency Executive/ Management Staff		
2. Other Paid Professional Staff (By Functional Responsibility)		
A. Planning		
B. Development		
C. Administration		
D. Service Delivery		
E. Access/Care Coordination		
F. Other		
3. Clerical/Support Staff		
4. Volunteers		
5. Total AAA Staff		

Functional Responsibilities:

A. Planning—Includes needs assessment, plan development, budgeting/resource analysis, service inventories, standards development and policy analysis.

B. Development—Includes public education, resource development, training and education, research and development and legislative activities.

C. Administration—Includes bidding, contract negotiation, reporting, reimbursement, accounting, auditing, monitoring and quality assurance.

D. Service Delivery—Includes those activities associated with the direct provision of a service which meets the needs of an individual older person and/or caregiver.

E. Access/Care Coordination—Include outreach, screening, assessment, case management and I&R.

FIGURE 25 NAPIS REPORT III.B



2.4.3 REPORT III.C

Provider Profile (excluding AAAs providing direct services)

This information comes from Provider records in OA. To be accurate, it is important to select the correct demographic check boxes on the “**OA Provider**” screen. See [Add Provider in OA](#) and [AAA as Provider](#) for more information.

Section III. Network Profiles
C. Provider Profile (Excluding Area Agencies on Aging providing direct services)

	Total # of Providers
Total	
Minority	
Rural	

FIGURE 26 NAPIS REPORT III.C

2.4.4 REPORT III.D

Profile of Community Focal Points and Senior Centers

SECTION III Network Profiles
D. Profile of Community Focal Points and Senior Centers

State ID: _____ Fiscal Year: _____

	Number
1. Total Number of Focal Points Designated Under Section 306(a)(3) of the Act in Operation in the Past Year.	
2. Of the Total Number of Focal Points in Item 1., the Number That Were Senior Centers.	
3. Total Number of Senior Centers in the State in the Past Fiscal Year.	
4. Total Number of Senior Centers in Item 3. That Received OAA Funds During the Past Fiscal Year.	

FIGURE 27 NAPIS REPORT III.D

This information is submitted by each AAA annually through RAIN “**Community**” screen.



2.5 NAPIS SECTION IV – DEVELOPMENTAL ACCOMPLISHMENTS

The AAAs enter these accomplishments in RAIN after the fiscal year-end.

AAAs submitting batch input to RAIN rather than using the RAIN entry screens should NOT include this data in the batched data. Submit it to the SUA in a WORD document for inclusion in the State submission.

2.5.1 REPORT IV.A

For Home and Community Based Programs

Each AAA submits this information through the RAIN “**Home and Community Accomplishments**” screen.

SECTION IV. DEVELOPMENTAL ACCOMPLISHMENTS		
a. FOR HOME AND COMMUNITY BASED PROGRAMS*		
State ID: ____	Fiscal Year: ____	
Identification Of Three Top Accomplishments:		
1		
Type of Development	TYPE_CODE	Enter Code(s)
2		
Type of Development		Enter Code(s)
3		
Type of Development		Enter Code(s)
Development Type Codes:		
1. Public education/awareness	3. Training/education	5. Policy development
2. Resource development	4. Research and development	6. Legislative development
* includes Title III-E NFCSP		

FIGURE 28 NAPIS REPORT IV.A



2.5.2 REPORT IV.B

For a System of Elder Rights

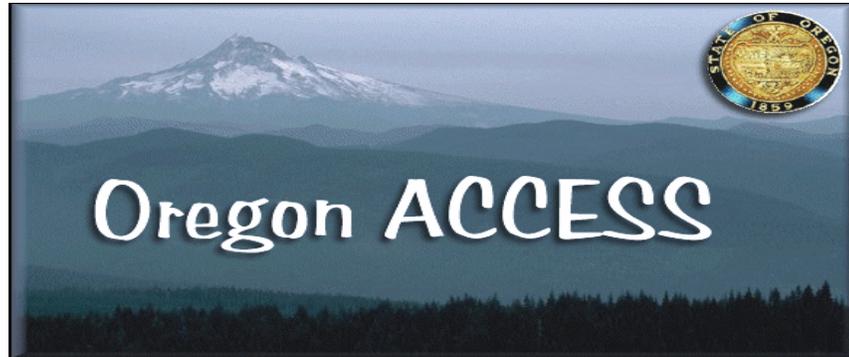
Each AAA submits this information annually through the RAIN “Elderly Rights Accomplishments” screen

SECTION IV. DEVELOPMENTAL ACCOMPLISHMENTS		
B. FOR A SYSTEM OF ELDER RIGHTS		
State ID: _____	Fiscal Year: _____	
Identification Of Three Top Accomplishments		
1.		
Type of Development		
	Enter Code(s)	
2.		
Type of Development		
	Enter Code(s)	
3.		
Type of Development		
	Enter Code(s)	
Development Type Codes:		
1. Public education/awareness	3. Training/education	5. Policy development
2. Resource development	4. Research and development	6. Legislative development
		7. Other

FIGURE 29 NAPIS REPORT IV.B



3 OREGON ACCESS



3.1 OA TIPS

3.1.1 SAVING DATA

The Oregon ACCESS system provides real-time updates to a relational database. Each time the <ENTER> key is struck, whenever the user exits a screen, or when the SAVE icon is clicked, the current data on the screen is written back to the database. If you have changed any information on the screen, it will overwrite what was in the database previously.

If you realize that you have changed a field or have created a record that you do NOT want to save, you must select **Windows** on the Menu bar and select **Prompt on Save** so that it's checked as in the example below. Then when you exit that screen, it will prompt you and give you the option to NOT save the record.



FIGURE 30 PROMPT ON SAVE

Having it turned off is the default so you will need to set it on when you want the prompt. You can turn it back off to make transitions from screen to screen more quickly.

3.1.2 Passwords

To log into Oregon ACCESS, you are required to have a User ID and password. These are initially set up so that logging into your desktop, Oregon ACCESS and RAIN are all the same which matches a mainframe User ID and password that are



often referred to as your RACF ID. You are required to change the RACF password every 90 days. However, that is not automatically forwarded to OA. If you get the following message while in OA, you will need to change your OA password to match your current RACF password.

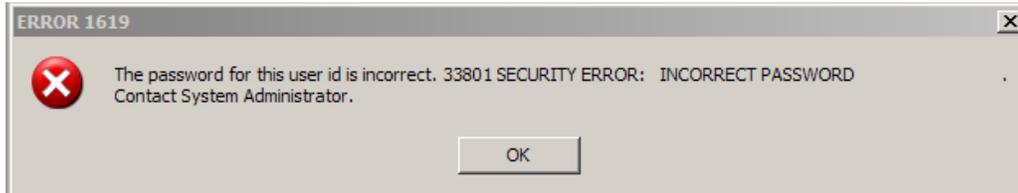


FIGURE 31 OA PASSWORD ERROR

You can do this, once logged on by going to Select/Housekeeping/Maintain Password:

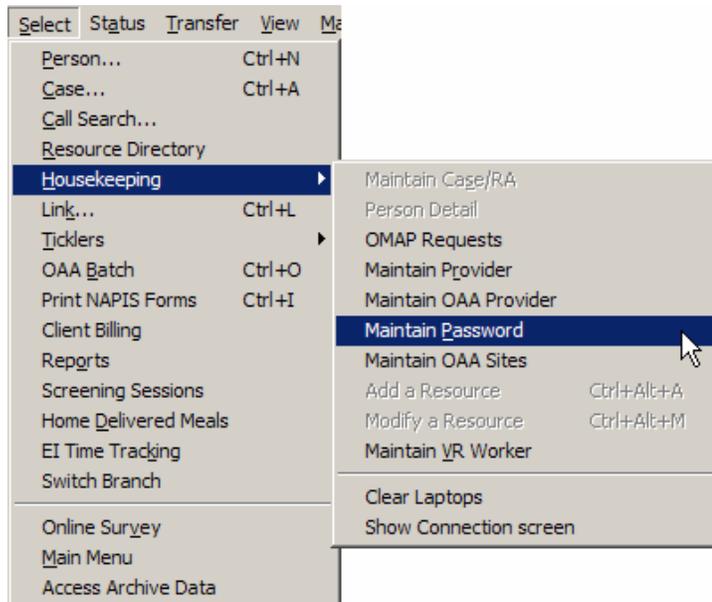


FIGURE 32 PASSWORD CHANGE PATH

This will give you the password change box:



FIGURE 33 PASSWORD CHANGE BOX

Enter your current password, type your new password twice and <Click> OK. If all goes well, you'll receive the confirming message:

FIGURE 34 PASSWORD CONFIRMATION

If you are unable to complete the password change, you may contact DHS Service Desk at 503-945-5623.

3.1.3 Verified Check Box

The Verified Check Box appears on a number of screens. The box is an available tool for AAA's to employ at their option. An example of usage may be to indicate that no further information or research is necessary - all information is valid (perhaps a volunteer added the data and the AAA has to verify its entry.)

3.1.4 GATHERING DATA

The primary form for gathering a client's information is the NAPIS Registration form. This may be completed by a case worker or the individual themselves. The comments in this guide refer to the DHS NAPIS Registration Record. Some AAAs have developed their own version of this form which may vary to some degree in form. You will have to apply this information to the form you are using.

The first page, containing Person, Address and Nutrition Risk sections, should be completed for all service recipients receiving registered and non-registered services. The second page, containing ADL/IADL, Services, Emergency Contact and Special Diet, should be completed for all service recipients who receive

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registered services such as OAA/OPI personal care, home care, chore, home delivered meals, adult day care or case management.

While the client is not required to complete a form to receive services, the state and therefore, the AAA is required to report demographic information so all possible non-coercive efforts should be made to ascertain as much information as possible. See [Appendix G](#) for additional clarification on gathering race and ethnicity.



3.2 OA PERSON DETAIL



The **“Person Detail”** screen icon is used to enter or access the OAA/OPI/FCSP information about an individual. In the following screens, white boxes will show the path to the screen we will use to enter data. The red boxes (gray when printed) will generally show the data to be entered and possible additional selections once data has been entered or confirmed.

As we begin this section, we make the assumption that you have logged onto OA, selected your Branch or case worker, have either added a  new person or performed a search for and selected a person to work with.

3.2.1 OA CLIENT PERSON DATA

To get to the **“Person”** screen, first perform a person search or select a client from the **“Main Menu”**, then:

1. <Click> the Person Detail icon at the top of the page
2. <Click> on the Person tab.



Address List	Address	City	Verified
1	P.O. Box 2343	Salem	Yes
2	7777 Streetwise lane	Medford	Yes

Address Detail

Address: 7777 Streetwise lane
 Line 2: Apt. #4
 City State ZIP: Medford OR 97504
 FIPS Cnty Code: 029
 Directions: drive our 199 to remote and turn south

OAA/NAPIS: Is this address within the city limits? No Verified:

Address Owners

Name	Address Type
FARFENSLAPHER, IGNAZT I	Residence Address

FIGURE 36 OA ADDRESS DETAIL SCREEN

The important field for completing the SPR and NAPIS is **ZIP** on the Addresses. The Zip code is used to determine whether the client is in a rural or urban area.

Note: The OA/RAIN nightly batch job uses only the first address to evaluate Urban/Rural. Therefore, always attempt to put the residence address on line 1 of the Address List. The example above is not the correct way to setup addresses.

See [Rural Determination](#) for additional information.

FIPS Cnty Code (County) is not used by OAA but may be entered for documentation purposes. The list of codes may be found at a number of federal sites including: <http://www.census.gov/geo/www/fips/fips65/index.html>.

The **Verified** box may be checked once all information is input and validated. It will not affect processing of OAA information.

The **OAA/NAPIS: Is this address within the city limits?** and **Directions** boxes are not used at this time but may be filled in for documentation purposes.

3.3 OA CLIENT SERVICE DATA



The Service Needs icon provides access to the OAA/OPI/FCSP information about services provided to an individual.



- Demographics
- Service Needed
- Caregiver relationship





3.3.1 OA OAA SUMMARY

This screen is used to enter most of the information having to do with OAA demographics.

To get to the “**OAA Service Applicant**” screen:

1. <Click> the Service Needs icon at the top of the page
2. <Click> on the “**OAA Summary**” tab.

FIGURE 37 OA OAA SERVICE APPLICANT SCREEN

To complete this screen, enter the **Last Review Date**. If this information came from a phone interview, enter “6” in **Months to Next Rev** otherwise enter “12”. Then, enter the number in household (**Nmbr in HH**). This will display the proper **Income Level** ranges. Select the correct income range. The first range is considered as at or below poverty. See [Below Poverty](#) for more information on the use of these fields.

Information on **OAA Race(s)** and **OAA Ethnicity** are used to track effectiveness of reaching minority groups. Both demographics should be obtained and entered.

<Click> **Add** to add **OAA Races**. <Click> **Remove** to delete a selected race from the **OAA Races**.

The **Total Income** box and **Not OAA Eligible** box have no relevance for OAA at this time..



3.3.2 NUTRITION RISK

This screen is used to enter Nutritional Risk information from the NAPIS Registration form.

To get to the Nutrition Risk tab:

1. <Click> the Service Needs icon at the top of the page
2. <Click> on the “**NutrRsk/ADL**” tab.
3. <Click> on the “**Nutrition Risk**” tab.

This screen will identify a person as Nutritionally At-Risk. In the NAPIS reports a person is at risk with 6 or more **Yes** answers.

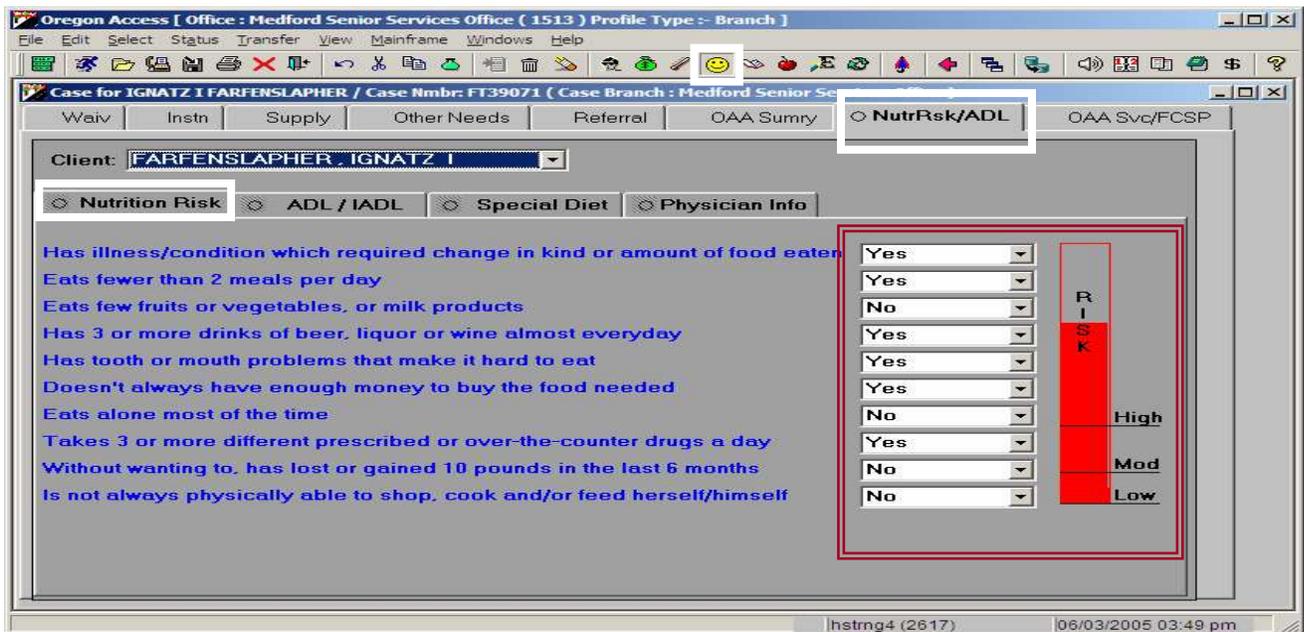


FIGURE 38 OA NUTRsk/ADL RISK SCREEN

3.3.3 ADL/IADL

This set of screens is used to enter ADL and IADL details for the client.

To get to the ADL/IADL tab:

1. <Click> the Service Needs icon at the top of the page
2. <Click> on the “**NutrRsk/ADL**” tab.
3. <Click> on the “**ADL/IADL**” tab.



4. Select the ADLs radio button to enter ADLs. Select the IADLs radio button to enter IADLs.

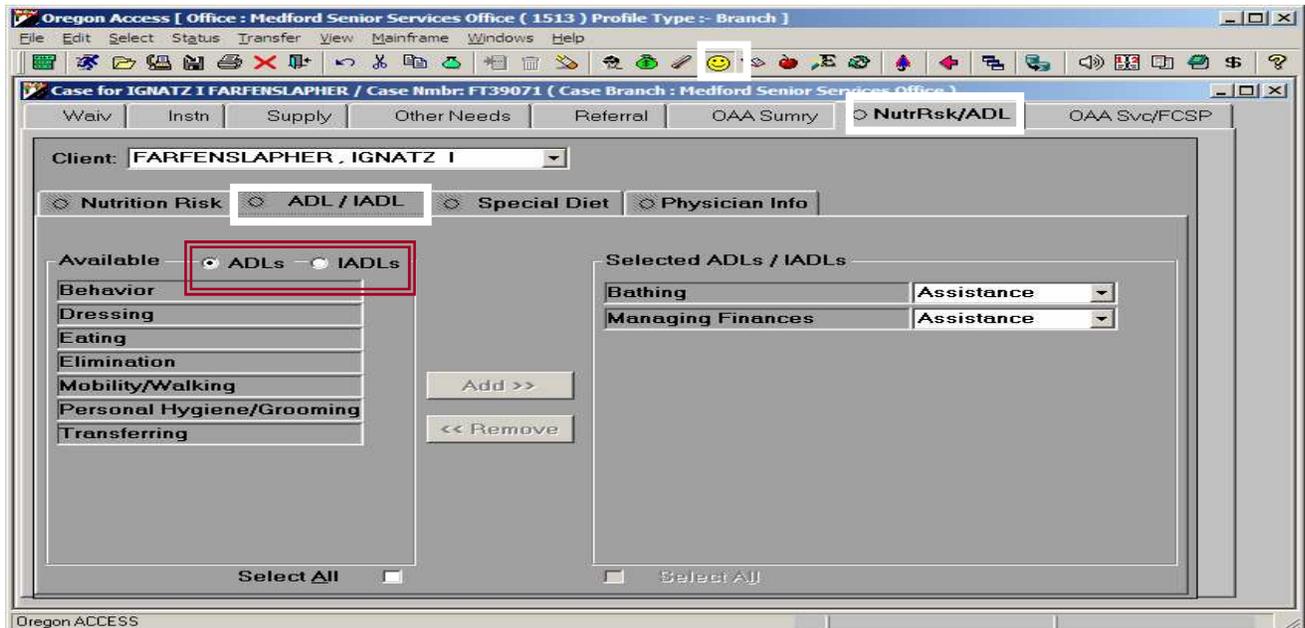


FIGURE 39 OA NUTRsk/ADL – ADL SCREEN

This screen allows entry of both ADLs and IADLs. This reported on the NAPIS Section I.C & I.D reports.

As appropriate, select one of the available ADLs or IADLs; <Click> **Add** to move it to the right. Then select **Assistance**, **Dependant** or **Independent** in the dropdown box.

Should you need to delete an entry from the right side, <Click> on it to select it then <Click> the **Remove** button.

3.3.4 OAA SERVICE

This screen is used to assign specific OAA services to a client.

To get to the OAA Services tab:

1. <Click> the Service Needs icon at the top of the page
2. <Click> on the “**OAA Svc/FCSP**” tab.
3. <Click> on the “**OAA Services**” tab.

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#	District	OAA Class	Site	Start Date	End Date	Verified
1	008	Congregate Meals {#7}	CAVE JUNCTION	05/24/2009	00/00/0000	Yes
2	008	Home Deliv. Meals {#4}	CAVE JUNCTION	05/09/2009	00/00/0000	No

Detail

District: Jackson, Josephine Site: CAVE JUNCTION Service: Congregate Meals {#7}

Route: Authorized Units: .00 Custom Data

Provider

Name: RVCOG FOOD & FRIENDS Provider ID:

Address: 155 N 1st Street

Line 2:

City State ZIP: CENTRAL POINT OR 97502 - Route Seq.

Tele Nbr: (541) 664-6474 Ext: Fax: (541) 664-7927 Qualifier/Units

Dates

Start Date: 00/00/0000 End Date: 00/00/0000 End Reason: Verified

FIGURE 40 OA OAA SERVICE SCREEN

To add a service to the client, select the new record button at the top of the screen (arrow). This will display a new blank Provider area.

#	District	OAA Class	Site	Start Date	End Date	Verified
1	008	Congregate Meals {#7}	CAVE JUNCTION	05/24/2009	00/00/0000	Yes
2	008	Home Deliv. Meals {#4}	CAVE JUNCTION	05/09/2009	00/00/0000	No

Detail

District: Jackson, Josephine Site: Service:

Route: Authorized Units: .00 Custom Data

Provider

Name: Provider ID:

Address:

Line 2:

City State ZIP: - Route Seq.

Tele Nbr: () - Ext: Fax: () - Qualifier/Units

Dates

Start Date: 00/00/0000 End Date: 00/00/0000 End Reason: Verified

FIGURE 41 OA OAA SERVICES - NEW SERVICE SCREEN

To set up a service, enter District, Site, Service and maximum units per month. Then select the Provider Name. The provider information is automatically populated from the Provider record.



If you are using Routes for home delivered meals, select it also.

Enter a Start Date. The OAA Batch system will not allow batching of units prior to the Start Date.

Warning: Make sure this is all correct. You will not be able to delete the service once saved. You will have to end-date it to deactivate it.

While the receipt of most services are entered using **Batch Input**, you can <Click> on the **Qualifier/Units** button to enter monthly units or display the units this person has received for the selected Service. You may also use this to correct individual service units by typing over the **Actual Units**.

If you <Click> on the “**Qualifier/Units**” button, you will get the following screen:

OAA Service Qualifier For Access to CG Services {#16}		
Authorized Units : 0		
List		
Standard	Add	
	Remove	
Actual Units		
Date(mm/yyyy)	Actual Units	Add
04/2009	1.00	Remove
		OK
		Cancel

FIGURE 42 OA OAA SERVICE QUALIFIER SCREEN

The **Authorized Units List** displays the service/qualifier and the actual units received. If you have set everything up correctly, you can add or remove Units of service on this screen.

3.3.5 FCSP

The Family Caregiver Support Program (FCSP) is a program created as Title III-E of the Older Americans Acts 2000 reauthorization. The intent of the program is to

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serve caregivers – spouses, daughters, sons, grandparents, aunts, uncles, or neighbors – that have been providing care on an informal basis.

General categories served:

- Caregivers (18 or older) [family or non-family] caring for someone 60 or older and as of 2006 younger than 60 with early onset dementia
- Caregivers 60 or older [related by blood or marriage] caring for a child (18 or younger) and as of 2006 a child 18+ with disabilities

3.3.5.1 CARE RECIPIENT

To get to the Client (Caregiver) tab:

1. <Click> the Service Needs icon at the top of the page
2. <Click> on the “OAA Svc/FCSP” tab.
3. <Click> on the “FCSP” tab.
4. <Click> on “Care Recipient” tab in the Recipient Detail box.

The screenshot shows the Oregon Access software interface. The main window title is "Oregon Access [Office : Medford Senior Services Office (1513) Profile Type :- Branch]". The case information is "Case for IGNATZ I FARFENSLAPHER / Case Nbr: FT39071 (Case Branch : Medford Senior Services Office)". The "OAA Svc/FCSP" tab is selected. The "Client (Caregiver)" dropdown is set to "FARFENSLAPHER, IGNATZ I". The "Care Recipient List" table is empty. The "Recipient Detail" box is open to the "Care Recipient" tab, showing the following information:

Last Name:	Farfenslapher
First Name:	Earl
Middle Initial:	G
Gender:	Male
Date of Birth:	5 / 5 / 2000
Caregiver Relationship To Care Recipient:	Grandparents
Verified:	<input checked="" type="checkbox"/>

FIGURE 43 OA FCSP - CARE RECIPIENT SCREEN

The example above sets up a child relationship for a grandparent caring for a child.

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Note that the Client is the caregiver. Services include Respite, Training, etc.

The Care Recipient receives care from the Client (caregiver), not from the program.

The screenshot shows a software window titled "Case for IGNATZ I FARFENSLAPHER / Case Nmr: FT39071 (Case Branch : Medford Senior Services Office)". The interface includes several tabs: "Waiv", "Instn", "Supply", "Other Needs", "Referral", "OAA Sumry", "NutrRsk/ADL", and "OAA Svc/FCSP". The "FCSP" tab is selected. Below the tabs, the "Client (Caregiver)" is listed as "FARFENSLAPHER, IGNATZ I". A "Care Recipient List" table is displayed with the following data:

#	Person	Relationship	DOB	Verified
1	Farfenslapher, Sara G	Husband	05/05/1940	Yes

Below the table, the "Recipient Detail" section is visible, with the "Care Recipient" tab selected. The details for the care recipient are:

- Last Name: Farfenslapher
- First Name: Sara
- Middle Initial: G
- Gender: Female
- Date of Birth: 5 / 5 / 1940
- Caregiver Relationship To Care Recipient: Husband
- Verified:

FIGURE 44 OA FCSP - HUSBAND

This screen exhibits the case where a husband is the Caregiver to his wife.

3.3.5.2 ADL/IADL

1. <Click> on the ADL\IADL tab under Recipient Data.

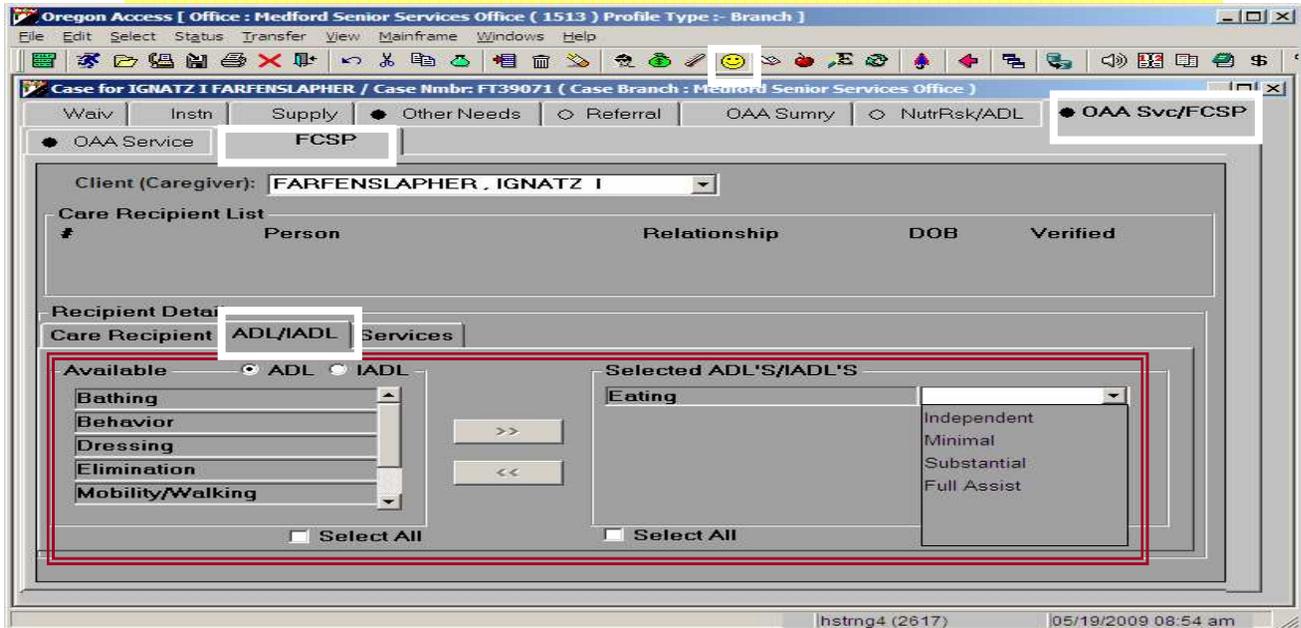


FIGURE 45 OA FCSP ADL/IADL SCREEN

This screen adds ADLs and IADLs for the Care Recipient, NOT Caregiver. **Note: At present, AoA does not require this data to be reported.**

3.3.5.3 SERVICES

1. <Click> on the “**Services**” tab under Recipient Data.

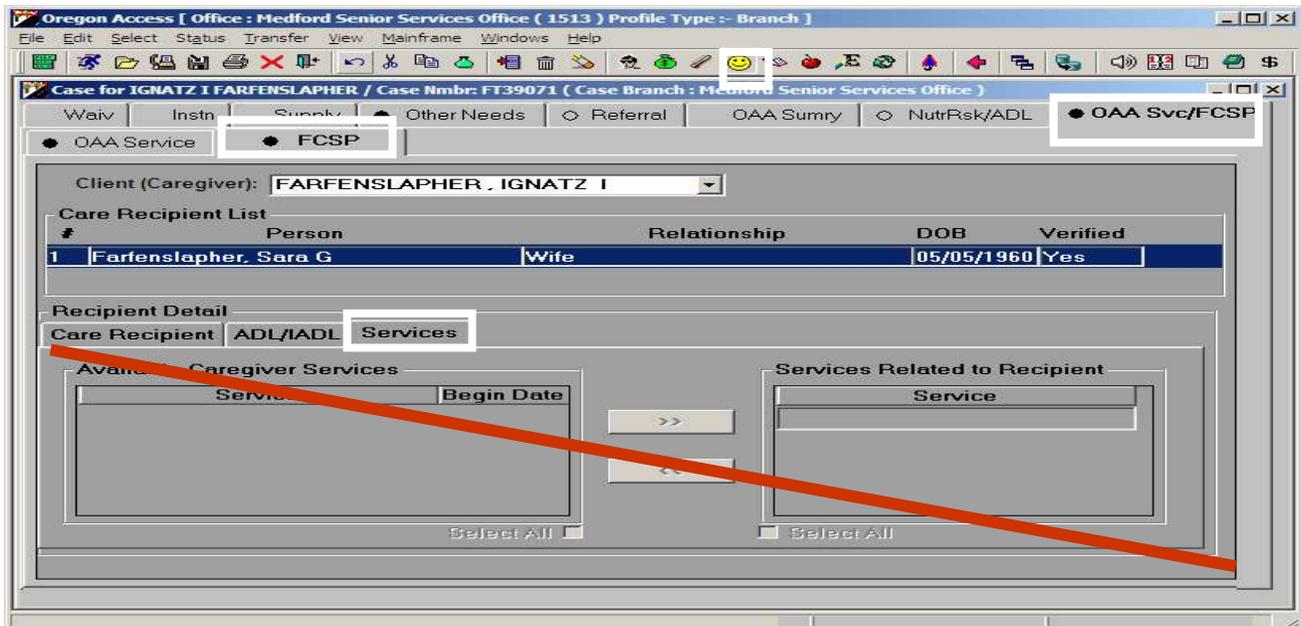


FIGURE 46 OA FCSP - SERVICES SCREEN



This is not the place to enter services for the Client (Caregiver). Services must be selected through the **OAA Services** tab. This area is not currently used by OAA and is not reported to NAPIS.

Note: Entering services in this area can cause issues with attempting to close providers and should not be used. Apparently there is no way to end-date these services which is required for a provider to be inactivated.

3.4 OAA PROVIDERS

Before any service can be allocated to a client, a network of information must be entered into the system which defines the services, who will deliver those services and where they will be made available.

When the AAA office is first set up, the Branch and District codes must be defined in Oregon ACCESS.

System users must be given security rights to modify information for the new district and branches. At that point, a AAA user is able to log into the system and begin to define the services which will be made available.

The chart below is a very simplified illustration of the process of adding providers, services and locations. Since the entire process is discussed in the OA/RAIN Provider/Service/Site Best Practice, we'll concentrate on maintenance tasks in this section of the Guide.



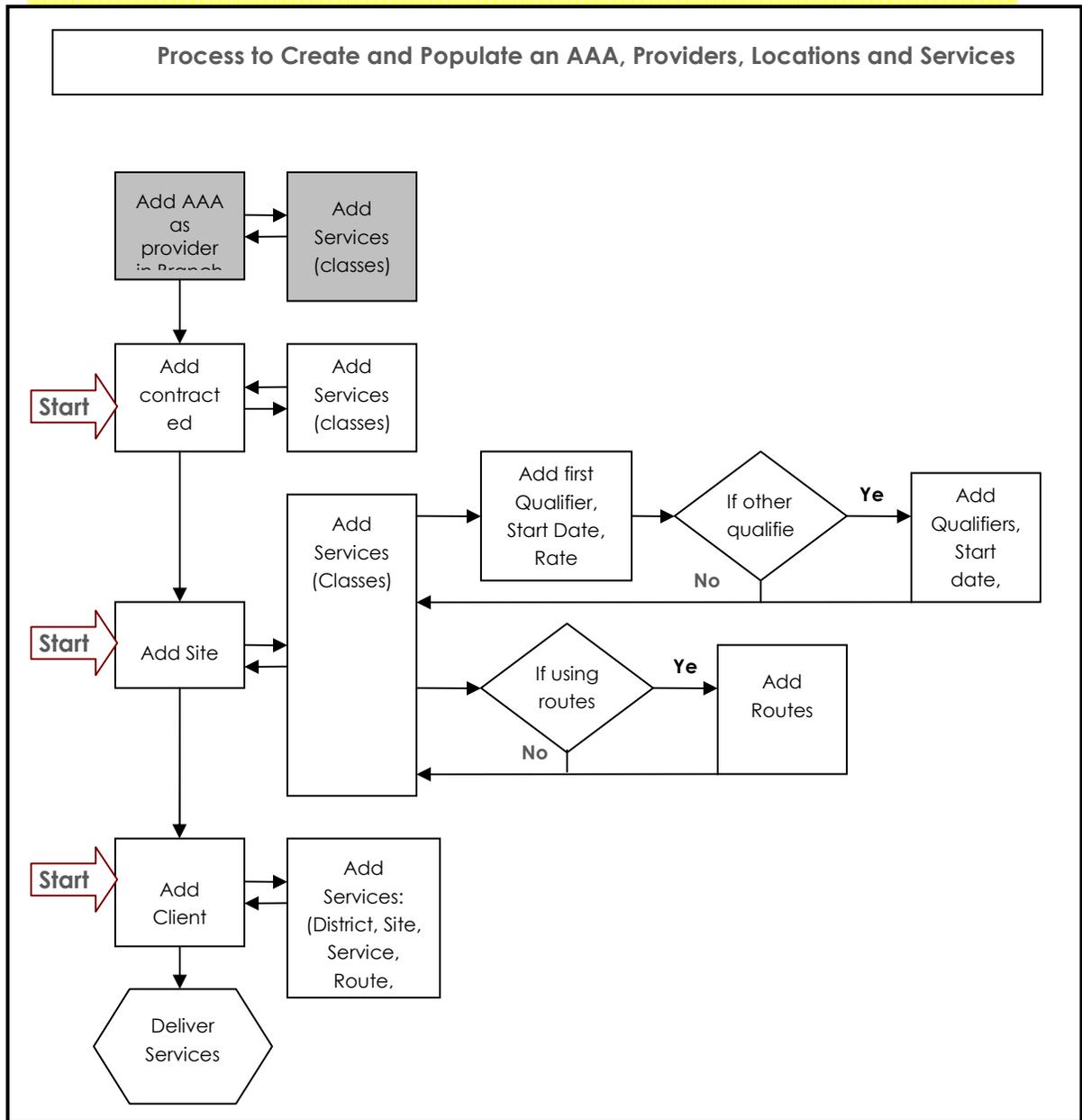


FIGURE 47 OAA PROVIDER SETUP PROCESS

This chart should be useful in recognizing where to begin the processes to complete the maintenance tasks in the following Guide sections. You should be able to begin at any of the start points to add information or go to a specific screen to make modifications to providers, services or locations.

3.5 OAA PROVIDER MAINTENANCE

Types of maintenance tasks

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- Add/change/inactivate Providers/Contractors
- Add/delete Services
- Add/delete a Location

3.5.1 ADD PROVIDER IN OA

Note: There are two areas within OA to perform Provider Maintenance. Under Housekeeping, Do NOT select Maintain Provider as this is used for providers related to Medicaid.

To get to the correct Provider Maintenance area:

1. <Click> on Select on the upper menu.
2. <Click> Housekeeping on the dropdown menu.
3. <Click> Maintain OAA Provider in the second dropdown menu.

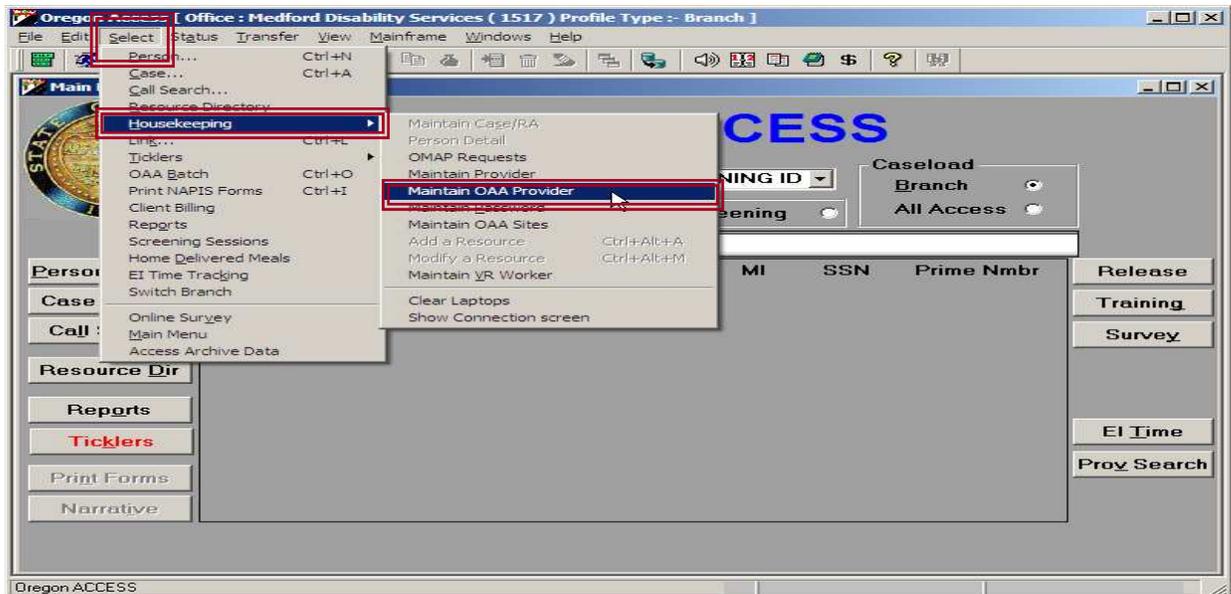


FIGURE 48 OAA PROVIDER MAINTENANCE



OAA Provider Search

Search

Class	Last Name	First Name	Nbr	City
Congregate Meals {#7}				ROSEBURG

Search **Clear**

Provider

Last Name	First Name	Nbr	Status

Address

Addr Line One	Addr Line Two	City	State	Zip	Tel Nbr	Tel Ext

Class

Comments

Maintain OAA Provider **Cancel** **New** **Help**

FIGURE 49 OAA PROVIDER SEARCH SCREEN

You may type the provider’s business name in the Last Name field or you can select a class (service) and/or a city, and <Click> on Search, to display a list of providers.

From the displayed screen, you may perform maintenance on the selected provider (<Click> “**Maintain OAA Provider**”) or add a new provider (<Click> **NEW**).

OAA Provider Search

Search

Class	Last Name	First Name	Nbr	City
Congregate Meals {#7}				ROSEBURG

Search **Clear**

Provider

Last Name	First Name	Nbr	Status
DOUGLAS COUNTY AAA		000006	Active
THE FRIENDLY KITCHEN	DOUGLAS COUNTY	000008	Active

Address

Addr Line One	Addr Line Two	City	State	Zip	Tel Nbr	Tel Ext
621 W. MADRONE ST.		ROSEBURG	OR	97470	() -	

Class

Comments

Maintain OAA Provider **Cancel** **New** **Help**

FIGURE 50 OAA PROVIDER MAINTENANCE

If no providers are found, you will be prompted to add a new Provider.

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Warning: Once you are in the new “Provider” screen, you will have to enter a Provider before it will let you out. Remember the Prompt on Save trick to leave without saving.

If you select *Douglas County AAA* (for example) and click “**Maintain OAA Provider**” to perform maintenance, the following screen will be displayed:

FIGURE 51 OAA PROVIDER DETAIL SCREEN

From here, you may do a number of things:

- The Name and Comments may be changed.
- The Address may be changed (<Click> “**Change Address**”) or an additional address added (<Click> “**Add Address**”).
- A class may be added (<Click> “**Add Class**”).

Warning: There is NO function to remove a provider once entered and saved. The provider will have to be inactivated and re-added if it is wrong. Use the Prompt on Save tip if you need to get out without saving data on this screen.

It is important to check **AAA as provider**, **Minority Provider** and **Rural provider** if these apply. See [Report III.B](#) and [Report III.C](#) for more information.

A **Rural Provider** is a provider of services to clients who live in rural areas. Rural providers are not necessarily providers of services only to rural clients. They may also be providers of services to clients in urban areas. A non-rural provider would only provide services to urban clients. Most of Oregon is considered rural so there will be few non-rural providers.

A **Minority Provider** meets one of the following criteria:

1. A not for profit organization with a controlling board comprises at least 51% of individuals in the racial and ethnic categories listed below.*

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2. A private business concern that is at least 51% owned by individuals in the racial and ethnic categories listed below.*
3. A publicly owned business at least 51% of its stock owned by one or more individuals and having its management and daily business controlled by one of more individuals in the racial and ethnic categories listed below.*

* The applicable racial and ethnic categories include: American Indian or Alaskan Native, Asian, Black or African American, Native Hawaiian or other Pacific Islander or Hispanic.

When adding the AAA as a Provider, the AAA should only add Services (Classes) that they directly provide, not those services contracted out to other agencies. See [AAA as Provider](#) for additional information.

To insert a new provider, first do a provider search to make sure the provider doesn't already exist in the system. If you have performed the search and are at the "**OAA Provider Search**" screen, go to step 4.

1. <Click> on Select on the upper menu.
2. <Click> Housekeeping on the dropdown menu.
3. <Click> Maintain OAA Provider in the second dropdown menu.
4. <Click> "**New**"

A blank "Provider" will be displayed.

The screenshot shows a software interface for maintaining OAA providers. It features several input fields for provider details, a search button, and a section for adding or changing addresses. A dropdown menu for selecting a class is highlighted with a red box, showing 'Congregate Meals {#7}' as the selected option.

FIGURE 52 OAA PROVIDER ADD SCREEN

Enter the OAA provider information including an address. Then, select the correct **Class** (service). The new provider Class defaults to the class you searched for.

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You are not locked into that one, you may select any in the dropdown box. When you leave this screen, the new provider will be added.

3.5.2 OA SITE MAINTENANCE

After entering a provider, you must also indicate the OAA site to which the provider is linked.

To get to the Site Maintenance area:

1. <Click> on Select on the upper menu.
2. <Click> Housekeeping on the dropdown menu.
3. <Click> Maintain OAA Sites in the second dropdown menu.

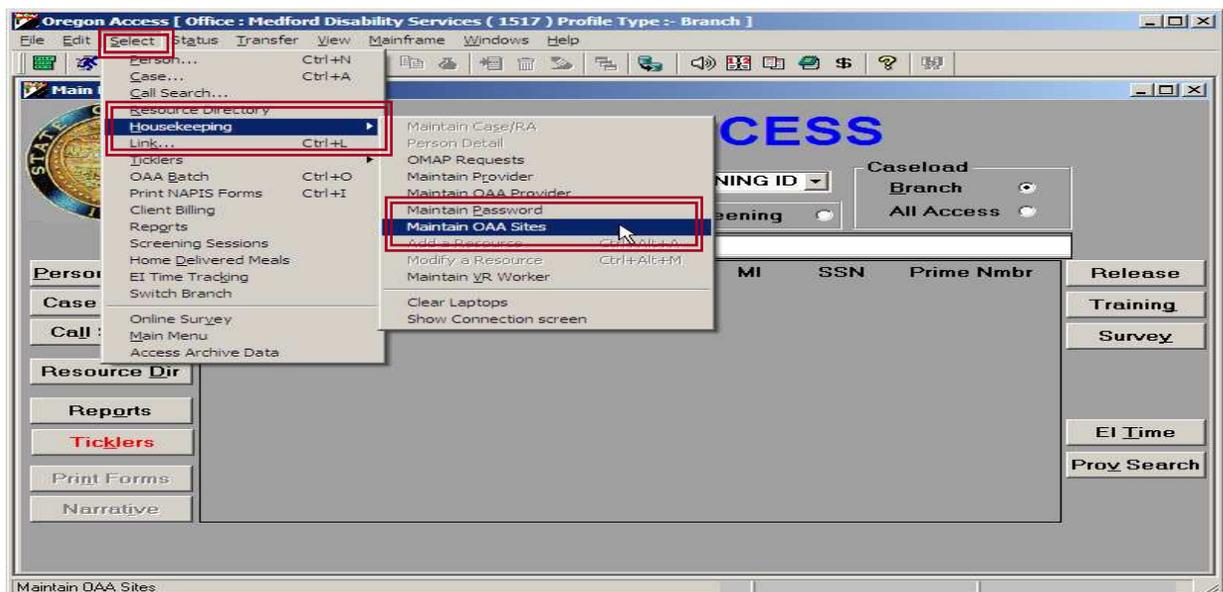


FIGURE 53 OAA SITE MAINTENANCE SELECTION

Note that the list format on the following screen varies from AAA to AAA. A Best Practice for the OAA Site Setup and Maintenance will be developed and published on the SUA website.

The following screen is displayed.

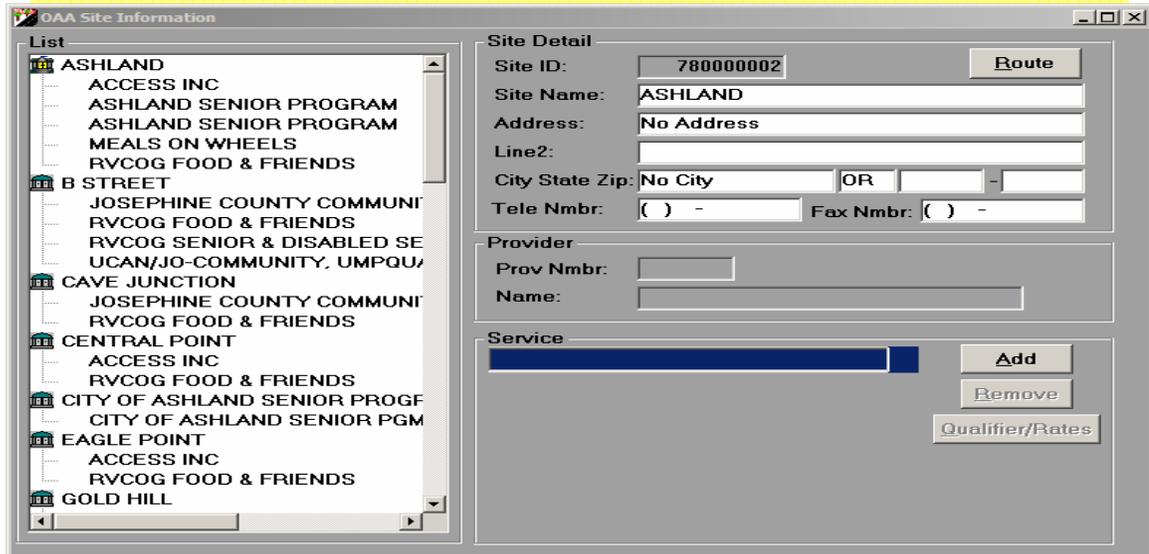


FIGURE 54 OAA SITE SELECTION SCREEN

These are the sites for the district associated with the branch you're logged into.

Selecting a provider under a location displays the provider information and services linked to that location.

Note: Inactive providers will show up in the list if they have an active service with clients who have not been end-dated. If you select an inactive provider on the List, it will tell you it is inactive via a pop-up.

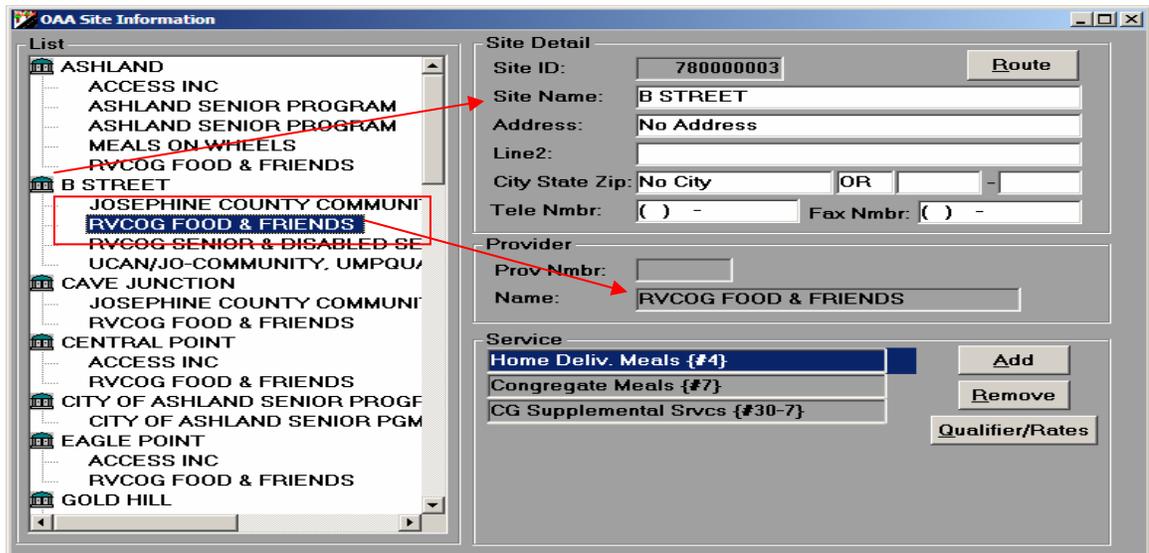


FIGURE 55 OAA SITE DETAIL SCREEN

You may update the site information, add or remove services, and set qualifiers and rates. Services cannot be removed as long as there is an active client linked to the service.

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To assist with cleaning up inactive Providers, run an **OAA Services & Billing** report for the provider you want to inactivate. You will get a report of all clients who have received services within the period you chose. You may have to choose different report ranges until you find the most current service period.

Examine the services assigned to each client until you find all that have not been end-dated for that provider and give them an end-date. Once that is completed, the provider will no longer appear in the Site List.

If a location has no services linked to it or you want to add additional services, <Click> the “**Add**” button and an “**OAA Provider Search**” screen will allow you to search for providers.

Class	Last Name	First Name	Nbr	City
Congregate Meals (#7)				
Chore (#3)				
Chore (#3a)				
Congregate Meals (#7)				
Counseling (#70-2)				
Crime Pre./Home Sity (#50-4)				
Elder Abuse Awar. (#50-3)				

Search

Search Clear

Address

Addr Line One Addr Line Two City State Zip Tel Nbr Tel Ext

Class

Comments

Add to Site Cancel New Help

FIGURE 56 OAA PROVIDER SEARCH SCREEN

Highlight the provider name; select the service from the drop-down menu and <Click> “**Add**” to add the provider to the site. Repeat to add each service provided.



FIGURE 57 OAA SITE DETAIL SCREEN

For each Class (service) added you must add one and may add additional qualifiers to assist in reporting and batching.

1. <Click> **Qualifier/Rates** to get to the next screen.

FIGURE 58 OAA QUALIFIER - RATES SCREEN

Once a qualifier is added, you may enter a start date, end date, if it's a short duration qualifier and a rate. The end date and rate are not required.

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Note: Qualifiers are added at the time you set up Services from the dropdown. If you need a qualifier that is not in the list, you will need to request this be added to the system by contacting your SUA support person.

This is a good place to differentiate different types of the same service. i.e.: Home Delivered Meals could be Frozen, Fresh, Shelf-Stable, OPI or Medicaid. Delineating qualifier is useful in producing reports for various uses. The STANDARD qualifier should be set up for each new service in addition to others you desire.

Warning: At least one qualifier must be setup with a new service or strange numbers will appear when you attempt to add services at the “Add Qualifiers” panel in the “OAA Site Information” screen (Site Maintenance). See example below:

OAA Service Qualifier For Congregate Meals {#7}

Authorized Units : 12.0

List

200000001

Add

3.5.3 AAA AS PROVIDER

OAA requires AAAs to contract services to community providers; however, in some situations the AAA is authorized to self-provide services, using their own staff resources. In that situation, the AAA may check the **AAA as Provider** checkbox when setting up services.

- When an AAA is a provider of services, selecting the AAA is Provider check box will add the AAA into the provider counts on NAPIS
- Inactivate old providers to avoid over counting.

Note: Care should be taken to only add directly provided services under the AAA to avoid duplicate counts



The screenshot shows a software window titled "Maintain OAA Provider". It has several sections:

- OAA Provider:** Includes input fields for "Nnbr:", "Last Name:", "First Name:", and "Comments:". To the right are checkboxes for "Inactive Provider", "Provider Is AAA" (highlighted with a red box), "Minority Provider", and "Rural Provider". A "Search" button is also present.
- Address:** A table with columns "Addr Line One", "Addr Line Two", "City", and "State". Below the table are "Add Address" and "Change Address" buttons.
- Class:** A dropdown menu currently showing "Congregate Meals {#7}" and an "Add Class" button.

FIGURE 59 MAINTAIN OAA PROVIDER DETAIL SCREEN

3.6 OA ANNUAL CLIENT REVIEW

AAAs are required to do an annual reassessment of clients receiving services. This provides the opportunity to gather information that may have been missed the first time and to update important demographic information that might have changed.

- It is important to check that needs are still being met
- Life changes need to be updated in OA
 - Change in income
 - Change in living situation
 - Loss of spouse
 - Change in ADL and IADL
 - Caregiver for others
 - New information affecting demographics
 - FCSP relationships
 - Death of recipient

Note: When updating this information, the previous state of things is lost. There is no historical reporting at the detail level.

3.7 OA REPORTS

Department of Human Services



There are a number of useful reports available within the Oregon ACCESS system. There are also a number of different places to look for them. We will cover all of the ones that are useful for OAA reporting.

3.7.1 OA PRINT NAPIS ENROLLMENT FORMS

This method allows you to select a client list based on District, Service, Provider, Qualifier and Site and whether services were allowed within a date range or whether units of service were received with a date range and report on that list. You may select and run this report regardless of the screen being displayed, in this case the **“Main Menu”**.

To get to the **“NAPIS Registration Form”** screen:

1. <Click> on Select on the upper menu.
2. <Click> Print NAPIS Forms on the dropdown menu.

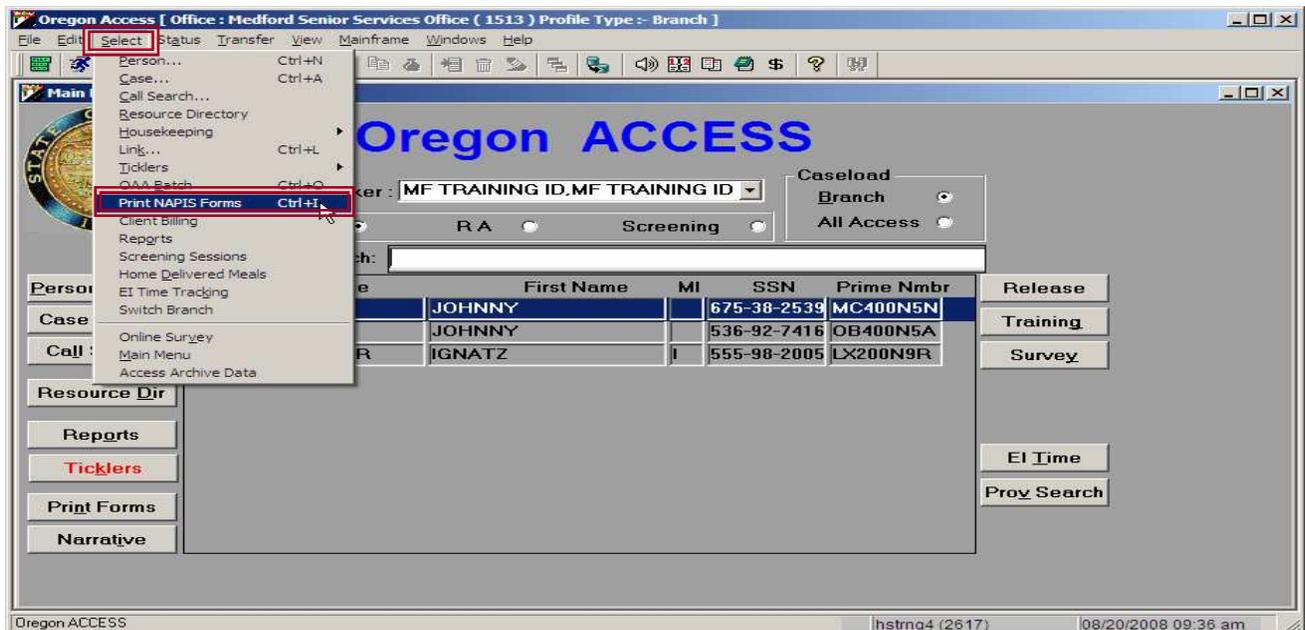


FIGURE 60 OA PRINT NAPIS FORM

The following screen is displayed:

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The screenshot shows the 'NAPIS Registration form' with a red box highlighting the 'Filter Clients By' section. The filters are: District: Jackson, Josephine; Service: (empty); Provider: (empty); Qualifier: (empty) with an 'All' checkbox. The 'Start Date Range' section shows Service: 00/00/0000 - 00/00/0000 and Units: 00/00/0000 - 00/00/0000. Below the filters is a 'Client List' table with columns for Last Name, First Name, and MI, and a 'Show Clients' button. At the bottom are 'Help', 'Print', and 'Close' buttons.

FIGURE 61 OA NAPIS REGISTRATION FORM SCREEN

Enter your selection criteria. Note that you must enter it in order of District, Site, Service Provider, and Qualifier before entering any dates.

You may add a **Service Date Range** that selects any client who has active services within the range or **Units Date Range** that will select anyone who has received any service units during the date range.

The screenshot shows the 'NAPIS Registration form' with a red box highlighting the 'Show Clients' button in the 'Client List' section. The filters are: District: Jackson, Josephine; Site: CAVE JUNCTION; Service: Congregate Meals {#7}; Provider: RVCOG FOOD & FRIENDS; Qualifier: (empty) with an 'All' checkbox checked. The 'Start Date Range' section shows Service: 00/00/0000 - 00/00/0000 and Units: 00/00/0000 - 00/00/0000. The 'Client List' table has the following data:

Last Name	First Name	MI
BETTERIDEA	JOHNNY	
FARFENSLAPHER	IGNATZ	I

At the bottom are 'Help', 'Print', and 'Close' buttons.

FIGURE 62 OA NAPIS REGISTRATION CLIENT LIST

<Click> **Show Clients** to display the client List.

<Click> **Print** to print the forms on your default printer.

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The forms will contain the current information from OA. It will print a form for each person in the client list. It will go to your default printer.

3.7.2 OA PRINT MAIN MENU REPORTS

The **OA Main Menu** had a button that provides access to four additional reports. On the left side of the Menu, select **Reports**.

This will display the **"Print Reports"** screen. Scroll to the bottom to display the available OAA reports.

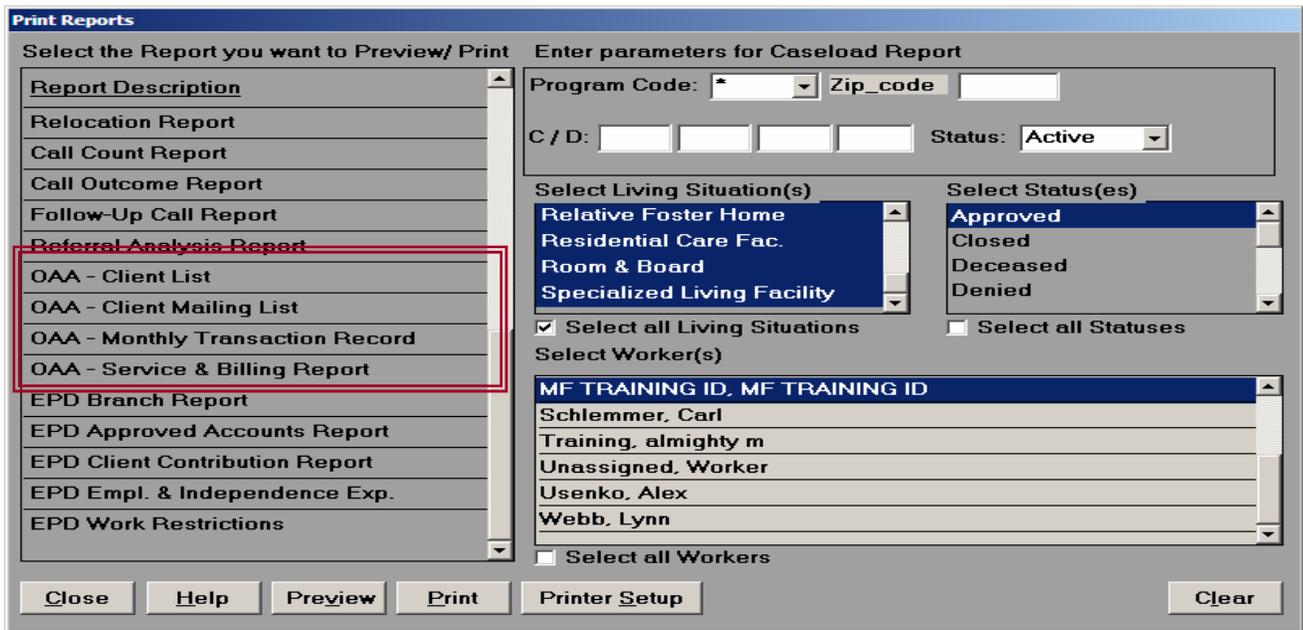


FIGURE 63 MAIN MENU REPORTS

3.7.2.1 CLIENT LIST

Department of Human Services



Print Reports

Select the Report you want to Preview/ Print Enter parameters for OAA - Client List

Report Description	Parameters
Relocation Report	Status: <input type="text" value="Approved"/> Age Range: <input type="text"/> To <input type="text"/> Month of Birth: <input type="text"/> Nutrition Risk: <input type="text"/> To <input type="text"/> (0 to 21) Address Type: <input type="text"/> Zip: <input type="text"/> Service Date Range: <input type="text" value="00/00/0000"/> To <input type="text" value="00/00/0000"/> Service Start Dates: <input type="text" value="00/00/0000"/> To <input type="text" value="00/00/0000"/> Service Open During: <input type="text" value="00/00/0000"/> To <input type="text" value="00/00/0000"/> Next Review During: <input type="text" value="00/00/0000"/> To <input type="text" value="00/00/0000"/> District: <input type="text" value="Jackson, Josephine"/> Site: <input type="text" value="CAVE JUNCTION"/> Service: <input type="text"/> Qualifier: <input type="text"/> <input checked="" type="checkbox"/> All Qualifiers Provider: <input type="text"/> <input type="checkbox"/> Arrange by Site Name
OAA - Client List	
OAA - Client Mailing List	
OAA - Monthly Transaction Record	
OAA - Service & Billing Report	
EPD Branch Report	
EPD Approved Accounts Report	
EPD Client Contribution Report	
EPD Empl. & Independence Exp.	
EPD Work Restrictions	

FIGURE 64 OAA CLIENT LIST SCREEN

Enter any selection criteria you wish. <Click> **“Preview”** to see the following report on screen or <Click> **Print** to print the full report on your printer.

Print Preview : OAA - Client List Print Date: 05/19 /200

Client List

Status: Approved	Nutrition Risk: * to *	Dist Name: Jackson, Josephine
Month of Birth: All	Service Rec'd: **/**/**** to **/**/****	Site Name: CAVE JUNCTION
Age Range: * to *	Start Date: **/**/**** to **/**/****	Service: ALL
Address Type: None	Open During: **/**/**** to **/**/****	Ser.Qual.: ALL
Zip: *	Next Review: **/**/**** to **/**/****	Prov. Name: ALL

Client Id	Name	Address	Type	Telephone	DOB	Lang Spoken/Read
180000820	BELL, TINKER	154 Fairy Dust Ln Salem OR 97301	Residence	() -	02/01/1936	English/English
180000661	BLOW, JOE D	po bOX 2 Salem OR 97301	Mailing	(541) 295 - 1111 (Home)	01/01/1930	English/English
360000501	FARFENSLAPHER, IGNATZ I	P.O. Box 2343 Alt Contractor Salem OR 97303	Mailing	(541) 890 - 2222 (Home)	09/01/1934	English/Russian

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FIGURE 65 CLIENT LIST REPORT

3.7.2.2 CLIENT MAILING LIST

Department of Human Services



Print Reports

Select the Report you want to Preview/ Print Enter parameters for OAA - Client Mailing List

Report Description	Status: <input type="text" value="Approved"/>
Relocation Report	Age Range: <input type="text"/> To <input type="text"/> Month of Birth: <input type="text"/>
Call Count Report	Nutrition Risk: <input type="text"/> To <input type="text"/> (0 to 21)
Call Outcome Report	Address Type: <input type="text"/> Zip: <input type="text"/>
Follow-Up Call Report	Service Date Range: <input type="text" value="00/00/0000"/> To <input type="text" value="00/00/0000"/>
Referral Analysis Report	Service Start Dates: <input type="text" value="00/00/0000"/> To <input type="text" value="00/00/0000"/>
OAA - Client List	Service Open During: <input type="text" value="00/00/0000"/> To <input type="text" value="00/00/0000"/>
OAA - Client Mailing List	Next Review During: <input type="text" value="00/00/0000"/> To <input type="text" value="00/00/0000"/>
OAA - Monthly Transaction Record	Sort by <input checked="" type="radio"/> Client ID <input type="radio"/> Name <input type="radio"/> Zip Code
OAA - Service & Billing Report	Style <input type="radio"/> 1 up <input type="radio"/> 2 up <input checked="" type="radio"/> 3 up
EPD Branch Report	District: <input type="text" value="Jackson, Josephine"/>
EPD Approved Accounts Report	Site: <input type="text" value="CAVE JUNCTION"/>
EPD Client Contribution Report	Service: <input type="text"/>
EPD Empl. & Independence Exp.	Qualifier: <input type="text"/> <input checked="" type="checkbox"/> All Qualifiers
EPD Work Restrictions	Provider: <input type="text"/>

Arrange by Site Name

FIGURE 66 OA CLIENT MAILING LIST SCREEN

Enter any selection criteria you wish. <Click> **“Preview”** to see the following report on screen or <Click> **Print** to print the full report on your printer.

The labels are designed to work with Avery 5160, 8160 or similar labels. There is ½ inch leader at the top, 1/8 inch space on the left side, 2 5/8" label, 1/8" space, 2 5/8" label, 1/8" space, 2 5/8" label. There are 4 printed lines per label.

Print Preview : OAA - Client Mailing List

JOE D BLOW po BOX 2 Salem OR 97301	TINKER BELL 154 Fairy Dust Ln Salem OR 97301	IGNATZ I FARFENSLAPHER P.O. Box 2343 Alt Contractor Salem OR 97303
--	--	---

FIGURE 67 OA CLIENT MAILING LIST REPORT



3.7.2.3 SERVICE & BILLING REPORT

Print Reports

Select the Report you want to Preview/ Print

Report Description
Relocation Report
Call Count Report
Call Outcome Report
Follow-Up Call Report
Referral Analysis Report
OAA - Client List
OAA - Client Mailing List
OAA - Monthly Transaction Record
OAA - Service & Billing Report
EPD Branch Report
EPD Approved Accounts Report
EPD Client Contribution Report
EPD Empl. & Independence Exp.
EPD Work Restrictions

Enter parameters for OAA - Monthly Transaction Record

Batch

Dist Code: Jackson, Josephine

Site: CAVE JUNCTION

Service:

Qualifier Type: OAA

Route Id:

Provider Name:

Report Date: 00/0000

Close Help Preview Print Printer Setup Clear

FIGURE 68 OAA MONTHLY TRANSACTION SCREEN

Enter any selection criteria you wish. <Click> **Preview** to see the following report on screen or <Click> **Print** to print the full report on your printer.

This generates a Roster for services to be provided. The Roster may then be printed or exported to EXCEL. Just <Click> **Export** and a dialogue will ask you where to save it on your PC.

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Enter any selection criteria you wish. <Click> **Preview** to see the following report on screen or <Click> **Print** to print the full report on your printer.

Service & Billing Report							Print Date: 05/19 /2009
Dist Name.... : Jackson, Josephine		Service: ALL					
Site Name.... : ALL		Ser.Qual.: ALL					
Service Date : 1/1/2000 to 1/1/2009		Prov. Name: ALL					
Client Id	Name	Service/Qualifier	Auth. Units	Act. Units	Billed Units	Unit Rate	Total Billed
180000635	APPLE, MACINTOSH	Assist. Transportation {#9}	.00				
		Standard		30.00	30.00	.00	0.00
180000635	APPLE, MACINTOSH	Caregiver Training {#70-9}	.00				
		Standard		19.00	19.00	.00	0.00
180000635	APPLE, MACINTOSH	Caregiver Respite {#30-5}	.00				
		Standard		10.00	10.00	.00	0.00
180000820	BELL, TINKER	Caregiver Training {#70-9}	.00				
		Standard		1.00	1.00	.00	0.00
Total Unduplicated Client Count: 2			0.00	60.00	60.00		\$ 0.00

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Close Help Print Prev Page Next Page

FIGURE 71 OAA SERVICE & BILLING REPORT

The second report is the Billing Summary report which summarizes services by service and qualifier for the period.

Billing Summary Report				Print Date: 05/19 /2009
Dist Name.... : Jackson, Josephine		Service: ALL		
Site Name.... : ALL		Ser.Qual.: ALL		
Service Date : 1/1/2000 to 1/1/2009		Prov. Name: ALL		
Service/Qualifier	Act. Units	Units Billed	Unit Rate	Total Billed
Caregiver Respite {#30-5}				
Standard	10.00	10.00	.00	.00
Caregiver Training {#70-9}				
Standard	20.00	20.00	.00	.00
Assist. Transportation {#9}				
Standard	30.00	30.00	.00	.00
Totals:	60.00	60.00		\$ 0.00

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Close Help Print Prev Page Next Page

FIGURE 72 OAA BILLING SUMMARY REPORT

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3.7.3 OA PRINT MAIN MENU PRINT FORMS

The OA Main Menu has an additional button that provides access to two reports.

You will need to select the worker name to produce a client list if you have not already done so. Then, select the client name to appear on the report.



<Click> **"Print Forms"** to access the following menu.

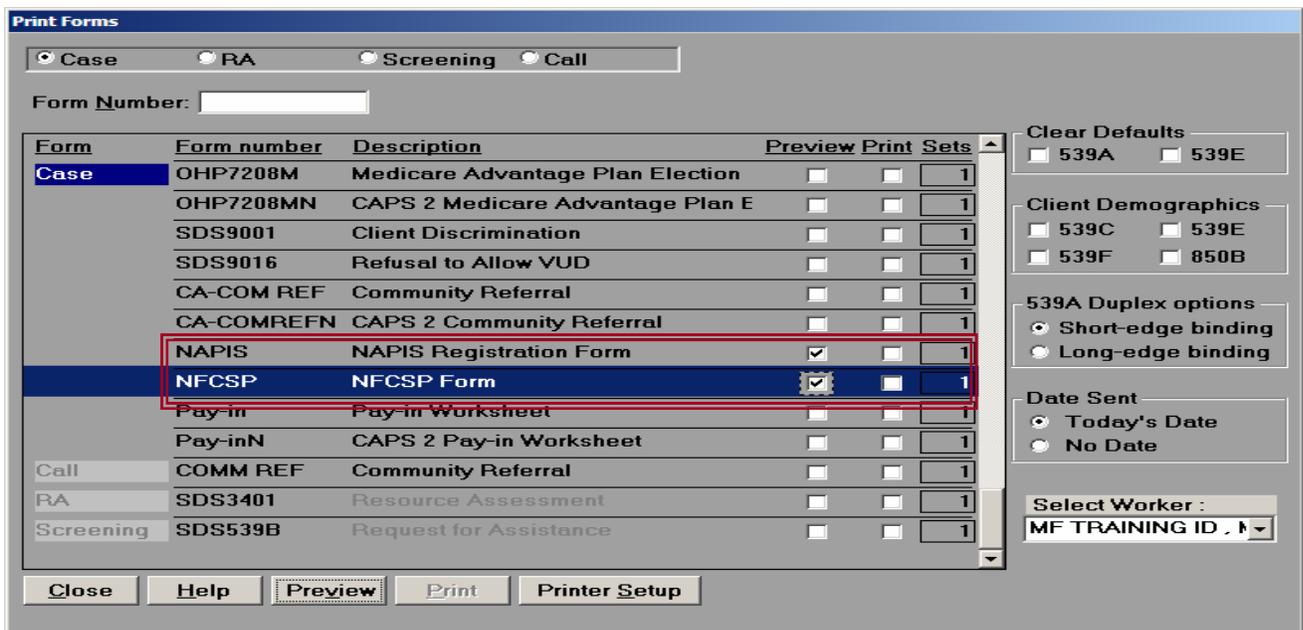


FIGURE 73 MAIN MENU - PRINT FORMS SCREEN

The NAPIS Registration Form will produce the same NAPIS form as available from the Select menu. It will print a single client from the Case list at the Main Menu. You can do a client name search to select an individual.

This is the only source for FCSP forms in OA.

If you check Preview, the lower Preview button will be enabled and a preview will be shown. If you check Print, the lower Print button will be enabled and a printed report will be sent to your default printer. You can use the Printer Setup button to select the printer you wish to use for the reports before printing.

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There is no current provision for printing a blank form. You may go to the DHS Forms site at

http://dhsforms.hr.state.or.us/forms/databases/FMPRO?-db=FormTbl.fp5&-lay=Main&-format=Findforms_FMP.htm&-findany.

In the *Title contains the word or phrase:* box, enter NAPIS. It will display a PDF of the most current blank NAPIS Registration form.

Note: Some AAAs have designed their own NAPIS Registration forms. These are not available at the DHS site.



4 RAIN SYSTEM

Reporting and Analyzing Information for NAPIS



4.1 RAIN LOGON

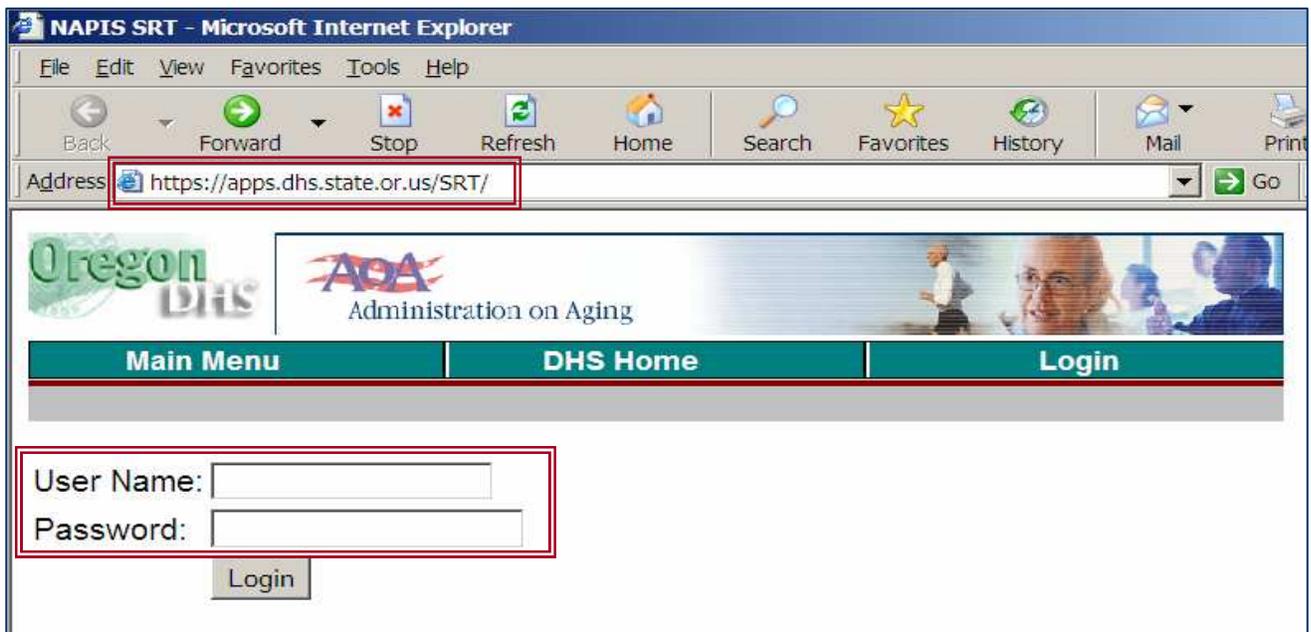


FIGURE 74 RAIN LOGON SCREEN

Enter the correct URL in the ADDRESS line in your browser to get to RAIN

Enter your RACF ID and password to sign in to RAIN. This is the same one you use to sign into Oregon Access. Your sub-administrator will need to give you rights to access the RAIN system.



4.2 RAIN MAIN MENU

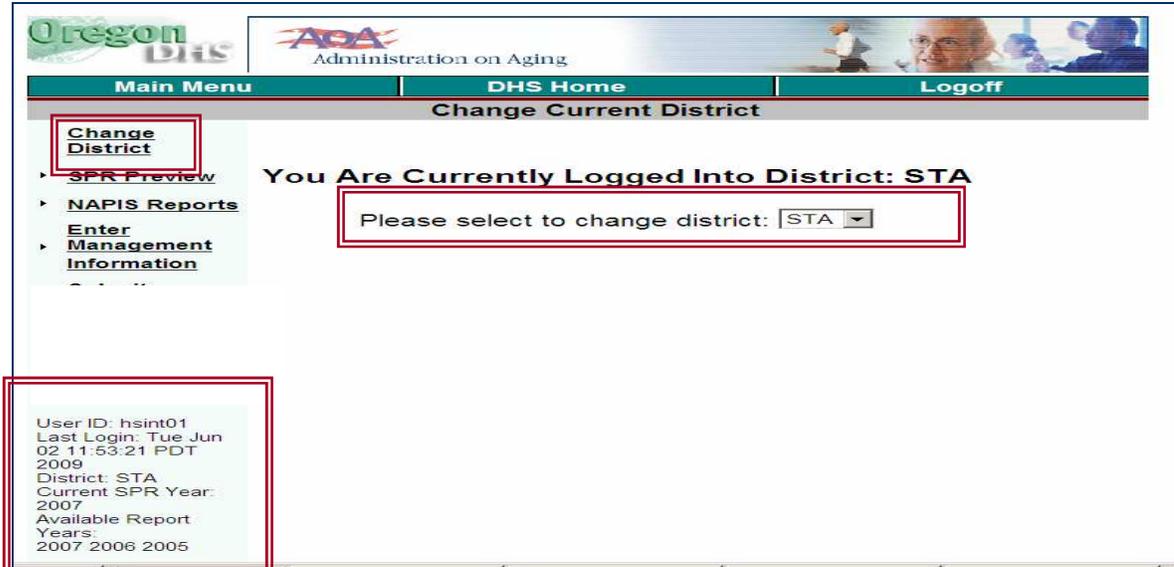


FIGURE 75 RAIN MAIN MENU

If you are responsible for more than one District, you will have the option to select the District you wish to work with. If you are responsible for only one District, you may not see this Change District menu item.

Notice the information box at the lower left. It shows your login ID, the last time you were in the system, the current NAPIS year and the report years available in the Year-over-Year reports.

4.3 RAIN SPR PREVIEW

The SPR Preview section contains the same report names and numbers as the respective reports in the NAPIS report. It will contain the year-to-date information for the current SPR year.

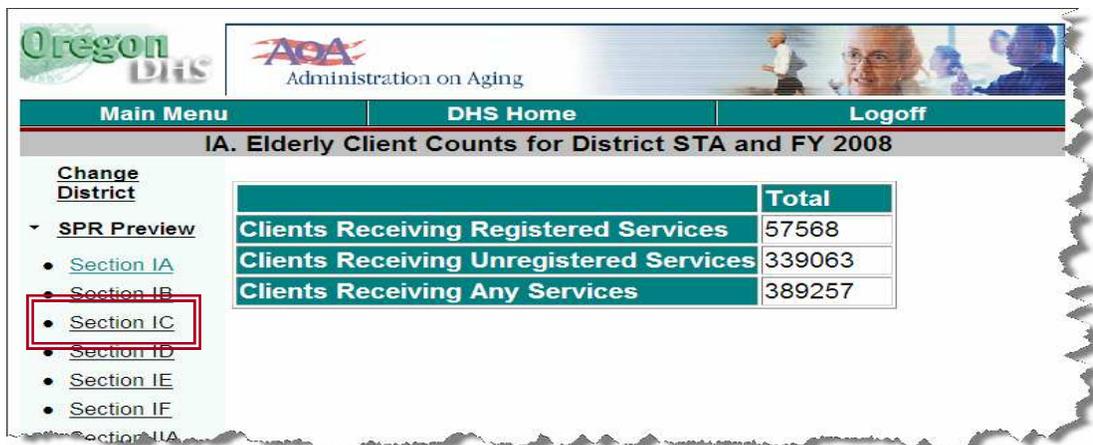


FIGURE 76 RAIN SPR PREVIEW



4.3.1 RAIN SECTION IA REPORT

Change District	Total
SPR Preview	
• Section IA	57568
• Section IB	339063
• Section IC	
• Section ID	
• Section IE	
• Section IF	
• Section IIA	
• Section IIB	
• Section IIC	
• Section IID	
• Section IIE	
• Section IIF	
• Section IIIA	
• Section IIIB	
• Section IIIC	
• Section IIID	
• Section IIIA	
• Section IIIB	
• Section IIIC	
• Section IIID	
• Section IVA	
• Section IVB	

FIGURE 77 RAIN SPR IA REPORT

This report is identical in format and content to the NAPIS report I.A.

4.3.2 RAIN SECTION IB REPORT

Change District	Total Registered Clients	Congregate Meals	Nutrition Counseling	Assisted Transportation	Total	With Income Below Poverty	Total For Age 60-74	Total For Age 75-84	Total For Age 85+
SPR Preview									
• Section IA									
• Section IB	57568	4895							
• Section IC									
• Section ID									
• Section IE									
• Section IF									
• Section IIA									
• Section IIB									
• Section IIC									
• Section IID									
• Section IIE									
• Section IIIA									
• Section IIIB									
• Section IIIC									
• Section IIID									
• Section IIIA									
• Section IIIB									
• Section IIIC									
• Section IIID									
• Section IVA									
• Section IVB									
Clients By Ethnicity									
Hispanic Or Latino	613	145	263	209	73				

FIGURE 78 RAIN SPR IB REPORT

This report is identical in format and content to the NAPIS report I.B.

4.3.3 RAIN SECTION IC – SECTION IVB

These reports are identical in format and content to the NAPIS report I.C through IV.B and will not be shown in this document.



4.4 RAIN NAPIS REPORTS

4.4.1 RAIN REGISTERED SERVICE PROFILE

To select Services, **<Click>** selects one item **<CTL>+<Click>** selects additional individual items, **<Shift>+<Click>** selects a range after the initial **<Click>**.

Enter the **Current Period** dates. The **Previous Period** will automatically update. You must select the month then year of the current start and end date to force the previous date to populate correctly.

Select one **Age** range, one **ADL**, one **IADL** range and one or more **Characteristics**.

The more you select, the longer it takes to develop the report. It can take several minutes for complex searches.

<ul style="list-style-type: none"> ▶ SPR Preview ▼ NAPIS Reports <ul style="list-style-type: none"> • Registered Service Profiles • Caregiver Profiles • Clients • Services • Income and Expenditure • Staffing ▶ Enter Management Information <p>User ID: hsint01 Last Login: Tue Jun 02 11:53:21 PDT 2009 District: STA</p>	Select Months: Current Period Start: January 2008 End: January 2008 Previous Period Start: January 2005 End: January 2005	Select Branches: State wide Count by <input type="radio"/> - Branch <input type="radio"/> - District <input checked="" type="radio"/> - State	Select Services: Personal Care {#1} Personal Care(CEP) {#1a} Homemaker {#2} Homemaker (CEP) {#2a} Chore {#3} Chore {#3a} Home Deliv. Meals {#4} Adult Day Care/Health {#5} Case Management {#6} Private Case Mgmt. {#70-8} Congregate Meals {#7} Nutrition Counseling {#8} Assist. Transportation {#9}	
	FIPS Code:			
	Age <input checked="" type="radio"/> - All <input type="radio"/> - 60-74 <input type="radio"/> - 75-84 <input type="radio"/> - 85+ <input type="radio"/> - Missing	ADL <input checked="" type="radio"/> - All <input type="radio"/> - 0 <input type="radio"/> - 1 <input type="radio"/> - 2 <input type="radio"/> - 3+	IADL <input checked="" type="radio"/> - All <input type="radio"/> - 0 <input type="radio"/> - 1 <input type="radio"/> - 2 <input type="radio"/> - 3+	Characteristics <input checked="" type="checkbox"/> - Gender <input type="checkbox"/> - Rural <input type="checkbox"/> - Poverty <input type="checkbox"/> - Live Alone <input type="checkbox"/> - In/Out of City <input type="checkbox"/> - Ethnicity <input type="checkbox"/> - Race
	<input type="button" value="Submit"/>			

FIGURE 79 RAIN REGISTERED SERVICE PROFILE

The next two pages display the contents of the Registered Service Profiles report.

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Note: This report is unavailable at this time due to a programming error. It will be updated as soon as the error is corrected.

The screenshot displays the Oregon DHS Administration on Aging website. At the top, there are navigation links for 'Main Menu', 'DHS Home', and 'Logoff'. Below these is a header for the 'Year over Year: Registered Services Profile Report'. A left-hand navigation menu includes options like 'Change District', 'SPR Preview', 'NAPIS Reports', and 'Registered Service Profiles' (which is highlighted with a red box). The main content area, titled 'Profile Description', shows report details: 'Report Duration: Current : 07/2007 TO 06/2008, Previous: 07/2006 TO 06/2007', 'Count State wide', 'Services: Congregate Meals {#7}', 'ADL: ALL', 'IADL: ALL', 'Age: ALL', and 'Characteristics selected: Gender, Poverty'. A blue arrow points downwards from the 'IADL: ALL' section.

FIGURE 80 RAIN REGISTERED SERVICE PROFILE - REPORT

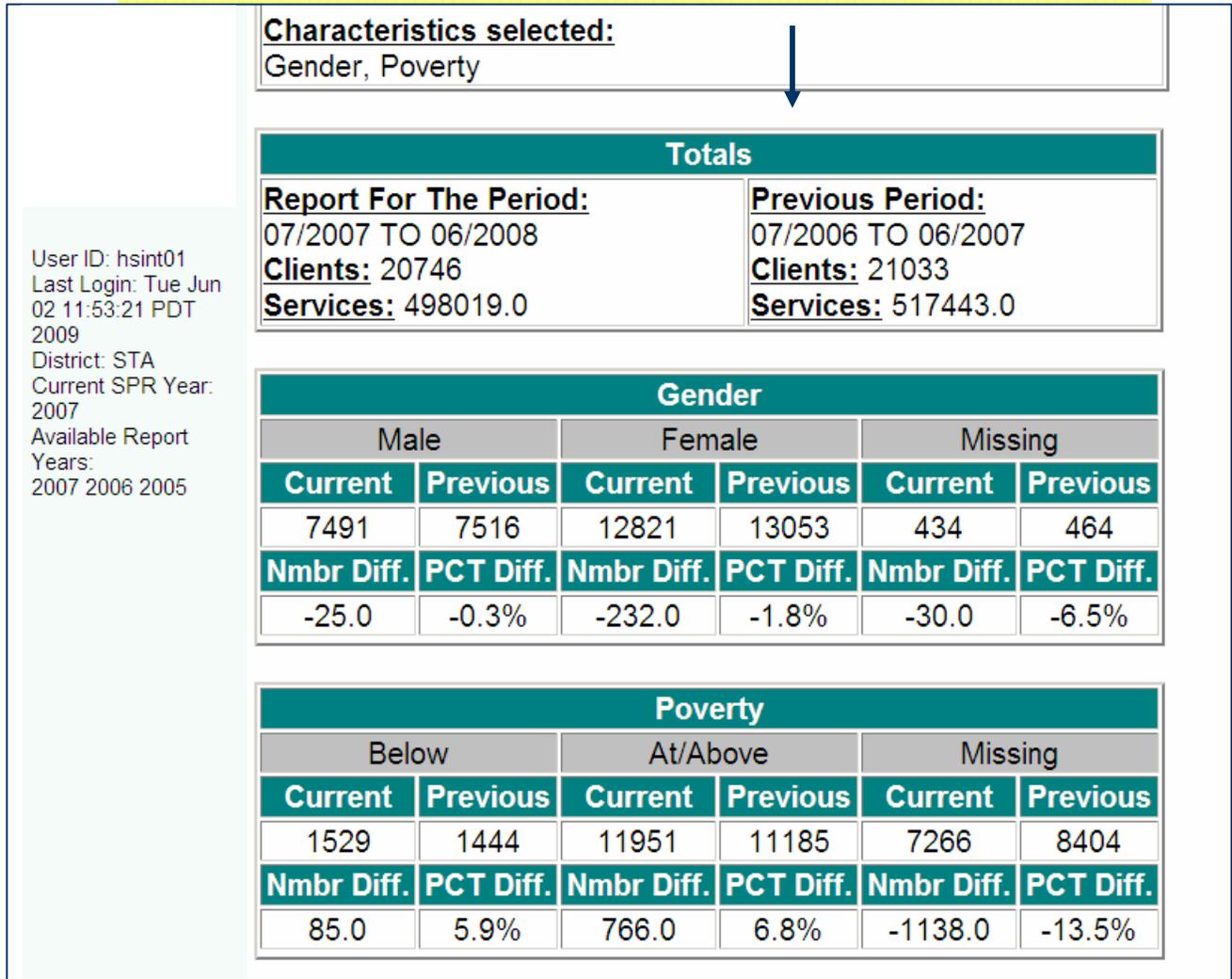


FIGURE 81 RAIN REGISTERED SERVICES PROFILE - REPORT, CONT.

4.4.2 RAIN CAREGIVER PROFILES

Select the **Branches**, Branch, District or State. Depending upon your security settings, you may not have all these options available. (You will need to work with your manager and sub-administrator to change your security settings if needed.)

To select **Services**, <Click> selects one item <CTL>+<Click> selects additional individual items, <Shift>+<Click> selects a range after the initial <Click>.

Enter the **Current Period** dates. The **Previous Period** will automatically update. You must select the month and year for both Start and End for the previous dates to populate correctly.

Select one **Age** range and one or more **Characteristics**.

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The more you select, the longer it takes to develop the report. It can take several minutes for complex searches.

Main Menu	DHS Home	Logoff															
2008 Caregiver Profile Filter For District STA																	
<p>Change District</p> <ul style="list-style-type: none"> ▶ SPR Preview ▼ NAPIS Reports <ul style="list-style-type: none"> • Registered Service Profiles • Caregiver Profiles • Clients • Services • Income and Expenditure • Staffing Enter Management Information 	<table border="1"> <thead> <tr> <th>Current Period:</th> <th>Previous Period:</th> <th>Select Branches:</th> </tr> </thead> <tbody> <tr> <td>Start: July 2007</td> <td>Start: July 2006</td> <td>State wide</td> </tr> <tr> <td>End: June 2008</td> <td>End: June 2007</td> <td> Count by <input type="radio"/> - Branch <input type="radio"/> - District <input checked="" type="radio"/> - State </td> </tr> <tr> <td colspan="3" style="text-align: center;">FIPS Code: <input type="text"/></td> </tr> <tr> <td> Services Caregiver Respite Support Groups for CG CG Supplemental Svcs Caregiver Counseling Caregiver Training </td> <td> Age <input checked="" type="radio"/> - All <input type="radio"/> - 60-74 <input type="radio"/> - 75-84 <input type="radio"/> - 85+ <input type="radio"/> - Missing </td> <td> Characteristics <input checked="" type="checkbox"/> - Gender <input type="checkbox"/> - Rural <input type="checkbox"/> - In/Out of City <input type="checkbox"/> - Ethnicity <input type="checkbox"/> - Race <input checked="" type="checkbox"/> - Relationship </td> </tr> </tbody> </table>	Current Period:	Previous Period:	Select Branches:	Start: July 2007	Start: July 2006	State wide	End: June 2008	End: June 2007	Count by <input type="radio"/> - Branch <input type="radio"/> - District <input checked="" type="radio"/> - State	FIPS Code: <input type="text"/>			Services Caregiver Respite Support Groups for CG CG Supplemental Svcs Caregiver Counseling Caregiver Training	Age <input checked="" type="radio"/> - All <input type="radio"/> - 60-74 <input type="radio"/> - 75-84 <input type="radio"/> - 85+ <input type="radio"/> - Missing	Characteristics <input checked="" type="checkbox"/> - Gender <input type="checkbox"/> - Rural <input type="checkbox"/> - In/Out of City <input type="checkbox"/> - Ethnicity <input type="checkbox"/> - Race <input checked="" type="checkbox"/> - Relationship	
	Current Period:	Previous Period:	Select Branches:														
	Start: July 2007	Start: July 2006	State wide														
	End: June 2008	End: June 2007	Count by <input type="radio"/> - Branch <input type="radio"/> - District <input checked="" type="radio"/> - State														
	FIPS Code: <input type="text"/>																
Services Caregiver Respite Support Groups for CG CG Supplemental Svcs Caregiver Counseling Caregiver Training	Age <input checked="" type="radio"/> - All <input type="radio"/> - 60-74 <input type="radio"/> - 75-84 <input type="radio"/> - 85+ <input type="radio"/> - Missing	Characteristics <input checked="" type="checkbox"/> - Gender <input type="checkbox"/> - Rural <input type="checkbox"/> - In/Out of City <input type="checkbox"/> - Ethnicity <input type="checkbox"/> - Race <input checked="" type="checkbox"/> - Relationship															
	<input type="button" value="Submit"/>																

FIGURE 82 RAIN CAREGIVER PROFILE

The following report exhibits the output based on the selection criteria above.



REPORT IS MISSING due to RAIN error. This will be corrected and the document updated soon.

FIGURE 83 RAIN CAREGIVER REPORT



4.4.3 RAIN CLIENTS

The **Clients** report is a total of all clients for the selected NAPIS years.

Annual Overview: Clients

Client Type	Client Count
Registered Clients	1142
Non Registered Clients	68
Total Clients	1202

FIGURE 84 RAIN CLIENT PROFILE REPORT

4.4.4 RAIN SERVICES

The **Services** report is a total of all clients for the selected NAPIS years. The **Report Type** may be **Summary** or **Detail**. Both are displayed below. The report shows a total by either Services or Clients. The formats are identical.

Annual Overview: Services

Cluster1	Clients Count
Personal Care	0
Home Maker	123
Chore	0

Services Report For District STA

Cluster1	Services Count
Personal Care	28877
Home Maker	211549
Chore	0
Home Delivered Meals	1633115
Adult Day Care/Health	255
Case Management	0

FIGURE 85 RAIN SERVICES PROFILE REPORT



4.4.5 RAIN INCOME & EXPENDITURE

The screenshot shows a web application interface for the Department of Human Services. At the top, there are navigation tabs: "Main Menu", "DHS Home", and "Log out". Below this is a header for "Annual Overview: Income and Expenditure". On the left is a sidebar menu with the following items: "Change District", "SPR Preview", "NAPIS Reports" (expanded), "Registered Service Profiles", "Caregiver Profiles", "Clients", "Services", and "Income and Expenditure" (highlighted with a red box). In the main content area, there are three selection criteria: "Year:" with a dropdown menu showing "FY 2007" (selected), "FY 2006", and "FY 2005"; "Category:" with a dropdown menu showing "Cluster1" (selected), "Cluster2", "Cluster3", "Group1", "Group2", and "Other"; and "Report Type" with radio buttons for "Summary" and "Detail" (selected). A "Submit" button is located below the "Category:" dropdown.

FIGURE 86 RAIN INCOME & EXPENDITURE

The Income & Expenditure report is shown below the selection criteria using the selection criteria above.

Department of Human Services



Main Menu	DHS Home	Logoff																
Annual Overview: Income and Expenditure																		
<p>Change District</p> <ul style="list-style-type: none"> ▶ SPR Preview ▼ NAPIS Reports <ul style="list-style-type: none"> • Registered Service Profiles • Caregiver Profiles • Clients • Services • Income and Expenditure • Staffing Enter Management Information 	<table border="1"> <thead> <tr> <th></th> <th style="text-align: right;">\$ Income</th> </tr> <tr> <th style="text-align: center;">Cluster1</th> <th style="text-align: center;">FY 2007</th> </tr> </thead> <tbody> <tr> <td>Personal Care</td> <td style="text-align: right;">11838</td> </tr> <tr> <td>Home Maker</td> <td style="text-align: right;">60341</td> </tr> <tr> <td>Chore</td> <td style="text-align: right;">493</td> </tr> <tr> <td>Home Delivered Meals</td> <td style="text-align: right;">456001</td> </tr> <tr> <td>Adult Day Care/Health</td> <td style="text-align: right;">778</td> </tr> <tr> <td>Case Management</td> <td style="text-align: right;">98220</td> </tr> </tbody> </table>			\$ Income	Cluster1	FY 2007	Personal Care	11838	Home Maker	60341	Chore	493	Home Delivered Meals	456001	Adult Day Care/Health	778	Case Management	98220
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Case Management	2067389																	
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Case Management	421715																	
<p>User ID: hsint01 Last Login: Tue Jun 02 11:53:21 PDT 2009 District: STA Current SPR Year: 2007 Available Report Years: 2007 2006 2005</p>																		

FIGURE 87 RAIN INCOME & EXPENDITURE REPORT - DETAIL



4.4.6 RAIN STAFFING

The **Staffing** report is shown next to the selection criteria.

Category	Local FY 2007
1. Agency Executive/Management Staff	5
2. Other Paid Professional Staff (By Functional Responsibility)	
A. Planning	1
B. Development	1
C. Administration	1
D. Service Delivery	1
E. Access/Care Coordinator	1
F. Other	1
3. Clerical/Support Staff	1
4. Volunteers	4
5. Total AAA Staff	4

FIGURE 88 RAIN STAFFING REPORT

4.5 RAIN ENTER MANAGEMENT INFORMATION

The screens shown throughout this section are used to enter information that is not accumulated in the Oregon ACCESS system. Generally, it consists of financial information, staffing and accomplishments.

- There is a 45 minute time limit to enter information on any screen. You should click on save to reset the timer. If the system times you out, you will not be notified and you will lose your work since the last save.
- If you enter data on a screen and do not hit save, you will be prompted with the following message:



The “**Enter Management Information**” screens below are that seen by the SUA staff at the state level and that seen by the AAAs at the district level.



FIGURE 89 RAIN ENTER MANAGEMENT INFORMATION SCREEN

The table shown below contains the name of the RAIN entry and the NAPIS report section where that information is reported.

RAIN Entry Screen	NAPIS Sect.
Client Services	II-A
Caregivers serving Elderly	II-B
Caregivers serving Children	II-C
Chapter Information	II-D
Other Services	II-E
AAA Staff	III-B
Community	III-D
Home & Community Accomplishments	IV-A
Elder Rights Accomplishments	IV-B

FIGURE 90 RAIN ENTRY SCREEN REFERENCE

Department of Human Services



Note: All AAA information entered in RAIN must match the final year-end 148/150 report submitted to the state.

4.5.1 RAIN MANAGEMENT INFORMATION – CLIENT SERVICES

FY 2008 Client Services for District 013							
Selected Services	Title III Exp.	Total Service Exp.	Program Income	Exp. B	Exp. C1	Exp. C2	Exp. D
Cluster 1							
Personal Care	0.0	0.0	0.0	0.0			
Home Maker	0.0	0.0	0.0	0.0			
Chore	0.0	0.0	0.0	0.0			
Home Delivered Meals	0.0	0	0			0	
Adult Day Care/Health	0.0	0.0	0.0	0.0			
Case Management	0.0	0.0	0.0	0.0			
Cluster 2							
Assisted							

FIGURE 91 RAIN CLIENT SERVICES ENTRY

AAAs should enter this financial information for client services at the end of the fiscal year.

4.5.2 RAIN MANAGEMENT INFORMATION – CAREGIVERS SERVING CHILDREN

Department of Human Services



FY 2008 Caregivers Serving Children for District 013

Change District

- [SPR Preview](#)
- [NAPIS Reports](#)
- Enter**
- ▾ **Management Information**
 - [Client Services](#)
 - [Caregivers Serving Children](#)
 - [Caregivers Serving Elderly](#)
 - [Other Services](#)
 - [Chapter](#)
 - [AAA Staff](#)

Selected Services	Title III E Expenditures	Total Service Expenditures	Program Income
Group 1			
Counseling	0	0	0
Respite Care	0	0	0
Supplemental Services	0	0	0
Group 2			
Access Assistance	0	0	0
Information Services	0	0	0

FIGURE 92 RAIN CAREGIVERS SERVING CHILDREN ENTRY

AAAs should enter financial information for Caregiver services at the end of the fiscal year.

Department of Human Services



4.5.3 RAIN MANAGEMENT INFORMATION – CAREGIVERS SERVING ELDERLY

Change District

- ▶ [SPR Preview](#)
- ▶ [NAPIS Reports](#)
- Enter Management Information**
 - [Client Services](#)
 - [Caregivers Serving Children](#)
 - [Caregivers Serving Elderly](#)
 - [Other Services](#)
 - [Chapter](#)
 - [AAA Staff](#)

Selected Services	Title III E Expenditures	Total Service Expenditures	Program Income
Group 1			
Counseling	0	0	0
Respite Care	0	0	0
Supplemental Services	0	0	0
Group 2			
Access Assistance	0	0	0
Information Services	0	0	0

FIGURE 93 RAIN CAREGIVERS SERVING ELDERLY ENTRY

AAAs should enter this financial information for Caregiver services at the end of the fiscal year.

Department of Human Services



4.5.4 RAIN MANAGEMENT INFORMATION – OTHER SERVICES

FY 2008 Other Services for District 013			
Service Name	OAA Service Expenditure Amount	Total Service Expenditure Amount	
Home Repair/Modify	0	0	
Home Health	0	0	
In-Home Volunteers	0	0	
Respite	0	0	
Health/Nutr. Screen	0	0	
Exer. Or Phys. Fit	0	0	
Wellness Education	0	0	
Mental Health Serv.	0	0	
Health Equipment Loans	0	0	
Medical Alert	0	0	
Medical Equipment	0	0	
Reg. Nurse. Serv.	0	0	
Guardian. /Conserv.	0	0	
Protective Service	0	0	
Elder Abuse Awar.	0	0	
Crime Pre./Home Sfty	0	0	
LTC Ombudsman	0	0	
Recreation	0	0	
Friendly Visiting	0	0	
Tel. Reassur.	0	0	
Volunteer Oppor.	0	0	
Interpreting/Trans.	0	0	
Case Monitoring	0	0	
Counseling	0	0	
Screening	0	0	
Geriatric Assmt.	0	0	
Newsletter	0	0	
Gatekeeper Trng.	0	0	
Placement Serv.	0	0	
Senior Center Asst.	0	0	
Employment Asst.	0	0	
Utility Asst.	0	0	
Fin. Asst./Mat. Aid	0	0	
Money Mgmt.	0	0	
Center Reno./Acqu.	0	0	
Adult Care Home Lic.	0	0	
Housing Asst.	0	0	
Medication Management	0	0	
Volunteer Services	0	0	
Outreach - Public	0	0	

Save

FIGURE 94 RAIN OTHER SERVICES ENTRY

Department of Human Services



AAAs should enter this financial information for Other Services at the end of the fiscal year.

Department of Human Services



4.5.5 RAIN MANAGEMENT INFORMATION – CHAPTER

FY 2008 Chapter for District 013		
Change District	Title VII Expenditure	Total Service Expenditures
C. Title VII Expenditures By Chapter		
Chapter3: Elder Abuse Prevention	0	0
Chapter4: Legal Assistance Development		0

FIGURE 95 RAIN CHAPTER ENTRY

AAAs should enter this financial information for Chapter 3 at the end of the fiscal year. The state SUA will enter Chapter 4 expenses.

4.5.6 RAIN MANAGEMENT INFORMATION – AAA STAFF

FY 2008 AAA Staff for District 013		
AAA Personnel Categories	Total FTEs	Minority FTEs
1. Agency Executive/Management Staff	0.0	0.0
2. Other Paid Professional Staff (By Functional Responsibility)		
A. Planning	0.0	0.0
B. Development	0.0	0.0
C. Administration	0.0	0.0
D. Service Delivery	0.0	0.0
E. Access/Care Coordination	0.0	0.0
F. Other	0.0	0.0
3. Clerical/Support Staff	0.0	0.0
4. Volunteers	0.0	0.0
5. Total AAA Staff	0.0	0.0

FIGURE 96 RAIN AAA STAFF ENTRY

AAAs should enter the staffing information at the end of the fiscal year.

Department of Human Services



4.5.7 RAIN MANAGEMENT INFORMATION – COMMUNITY

Main Menu	DHS Home	Logout										
FY 2008 Community for District 013												
<p>Change District</p> <ul style="list-style-type: none"> ▶ SPR Preview ▶ NAPIS Reports Enter Management Information • Client Services • Caregivers Serving Children • Caregivers Serving Elderly • Other Services • Chapter • AAA Staff <li style="border: 2px solid red; padding: 2px;">• Community 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #008080; color: white;"> <th style="width: 80%;">Number</th> <th style="width: 20%;">Number</th> </tr> </thead> <tbody> <tr> <td style="background-color: #008080; color: white;">Total Focal Points</td> <td style="text-align: center;">0</td> </tr> <tr> <td style="background-color: #008080; color: white;">Focal Point Senior Centers</td> <td style="text-align: center;">0</td> </tr> <tr> <td style="background-color: #008080; color: white;">Total Senior Centers</td> <td style="text-align: center;">0</td> </tr> <tr> <td style="background-color: #008080; color: white;">OAA Funded Senior Centers</td> <td style="text-align: center;">0</td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 10px;"><input type="button" value="Save"/></p>	Number	Number	Total Focal Points	0	Focal Point Senior Centers	0	Total Senior Centers	0	OAA Funded Senior Centers	0	
Number	Number											
Total Focal Points	0											
Focal Point Senior Centers	0											
Total Senior Centers	0											
OAA Funded Senior Centers	0											

FIGURE 97 RAIN COMMUNITY ENTRY

AAAs should enter the Community information at the end of the fiscal year.

4.5.8 RAIN MANAGEMENT INFORMATION – HOME & COMMUNITY ACCOMPLISHMENTS

Main Menu	DHS Home	Logout								
FY 2008 Home and Community Accomplishments for District 013										
<p>Change District</p> <ul style="list-style-type: none"> ▶ SPR Preview ▶ NAPIS Reports Enter Management Information • Client Services • Caregivers Serving Children • Caregivers Serving Elderly • Other Services • Chapter • AAA Staff <li style="border: 2px solid red; padding: 2px;">• Home and Community Accomplishments • Elder Rights Accomplishments <p><input type="button" value="Submit Service Batch File"/> <input type="button" value="Save"/></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #008080; color: white;"> <th style="width: 60%;">Identification Of The Top Three Accomplishments</th> <th style="width: 40%;">Development Types</th> </tr> </thead> <tbody> <tr> <td style="height: 40px;"></td> <td> <ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other </td> </tr> <tr> <td style="height: 40px;"></td> <td> <ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other </td> </tr> <tr> <td style="height: 40px;"></td> <td> <ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other </td> </tr> </tbody> </table>	Identification Of The Top Three Accomplishments	Development Types		<ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other 		<ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other 		<ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other 	
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FIGURE 98 RAIN HOME & COMMUNITY ACCOMPLISHMENTS ENTRY

Department of Human Services



AAAs should enter the Home and Community accomplishments here. Three accomplishments must be entered. Make sure to select the correct Type Code(s).

4.5.9 RAIN MANAGEMENT INFORMATION – ELDER RIGHTS ACCOMPLISHMENTS

FY 2008 Elderly Rights Accomplishments for District 013

<p>Change District</p> <ul style="list-style-type: none"> ▶ SPR Preview ▶ NAPIS Reports Enter Management Information • Client Services • Caregivers Serving Children • Caregivers Serving Elderly • Other Services • Chapter • AAA Staff • Community • Home and Community Accomplishments • Elder Rights Accomplishments <p style="text-align: right; margin-top: 10px;"><input type="button" value="Save"/></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #008080; color: white;"> <th style="width: 55%;">Identification Of The Top Three Accomplishments</th> <th style="width: 45%;">Development Types</th> </tr> </thead> <tbody> <tr> <td style="height: 40px;"></td> <td> <ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other </td> </tr> <tr> <td style="height: 40px;"></td> <td> <ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other </td> </tr> <tr> <td style="height: 40px;"></td> <td> <ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other </td> </tr> </tbody> </table>	Identification Of The Top Three Accomplishments	Development Types		<ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other 		<ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other 		<ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other 	
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	<ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other 									
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	<ul style="list-style-type: none"> 1.Public Education/Awareness 2.Resource Development 3.Training/Education 4.Research and Development 5.Policy Development 6.Legislative Development 7.Other 									

FIGURE 99 RAIN ELDER RIGHTS ACCOMPLISHMENTS ENTRY

AAAs should enter the Elderly Rights accomplishments here. Three accomplishments must be entered. Make sure to select the correct Type Code(s).



Department of Human Services

APPENDIX A – CLUSTERS, SERVICES & STANDARD UNITS

NAPIS Code	Reg	Cluster	Description	Report Section(s)						Item	Unit
				IA	IB	IC	ID	IIA	IIB		
1	Y	1	Personal Care {#1}	IA	IB	IC	ID	IIA		1	1 Hour
1 A	Y	1	Personal Care(CEP) {#1a}	IA	IB	IC	ID	IIA		2	1 Hour
2	Y	1	Homemaker {#2}	IA	IB	IC	ID	IIA		3	1 Hour
2 A	Y	1	Homemaker (CEP) {#2a}	IA	IB	IC	ID	IIA		4	1 Hour
3	Y	1	Chore {#3}	IA	IB	IC	ID	IIA		5	1 Hour
3 A	Y	1	Chore {#3a}	IA	IB	IC	ID	IIA		6	1 Hour
4	Y	1	Home Deliv. Meals {#4}	IA	IB	IC	ID	IIA		7	1 Meal
5	Y	1	Adult Day Care/Health {#5}	IA	IB	IC	ID	IIA		8	1 Hour
6	Y	1	Case Management {#6}	IA	IB	IC	ID	IIA		9	1 Hour
7008	Y	1	Private Case Mgmt. {#70-8}	IA	IB	IC		IIA		48	1 Hour
7	Y	2	Congregate Meals {#7}	IA	IB			IIA		10	1 Eligible Meal
8	Y	2	Nutrition Counseling {#8}	IA	IB			IIA		11	1 Session
9	Y	2	Assist. Transportation {#9}	IA	IB			IIA		12	1 One-Way Trip
10		3	Transportation {#10}	IA				IIA		13	1 One-Way Trip
11		3	Legal Assistance {#11}	IA				IIA		14	1 Hour
12		3	Nutrition Education {#12}	IA				IIA		15	1 Session
13		3	Info. and Assistance {#13}	IA				IIA		16	1 Contact
14		3	Outreach {#14}	IA				IIA		17	1 Contact
15			Information For CG {#15}	IA		IE		IIB		57	1 Activity
15 A			Information for Caregivers Serving Children	IA		IF		IIC		new	1 Activity
16			Assistance in Gaining Access to Caregiver Services {#16}	IA		IE		IIB		58	1 Contact
16 A			Access to Services - Serving Children	IA		IF		IIC		new	1 Contact

Department of Human Services



NAPIS Code	Reg	Cluster	Description	IA	IE	IF	IIB	IIC	IIE	Item	Unit
3001			Home Repair/Modify {#30-1}	IA					IIE	18	1 Client
3002			Home Health {#30-2}	IA					IIE	19	1 Home Visit
3003			In-Home Volunteers {#30-3}	IA					IIE	20	1 Hour
3004			Respite {#30-4}	IA				IIB	IIE	21	1 Hour
3005			Caregiver Respite {#30-5}	IA		IE				22	1 Session
3005	A		Caregiver Respite for Caregivers Serving Children (#30-5A)	IA		IF		IIC		new	1 Session
3006			Organization of Caregiver Support Groups (#30-6)	IA		IE		IIB		60	1 Session
3006	A		Support Groups for Caregivers Serving Children (#30-6A)	IA		IF		IIC		new	1 Session
3007			Supplemental Services to Caregivers (#30-7)	IA		IE		IIB		61	1 Activity
3007	A		Supplemental Services to Caregivers (#30-7) + Children	IA		IF		IIC		new	1 Activity
4001			Health/Nutr. Screen {#40-1}	IA					IIE	23	1 Screening
4002			Exer. or Phys. Fit. {#40-2}	IA					IIE	24	1 Session
4003			Wellness Education {#40-3}	IA					IIE	25	1 Session
4004			Mental Health Serv. {#40-4}	IA					IIE	26	1 Hour
4005			Health Equip. Loans {#40-5}	IA					IIE	27	1 Loan
4006			Medical Alert {#40-6}	IA					IIE	28	1 Client Served
4007			Medical Equipment {#40-7}	IA					IIE	29	1 Client Served
4008			Reg. Nurse. Serv. {#40-8}	IA					IIE	30	1 Hour
4009			Medication Management {#40-9}	IA					IIE	64	1 Session
5001			Guardian./Conserv. {#50-1}	IA					IIE	31	1 Client Served
5002			Protective Service {#50-2}	IA					IIE	32	1 Client Served
5003			Elder Abuse Awar. {#50-3}	IA					IIE	33	1 Activity
5004			Crime Pre./Home Sfty {#50-4}	IA					IIE	34	1 Activity
5005			LTC Ombudsman {#50-5}	IA					IIE	35	1 Client Served

Department of Human Services



NAPIS Code	Reg	Cluster	Description	Report Section(s)										Item	Unit			
6001			Recreation {#60-1}	IA												IIE	36	1 Activity
6002			Friendly Visiting {#60-2}	IA												IIE	37	1 Visit
6003			Tel. Reassur. {#60-3}	IA												IIE	38	1 Call
6004			Volunteer Oppor. {#60-4}	IA												IIE	39	1 Placement
6005			Interpreting/Trans. {#60-5}	IA												IIE	40	1 Session
7001			Case Monitoring {#70-1}	IA												IIE	41	1 Hour
7002			Counseling {#70-2}	IA												IIE	42	1 Hour
7002 A			Counseling for Caregivers (70-2A)	IA				IE								IIE	62	1 Hour
7002 B			Individual Counseling for Caregivers Serving Children (#70-2B)	IA						IF						IIE	new	
7003			Screening {#70-3}	IA												IIE	43	1 Screening
7004			Geriatric Assmt. {#70-4}	IA												IIE	44	1 Assessment
7005			Newsletter {#70-5}	IA												IIE	45	# Distributed
7006			Gatekeeper Trng. {#70-6}	IA												IIE	46	1 Session
7007			Placement Serv. {#70-7}	IA												IIE	47	1 Referral
7009			Caregiver Training {#70-9}	IA				IE								IIE	63	1 Session
7009 A			Caregiver Training for Those Serving Children (#70-9)	IA						IF						IIE	new	1 Session
7010			Public Outreach/Education {#70-10}	IA												IIE	66	1 Activity
8001			Senior Center Asst. {#80-1}	IA												IIE	49	1 Center Assist
8002			Employment Asst. {#80-2}	IA												IIE	50	1 Client Served
8003			Utility Asst. {#80-3}	IA												IIE	51	1 Client Served
8004			Fin. Asst./Mat. Aid {#80-4}	IA												IIE	52	1 Client Served
8005			Money Mgmt. {#80-5}	IA												IIE	53	1 Client Served
8006			Center Reno./Acqu. {#80-6}	IA												IIE	54	1 Center
8008			Housing Asst. {#80-7}	IA												IIE	56	NULL

Department of Human Services



NAPIS Code	Reg	Cluster	Description	Report Section(s)										Item	Unit			
9001			Volunteer Services {#90-1}	IA													65	NULL



Department of Human Services

APPENDIX B – 2008 -2009 POVERTY TABLE

Persons in Family or Household	2008 Annual Income	2008 Monthly Income	2009 Annual Income	2009 Monthly Income
1	10,400	867	10,830	903
2	14,000	1,167	14,570	1,214
3	17,600	1,467	18,310	1,526
4	21,200	1,767	22,050	1,838
5	24,800	2,067	25,790	2,149
6	28,400	2,367	29,530	2,461
7	32,000	2,667	33,270	2,773
8	35,600	2,967	37,010	3,084
Each adl	3,600	300	3,740	312



APPENDIX D - HALF A MILLION MISSING²

Last year (2006) State Units on Aging submitted in cooperation with their providers and Area Agencies counts of clients served with Older Americans Act Services. More than 2.7 million people received registered services like home delivered meals, chore, homemaker, care management, and much more. But many locations had missing data. Of the 2.7 million people documented as registered clients 561,971 were missing age data. In addition, hundreds of thousands had ethnicity missing, poverty missing, rural missing, and even gender missing!

Why Is This Important?

- ❖ The Administration on Aging reports performance results to Congress as part of the annual request for funds. Missing data can lead to under reporting the Aging Network's accomplishments.
- ❖ Future performance measures are developed based on trends in data supplied by states.
- ❖ Researchers, community leaders, the press have important questions about service provision.
- ❖ Reliability is questioned when significant amounts of data are missing.

How to Improve

- ❖ Collect thorough and accurate data. **There are no optional fields in the State Program Report.**
- ❖ Assure that sub-fields add across to Total fields (See Related Fields Attachment)
- ❖ Total fields should match across tables (See Related Fields Attachment)
- ❖ Accurately calculate missing data to correspond with the difference of Total Clients and sub-fields. For example, "Total Clients" minus "Total with Age Reported" equals "Age Missing."

Important Exception for Nutrition

Our OMB approved reporting format includes counting individuals under 60 years old. Individuals who are eligible to participate in nutrition services and are under 60 are supposed to appear in the "Total*" column on Section I.B for Congregate Meals & Nutrition Counseling or "Total – All Ages*" on Section I.C for home delivered meals. See pages 4 & 5 of the "Reporting Requirements for Title III & VII" available on-line at http://aoa.gov/prof/agingnet/napis/docs/SPR-Modified-Form-06_08_2007.pdf.

² [http://aodatacommunity.us/communities/What's Missing - Reducing Missing Data](http://aodatacommunity.us/communities/What's_Missing_-_Reducing_Missing_Data)





Related Fields Attachment

Section	Worksheet	Field	Related Fields
Section I.B	Total Registered Clients	Total Clients	Equal to Section I.A Unduplicated Count of Persons Served for Registered Services Supported by the OAA Title III
Section I.B	Total Registered Clients	Total Clients	Equal to Total with Age Reported + Age Missing Equal to Female + Male + Gender Missing Equal to Hispanic/Latino+Not Hispanic+Ethnicity Missing Equal to White-Non-Hispanic + White-Hispanic + American Indian + Asian + Black/African American + Native Hawaiian + Persons Reporting Some Other Race + Persons Reporting 2 or More Races + Race Missing
Section I.B	Congregate Meals	Total Clients	Similar to Section I.B-Total Registered Clients and Equal to Section II.A. Unduplicated Persons Served Congregate Meals
Section I.B	Nutrition Counseling	Total Clients	Similar to Section I.B-Total Registered Clients and Equal to Section II.A. Unduplicated Persons Served Nutrition Counseling
Section I.B	Assisted Transportation	Total Clients	Similar to Section I.B-Total Registered Clients and Equal to Section II.A. Unduplicated Persons Served Assisted Transportation
Section I.C	Total Cluster 1 Clients	Total	Equal to Total with Age Reported + Age Missing Equal to Total All Ages ADL + ADL Missing Equal to Female + Male + Gender Missing Equal to Hispanic/Latino+Not Hispanic+Ethnicity Missing Equal to White-Non-Hispanic + White-Hispanic + American Indian + Asian + Black/African American + Native Hawaiian + Persons Reporting Some Other Race + Persons Reporting 2 or More Races + Race Missing

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Section	Worksheet	Field	Related Fields
Section I.C	Personal Care	Total	Similar to Section I.C – Total Clients and Equal to Section II.A. Unduplicated Persons Served Personal Care
Section I.C	Homemaker	Total	Similar to Section I.C – Total Clients and Equal to Section II.A. Unduplicated Persons Served Personal Care
Section I.C	Chore	Total	Similar to Section I.C – Total Clients and Equal to Section II.A. Unduplicated Persons Served Chore
Section I.C	Home Delivered Meals	Total	Similar to Section I.C – Total Clients and Equal to Section II.A. Unduplicated Persons Served Home Delivered Meals
Section I.C	Adult Day Care/Health	Total	Similar to Section I.C – Total Clients and Equal to Section II.A. Unduplicated Persons Served Adult Day Care/Health
Section I.C	Case Management	Total	Similar to Section I.C – Total Clients and Equal to Section II.A. Unduplicated Persons Served Case Management
Section I.D	All	Total	Wash, rinse, repeat Section I.C – Total Clients
Section I.E		Total Caregivers	The unduplicated count of individuals reported on Section II.B Group 1 services. The acceptable range is No Lower than the highest number of people who receive: Counseling/Support Groups/Caregiver Training; Respite Care; and Supplemental Services. No Higher than the sum of: Counseling/Support Groups/Caregiver Training; Respite Care; and Supplemental Services.

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Section	Worksheet	Field	Related Fields
Section I.F		Total Caregivers	<p>The unduplicated count of individuals reported on Section II.C Group 1 services.</p> <p>The acceptable range is</p> <p>No Lower than the highest number of people who receive:</p> <ul style="list-style-type: none"> Counseling/Support Groups/Caregiver Training; Respite Care; and Supplemental Services. <p>No Higher than the sum of:</p> <ul style="list-style-type: none"> Counseling/Support Groups/Caregiver Training; Respite Care; and Supplemental Services.



APPENDIX E – LOCAL FAQ

The following FAQ items are some that have commonly been asked within Oregon and are placed here for your reference.

Q1	Our local newspaper interviewed our Caregiver Coordinator and wrote an informational article about our services. Should we be reporting this on the SPR?
A1	Absolutely! This meets the definition of Information for Caregivers (1 unit = 1 Activity). Use the OAA Batch function to record 1 unit of service and your unduplicated client count. For activities directed at large audiences AoA only requires an estimate of unduplicated clients. Report a percentage of the circulation count for the date article was published. Suggested aid: census breakdown
Q2	How do I know if my OAA Provider is a rural provider or not?
A2	AoA defines rural as any area not defined as urban. Urban areas are densely settled territories of 50,000+ and incorporated areas/census area of 20,000+. See Appendix F . The decision is based upon their physical address, not on the area served.
Q3	Do we report program income even if we don't spend it during the reporting year?
A3	Yes. All funds earned as a result of the OAA program during the grant period are to be reported.
Q4	What do I do if a Medicaid client dies and the OA case file is transferred for estate recovery before we have the OAA service units and/or the Medicaid home-delivered meals entered?
A4	E-mail estate.admin@state.or.us and request the file be transferred to your branch so that you can enter the remaining units of service received by the client.
Q5	What if after I review and tell the state that my report is accurate - I find an error?
A5	Contact the State Unit on Aging, if the SPR hasn't been uploaded to AoA they can manually edit the information.
Q6	Our OPI information is uploaded and reported but it is not an OAA service. Why do we report it?
A6	OPI expenditures are used to match the grant award. This match is known as Maintenance of Effort (MOE) and is required by AoA.
Q7	Should we be reporting the home-delivered meals we serve to Medicaid clients too?
A7	Yes. The client and the units of service will upload into RAIN from OA. Means-tested meals are not NSIP eligible meals and should not be noted on your monthly Form 150, page 2 in the NSIP meal count section.
Q8	Can I report the meal site newsletter even though I only provide funding for the meal program? The newsletter contains healthful articles and meal site activities.
A8	A third-party publication is ineligible.
Q9	If the Total Income field is greater then the self-proclaimed income range, should the AAA update the Income range to fit the TI?
A9	No. The "Total Income" field is populated from a list of Incomes, which is a Medicaid

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and Food Stamp screen. The two programs base eligibility upon household incomes (which includes others such as spouse, adult children, etc.) and are referred to as "adjusted income".

Even if the client was lying - it doesn't matter - OAA and OPI services are not means-tested services.



APPENDIX F – URBAN AND RURAL

The following was extracted from the AoA Data Community website FAQ.³

1. QUESTION. Urban and Rural: Is there one source which has a master list of areas defined as rural and urban?

ANSWER. Currently, AoA's Instructions for Completion of Title III and VII SPR define rural as follows: Urban areas comprise: (1) urbanized areas (a central place and its adjacent densely settled territories with a combined minimum population of 50,000) and (2) an incorporated place or a census designated place with 20,000 or more inhabitants.

Rural – A rural area is any area that is not defined as urban.

2. QUESTION. What is the meaning of adjacent densely settled territories? How is density measured? What is the proximity of a densely settled territory to a central place? In order to be classified as an urban area, does an area have to meet both conditions (1) and (2) above or, an area has to meet only either condition (1) urbanized area of 50,000 or more population, or condition (2) an incorporated place or a census designated place with 20,000 or more inhabitants?

ANSWER. Only one of the conditions cited above needs be met in order for an area to be considered urban. Although the SPR retained the previous SPR the definition of urban/rural which is cited in the question above, AoA has no objection to states using the Census Bureau definition which was modified in 2000. As a practical matter, it may be difficult for many entities to apply the old definition.

The Census Bureau provides a number of resources for users to determine urban/rural status of a particular place as well as explanations for the system used by the Census Bureau to determine classification of an area as urban. These may be found on the Census Bureau web site at: http://www.census.gov/geo/www/ua/ua_2k.html (Off Site). A street address lookup may also be found at: <http://factfinder.census.gov> (Off Site). AoA plans to seek a modification of the current SPR definition to bring the SPR urban/rural definition into conformity with the Census Bureau definition. AoA plans to have the Census Bureau develop a file with the number of rural persons aged 60+ and the number of urban persons aged 60+ in each populated (Zip Code Tabulation Area).

³ <http://aodatacommunity.us/communities/course/view.php?id=7>

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This may be a useful tool for many automated systems when the client's address is available but its use will not be mandated.



APPENDIX G – REPORTING RACE AND ETHNICITY

The following was extracted from the AoA Data Community website FAQ.⁴

1. QUESTION. Because "Hispanic" was removed as an option for Race, it was anticipated that many Hispanic clients would select "Other" as the response to the racial category. Is this correct or should there be an additional racial category for the "Hispanic" response?

ANSWER: Under the 1997 OMB Guidelines, race and ethnicity (i.e., Hispanic status) must be asked as separate questions (although we may later aggregate the responses as appropriate to the data). Past Census surveys do indicate that some Hispanic persons list their race as "Other" but at least in the 2000 Census very few persons over 60 did so. The SPR race categories do include "Other" so this category is available as needed.

2. QUESTION. According to state legal counsel questions regarding race and ethnicity must be "optional" unless required by state or federal law. Therefore, my question is there such a requirement or are we to make these two questions optional?

ANSWER. Data collection under the State Program Report (SPR) is a requirement of the Older Americans Act (OAA). All SPR reporting requirements, including race and ethnicity, are in compliance with and have been approved by the Office of Management and Budget (OMB). Reporting client level data, i.e., race and ethnicity, income, gender, etc., is a requirement in accordance with the specific provisions of the SPR. Service cannot to be denied to an older adult for refusal to provide this information.

3. QUESTION. In Sections I. B; I. C; I. D; I. E; and I. F on the SPR Reporting Requirements for Title III and VII, are all the breakouts for Ethnicities and/or Races required fields? Are both the ethnicities and races required or just the ethnicities? What if most of the ethnicities are counted as 'Missing'.

ANSWER. The OMB guidelines require that, at the client level, race and ethnicity are to be asked separately. This is needed to produce the state level data required by the SPR. What is required by the SPR (i.e., at the reporting level from the state to AoA) are items where race and ethnicity are mostly reported separately but with several combined items. These are:

Clients by Ethnicity

- Hispanic or Latino

⁴ <http://aodatacommunity.us/communities/course/view.php?id=7>

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- Not Hispanic or Latino
- Ethnicity Missing

Clients by Race or Ethnicity

- White (Alone) * – Non-Hispanic

Total Minorities **

- White (Alone) – Hispanic
- American Indian or Alaska Native (Alone)
- Asian (Alone)
- Black or African American (Alone)
- Native Hawaiian or Other Pacific Islander (Alone)
- Persons Reporting Some Other Race
- Persons Reporting 2 or More Races
- Race Missing

* (Alone) – When appended to a racial category, this term means that the individual designated only one race category.

** For this and subsequent tables, Total Minorities will be calculated by AoA sponsored State Reporting Tool software – will exclude White (alone) – Non—Hispanic and race/ethnicity missing

As noted, there are Missing data categories which may be used as needed. However, they should not be used as a substitute for the required data collection.



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