

DEPARTMENT OF AGING

1300 NATIONAL DRIVE, SUITE 200

SACRAMENTO, CA 95834-1992

Internet Home Page: www.aging.ca.gov

TDD Only 1-800-735-2929

FAX Only (916) 928-2506

Phone Number (916) 928-2289



PROGRAM MEMO

TO: AREA AGENCIES ON AGING DIRECTORS	NO.: PM 08-01(P)
SUBJECT: Modification of Quarterly Aggregate Health Insurance Counseling and Advocacy Program Reporting Form and Model Intake/Counseling Form	DATE ISSUED: January 11, 2008
REVISED	EXPIRES: July 1, 2010
REFERENCES:	SUPERSEDES: PM-06-01, issued 1/19/06 PM-06-20, issued 10/25/06
PROGRAMS AFFECTED: <input type="checkbox"/> All <input type="checkbox"/> Title III-B <input type="checkbox"/> Title III-C1/C2 <input type="checkbox"/> Title III-D <input type="checkbox"/> Title III-E <input type="checkbox"/> Title V <input type="checkbox"/> CBSP <input type="checkbox"/> MSSP <input type="checkbox"/> Title VII <input type="checkbox"/> ADHC <input checked="" type="checkbox"/> HICAP <input type="checkbox"/> Other: _____	
REASON FOR PROGRAM MEMO: <input type="checkbox"/> Change in Law or Regulation <input type="checkbox"/> Response to Inquiry <input checked="" type="checkbox"/> Other Specify: <u>Federal Ship Grant</u>	
INQUIRIES SHOULD BE DIRECTED TO: Xochi Prock, (916) 928-2289 or xprock@aging.ca.gov	

The purpose of this Program Memo (PM) is to notify Area Agencies on Aging (AAA) and Health Insurance Counseling and Advocacy Program (HICAP) service providers that the revised HICAP Intake/ Counseling Form (Model CDA 264) and HICAP Quarterly Aggregate Report (CDA 1005) and Instructions are now available. These documents are available on the California Department of Aging's (CDA) web site (www.aging.ca.gov). To access these materials, select the "AAA" tab, select the "Data" link, click on "Reporting Instructions," then select "HICAP Current Forms and Instructions."

All instructions, forms, and tools have been updated and posted on the Web for your convenience. Please carefully review the new instructions before using the forms. Questions may be directed to Xochi Prock, (916) 928-2289 or xprock@aging.ca.gov.

You may use the new report forms at any time after the date of this notice. After the start of the new State Fiscal Year, effective July 1, 2008, only updated report forms will be accepted. After July 1, 2008, the previous forms will be removed from the web site and only the updated quarterly report form should be used to report HICAP program data. This brings all HICAP reporting forms into synchronization with the previous changes transmitted by PM 06-01 (P) and PM 06-20 (P) due to the Medicare Part D changes.



Do Your Part to Help California Save Energy
To learn more about saving energy, visit the CDA web site at www.aging.ca.gov

The model Intake/Counseling Form format may be modified to meet local design requirements, but the revisions must be approved by CDA prior to implementation. All required data elements must be auditable to the original model standards.

Background

Centers for Medicare and Medicaid Services made additional reporting requirements in 2006 due to the roll out of Medicare Part D. PM-06-01 (P) issued a temporary "Addendum" (CDA 264B) to the Intake/Counseling Report (CDA 264A) to meet the new requirements. A special task group completed a study of the required and other needed changes to the HICAP reporting form in November 2007 and recommended these modifications. The new Intake/Counseling Form combines the previous form and Addendum into one document. The Addendum will no longer be required when the new form is used.

PM-06-20 (P) issued a temporary Quarterly Aggregate Report that combined and replaced three previous reports: (1) CDA 264 (REV 7/04) Quarterly Aggregate Counseling Activity Report; (2) CDA 265 (REV 7/04) Quarterly Aggregate Public and Media Activity Report; and (3) CDA 266 (REV 7/04) Annual HICAP Resource Report. Based on the completed study and recommended modifications from the special task group, the Aggregate form has been revised to coordinate completely with the revised Intake/Counseling form.

Management Information System Automation

The Department recognizes that some AAAs and service providers may need to invest in automated management information system changes to accommodate the new formats. The six-month period between this notice and the implementation of the new forms on July 1, 2008, is intended to allow ample time for making these changes. Additionally, AAAs may use One-Time-Only Title III B funds for both costs associated with changes to automated systems costs and for ongoing systems maintenance.

AAA and HICAP provider cooperation is greatly appreciated.

Questions or concerns may be addressed to Xochi Prock, at (916) 928-2289 or xprock@aging.ca.gov.



Lynn Daucher
Director