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# —PROGRAM INSTRUCTION—

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## Texas Department of Aging and Disability Services (DADS) – Access and Intake Division

<b>TITLE:</b>	Client Document Requirements for Services	<b>NUMBER:</b>	AAA-PI 316
<b>SECTION:</b>	Area Agencies on Aging	<b>APPROVAL:</b>	Betty Ford
<b>ISSUE DATE:</b>	10/6/09	<b>REVISION DATE:</b>	10/13/09
<b>RELEVANT CITATION(S):</b>	40 TAC §83.3 (d)		
<b>DISTRIBUTION:</b>	<input type="checkbox"/> Executive Director <input checked="" type="checkbox"/> Director <input type="checkbox"/> Fiscal Director <input checked="" type="checkbox"/> AAA Section Staff		

The Department is revising the program instruction (PI) to remove the Client Documents Required for Services matrix from the PI allowing the matrix to be revised without causing a revision of the PI. No substantive changes were made to the PI.

The matrix (Client Documents Required for Services) identifies all required documentation for a specific service provided through the Older Americans Act. The Client Documents Required for Services matrix can be found on the AAA website.

### **AAAs must also follow the items listed below:**

- When a program participant uses a mark, such as an “X” as their signature, the service provider must sign as witness.
- All documents and forms must be dated.

### **Definitions:**

Client Contact Report – a Centers for Medicare and Medicaid Service report supporting contact with a client (program participant) such as an individual client contact report on SHIPTalk / NPR.

Estimated Audience – documentation supporting audience participation or target audience, such as activity log, sign-in sheet, estimated number of attendees at a group event, or a AAA designed event summary log which includes an agenda, description, and estimated number of participants.

Follow Up / Monitoring – activities performed to confirm the individual for whom service was approved, received the service and found it acceptable.

Record of Units Provided – any documentation supporting the units provided to the program participant such as a timesheet, IR&A Activity Log, rosters, sign-in sheets.

For questions or comments, please direct them to the Help Desk at T3AHelp@dads.state.tx.us.