

## **State Health Insurance Assistance Program Grant**

### **Background**

The State Health Insurance Assistance Program grant is funded by the Centers for Medicare and Medicaid Services (CMS) to provide information, counseling and assistance to Medicare eligible individuals and their representatives. The grant is traditionally referred to as the CMS Basic Grant. In Texas the State Health Information and Assistance Program (SHIP) is called the Health Information, Counseling and Advocacy Program (HICAP). HICAP has been a component of the national SHIP Network since 1992. HICAP is comprised of a partnership of six core agencies and groups: the Texas Department of Aging and Disability Services (DADS), the Texas Department of Insurance, Texas Legal Services Center, the local and regional Area Agencies on Aging (AAAs), Novitas Solution, Inc. (Novitas) (in an advisory capacity), and the Medicare Secondary Payer Recovery Contractor (in an advisory capacity).

### **Funding**

CMS funds are secured by DADS on an annual basis. Once approved for funding, DADS allocates the funds to AAAs via a Request for Proposal process. None of the CMS funds are retained by DADS. To secure CMS funds, each AAA is required to submit a proposal indicating how their respective agency will use the funds to assist Medicare beneficiaries. CMS funds are designated for the provision of the following services to Medicare beneficiaries:

- Information, Referral & Assistance
- Legal Assistance Age 60 & Over
- Legal Assistance Under Age 60
- Legal Awareness

Each AAA's funding proposal is reviewed and approved by the HICAP Director. If approved for funding, the AAA will receive a memorandum and Notification of Funds Available indicating the amount of the award. The CMS Basic Grant period is April 1<sup>st</sup> to March 31<sup>st</sup> of each year.

### **Request for Reimbursement**

Requests for reimbursement (RfRs) are approved by the Fiscal Coordinator at DADS. To request reimbursement of CMS funds an RfR must be submitted to DADS by the AAA requesting funds.

### **Reporting Requirements**

CMS requires all activity data associated with the grant (individual client contact data, and public and media activity data) to be submitted electronically to CMS by way of the SHIPTalk website. To ensure compliance with this requirement, AAAs accepting CMS funds agree to meet the following reporting guidelines:

1. On a monthly basis, AAAs agree to export individual client contact (ICC) data into the SHIPTalk website report database at [www.shiptalk.org](http://www.shiptalk.org). Furthermore, each AAA agrees to confirm completion of ICC reporting by email to DADS on or before the 12<sup>th</sup> of each month.

2. On a monthly basis, AAAs receiving CMS funding agree to export public and media activity (PAM) data into the SHIPTalk website at [www.shiptalk.org](http://www.shiptalk.org). As with the ICC report, each AAA agrees to confirm completion of PAM reporting by email to DADS on or before the 12<sup>th</sup> of each month.
3. Submit to DADS a completed Resource Report annually on the 15<sup>th</sup> of May.

## Housing Bond Fee Residential Repair and Modifications Grant for Older Texans

### Background

The Texas Housing Finance Corporation Act, 394 Local Government Code §394.902(b) directs housing finance corporations to pay DADS a fee of one-tenth of one percent of the bond amount used to develop multi-family housing. The fee is paid in lieu of a five percent housing unit set-a-side for older persons. Fees are used to support the housing bond program.

Funds will be awarded for reimbursement of allowable expenses in accordance with 40 TAC §85.308(g). Repairs or modifications to homes are essential for maintaining the health, safety, and independence of the older individual living in the residence. In accordance with 40 TAC §85.308(i), prohibited activities include activities associated with outbuildings, nonessential appliances, and cosmetic purposes.

### Targeted Population

In accordance with the targeting criteria contained in the Older Americans Act, AAAs will give preference to:

- older individuals with greatest economic and social need (with particular attention to low-income minority individuals and older individuals residing in rural areas)
- older individuals with limited English proficiency
- older individuals at risk for institutional placement

### Home Repair Categories

All repairs made with housing bond funding fall into at least one of the following categories:

- **Accessibility:** Structural adaptation that meets the needs of clients with disabling condition(s).
- **Safety:** Repairs/modifications deemed necessary to prevent accidents, fires, or intrusion into a dwelling, and the repair, modifications, treatment, or removal of safety hazards in the home or yard; including essential appliances necessary to sustain a healthy environment and independent living.
- **Structural:** Any repair to the structure considered necessary for the client's health and safety
- **Weatherization:** Repair, modification or supply purchase intended to; protect the home or the client from the effects of weather, conserve energy, or provide an alternative source to cool and heat the home.

### Match

A 25% (cash or in-kind) match from the sponsoring AAA and/or other local resources is required. Matching funds may be used for service provision only.

- Federal or state funds received from DADS may NOT be used to match Housing Bond awards
- Program income may be used for service provision only and may NOT be used to match Housing Bond awards
- Federal or state funds received from sources other than DADS may be used to match Housing Bond awards

- All in-kind match must be within the guidelines provided in DADS technical assistance memorandum relating to Identifying & Valuing In-kind ([AAA-TA 500](#))
- All match (cash or in-kind) must be fully documented

### **Reimbursement Requests and Payment**

Requests for reimbursement must be submitted in accordance with DADS standard request for reimbursement process.

### **Reporting Requirements**

All AAAs receiving Housing Bond funds must submit a Housing Bond Fee Program Progress report (furnished by DADS). Each AAA's project is monitored by the Housing Bond Grant Coordinator using the quarterly report to ensure funds are spent according to the AAA's approved proposal. The grant period for the grant is aligned with the state fiscal biennium. Failure to report in a timely manner shall cause all funds to be withheld until the report is received and can result in a late report designation.

### **De-Obligation**

De-obligation of award will occur based on year-to-date expenses.

**TEXAS DEPARTMENT OF AGING AND DISABILITY SERVICES**

**HOUSING BOND FEE/RESIDENTIAL REPAIR GRANT  
FOR FISCAL YEAR 2008-2009**

**QUARTERLY PROGRAM PROGRESS REPORT**

<b>Date Report is Being Submitted:</b>	
<b>AAA Name:</b>	
<b>Name of Person Submitting Report:</b>	
<b>Grant Period:</b>	<input type="checkbox"/> 3/10/2008 through 8/31/2009 <input type="checkbox"/> Other _____
<b>Reporting Period: (check one)</b>	
The Reports for SFY 2008	
<input type="checkbox"/> Report for March 10, 2008 – May 30, 2008 due June 25.	
<input type="checkbox"/> Report for June 1, 2008 – August 31, 2008 due September 25.	
The reports for SFY 2009	
<input type="checkbox"/> Report for September 1, 2008 – November 30, 2008 due December 25.	
<input type="checkbox"/> Report for December 1, 2008 – February 28, 2009 due March 25.	
<input type="checkbox"/> Report for March 1, 2009 – May 30, 2009 due June 25.	
<input type="checkbox"/> Report for June 1, 2009 – August 31, 2009 due September 25.	
<b>Grant Award:</b>	
<b>Initial Award</b>	\$
<b>Additional Awards</b>	\$
<b>Required 25% Match</b>	\$
<b>Additional Match</b>	\$

**PLEASE COMPLETE THE INFORMATION REQUESTED BELOW  
FOR THE IDENTIFIED REPORTING PERIOD**

1. Attach a list of homes repaired/modified, type of repair or modification and cost per home. Each home may include multiple types of repairs. (see below for types of repairs)

**Home Repair Categories:**

**Accessibility:** Structural adaptations that meet the needs of clients with disabling condition(s).

**Safety:** Repairs/measures deemed necessary to prevent accidents, fires or intrusion into a dwelling and the repair, modifications, treatment or removal of safety hazards in the home or yard.

**Structural:** Any repairs to the Structure itself considered as necessary to the health and safety of the client.

**Weatherization:** Repairs, modifications or supply purchases that protect the home or the client from the effects of the weather, conserve energy or provide an alternative source to cool and heat the home.

2. Describe efforts to ensure individuals who meet targeting criteria are served. Targeting criteria includes older individuals living in rural areas, low-income minority and individuals who are of greatest social and economic need.
3. Describe how the AAA ensured that repairs/modifications were satisfactory to homeowners?
4. Did all repairs/modifications made during the reporting period adhere to 40 TAC 84.19(g) (1) through (8)?  
 YES  
 NO, if no EXPLAIN
5. List and describe the involvement of the not-for-profit and community organizations.
6. Describe the type of leverage/match either cash or in-kind and identify the sources providing the match.

7. In the chart below, provide the expenditures **incurred** during this reporting period and the amount of match/leverage accrued.

Amount of Grant Award	\$
Additional Grant Award (if applicable)	
<b>Expenditures Incurred for Reporting Period</b>	<b>\$</b>
25% Match Requirement for Grant Award	\$
25% Match Requirement for Additional Grant Award (if applicable)	
<b>Amount of Match/Leverage either cash or in-kind</b>	<b>\$</b>

## **Disaster Relief Grant**

### **Background**

The Department secures disaster relief funds from the Administration on Aging (AoA) to assist older Texas with recovering from a natural disaster such as a flood or tornado. Disaster relief funds are only available to an area of the state declared a disaster area by the President of the United States of America. Disaster relief funds may only be used in counties designated in the disaster declaration.

### **Funding**

The Area Agencies on Aging (AAA) in an affected area are notified by the Department of a disaster declaration and funding by AoA. The amount of funding available is based on three factors:

- (1) number of older persons affected
- (2) amount and severity of need
- (3) amount of disaster funds available

The AAA submits a proposal to the Department indicating the number of older persons affected the severity and the types of assistance needed and plans for how the AAA will use the funds. Once the department has secured the funds, the AAA will receive a memorandum and Notification of Funds Available indicating the amount of the award amount. Disaster relief funds can be used to provide *gap-filling services*: outreach, information and assistance, counseling, case management, advocacy on behalf of older persons unable or reluctant to speak for themselves, and staff overtime. Funds may be used for additional food, supplies, extra home delivered meals, home clean-up and safety, emergency medications, transportation and other such immediate needs. Disaster relief funding should only be used to provide services not reimbursable under other funding sources.

### **Request for Reimbursement**

Request for reimbursement (RfR) are approved by the Fiscal Coordinator. No narrative is required to request reimbursement of fund related to the grant.

### **Reporting Requirements**

AoA requires the Department to submit a report every six months related to the completion of activities to assist with disaster recovery. Therefore, a AAA is required to submit to the department a six month performance report. A final performance report must be submitted to the Department within 60 days of the close of the grant. Both reports must include the following information:

**Major actives and accomplishments:** Include client specific information; the names of the clients served, the services provided each client, and the amount of funding used for each client.

Listing of uncompleted projects: Include projected expenditures and planned completion dates.

**Problems or barriers encountered during the grant period:** Describe any problems that your agency incurred in utilizing these funds.