

AAA4 BULLETIN

TO: Legal Services Providers	NO: A4B2022-01
SUBJECT: New Data Requirements for Legal Service Providers	DATE ISSUED: January 13, 2022
REFERENCES: A4B 2021-03	SUPERSEDES: N/A
PROGRAMS AFFECTED: ☐ ALL ☒ Title III-B (Legal Only) ☐ Title III C-1 ☐ Title III C-2 ☐ Title III-D ☐ Title III-E ☐ HICAP ☐ OTO ☐ Other	
PURPOSE OF BULLETIN: ☒ Amend Policy or Procedure ☐ Clarification ☐ Information:	
FOR INQUIRIES CONTACT: AAA4's Data Team datacollection@agencyonaging4.org	

The purpose of this Bulletin is to document policy and procedural changes that have already been noticed and adopted pursuant to California Department of Aging (CDA) Program Memo 21-09 regarding an update to the federal Older Americans Act Performance System (OAAPS).

Effective July 1, 2021, the California Department of Aging now classifies Title III-B Legal Services as a "Restricted" service (rather than a Non-Registered service), and the State requires the reporting of client-level data (rather than aggregate data). The term Restricted means that Legal Services Providers will use unique client identification numbers so that the names of individual clients will remain confidential.

Legal Services Providers must collect and track client-level data for each case as listed below. Submission of the California Legal Services Quarterly Aggregate Report Form (CDA 1022) is no longer required.

Client Information:

Client Unique ID	Automatically generated by database or use an AAA4-approved method
Zip Code	Five-digit ZIP at the clients' physical address [#####]
Date of Birth	Two-digit month, two-digit day and four-digit year [mm/dd/yyyy]
Gender Identity	Male, Female, Transgender (Male to Female), Transgender (Female to Male), Genderqueer/Gener Non-binary or Other
Sex at Birth	Male or Female
Sexual Orientation	Straight/Heterosexual, Bisexual, Gay/Lesbian/Same Gender-Loving, Questioning/Unsure or Other
Race	White Black or African American American Indian/Alaskan Native <i>Asian Subcategories:</i> Asian Indian, Cambodian, Chinese, Filipino, Japanese, Korean, Laotian or Vietnamese <i>Pacific Islander Subcategories:</i> Guamanian, Hawaiian or Samoan

Client Information (continued):

Ethnicity	Hispanic/Latino or Not Hispanic/Latino
Living Arrangement	Not Alone or Lives Alone
Poverty Status	Above 100% of Federal Poverty Level or At or Below 100% of Federal Poverty Level

Case Information:

Case Unique ID	Automatically generated by database <u>or</u> use an AAA4-approved method
Client Unique ID	Automatically generated by database <u>or</u> use an AAA4-approved method
Case Open Date	Two-digit month, two-digit day and four-digit year [mm/dd/yyyy]
Case Closed Date	Two-digit month, two-digit day and four-digit year [mm/dd/yyyy]
Service Type	Income, Health Care, Long Term Care, Nutrition, Housing, Utilities, Abuse/Neglect, Protective Services, Age Discrimination or Other/Miscellaneous
Service Level	Advice, Limited Representation or Representation
Hours (Units)	Round to the nearest quarter of an hour [###.##]

Legal Services Providers funded by AAA4 must ask clients to provide the Client Information listed above; however, clients are not required to provide it in order to receive services. Hence “Decline to State” is also an acceptable response. All Case Information is required.

The data described in this Bulletin is be due to AAA4 on the 10th calendar day of each month. AAA4 Staff has been working with each Legal Services Provider to establish an appropriate method for data submission.

Any questions or concerns should be directed to AAA4’s Data Team.