

**CALIFORNIA DEPARTMENT OF AGING**

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**PROGRAM MEMO**

CDA 1014 (Rev. 02/14)

<b>TO: Area Agencies on Aging Directors</b>		<b>NO.: PM 14-14 (P)</b>	
<b>SUBJECT: Ombudsman Model Monitoring Tool for Long-Term Care Ombudsman Programs</b>		<b>DATE ISSUED: October 7, 2014</b>	
		<b>EXPIRES: When Superseded</b>	
<b>REFERENCES:</b>		<b>SUPERSEDES: PM 05-06 (P)</b>	
<b>PROGRAMS AFFECTED:</b>	<input type="checkbox"/> All <input checked="" 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 checked="" type="checkbox"/> Title VII <input type="checkbox"/> Title V <input type="checkbox"/> HICAP <input type="checkbox"/> Other:		

**Purpose**

This Program Memo (PM) transmits to Area Agencies on Aging (AAAs) the following updated forms that can be used when monitoring subcontracted local Long-Term Care Ombudsman Programs (LTCOPs):

- Model Monitoring Tool for Title III-B/Title VII-A Ombudsman Program (form OSLTCO S408)
- Document Checklist for AAA Contracted Ombudsman Program Monitoring Visit (form OSLTCO S411)

**Model  
Monitoring  
Tool**

The Model Monitoring Tool addresses the three components that AAAs should be including in their monitoring of the contracted local LTCOP:

- Program Management
- Fiscal and Administrative Support
- Data

The Model Monitoring Tool also contains a section for the AAA to record observations, recommendations, and required corrective action. The use of this particular tool is optional; however, AAAs must have some method of documenting their monitoring results.

**Document  
Checklist**

The AAA may use the Document Checklist to collect relevant background information to review prior to the on-site monitoring visit.

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**Revisions  
Made**

The Model Monitoring Tool and Document Checklist changes consist of:

- Updated citations to Federal and State laws, Area Plan contract terms and conditions, and Program Memoranda
- Elimination of questions that are no longer relevant to the LTCOP

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**Inquiries**

If you have questions about the Model Monitoring Tool or the Document Checklist, please contact Hester Klinesteker at [hester.klinesteker@aging.ca.gov](mailto:hester.klinesteker@aging.ca.gov) or (916) 419-7510.

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Lora Connolly  
Director