



## Updates to ADRC Quarterly Data Collection and Reporting Form (Form 7029) Instructions: A Summary

This summary provides additional guidance to Designated ADRCs for completing the ADRC Quarterly Data Collection and Reporting Form ([Form 7029](#)). The instruction sheet, [7029i](#), will be updated with the next release of the Quarterly Data Collection and Reporting Form.

### Reminders When Filling Out Form 7029:

- Enter numbers in all spaces if the partner provides services. If there is no data to report, enter “0.” Please do not leave fields blank.
- Mark “Do Not Collect” if data is not collected by a core or extended partner.
  - If there are multiple extended partners, and one or more collect a data element, but another partner (or partners) does not collect that data, report the data that is collected. (Do not mark “do not collect” in Extended Partner data where there is data that could be reported.)

### Service Function Data Collection:

The 2021 report requests additional data elements, some of which are defined in more detail on the table below. The table describes the service functions performed by ADRCs as defined in the [California ADRC Designation Criteria](#).

**Note:** Data element definitions are general terms most commonly used by ADRCs. Local ADRC partnerships may use different terms for some of the data elements. Report on the appropriate data that indicates the “Overall Plan” and “Steps to Complete the Plan.”

Service Function	Overall Plan	Steps to Complete the Plan
<b>Enhanced Information and Referral</b> ADRCs specialize in information from a broad perspective, referral	N/A	N/A

<b>Service Function</b>	<b>Overall Plan</b>	<b>Steps to Complete the Plan</b>
between a wide array of organizations, and public awareness of LTSS options.		
<p><b>Options Counseling</b> An interactive process where individuals receive guidance in their deliberations to make informed choices about long-term supports.</p>	<p><u>Total Action Plans Developed:</u> The total number of individual Action Plans developed. An Action Plan supports an individual in achieving their desired state of independence (i.e., normally one action plan for an individual)</p>	<p><u>Total Goals Developed:</u> The total number of goals developed to support an individual's Action Plan.</p>
<p><b>Short Term Service Coordination</b> Provide assistance to consumers who urgently need help with multiple services and programs, generally for 90 days or less, until a longer-term plan is in place. Note: in general terms, short-term service coordination includes three or more service referrals and coordination, along with follow-up.</p>	<p><u>Total Plans Developed:</u> A plan to help meet the needs of an individual in need of urgent service coordination. (i.e., normally one plan for an individual)</p>	<p><u>Total Actions Developed:</u> The total number of actions (steps) within the plan to meet the needs of an individual during an urgent situation.</p>
<p><b>Transition Services</b> One or more organizations in the ADRC network provides</p>	<p><u>Total Service Plans Developed:</u> The number of Transition Service Plans developed for individuals</p>	<p><u>Total Actions Developed:</u> The total number of action (steps) needed to support an individual's</p>

<b>Service Function</b>	<b>Overall Plan</b>	<b>Steps to Complete the Plan</b>
individualized Hospital-to-Home or Nursing Facility-to-Home transition services.	desiring to return to a community setting. (i.e., normally one plan for an individual).	Transition Service Plan for returning back into the community.