

DOCUMENT CHECKLIST FOR DIRECT SERVICE MONITORING VISIT

The Area Agency on Aging (AAA) shall provide to California Department of Aging (CDA) copies of the following documents two weeks before the monitoring visit:

- Completed Monitoring Tool for Ombudsman Program Service Providers (Title III-B/Title VII-A) and Elder Abuse Prevention Programs (Title VII-B)
- AAA Organizational Chart
- Ombudsman Program Organizational Chart
- Current Budget for the Ombudsman Program
- Roster of Ombudsman Program Staff that are included in the Ombudsman Program Budget
- Job Descriptions for Ombudsman Program Staff that are included in the Ombudsman Program Budget
- Conflict of Interest Policy
- Employee/Volunteer Grievance Procedure
- Consumer Grievance Procedure
- Memorandum of Understanding with Legal Services Provider
- Minutes from the last two Ombudsman Advisory Council meetings
- Roster of Current Ombudsman Advisory Council Members
- List of in-service training sessions conducted by the Program to meet recertification requirements during the past year, include dates and topics.
- Customer Satisfaction Survey – sample and results, if available
- Completed Core Elements Self-Assessment Tool
- Copies of Ombudsman Program publications, brochures, etc.