

DOCUMENT CHECKLIST FOR CONTRACTED SERVICE MONITORING VISIT

The Area Agency on Aging (AAA) shall provide to California Department of Aging (CDA) Office of the State Long-Term Care Ombudsman (OSLTCO) electronic copies of the following documents at least two weeks prior to the monitoring visit:

- Most Recent Request for Proposals including the completed proposal for the local Long-Term Care Ombudsman Program (LTCOP) and the Elder Abuse Prevention Program (if applicable)
- Existing AAA Contract for the local LTCOP and for the Elder Abuse Prevention Program (if contracted) - Include current fiscal year local LTCOP working budget determined by/with the Ombudsman Program Coordinator
- Most recent AAA monitoring report for the local LTCOP and for the Elder Abuse Prevention Program (if contracted)

The AAA shall obtain from the local LTCOP and provide to CDA OSLTCO the following documents at least two weeks prior to the monitoring visit:

- Completed Monitoring Tool for Ombudsman Program Service Providers (Title III-B/Title VII-A) and Elder Abuse Prevention Programs (Title VII-A, Chapter 3)
- Local LTCOP organizational chart, including paid staff (with FTEs) and volunteers
- Roster of local LTCOP staff who are included in the local LTCOP budget
- Job descriptions for local LTCOP staff and general job description for local LTCOP volunteers
- Grievance procedure for older individuals as required by the California Code of Regulations
- Grievance procedure(s) for employees, volunteers, and others
- Memorandum of Understanding with Legal Services Provider
- Roster of current local LTCOP Advisory Council or Board of Directors
- Minutes from the last two local LTCOP Advisory Council or Board of Directors meetings
- List of in-service training sessions provided or arranged by the local LTCOP during the past year to meet recertification requirements. Include dates, topics, and list of attendees
- Copies of local LTCOP publications, brochures, etc.
- Customer satisfaction survey – sample and results, if available
- Self-Assessment Tool (Core Elements or National Ombudsman Resource Center) if completed