



AAA Onsite Monitoring FAQs & Information

Preparing for Monitoring Onsite

How is the schedule for the Monitoring Onsite Visits Determined?

The monitoring onsite visits are scheduled during months that do not interfere with other fiscal processes and events. The Monitoring Coordinator works with the monitoring team to determine a listing of several available dates to provide to the AAA Executive Directors for their selection. The dates are available on a first come basis. Once the schedule is determined, the Monitoring Coordinator sends an email to the AAA Executive Director with a cc to applicable AAA staff and the IDA Assistant Director. See Monitoring Process Flowchart for detailed information.

How are the Area Agencies on Aging Made Aware of What is Needed?

The template email, located in the handouts, will be sent by the Monitoring Coordinator to AAA Executive Directors with a copy to applicable AAA staff and the IDA Assistant Director. The following logistical information will be included:

- How many Team Members will be coming and who they are;
- The need for a room(s) for the Team to set up;
- A private area for AAA staff interviews, if needed;
- Method for setting up home visits and meal site visits; and
- How records will be selected.
- IDA staff will break for a one hour lunch. Unfortunately, joining AAA staff for lunch during a monitoring visit is not allowed.

How is Inclement Weather Situations Handled?

In cases of inclement weather, the Team may decide to reschedule the onsite monitoring visit. Safety should always prevail.

What if a Team Members is Unable to Participate Due to Illness or an Unexpected Event?

The onsite monitoring visit proceeds as scheduled. The other Team members will complete as much of the monitoring tool for the absent Team member as possible. Once the Team member returns, he/she will contact the AAA schedule a time to complete any remaining items for the onsite.

Is There a Schedule and Timelines for the Monitoring Onsite Process?

Refer to the Monitoring Process Flowchart for steps and timeframes.

During Monitoring Onsite Visit

How long are the Monitoring Onsite Visits?

Typically one and a half days at the Area Agency on Aging

What Occurs During the Onsite Monitoring Visit?

- IDA Team arrives at 9:00 a.m. and sets up in designated area
- Initial entrance meeting between Monitoring Coordinator and AAA Executive Director or designee
- IDA Team members conduct the following:
 - Completion of the monitoring tools
 - Record reviews via random sampling
 - Interviews with AAA staff
 - Home visits / meal site visits, as applicable
- Exit interview occurs at the end of the onsite with the Executive Director, applicable AAA staff and IDA Monitoring Team.
- Team departs

Exit Interview:

During the exit interview, preliminary findings are provided with final comments following within 20 days after the onsite visit. The emphasis is to be placed on “preliminary” as additional follow-up and clarification may need to occur at the Department level.

The goal is for monitoring visits to be a positive experience for both IDA and for the AAA's. IDA's role is to ensure the AAA is in compliance AND successful.

Post Monitoring Onsite Visit

When and How are the AAAs Notified of the Monitoring Onsite Findings?

Within 20 business days of the monitoring onsite visit, the Monitoring Coordinator will email a letter with the findings to the AAA Executive Director, applicable AAA staff and the IDA Assistant Director. Included with the letter and findings will be a link to a survey for the AAA Executive Director and applicable AAA staff to complete. The survey asks the AAA to evaluate the monitoring onsite process in order to assess what went well and what needs improvement.