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**PROGRAM MEMO**

TO: <b>AREA AGENCIES ON AGING DIRECTORS</b>	NO.: <b>PM 08-10 (P)</b>
SUBJECT: Title III Legal Services Reporting	DATE ISSUED: March 10, 2008
REVISED: N/A	EXPIRES: July 1, 2011
REFERENCES: N/A	SUPERSEDES: N/A
PROGRAMS AFFECTED: <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 type="checkbox"/> Title V <input type="checkbox"/> CBSP <input type="checkbox"/> MSSP <input type="checkbox"/> Title VII <input type="checkbox"/> ADHC <input type="checkbox"/> HICAP <input type="checkbox"/> Other: _____	
REASON FOR PROGRAM MEMO: <input type="checkbox"/> Change in Law or Regulation <input type="checkbox"/> Response to Inquiry <input checked="" type="checkbox"/> Other Specify: <u>New State Reporting Requirements</u>	
INQUIRIES SHOULD BE DIRECTED TO: Chisorom Okwuosa, Senior Staff Counsel, (916) 419-7500 or <a href="mailto:cokwuosa@aging.ca.gov">cokwuosa@aging.ca.gov</a> .	

This Program Memo is to notify Area Agencies on Aging (AAA) and Title III Legal Services providers (LSP) that effective **July 1, 2008**, all AAAs and LSPs will be required to comply with the California Legal Services Uniform Reporting System (URS), developed by the California Department of Aging (CDA) in December 2007. Each AAA is required under the URS to submit quarterly reports on legal services to CDA.

The URS consists of the following:

1. Intake Form – CDA Form 1021
2. Quarterly Aggregate Report Form – CDA Form 1022
3. Instructions and Definitions

The Intake Form (CDA 1021) was designed as an internal tool to assist LSPs to collect data about each client. Each LSP may adapt the Intake Form to suit its data collection system, provided the same data is collected. This form should not be submitted to CDA.

The Quarterly Aggregate Report Form (CDA 1022) was designed to capture information about the LSP, AAA, Legal Services client characteristics, and types and levels of Legal Services provided to older Californians under Title III-B. LSPs must complete and submit this form to their respective AAAs. AAAs must submit the report on a quarterly basis to CDA using CDA Form 1022.

The Instructions and Definitions document was designed to provide guidance on how to complete the forms. Carefully review this document prior to completing the forms.

These documents are available on the CDA web site ([www.aging.ca.gov](http://www.aging.ca.gov)). To access these materials, select the "AAA" tab at the top of the Home Page, then select "Data," then select "Reporting Instructions and Forms," then select "California Legal Services," then select "Title III - Legal Services."

## **Background**

In 2005, CDA formed a workgroup consisting of four AAAs, six LSPs, two CDA staff, and two facilitators from The Center for Social Gerontology to develop the URS for Title III-B providers in California. By December 2006, the workgroup had developed the URS. In January 2007, CDA began a one-year pilot project with four AAAs and four LSPs for the purpose of testing the system. The pilot project ended December 2007. In January 2008, the California Association for Area Agencies on Aging endorsed the URS for implementation.

The goal of the URS is to provide an uncomplicated system to collect meaningful, statewide information that will help build support for, and increase understanding of, the importance of legal services to older Californians. Further, it will help assess whether limited Title III-B Legal Services are being effectively targeted to those in greatest need, as required in the Older Americans Act.

## **Management Information System Automation**

CDA recognizes that some AAAs and service providers may need to invest in automated management information system changes to accommodate the new reporting formats. The period between this notice and the implementation of the new forms on July 1, 2008, is intended to allow time for making these changes. AAAs may use One-Time-Only Title III-B funds for costs associated with changes to automated systems and for ongoing systems maintenance.

AAA and legal services provider cooperation in developing and implementing the URS is greatly appreciated.



Lynn Daucher  
Director

Attachments