

CALIFORNIA DEPARTMENT OF AGING

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**PROGRAM MEMO**

TO: Area Agencies on Aging

NO.: PM 20-19

SUBJECT: Financial Alignment (FA) Contract FA-2021, Budget and Reporting Information

DATE ISSUED: September 29, 2020

EXPIRES: October 31, 2021

SUPERSEDES: N/A

PROGRAMS AFFECTED: Financial Alignment (FA)

Purpose:

This Program Memo (PM) provides funding information and specifies reporting requirements for your Financial Alignment (FA) Contract FA-2021.

Please refer to your original email (Contract Release Notification) for all contract-related documents, including Budget Displays and the Local Assistance Checklist (CDA 9007A). These documents are no longer available on the Area Agencies on Aging (AAA) page of the California Department of Aging's (CDA) website.

Funding:

Funding for the FA program comes from the Centers for Medicare & Medicaid Services grant funds to provide one-on-one counseling support and information on health coverage options to beneficiaries who are dually eligible to receive services through both Medicare and Medicaid, and eligible for California's FA model demonstration (Cal MediConnect).

The total FA contract funding amount is estimated to be \$450,000. Local assistance funds are allocated based on a 50/50 split. 50 percent of the \$450,000 is allocated equally to the eight AAAs. The remaining 50 percent of the \$450,000 is allocated using the dual eligible beneficiary factors obtained from the Department of Health Care Services.

The contract funding will be adjusted as necessary through a contract amendment as actual funding information becomes available.

Request for Funds and Expenditure Reports:

CDA will not process payments for the FA 2021 grant until the AAA's original FA Budget (CDA 229FA) and Work Plan (CDA 7001) is approved and the Contract is fully executed.

Please use the FA Request for Funds (CDA 245FA) form to request funds and the FA Expenditure Report (CDA 255FA) form to report monthly expenditures. Refer to the FA Request for Funds Instructions (CDA 245FAi) and the FA Expenditure Report Instructions (CDA 255FAi) for guidance. These forms can be found under the FA Documents section of the [Fiscal Forms and Documents](#) page on CDA's website.

Deadlines:

AAAs must submit the FA Budget (CDA 229FA) and Work Plan (CDA 7001) as soon as possible, but no later than 30 days from the date of this PM. Additionally, all other contract-related documents identified in the Local Assistance Contract Checklist (CDA 9007A) must be returned as soon as possible but no later than the contract start date.

Monthly Expenditure Reports are due at the end of each following month. Expenditure time periods and closeout deadlines are footnoted on the Budget Display within Exhibit B of the contract.

Contract Language Updates:

The Contract Summary of Changes (SOC) can no longer be found on CDA's website. Please find the SOC, with all contract language updates included in the FA-2021 contract, attached to the Contract Release Notification email.

Inquiries:

For programmatic and data inquiries, email: cda.hicapanalysts.group@aging.ca.gov

For program fiscal inquiries, email: FiscalTeam@aging.ca.gov.

For payment inquiries, email: CDA.Accounting@aging.ca.gov.

____ Irene Walela _____
Irene Walela
Long-Term Care and Aging Services, Deputy Director