

Instructions for Completing CDA 7001Mi

BACKGROUND INFORMATION

The Fiscal Year 2023-24 Medicare Improvements for Patients and Providers Act (MIPPA) Work Plan should outline major objectives, key tasks, success criteria, and time frames (start and end dates) to accomplish the CDA prescribed MIPPA Work Plan Goals and project activities outlined in the contract Scope of Work.

The MIPPA Contract provides AAAs with up to three MIPPA Priority Area funding sources to achieve the MIPPA Work Plan Goals. The MIPPA Work Plan should delineate how each of the three Priority Area allocations are used to coordinate efforts and resources to achieve the MIPPA Work Plan goals. The goals for each of the Priority Areas may differ slightly. Refer to the table below when completing each Priority Area section of the Work Plan.

Additional Information	Priority Area 1 (SHIP) Work Plan Section	Priority Area 2 (AAA) Work Plan Section	Priority Area 3 (ADRC) Work Plan Section
Work Plan Purpose	Work Plan outlines service provider strategies to accomplish MIPPA Goals in the designated service area(s) using MIPPA Priority Area 1 allocations.	Work Plan outlines service provider strategies to accomplish MIPPA Goals in the designated service area(s) using MIPPA Priority Area 2 allocations.	Work Plan outlines service provider strategies to accomplish MIPPA Goals in the designated service area(s) using MIPPA Priority Area 3 allocations.
Work Plan Section Instructions	All MIPPA contracted Area Agencies on Aging (AAAs) to complete.	All MIPPA contracted AAAs to complete.	Only applies to MIPPA contracted AAAs that receive MIPPA Priority Area 3 (ADRC) allocation.
MIPPA Service Area(s)	Designated HICAP Planning and Service Area(s) (PSAs). For AAAs with multi-PSA HICAPs, MIPPA Service Area includes all designated HICAP PSAs.	Designated AAA PSA. For AAAs with multi-PSA HICAPs, Priority Area 2 MIPPA Service Area includes all PSAs covered by HICAP Service Provider.	Designated Aging and Disability Resource Connection (ADRC) Service Area(s).

Additional Information	Priority Area 1 (SHIP) Work Plan Section	Priority Area 2 (AAA) Work Plan Section	Priority Area 3 (ADRC) Work Plan Section
Work Plan Goals	<ol style="list-style-type: none"> 1. Expand outreach services, both in-person and virtual, to reach Medicare beneficiaries with limited income and assets who may qualify for the Low-Income Subsidy (LIS) and/or the Medicare Savings Program (MSP). 2. Provide one-on-one application and/or enrollment assistance for Medicare beneficiaries, focusing on those eligible for LIS and MSP. 3. Provide outreach to the community about Medicare Preventive Benefits and Supplemental Benefits. 4. Develop new and/or innovative partnerships, or enhance existing partnerships, to increase the number of hard-to-reach beneficiaries receiving LIS and MSP information and/or assistance. 	<ol style="list-style-type: none"> 1. Expand outreach services, both in-person and virtual, to reach Medicare beneficiaries with limited income and assets who may qualify for the Low-Income Subsidy (LIS) and/or the Medicare Savings Program (MSP). 2. Provide one-on-one application and/or enrollment assistance for Medicare beneficiaries, focusing on those eligible for LIS and MSP. 3. Provide outreach to the community about Medicare Preventive Benefits and Supplemental Benefits. 4. Develop new and/or innovative partnerships, or enhance existing partnerships, to increase the number of hard-to-reach beneficiaries receiving LIS and MSP information and/or assistance. 	<ol style="list-style-type: none"> 1. Expand outreach services, both in-person and virtual, to reach Medicare beneficiaries with limited income and assets who may qualify for the Low-Income Subsidy (LIS) and/or the Medicare Savings Program (MSP). 2. Provide outreach to the community about Medicare Preventive Benefits and Supplemental Benefits. 3. Develop new and/or innovative partnerships, or enhance existing partnerships, to increase the number of hard-to-reach beneficiaries receiving LIS and MSP information and/or assistance.

WORK PLAN DEFINITIONS

Goal(s) – CDA has prescribed goals for the MIPPA Work Plan. These goals are aligned to the grant activities outlined in the application.

Objectives – Service provider (direct or subcontracted) strategies to accomplish the prescribed MIPPA Goal(s).

Key Tasks – List of high-level steps needed to complete the stated objective.

Success Criteria – Measurable outcomes for determining the success of each objective.

Responsible Position(s) – Identify the individuals responsible for management/oversight of key tasks, either Contractor Staff (e.g., AAA staff if providing direct MIPPA service), or Sub-contractor Staff (e.g., HICAP subcontractor staff if providing subcontracted MIPPA service).

Start Date – Date in format MM/DD/YYYY. Date for when work is expected to commence. Cannot be earlier than CDA contract start date.

End Date – Date in format MM/DD/YYYY. Date for when work is expected to be finished. Cannot be later than CDA contract end date.

HOW TO COMPLETE HEADER SECTION

Enter the following information:

- Contractor Agency name as it appears on the Standard Agreement (STD 213)
- Date the report is being submitted
- Current Fiscal Year
- Contract Number: (i.e., MI-2324-34)
 - MI
 - Fiscal Year
 - AAA's PSA number

HOW TO COMPLETE CATEGORY SECTION

Fields will increase in size, down the page, as you type.

Additional Objective fields may be added by highlighting the blank row and inserting a row above or below.

SAMPLE GOAL AND OBJECTIVE

Goal #2: Provide enhanced one-on-one application assistance for Medicare beneficiaries eligible for the LIS and MSP programs.

#	Objectives	Key Tasks	Success Criteria	Responsible Position	Start Date	End Date
1.	Enhance counselor competency in screening for and reviewing all options to lower Medicare costs for beneficiaries.	<ul style="list-style-type: none">a. Conduct at least one counselor training that focuses on interviewing skills.b. Conduct at least three In-Service or supplemental trainings specific to the LIS and MSP benefits and application.	Increased counseling services related to LIS and MSP.	HICAP Manager	09/01/2023	08/31/2024

WORK PLAN UPDATE

Unexpended MIPPA funds at the end of the project period will trigger an Amendment to the original contract, allowing Contractors additional time to complete MIPPA activities using those unexpended funds. This is known as a No Cost Extension (NCE) and requires an update to the approved MIPPA Work Plan. The update to the MIPPA work plan must highlight MIPPA activities that will be completed using the unexpended funds. The MIPPA activities to be completed will be handed down by CDA after approval from ACL.

SUBMISSION

The completed 7001M must be sent as an e-mail attachment to the CDA HICAP Team Email Address: cda.hicap.team@aging.ca.gov and is due by the date identified in the Program Memo.

CDA USE ONLY SECTION

CDA 7001M contains a CDA Use Only section. The CDA HICAP Bureau will complete this section following CDA's approval of the AAA's MIPPA Work Plan.