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PROGRAM MEMO

TO: Area Agencies on Aging (AAA)**EXPIRES:** Until Superseded or Rescinded**NO:** 21-08**PROGRAMS AFFECTED:** FFCRA, CARES, CAA, ARP and OAA Funding**DATE ISSUED:** June 23, 2021**SUPERSEDES:** N/A

SUBJECT: CHAT Project: Guidance for the purchase and distribution of tablet computers to older adults and caregivers through the Connections, Health, Aging and Technology (CHAT) project funded by the Families First Coronavirus Response Act (FFCRA), Coronavirus Aid, Relief and Economic Security Act (CARES) Act, Consolidated Appropriations Act (CAA), the American Rescue Plan Act (ARP), and Older Americans Act, collectively referred to as Older Americans Act (OAA) funding in the following Program Memo.

Purpose

This revised Program Memo (PM) provides information and requirements for purchasing of CHAT project tablet computers for older adults and caregivers who are participating in Older Americans Act (OAA) programs, to respond to COVID-19's impact on social isolation and well-being and to help bridge the digital divide for older adults and caregivers.

Program Requirements for Tablet Computers through the CHAT Project

This Program Memo, and the five (5) appendices, provide the listed guidance for using OAA funding to purchase CHAT tablet computers.

- APPENDIX A: Purchasing instructions and data/expenditure reporting.
- APPENDIX B: Update Participant eligibility and distribution
- APPENDIX C: Asset management
- APPENDIX D: Approved allocation methodology for AAAs
- APPENDIX E: Cost for local CHAT table computer purchase(s) from AT&T

Federal Guidance on Tablet Computers in Response to COVID-19

In response to COVID-19 and an increased effort to reduce social isolation, the Administration on Community Living (ACL) is allowing the purchase and distribution of CHAT tablet computers under the Major Disaster Declaration. The service definition is a device provided to a participant or informal caregiver for use in their home to maintain safety, allow for socialization, and/or promote participation in activities, resulting in decreased isolation. The service unit is one device. Please see the data expenditure/reporting section in Appendix A for more details.

Background on Bridging the Digital Divide Projects

On August 14, 2020, Governor Newsom issued Executive Order (EO) N-73-20 to improve broadband speed and access in California, including improving download speeds for all Californians and to bridge the digital divide for two million Californians who lack broadband access. The EO specifies older adults as a priority population.

The California Department of Aging (CDA) has been working collaboratively with a workgroup of Area Agency on Aging (AAA) directors, the California Department of Technology, and other stakeholders on strategies to bridge the digital divide, and address social isolation for older Californians, people with disabilities, and caregivers. This includes forming public/private partnerships to identify opportunities for donations from private companies and leverage federal CARES Act funding to purchase devices and data plans for AAA program participants. CDA recently partnered with Google to distribute 8,573 donated Google Home Smart Speakers to participants in the OAA programs and the Multi-Purpose Senior Services Program across the state.

This revised Program Memo addresses the current CDA project, CHAT, to distribute at least 4,000 iPads with data plans and customized onboarding and technical support to older Californians. The purpose of this project is to mitigate loneliness and isolation for older adults, providing them with greater access to resources and information. For this project, CDA also partnered with the University of Southern California's Graduate School of Gerontology to develop tools that will evaluate the effectiveness of digital devices in reducing social isolation for device recipients. The AAA's have the option of using CARES Act funding to hire additional staff for deployment of these survey tools,

In alignment with the OAA programs, all individuals 60 years of age and older, and family caregivers are eligible to receive a CHAT, and priority should be given to low-income older individuals, who are Black, Indigenous and people of color with the greatest economic and social need (OAA Section 206). This approach also reflects the equity focus of the Master Plan on Aging.

CDA has additional projects planned for 2021 to bridge the digital divide, including seeking opportunities for additional device donations, partnering with government, foundations, and non-profits to expand access/services, and identifying areas in the state where older adults lack broadband coverage or access to high-speed broadband to help close the digital divide.

Please refer to CDA's Digital Divide page (https://www.aging.ca.gov/covid19/Digital_Divide/) for updates on these projects as well as continued opportunities for training and technical assistance.

Revision Summary

The AAA's have the option of using CARES Act funding to hire additional staff for deployment of the survey tools.

In alignment with OAA programs, all individuals 60 years of age or older and family caregivers are eligible to receive a CHAT, and priority should be given to low-income older individuals, who are Black, Indigenous and people of color with the greatest economic and social need (OAA Section 206). This approach also reflects the equity focus of the Master Plan on Aging.

The monthly income amount has been removed from the eligibility criteria for CHAT tablet computer.

The question asking the recipients their origin of birth place has been removed from the surveys.

Inquiries

For questions regarding the implementation and administration of CHAT expenditures email:

CHAT@aging.ca.gov

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Appendix A – Purchasing and data/expenditure reporting for Connections, Health, Aging and Technology (CHAT) project

Purchasing CHAT

OAA funding can be used to purchase CHAT tablet computers; however, the contractor or subcontractor must track inventory and maintain internal policies and procedures to ensure compliance with the State's asset management requirements. Appendix A covers three (3) options for purchasing tablet computers.

OPTION 1: CDA purchased CHAT tablets

CDA has purchased 4,000 tablets from AT&T, with CARES Act set-aside funding. The AAAs are eligible to receive their allocation of the AT&T tablets based on the approved allocation methodology attached in Appendix D.

- AAAs submit orders, in accordance with the allocations listed in Appendix D, via the AT&T Purchase Form to AT&T (attached below) and a copy to Rebecca.Hinkson@aging.ca.gov



AT&T Purchase
Form Template.xlsx

- *No pre-approval is necessary.*
- *No payment from the AAA is necessary.*
- CDA's Business Management Branch (BMB) will provide AT&T with CDA Asset Tags, and AT&T will affix CDA Asset Tags to each iPad prior to shipping them to AAAs.
- Upon fulfillment of an AAA's order, AT&T will email a spreadsheet for each AAA to CDA's Rebecca.Hinkson@aging.ca.gov that includes the following information for each device supplied as part of the AAA's order:
 - Date order received from AAA and date AT&T fulfilled the order.
 - AAA Contact Name and Address
 - Master Tracking Number
 - ICCID
 - Device Serial Number
 - CDA Asset Tag Number
 - Mobile Number associated with the device.
- All devices in the approved allocation must be ordered by AAAs by 06/30/2021.
- CDA's Rebecca Hinkson (Rebecca.Hinkson@aging.ca.gov) will coordinate delivery of devices with the AAAs and AT&T to ensure AAA staff is available to accept shipment of the devices.
- Once devices are received by the AAA as ordered, AAAs will work with CDA's Rebecca Hinkson (Rebecca.hinkson@aging.ca.gov) to ensure items received match items ordered by comparing physical items to packing slip.
 - AAAs must sign packing slip, scan, and email to CDA's Rebecca.hinkson@aging.ca.gov once reconciled within 5 business days of receiving devices.
 - AAAs must communicate any inconsistencies with physical items received and packing slips to CDA's Rebecca.hinkson@aging.ca.gov immediately (e.g., received too few items, too many, not the correct item, etc.).

OPTION 2: AAA purchase of CHAT tablets from AT&T with local OAA funding

AAAs can purchase additional tablets above their allocation *using local OAA funds and pay AT&T directly for the additional tablets*. AAAs should follow normal Area Plan (AP) procurement processes (i.e., follow their own local procurement process and rules to create a purchase order for the devices and the cases), as well as the following:

- *No preapproval necessary.*
- AAAs submit orders via AT&T Purchase Form to AT&T, with a copy to Rebecca.hinkson@aging.ca.gov



AT&T Purchase
Form Template.xlsx

- CDA's Rebecca Hinkson (Rebecca.hinkson@aging.ca.gov) will work with AT&T to ensure that a CDA Asset Tag is affixed to each iPad prior to device shipment.
- AAAs must submit a Form 20 (<https://cdt.ca.gov/how-do-i-order-telecommunications-products-and-services-from-the-calnet-master-contract/>) for the procurement of services (monthly data plan, etc.) and submit to AT&T with a copy to Rebecca.Hinkson@aging.ca.gov
- CDA's Rebecca Hinkson (Rebecca.Hinkson@aging.ca.gov) will coordinate delivery of devices with AAA and AT&T to ensure AAA staff is available to receive devices.
- Once devices are received, in accordance with the AAAs order, AAAs will work with CDA's Rebecca Hinkson (Rebecca.Hinkson@aging.ca.gov) to ensure items received match items ordered by comparing physical items to packing slip and confirm info to CDA.
 - Once reconciled, within 5 business days of receiving devices, the AAA's must communicate any inconsistencies with physical items received and packing slips to CDA (e.g., received too few items, too many, not the correct item, etc.).
- AAAs will follow standard AP asset management processes and reporting to CDA.

OPTION 3: AAA purchase of tablet computers from local vendor(s) with local OAA funding

AAAs can purchase tablets from local vendors with local assistance funds. **Pre-approval from CDA will be required** prior to contractors and/or subcontractors purchasing the tablet computer with OAA funds from local vendors. AAAs must submit a the CDA 7022 to CHAT@aging.ca.gov. CDA will conduct a review and provide approval or request additional information within five days.

When purchasing the tablet computer from a local vendor for distribution to program participants and/or informal caregivers, the AAA, contractors and/or subcontractors must follow their local purchasing procedures and CDA tagging and tracking procedures.

When purchasing the tablet computer from a local vendor, the AAA, contractors and/or subcontractors, **must track the service unit data separately to provide to CDA**. The CARS system does not include this service unit category.

Tablets purchased from local vendors with local assistance funds are not included in the CHAT procedures, USC readiness survey and USC pre/post evaluations.

Data/Expenditure Reporting

As mentioned in PM 20-13, service data and expenses for CARES Act funding should not be tracked in/for the NAPIS/SPR systems. The ACL, which provides federal oversight of this funding, has requested that AAAs and providers track the data and expenditures separately, “**at a minimum and where possible. States should be recording the number of clients to whom service is provided, the name or category of services provided, the number of units of service provided, and the expenditures related to providing such services.**”

[PM 20-13: The Coronavirus Aid, Relief, and Economic Security \(CARES\) Act Funding, Planning, Information, and Updates on Continued Federal Spending Flexibilities](#)

As outlined in PM 20-22 – Reporting Guidance for SPR data for Area Plan, OAA, FFCRA and Cares Act funding for FFY 2020, the FFCRA/CARES Act expenditures and data (service units) must be tracked and reported in the AAA’s supplementary data report. AAAs must submit monthly FRCRA and CARES expenditure and service data reports to CDA. Expenditure reporting must include a data and expenditure report for the CHAT category. It is the responsibility of the AAA to track and monitor the actual number of persons served, the number of CHAT devices distributed, and FFCRA, CARES Act and/or OAA funding spent on this service.

ACL Approved Service Categories by fund source are listed below:

IIIB Supportive Services

Service Category	Service Definition	Unit Measure
Connections, Health, Aging and Technology (CHAT)	CHAT provided for use by an older adult in their home to maintain safety, allow for socialization, and/or promote participation in activities from the older adult’s home	One device

IIIE - FCSP Caregivers Caring for Elderly

Service Category	Service Definition	Unit Measure
Connections, Health, Aging and Technology (CHAT)	CHAT provided for use by caregiver in their home to maintain safety, allow for socialization, and/or promote participation in activities from the older adult’s home	One device

IIIE- FCSP Caregivers Caring for Grandchildren

Service Category	Service Definition	Unit Measure
Connections, Health, Aging and Technology (CHAT)	CHAT provided for use by caregiver in their home to maintain safety, allow for socialization, and/or promote participation in activities from the older adult’s home	One device

APPENDIX B- Eligibility criteria and distribution of CHAT

Eligibility criteria for CHAT tablet computer

To qualify for a CHAT tablet computer, low-income older adults or informal caregivers must:

- Be 60 years of age and older, or an informal caregiver of an older adult or adult with disability.
- Live alone
- Participate in the University of Southern California (USC) Readiness Survey and meet readiness criteria.
- Agree to complete the USC Pre and Post Evaluation Surveys.

Policy and Procedure for Distribution of CHAT tablet computer

Each AAA must develop a policy and procedure for the distribution of CHAT devices to eligible participants and/or informal caregivers.

The contractor/subcontractor's assignment and distribution procedure must include the following:

- Create a unique participant identification (ID) tracking number for participants being screened for distribution of CHAT devices to include:
 - Two-digit PSA #
 - Participant Identification Number from client database
 - Two-digit month readiness survey is conducted.
 - Two-digit year readiness survey is conducted.
 - **Example: In PSA 18, USC Readiness Survey is completed January 2021 with participant 12345; the unique ID is 18-12345-01-21**

The Contractor/subcontractor shall use the Survey Monkey links below or the attached PDF documents to complete the three (3) USC Surveys to determine eligibility and readiness to participate in the program, and to collect evidence-based data regarding impact of the CHAT program.

- The Digital Readiness Survey to determine eligibility:
<https://www.surveymonkey.com/r/USC62021Ready>
- If eligible, conduct the Pre-Evaluation Survey prior to issuing a CHAT tablet computer:
<https://www.surveymonkey.com/r/USC62021Pre>
- Six months after providing the CHAT tablet computer, conduct the Post-Evaluation Survey:
<https://www.surveymonkey.com/r/USC6021Post>

Appendix C – CHAT Asset Management

As outlined in PM 20-05, as well as the federal and state requirements detailed below, all computing devices, regardless of cost (including, but not limited to: workstations, servers, laptops, personal digital assistants, notebook computers, tablets, smartphones, and cellphones) and all portable electronic storage media, regardless of cost must be tagged and tracked according to these instructions.

Tracking/Inventory

The Contractor shall keep track of CHAT devices are purchased with OAA funding and submit to CDA the CDA 7023 to the CHAT@aging.ca.gov for CHAT devices purchased by either the Contractor or the Subcontractor. The Contractor shall certify their reported CHAT inventory at Closeout (PM 20-13 and PM 20-08) by completing the Program Property Inventory Certification (CDA 9024)

At a minimum, record of the following information must be maintained:

1. Date acquired.
2. Item description (including model number)
3. CDA tag number
4. Serial number (if applicable)
5. Purchase cost or other basis of valuation
6. Fund source

Disposal of Property

1. Approval from CDA shall be obtained prior to the disposal of any property purchased by the Contractor or the Subcontractor.
2. All confidential, sensitive, or personal information must be removed prior to disposal. Including removal or destruction of data on computing devices with digital memory and storage capacity. This includes, but is not limited to tablets, magnetic tapes, flash drives, personal computers, personal digital assistance, cell or smart phones, multi-function printers, and laptops.
3. The Contractor shall submit to CDA a Request to Dispose of Property (CDA 248). CDA will then instruct the AAA on disposition of the property. Once approval for disposal has been received from CDA and the AAA has reported to CDA the Property Survey Report's (STD 152) Certification of Disposition, the item(s) shall be removed from the Contractor's inventory report.

Previously Purchased CHAT

If equipment was purchased prior to the release of this guidance, Contractors must notify the CDA at CHAT@aging.ca.gov and submit a FFCRA/CARES/OAA Purchase Request (CDA 7022).

Federal requirements:

CARES/FFCRA ACL Guidance re: purchase of tablets

ACL COVID-19 Response, Older Americans Act COVID-19 Guidance

https://acl.gov/sites/default/files/common/Posted%20-%20COVID-19%20AoA_Guidance%20Collections%20from%20ACL%20website_Final%206-23-2020.pdf (page 12 of 137)

Code of Federal Regs (CFR) §200.313 Equipment, (d) Management Requirements, (1)-(5) & (e)

Disposition, (1)-(4)

<https://www.ecfr.gov/cgi->

[bin/retrieveECFR?gp=1&SID=8f651719b098312908bc34207f0b9b97&ty=HTML&h=L&mc=true&n=pt2.1.200&r=PART#se2.1.200_1313](https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=1&SID=8f651719b098312908bc34207f0b9b97&ty=HTML&h=L&mc=true&n=pt2.1.200&r=PART#se2.1.200_1313)

State requirements:

<https://www.dgs.ca.gov/Resources/SAM/TOC/8600/8650-3> - Sensitive Non-Capitalized Property

<https://www.dgs.ca.gov/Resources/SAM/TOC/8600/8651> - Identification and Tagging.

<https://www.dgs.ca.gov/Resources/SAM/TOC/8600/8650-2> - Recording Property Details

APPENDIX D: CHAT ALLOCATION METHODOLOGY



Device Allocations
6.23.21pg1.pdf



Device Allocations
6.23.21pg2.pdf

APPENDIX E: COST BREAKDOWN FOR CHAT DEVICES and SERVICE BUNDLE PURCHASED FROM AT&T



ATT Price
Estimate.pdf