

**Attachment K**  
**CAARS\Client\Verified\Plan Reports 2014**  
*(Reports available on NYSOFA Report Viewer are Underlined.)*

**Quarterly Units of Service Report (11)** – There is a one page report for each county and a one page statewide report. Reported units of service are compared to units of service projected in the AIP to determine if the units reported are a reasonable percent of those projected for the time period.

**Error Checks (30)** – Checks data by period for errors involving fiscal data (CAARS quarterly report).

**Title V Expenditure Report (31)** – A one page report listing all counties and showing Totals for Federal expenditures, Admin. Enrollee Wages and Other Costs.

**Summary of Expenditures (32A)** - Expenditure information by service and funding stream. There is a one page report for each county and a one page Statewide.

**Comparison of Expenditures and Revenues (32B)** - An individual three page report for each funding stream showing all counties.

**Summary of Expenditures (32C)** - Expenditure information by service and funding stream. There is a one page report for each county which provides percent of projected expended and a one page Statewide.

**EISEP Status Report (33)** – This three page report shows EISEP data for units, expenditures, persons served, etc.

**Quarterly Meal Units Report (35A)** – This is a two page report for congregate meals which compares two quarters and shows percent of change.

**Quarterly Meal Cost Report (35B)** – This two page report lists area agencies by size. Unit cost for Home Delivered Meals and Congregate meals are calculated by dividing the total expenditures by total units.

**QUARTERLY STATUS REPORT - Demographic Information (36A)** - This is a one page report for each county. A statewide report is also available. This report shows the total persons served by program and in total and includes projections and actual and counts for ethnic\racial characteristics.

**Quarterly Status Report (36B)** (Expenditure information page 2) Note: Expenditure information is generated from the grants database and is for the program quarter which is noted below the funding source.

**Units and Expenditures (39A)** – This one page report summarizes unit cost by funding stream for Transportation, Personal Care Level II, Personal Care Level I, Home Delivered Meals, Congregate Meals, Case Management and Adult Day Services. The report helps readers to determine if units of service reasonably are spread across funding streams.

**Quarterly Summary of Unit Costs (39B)** – This report is the same as above but shows data by funding source.

**Comparison of Costs Per Unit Budgeted vs. Reported (39C)** - Report compares AIP data to reported CAARS data and shows the percent of variance. Required action is also indicated.

**Budgeted vs. Actual Title V Expenditures (41)** – by quarter showing total for year and percent of actual budgeted.

**Title III-E Summary Report (42)** – Report provides information on Caregivers and the services they receive.

**Cost Per Service/Client (43)** - Report provides an overall picture of number of clients, units and expenditures for each service with an average cost per unit and client.

**Total Served Comparison Report (44)** – Allows user to compare multiple years.

**Estimated Allocations (61)** - Information is gathered for this report from the resource allocation pages of the plan (this information may be revised by budget mod or letter to ASR). This information is used on the CAARS 11, 33 and 36 reports to compare projected versus reported data.

**Reported and Actual Expenditures (81)** - Available after budget closeout and compares CAARS expenditures to voucher data showing details by county.

### **Verified Data Reports**

Two Year Client Count Comparison (36D) – this one page report shows number of people served for selected programs and services. The report uses verified data and allows users to make two year count comparison.

Two Year Service Data Comparison (36E) – this one page report have people, units, expenditures data for major aging network services. The report uses verified data and allows users to make two year count comparison.

Verified NSIP Congregate Meals (35A) - The report used verified congregate meals data, compares two quarters, shows percent of change between quarters, and yearend total.

Verified NSIP Home Delivered Meals (35A) - The report used verified home delivered meals data, compares two quarters, shows percent of change between quarters, and yearend total.

Verified Title III-E Summary (42) – Report uses IIIE verified counts, provides information on Caregivers and the services they receive.

Verified Cost Per Service/Client (43) - Report uses verified Client Unit counts, provides an overall picture of number of clients, units and expenditures for each service with an average cost per unit and client.

### **Client Data Reports**

**Client Unit Data Comparison Report** – (ClientDataVsVerifiedData) – Compares reported data for persons served and units provided with yearend AAA submitted verification. Allows users to see what is actually reported and compare it to the totals they have verified.

**NAPIS Data Review** – This report shows the total number of persons served by service. It also shows for the registered services the percent of data missing for selected required fields.

**Title IIIE Client Unit Comparison Report** – Compare IIIE reported data for persons served and units provided with AAA year end submitted verified data. Allow users to see what is actually reported and compare it to the numbers they have verified.

**Missing Caregiver Relationships** – **Title IIIE group 1 clients** are required to report Relationship data. Some clients have IIIE group 1 service records but do not have relationship record reported to us. This report is to identify IIIE group 1 client recordkey with missing relationship record.

**Missing ADL/IADL Records** – this type of missing occurs when **clients received cluster 1** services but do not report ADL IADL record. This report is for identifying client recordkey with this type of missing.

**Missing Characteristics Records** – the missing occurs when **clients received cluster 1** services but do not have health characteristics record reported. This report is to identify client recordkey with this type of missing.

**Missing Health Events Records** – this type of missing occurs when **clients received cluster 1** services but do not report Health Events record. This report is to identify client recordkey with this type of missing.

**Missing Care Plans** – this type of missing occurs when **clients received cluster 1** services but do not report Care Plan record. This report is for identifying client recordkey with this type of missing.

### **Plan Reports**

**AIP/4 Year Plan Narratives** – Provides users with a way of printing out narrative and Attachment sections of the AIP/4 Year Plan.

**End of Year AIP Variance Report** – Compares AIP data with end of year CAARS data. Each county report is 10 pages.

**Subcontractor Services** – Information for each subcontractor entered into the system is reflected in this report.

**AIP Landscape and Portrait pages** - available for 2012-16, 2013-14

**AIP One Report** - for full AIP for 2014-15

### **NYSOFA Report Viewer**

The dates are entered year and month, so that April 1, 2010 – December 31, 2010 would have a start date of 201004 and an end date of 201012. These reports can be printed or exported to a PDF file or MS Excel format. The link for this site is: <http://www.boedmz.ofa.state.ny.us/infoviewapp/logon.aspx>