

NEW YORK STATE OFFICE FOR THE AGING
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Kathy Hochul, Governor

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PROGRAM INSTRUCTION	Number 26-PI-05
	Supersedes
	Expiration Date

DATE: March 25, 2026

TO: Area Agency on Aging Directors, Caregiver Coordinators

SUBJECT: Caregiver Resource Center Reporting Requirements and Report

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ACTION REQUESTED: To comply with the Caregiver Resource Center (CRC) reporting requirements for the April – March State Fiscal Year (SFY), Area Agencies on Aging (AAAs) who have implemented a CRC program, must complete the CRC Report in NYSOFA’s Budget and Reporting site within 45 days of the end of the SFY. The requirements in this Program Instruction (PI) apply to the following 17 counties receiving CRC funding from the New York State Office for the Aging (NYSOFA): Broome, Cattaraugus, Clinton, Cortland, Fulton, Genesee, Madison, Monroe, Nassau, Onondaga, Orange, Putnam, Rockland, Steuben, Sullivan, Tompkins, and Westchester counties.

PURPOSE: The purpose of PI is to provide guidance on CRC reporting requirements and how to complete and submit the CRC report to NYSOFA.

BACKGROUND: Section 206 of the New York State Elder Law established the Caregiver Assistance Program within NYSOFA. Under this program, NYSOFA is authorized to develop training and assistance programs for caregivers of individuals who are frail and disabled. NYSOFA continues to provide annual funding to 17 AAAs for local CRCs to provide caregivers with information and assistance, training, support groups, counseling, and technical assistance, and a specialized training curricula for caregivers of adults with developmental disabilities and minority populations. AAAs receiving this funding have coordinated their CRC programs with their NFCSP programs so that, from the caregiver perspective, there is a program consisting of a coordinated

array of services that are comprehensive, complementary, and supplemental in nature.

CRC Services and Definitions

CRCs provide a variety of services to best address the needs of caregivers in their geographic area. The following allowable services are further defined in Table 1 of this PI.

- Caregiver Training
- Caregiver Support Groups
- Caregiver Counseling
- Assistance: Information and Assistance

CRC Goals and Objectives

- To provide a single focal point of assistance to family members and other informal caregivers.
- To provide information and assistance, training, support groups, counseling, and technical assistance to caregivers so they may continue in their caregiving roles.
- To link caregivers with AAA and other community-based services.

Eligibility

- Family and other informal caregivers of older adults who are frail and/or disabled.

Table 1: Service Definitions

Service	Definition	Unit of Service
Caregiver Training	<p>A service that provides family caregivers with instruction to improve knowledge and performance of specific skills related to their caregiving roles and responsibilities.</p> <p>Skills include:</p> <ul style="list-style-type: none"> • Activities related to health, nutrition, and financial management. • Provision of personal care. • Communication with health care providers and other family members. <p>Training includes use of evidence-based programs and may be conducted in-person or online and provided in individual or group settings.</p>	<p>Each hour of service, excluding travel time.</p> <p>Partial hours may be reported to two decimal places in 15-minute increments (e.g., .25 hours).</p>
Caregiver Support Groups	A service that is led by a trained individual, moderator, or professional,	Each session

	<p>as required by state policy, to facilitate discussion among caregivers about their common experiences and concerns and to develop a mutual support system. Support groups are typically held on a regularly scheduled basis and may be conducted in-person, over the telephone, or online.</p> <p>For Title III-E funding, caregiver support groups do not include caregiver education groups, peer-to-peer support groups, or other groups primarily aimed at teaching skills or meeting on an informal basis without a facilitator who possesses training and/or credentials as required by state policy.</p>	<p>Must capture and report the number of attendees per session.</p>
Caregiver Counseling	<p>A service designed to support caregivers and assist them in their decision-making and problem solving. Counselors are service providers, degreed and/or credentialed as required by state policy, who are trained to work with older adults and families, specifically to understand and address the complex physical, behavioral, and emotional issues and challenges related to caregiver roles. This includes counseling to individuals or groups.</p>	<p>Each hour of service.</p> <p>Partial hours may be reported to two decimal places in 15-minute increments (e.g., .25 hours).</p>
Assistance: Information and Assistance	<p>A service that:</p> <ul style="list-style-type: none"> • Provides caregivers with current information on opportunities and services available within their communities, including information related to Assistive Technology. • Assesses the problems and capacities of caregivers. • Links caregivers to the opportunities and services that are available. 	<p>Each contact</p>

	<ul style="list-style-type: none"> • Establishes adequate follow-up procedures to ensure caregivers receive the services needed and are aware of the opportunities available to them, to the maximum extent practicable. • Serves the entire community of older adults particularly: <ul style="list-style-type: none"> ○ Older adult caregivers in greatest economic and social need. ○ Older relative caregivers of individuals with disabilities or children with severe disabilities. ○ Family caregivers who provide care for individuals with Alzheimer’s disease and related disorders with neurological and organic brain dysfunction. ○ Caregivers of individuals who are unable to perform at least two ADLs without substantial human assistance, including verbal reminding, physical cueing, or supervision; and/or cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual. <p>Information and assistance for the caregiver may be provided in person, by phone, email or other communication in writing.</p>	
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Reporting and Data Collection

The CRC must report program and service data to NYSOFA through the CRC Reporting Database. Each annual report is due within 45 days of the close of the SFY. If the deadline falls on a weekend, the submission deadline will be extended to close of business on the following Monday.

The CRC must maintain an active account at <http://crc.aging.ny.gov> to submit required reports.

The CRC Reporting Database consists of three sections:

1. Background Information and Financial Report
2. Caregiver Demographics, Services, and Satisfaction
3. Program Updates and Sustainability

Page 1: Background Information and Financial Report

This section contains four open-ended questions. **All questions must be answered.**

The CRC must provide the following information:

- A description of priority populations served (e.g., caregivers, older relative caregivers, rural caregivers, low-income caregivers, etc.)
- A brief description of outreach efforts used to reach priority populations, including relevant policies and procedures, if applicable.
- A list of partner organizations that provide CRC-funded services. Organization types may include, but are not limited to, local and state agencies, non-profit organizations, social service organizations, and home health agencies.
- A brief description of how new partners are identified to deliver CRC-funded services.

Page 2: Caregiver Demographics, Services, and Satisfaction

Demographics:

The CRC must report aggregate demographic information for caregivers who received CRC-funded services during the reporting period. The total for each demographic category must equal the total number of caregivers served, as reported at the top of the page.

If a caregiver declines to respond to any demographic questions, their information

should be included in the “unknown” category.

The following demographic characteristics are reported in aggregate:

- Age
- Income Level
- Ethnicity and Race
- Gender
- Reported Disability Status

Service Delivery:

For each service provided, the CRC must report:

- The number of unduplicated caregivers served.
- Units of service.
- Average cost per unit.
- Frequency of service delivery (daily/weekly/monthly/quarterly/annually/as needed).

Services must be reported in the format in which they were delivered. For example, an in-person caregiver training must be reported separate from a virtual caregiver training.

If the CRC does not provide a listed service during the reporting period, a “0” (zero) must be entered for caregivers served, units of service, and average cost per unit.

The Service Delivery section also includes two open-ended questions:

- For caregiver training, briefly list and describe the types of training provided during the reporting period. Training topics may include, but are not limited to, education on aging-related diseases; education on physical and mental disabilities; practical skills for providing personal care and support; stress management; financial management; and information on benefits, entitlements, and available programs.
- For caregiver support groups, briefly describe the type of support groups offered and any common themes addressed.

Satisfaction:

Caregivers must have the opportunity to provide feedback on the services they receive under the CRC and National Family Caregiver Support Program (NFCSP) Standards. At least annually, the AAA/CRC must administer the Caregiver Program Quality Assurance Survey ([25-PI-01 Attachment 2](#)).

In the final chart on page 2, enter the total number of survey responses received. Survey responses do not need to be separated by the funding source (NFCSP (Title III-E) and CRC).

For each caregiver service, report:

- The total number of survey responses received.
- The number of responses received for each rating category: excellent, good, fair, and poor.

The sum of the ratings for each service must equal the total number of responses for that service.

This section also includes two open-ended questions:

- A brief description of how caregiver feedback is used to improve CRC services.
- A case example that demonstrates the effectiveness of the CRC in meeting the needs of informal caregivers during the reporting period.

Page 3: Program Updates and Sustainability

This section includes two components - Program Updates and Sustainability Plan - each consisting of three open-ended questions. The CRC must respond to all questions to the best of their ability.

Program Updates

- Provide a brief description of CRC accomplishments and a “snapshot” activities that lead to the success of the CRC during this reporting period.
- Describe any challenges encountered.
- Identify any major programmatic and staffing changes and explain how they were addressed.

Sustainability Plan

- Describe the CRC’s plan to continue delivering services and training, including relevant policies and procedures, if applicable.
- Describe the CRC’s outlook on program sustainability and partnerships should funding levels change.

- Additional information (optional).

PROGRAMS AFFECTED: Title III-B Title III-C-1 Title III-C-2
 Title III-D Title III-E CSE WIN Energy
 EISEP NSIP Title V HIICAP LTCOP
 NY Connects Other: **Caregiver Resource Centers (CRC)**

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