

Scott Walker
Governor



DIVISION OF PUBLIC HEALTH

1 WEST WILSON STREET
PO BOX 2659
MADISON WI 53701-2659

Linda Seemeyer
Secretary

State of Wisconsin
Department of Health Services

Telephone: 608-266-1251
Fax: 608-267-2832
TTY: 711 or 800-947-3529

Date: October 23, 2017

To: County and Tribal Aging Units
Area Agencies on Aging

From: Neal R. Minogue
Bureau of Aging and Disability Resources

Re: Plan Amendments and Budget Pages for 2018

Overview

Area agencies on aging and aging units are currently operating in the second year of their aging plans for the period 2016-2018. All aging agencies are required to submit budget pages and may also be required to submit plan amendments for the third year of their plan (2018).

This memorandum describes the required content and timetable for those amendments.

Plan Amendments

Amendments are Required Under the Following Circumstances:

1. If an aging unit or area agency on aging chooses to add, delete, or materially alter any proposed activities from the plan as originally approved, the pages from the plan describing the changes must be amended.
2. If an aging unit plans substantial organizational, staffing, or other changes, the sections of the plan describing the changes must be submitted. A public hearing is always required in these circumstances.

There is no plan amendment form for either aging units or area agencies on aging. Aging units that make amendments will put those amendments, with changes clearly marked, into the actual 2016-2018 plan document. Submit amended plans to the to the area agency on aging for review following the timetable described below. Area agencies on aging must submit their amended plan to the Bureau of Aging and Disability Resources.

Budget Pages

All aging units and area agencies on aging are required to submit budget pages for 2018.

The budget pages must be submitted using a Microsoft Excel budget template. This template is attached.

Preparation of Budget Pages:

Prepare the budget pages based on the figures in the attached estimated allocations table. Do not include anticipated carryover.

Public Hearing

Public hearings are not required for the 2018 amendment unless the aging unit has materially changed the content of the original plan or, if an aging unit plans substantial organizational, staffing, or other changes.

Budget pages are required by the Bureau of Aging and Disability Resources, and by themselves do not necessitate a public hearing.

Timetable for the Submission of Amendments

Aging units are required to submit their plan amendment materials (electronic copies in Microsoft Word/Excel format) to their area agencies on aging by 5:00 PM on November 13, 2017.

Area agencies must forward copies of approved aging unit plan amendments (electronic copies) to the Bureau of Aging and Disability Resources by 5:00 PM on December 15, 2017.

Questions/Problems

Direct questions regarding plan amendments to your area agency on aging. Milwaukee and Dane Counties should direct questions to Neal Minogue, neal.minogue@dhs.wisconsin.gov.