

Caregiver Grant Programs Best Practices, FAQs, and Reporting May 28th, 2024

Bryn Ceman, Older Americans Act
Consultant, Caregiver Support Specialist

Carrie Kroetz, Older Americans Act Consultant,
Data Management Specialist

Lynn Gall, Family Caregiver Support and Lifespan
Respite Programs Manager, DHS



Purpose of Training

- Build upon knowledge
- Consistency in knowledge
- Offer answers to Frequently Asked Questions

*GWAAR ED



Older Americans Act (OAA) Title III

- Largest Title of the OAA.
- Provides federal funding to state agencies on aging.
- No income test but prioritizing those of the **greatest social and economic** need.
- Cannot charge for services but **should** offer an opportunity to contribute.



OAA Title III

- To support older adults 60 + years old & their family caregivers
- Older adults must have the opportunity to contribute, but cannot be charged a participation fee



OAA Title III



- The Public Health & Welfare defines 'greatest economic need' - the need resulting from an income level at or below the poverty threshold and 'greatest social need' - the need caused by noneconomic factors which include physical and mental disabilities, language barriers, and cultural or social isolation."
- Examples of local procedures and policies can be found by clicking [*Waitlist Procedure Policy Examples](#)

National Family Caregiver Support Program

1. Any informal caregiver who provides care to a person aged **60 or older**, or to a person of any age who has Alzheimer's disease or related **dementia**.
 - Note: The older adult receiving care must need assistance with daily living in 2 (or more) areas.
2. Grandparents or relatives aged 55 and older who are the primary caregivers for a child under age 18.
 - Remember the cap has been lifted
3. Person 55 and older caring for a person aged 18 to 59 with a **severe** disability.*



*Family Caregiver Support Policy Manual

National Family Caregiver Support Program

1. **Information Services/Public Information**

Examples: Caregiver newsletters, radio interviews, articles, and more.

2. **Assistance** includes Case Management and I&A.

Examples: 1:1 info about available CG services, emails, walk-ins, p/c, caregiver needs assessment, and other grant work including the respite and supplemental grants via RCAW.

3. Caregiver **Respite**

Examples: In-home & facility-based respite care, household chores, snow removal & lawn care, and self-care.

4. Caregiver **Supplemental Services**

Examples: HDM, assisted transportation, legal & financial.

5. Caregiver **Counseling/Training/Support Groups**

Examples: Instruction that provides knowledge & performance of specific skills relating to their role as a caregiver. “Support groups” discussions led by a trained facilitator. “Counseling” a degreed or credentialed professional assisting a CG in their decision-making or problem-solving.*

*Need to use funds in at least **one** of three annually: Counseling, Training, and/or Support Group. *And* need to provide access to all three.

**WisconsinCaregiver.Org

National Family Caregiver Support Program



- A Title III E **waiver** can be requested for any of the five areas, during the budget process.* A plan needs to be in place for how you'll meet the caregiver's need if it's not being funded by III E.

*Preliminary budgets are due around Oct and final budgets are due in the Spring.

- **Even with an approved waiver, if you find later that you can offer the service using III E funds, you are encouraged to do so.**

National Family Caregiver Support Program

- 20% Supplemental Services limit was **discontinued**.
- 10% spending limit for Relative Caregivers was **discontinued**.
- 112 hrs. limit on respite has been **permanently** waived.
- Non-professional stipend to the primary caregiver is **permanently** allowable.
- Bookmark Program Management Resources:
 1. Updated FAQs
 2. *EXAMPLES - NFCSP Coordinator Checklist
 3. Family Caregiver Support Policy Manual

Additional NFCSP FAQs

Alzheimer's Family Caregiver Support Program

1. Requires a **diagnosis** of Alzheimer's Disease or another irreversible dementia.
2. The person with dementia resides in a **community** or home setting.
3. The person with dementia and spouse have a gross annual income of **\$48,000** or less.
 - Costs related to dementia care may be deducted when calculating a participant's gross income.
 - Financial Worksheets used to determine eligibility for the person with dementia & spouse
 - If the current year's income is too uncertain to estimate, the past year's income may be used.

- Created by the Wisconsin Legislature in 1985
 - Administrative Rule – DHS Chapter 68
- It is available in each county & **tribe** for caregiver **respite** and the purchase of goods & services needed to care for someone with irreversible dementia.
- Annual spending limit of \$4,000 per individual, but agencies may establish a lower limit to serve more families. ***

Alzheimer's Family Caregiver Support Program

****Waivers are an option! Waiver requests can be sent to Lynn.Gall@dhs.wisconsin.gov (cc in bryn.ceman@gwaar.org) explaining the extraordinary/unexpected situation such as a change in condition, safety/physical danger, and/or risk of becoming homeless or placed in an institutional setting.



Alzheimer's Family Caregiver Support Program

- Purpose is to enhance the lives of informal & family caregivers while helping people with dementia remain living in the community for as long as possible
- While the Program is designed for the Caregiver, a Person with Dementia (PWD) *may* enroll in AFCSP.
 - Adult Day Care
 - Homemaker/Chore Services
 - In-home Personal Care
 - Other Goods and Services such as consumable supplies, transportation
 - Support Groups for PWD
 - Memory Screenings and
 - Case Management

Alzheimer's Family Caregiver Support Program

- Requirement for counties (not tribes) that **40%** of funds be spent on respite or direct services each year.
- Primary caregivers may receive a non-professional stipend payment.
- A caregiver may access funding and respite hours for everyone they are caring for. Example: The daughter is the primary caregiver for both mother and father with dementia. In this case, the caregiver may access up to the maximum annual amount allowable for each parent.
 - No duplication of services.

Caregiver Grants and Meals

- Eligible individuals of the Nutrition Program, **MUST** receive their meals through III C funding.
- If a person is ineligible for C1 or C2 and are enrolled in one of the caregiver grant programs, then the caregiver may choose to use a portion of their NF/AFCSP funds to cover the FULL cost of the meals.
- This form must be completed <https://gwaar.org/api/cms/viewFile/id/2005278>.



WellSky/SAMS

- NFCSP services are always entered & collects the Caregiver and Care Recipient information and the quantity of services provided.
- AFCSP services can be entered but **must** be entered **IF** funding is used as NFCSP match.
 - Services are entered twice – once as AFCSP and again as NFCSP.
- Demographic Information
 - Helps ID populations most benefiting from services and population missing.
- Services are to be entered by the end of the month following the month when the service occurred. For example, if a service took place in October, it should be entered by the end of November.
- For caregivers receiving **Respite** or **Supplemental Services** for care recipients aged 60+, an annual reassessment of ADLs/IADL needs to be completed to continue to qualify.
 - NFCSP Caregiver Registration Form – annually
 - Best Practice: Reassess caregiver needs, update services provided, and discuss new unmet needs.

Budgeting for Caregiver Grants

NFCSP

- *25% match required of total expense (not just contract)*
 - *Cash match*
 - *In-kind match*
 - *Non-federal dollars*
- *Waivers can be requested if proved service is being provided within the county.*

AFCSP

- 10% limit on Admin
- 3% carryover

REMINDER for 2024, all services need to be entered by **10/18/2024** (vs. End of the month like in year's past). This deadline is due

Reporting/Claims Best Practice

- Aging Unit Director and Fiscal Staff to meet at least quarterly to ensure WellSky/SAMS entries match claim form expenses.
- Aging Unit Director signature now required on claim form.
- All error reports should be run and corrected monthly.
 - A list of all reports to run, and instructions regarding these reports, is on the GWAAR Data Management SharePoint site.
 - In addition to this, verifying reports to ensure that all clients and services have been entered are available.

Reporting FAQs

Q: Can caregiver grant dollars be used to host events?

A: Yes, caregiver grant funds can be used for caregiver conferences, events *and* when you are educating the public about the grants. Reporting Categories

- AFCSP - 7508-Public Awareness, program specific
- NFCSP/III E - 68-Information Services, program specific and
- III B - 16a - Public Information – more general Aging Services
- The AU would report the estimated number of people who attended each conference or event as a unit. (ie 550 people attended 1 event)
- Activities entered in WellSky/SAMS need to match the money used / reported on the claims.

How Do I Capture My Time?

- Any NFCSP spending indicated on claims needs to match a corresponding service in WellSky/SAMS.
- As of October 2021, Case Management requires unit services (hours) entry in WellSky/SAMS.
- As of October 2021, IIIE funds spent on I&A requires unit services (contacts) entry in WellSky/SAMS.
- A list of services, abbreviated definitions, caregiver info & units guide for WellSky/SAMS can be found on the GWAAR website here: [NFCSP Services Reference Sheet](#)



How Do I Capture My Time?

- Non-direct time such as staff meetings can be captured in III B-Admin.
- For AFCSP non-direct time can be captured in AFCSP Admin. Up to 10% allowable each year.
- Non-direct time such as staff training would not be a service reported in WellSky/SAMS but would be captured on your GWAAR claim form for the service it is associated with.
 - Example: training on how to provide I&A would be allocated to 6900 I&A service on the claim form.
- Helpful hint: Double check your local agency form to make sure you're able to capture as much time as possible.





Family Caregiver Support Programs

Caregiver Needs Assessments
Initial and Post Program Evaluations

Part 1

How to
register for
a DHS
REDCap
account





Collecting and reporting caregiver needs assessment and program evaluation data

**Understanding caregiver
and care recipient needs**

Services provided

**Quality of services
provided**



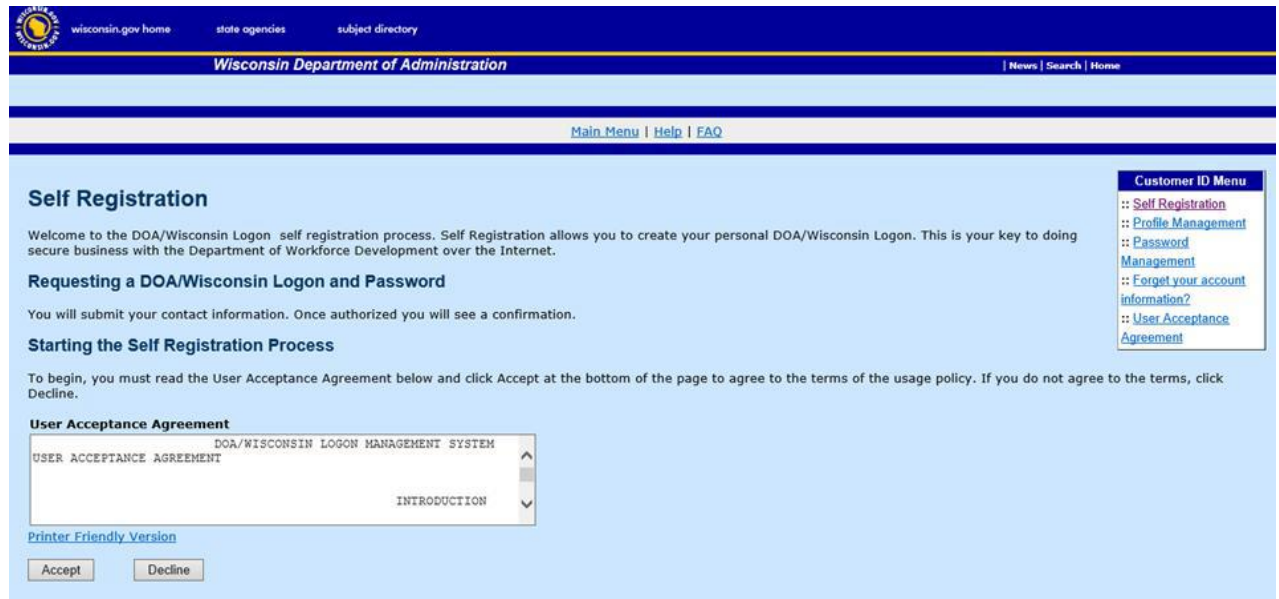
DO NOT USE THE WILMS SELF-HELP FUNCTION ON THE WEBSITE IF YOU ARE HAVING ISSUES LOGGING-IN TO DHS REDCAP.

Contact the DHS Office on Aging first for technical assistance. Eric Grosso and Lynn Gall are able to assist with any difficulties you may be experiencing.


create a
DHS
REDCap
account

Registration

Step 1: To create a DHS REDCap account, you must first create a new Wisconsin WILMS ID (even if you already have an existing WILMS ID) at: <https://register.wisconsin.gov/AccountManagement/AccountCreationOverview.aspx> You will see this screen; click the “Accept” button



The screenshot shows the 'Self Registration' page on the Wisconsin Department of Administration website. The page includes a navigation bar with links for 'wisconsin.gov home', 'state agencies', and 'subject directory'. Below the navigation bar, there is a header for 'Wisconsin Department of Administration' and a search bar. The main content area is titled 'Self Registration' and contains the following text:

Welcome to the DOA/Wisconsin Logon self registration process. Self Registration allows you to create your personal DOA/Wisconsin Logon. This is your key to doing secure business with the Department of Workforce Development over the Internet.

Requesting a DOA/Wisconsin Logon and Password

You will submit your contact information. Once authorized you will see a confirmation.

Starting the Self Registration Process

To begin, you must read the User Acceptance Agreement below and click Accept at the bottom of the page to agree to the terms of the usage policy. If you do not agree to the terms, click Decline.

User Acceptance Agreement

DOA/WISCONSIN LOGON MANAGEMENT SYSTEM
USER ACCEPTANCE AGREEMENT

INTRODUCTION

[Printer Friendly Version](#)

Accept Decline

On the right side of the page, there is a 'Customer ID Menu' with the following links:

- Self Registration
- Profile Management
- Password Management
- Forget your account information?
- User Acceptance Agreement

Create your DHS REDCap account

Step 2: Fill in the top portion of this webpage completely

The screenshot shows the 'Account Creation' page with a navigation bar at the top containing 'Main Menu | Help | FAQ'. Below the title 'Account Creation', there is a note: '* Indicates Required Field'. The 'Profile Information' section includes the following fields:

- First Name: *
- Middle Initial:
- Last Name: *
- Suffix:
- E-Mail: *
- Phone: Use this format 6085551234 ext.
- Mailing Address:
 - Street Address:
 - City:
 - State/Province:
 - Zip Code: -



Step 3:

Under **Systems You Will Access**, scroll down using the arrow and then click on **“DHS REDCap.”** The item will be highlighted, which is what is needed.

Finish this page by creating **Logon ID/Password, Password Recovery Question**, and typing in **Verification Code** as directed.

Make sure to remember the answer to your self-chosen verification secret question. Then click “Submit.”



Systems You Will Access
Use your mouse to highlight the system that you want to access.

Systems *

Account Information
Your Logon ID must be between 5-20 characters and **CAN** be a combination of letters and numbers. Your Logon ID must not contain spaces or special characters.

Logon ID *

Your Password must be 7-20 characters long and **MUST** contain a combination of letters and either numbers or special characters (except the @ ? / signs). Passwords are case sensitive. Your Password cannot contain the Logon ID.

[Password Tips](#)

Password *

Re-enter Password *

Logon ID/Password Recovery
Enter a question and answer for use if you forget your DOA/Wisconsin Logon ID or Password. Your Secret Question and Secret Answer cannot contain your password.

[Secret Question and Answer Tips](#)

Secret Question *

Secret Answer *

Verification
This step helps prevent automated registrations. If you cannot see the number below [click here](#).

81006 Please enter the number as it is shown in the box to the left. *

Step 4:

After clicking the submit button, you should immediately see this screen.

While it tells you that your account was successfully created, there are **three more steps** you need to complete before being able to use DHS REDCap.



A screenshot of a web application interface. At the top, there is a navigation bar with links for "Main Menu", "Help", and "FAQ". Below this is a header section titled "Account Creation". A red message states: "Your DOA/Wisconsin Logon profile was successfully created." Below the message are three blue links: "make changes", "return to DOA/Wisconsin Logon", and "Doa Homepage". A "Profile Information" section is visible, listing fields: Logon Id, First Name, Middle Initial, Last Name, Suffix, E-Mail, Phone, Mailing Address, Street Address, City, State/Province, and Zip/Postal Code. A modal dialog box titled "Message from webpage" is overlaid on the page, containing a yellow warning icon and the text: "Thank you for your registration. An administrator will be validating your registration." with an "OK" button.

Final steps to activate your account:

Log onto **DHS REDCap** with the new username and password that you just created.

(CTRL + Click on link):

<https://redcap.wisconsin.gov/>

You will see a screen that looks like the following. Fill this out completely and click the submit button.

[Log out](#)

Basic User Information Form

Before accessing REDCap, we first need to obtain some basic information about you. Please enter ALL the fields below and then hit the Submit button. Once this information is saved, you can change it any time by navigating to the My Profile page, which you will find the link to at the top right of every page.

Username: ██████████

First name:

Last name:

Email:

Re-enter email:

NOTE: The email address entered above will first need to be verified before access to REDCap is granted. After clicking the Submit button, an email will be sent to that email account, after which you will need to click the link inside the email to verify your email account before accessing REDCap.



After clicking submit, you will receive the message at the top right of this slide.

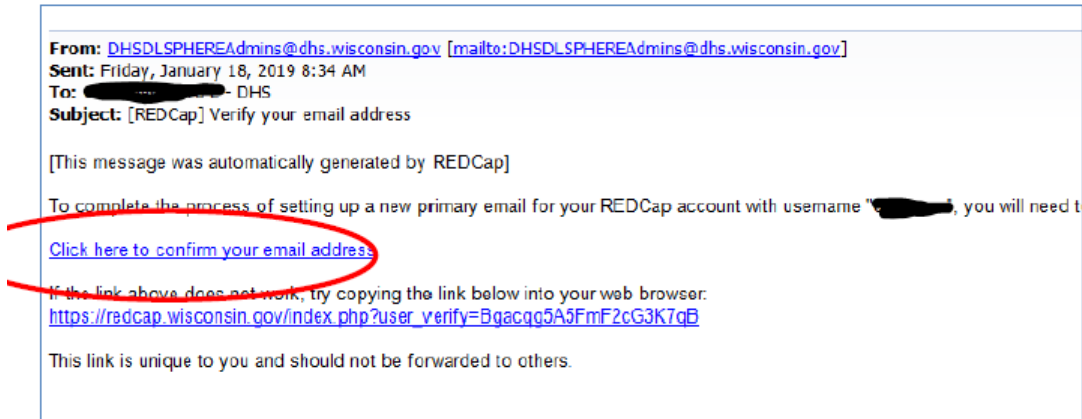
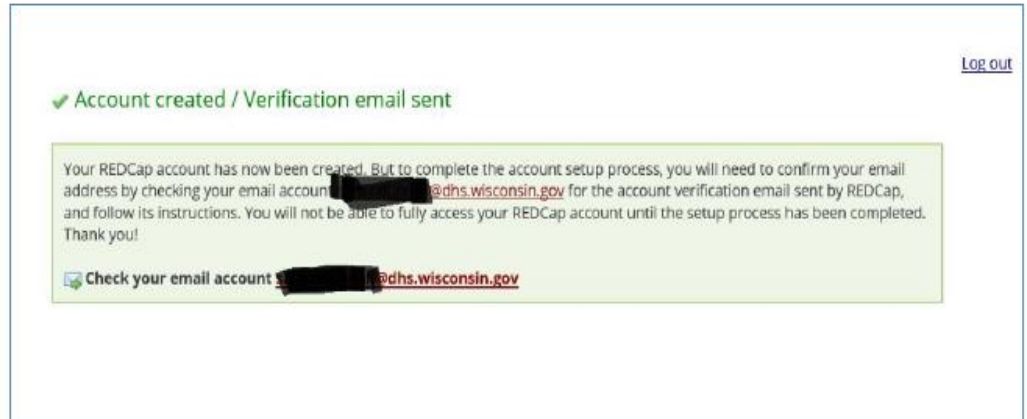
Go to your e-mail inbox. You will receive an e-mail that looks like the example at the lower right. The sender of this e-mail is DHSDLSPHEREAdmins@dhs.wisconsin.gov.

(Please check your e-mail's junk mail folder or spam folder if you have not received this message in your inbox.)

Open the e-mail and click the link that confirms your e-mail address.

*****This final step is very important*****

Send an email to Eric and Lynn in the State Aging Office, eric.grosso@wi.gov and lynn.gall@wi.gov, that includes your newly created username and the name of your agency so that we can activate your DHS REDCap account. Please do not send your private password.



DHS REDCap Summary

- Entry is required for both AFCSP & NFCSP caregivers.
 - ONLY the initial assessment is to be entered.
- Purpose is to understand & identify caregiver and care recipient needs and our programs' impact through uniform assessments.
- Assessments are to be entered by the end of the month in which a caregiver enrolls; at a minimum quarterly.
- You can contact ericr.grosso@wi.gov or lynn.gall@wi.gov if you experience a problem with REDCap.

DHS Forms

- All forms are available in English and Spanish
- Caregiver Needs Assessment helps families determine what services are needed most and should be prioritized.
- Initial and Post Evaluations measure the impact programs have on caregiver well-being.
- The DHS Caregiver Programs Customer Satisfaction Survey can be completed online, or printable surveys can be downloaded.
- Self-addressed stamped envelopes to return paper surveys are available from DHS. Contact Lynn.Gall@dhs.wisconsin.gov for envelopes.



QUESTIONS

Lynn Gall
lynn.gall@dhs.wisconsin.gov

Bryn Ceman
Bryn.Ceman@gwaar.org



Thank

Carrie Kroetz
Carrie.Kroetz@gwaar.org

You

