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<b>EXAMPLE:</b> Exhibit A, Article II.A.4.	<b>EXAMPLE:</b> n/a	<b>EXAMPLE:</b> c) Include staff timesheets that detail how much time is spent on each activity.
Exhibit D, Article I.B.5 and 6	5. Any other documents incorporated herein by reference including, if applicable, the federal HHS terms and conditions found in Part II of the HHS Grant Policy Statement. The HHS Grant Policy Statement is available under the HHS Policy Requirements Topic at <a href="https://www.hhs.gov/grants/grants/grants-policies-regulations/index.html">https://www.hhs.gov/grants/grants/grants-policies-regulations/index.html</a> 6. Program Memos and other guidance issued by CDA.	Program Guide, 3.1.2:  5. Program Memos and other guidance issued by CDA. 6. Any other documents incorporated herein by reference including, if applicable, the federal HHS terms and conditions found in Part II of the HHS Grant Policy Statement. The HHS Grant Policy Statement is available under the HHS Policy Requirements Topic at <a href="https://www.hhs.gov/grants/grants/grants-policies-regulations/index.html">https://www.hhs.gov/grants/grants/grants-policies-regulations/index.html</a>
New Language in Program Guide, 3.2.2 Subcontracts		10. Small contracts (under \$100,000 in the aggregate) do not require a competitive process [CCR 7352(g)]. In the case of small contracts, a AAA need only obtain price or rate quotations from a number of qualified sources and informally select the source with which to contract or obtain the purchase. a. Pre-Award Review: The AAA shall submit the following to CDA for review and approval for small contracts (under \$100,000 in the aggregate) to a for profit entity: i. Documentation that the aggregate value of the contract with any entity is less than \$100,000 ii. A completed CDA 2000 (Conflict of Interest Disclosure Form) that discloses whether a potential or actual conflict of interest exists iii. Copies of the price or rate quotations received from qualified sources

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		<p>b. CDA will provide a determination letter within fifteen (15) days of receipt of all required documentation confirming that the AAA has satisfied the requirements of a noncompetitive award to a for-profit entity or will provide detail as to the requirement(s) that have not been met.</p> <p>c. The AAA must maintain all documentation on file that supports a noncompetitive award to a for-profit entity, as well as CDA's determination letter.</p> <p>11. Contracts over \$100,000 in the aggregate for any entity must follow a competitive process [CCR 7352].</p>
Exhibit D, Article VII.C	<p>C. Additions, improvements, and betterments to assets meeting all of the conditions in Section B above must also be reported. Additions typically involve physical extensions of existing units. Improvements and betterments typically do not increase the physical size of the asset. Instead, improvements and betterments enhance the condition of an asset (e.g., extend life, increase service capacity, and lower operating costs). Examples of assets that might be improved and bettered include roads, bridges, curbs and gutters, tunnels, parking lots, streets and sidewalks, drainage, and lighting systems.</p>	Removed from Program Guide
New Language in Program Guide, 3.6 Monitoring and Evaluation		<p>Welfare and Institution Code (WIC) (Division 8.5. Mello-Granlund Older Californians Act [9000 – 9757.5] Chapter 2. California Department of Aging [9100 – 9118.5] Article 1. General Provisions [9100 – 9114] Section 9102(a)) states that the State Unit on Aging shall administer all programs under the Older Americans Act of 1965, as amended, and this division, including providing ongoing oversight, monitoring, and service quality evaluation to ensure that</p>

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		<p>service providers are meeting standards of service performance established by the department.</p> <p>CDA's AAA Based Teams and Office of the Long-term Care Ombudsman conduct onsite/remote monitoring visits to ensure that AAAs are in compliance with all federal and State laws, regulations, policies, contracts or grant agreements (Administrative); Performance goals are achieved (Program); and Federal awards are used for authorized purposes (Fiscal). Comprehensive onsite/remote assessments are conducted at a minimum once every four years as resources permit.</p>
Exhibit D, Article XIII	<p>The Contractor agrees that any remedy provided in this Agreement is in addition to and not in derogation of any other legal or equitable remedy available to CDA as a result of breach of this Agreement by the Contractor, whether such breach occurs before or after completion of the project.</p>	<p>MOU, Section 14, Remedies</p> <p>The AAA agrees that any remedy provided in this MOU is in addition to and not in derogation of any other legal or equitable remedy available to CDA as a result of breach of this MOU by the AAA, whether such breach occurs before or after completion of the project.</p>
Exhibit D, Article XIV	<p>The Contractor shall notify CDA immediately of any intention to discontinue existence of the entity or to bring an action for dissolution.</p>	<p>MOU, Section 15, Dissolution of Entity</p> <p>The AAA shall notify CDA immediately of any intention to discontinue existence of the entity or to bring an action for dissolution.</p>
Exhibit D, Article XV	<p>A. No amendment or variation of the terms of this Agreement shall be valid unless made in writing, signed and approved through the State amendment process in accordance with the State Contracting Manual. No oral understanding or agreement not incorporated in this Agreement is binding on any of the parties.</p> <p>B. The State reserves the right to revise, waive, or modify the Agreement to reflect any restrictions, limitations, or conditions enacted by Congress or</p>	<p>MOU, Section 16, Amendments</p> <p>A. No amendment or variation of the terms of this MOU shall be valid unless made in writing, signed, and approved by both parties. No oral understanding or agreement not incorporated in this MOU is binding on any of the parties.</p> <p>B. Any provision of this MOU or the Program Guide which conflicts with current or future applicable federal or state laws is hereby amended to conform to the provisions of those laws. Such amendment of this MOU and/or the</p>

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	the Legislature or as directed by the Executive Branch of State government.	<p>Program Guide shall be effective on the effective date of the laws necessitating it and shall be binding on the parties even though such amendment may not have been reduced to writing and formally agreed upon and executed by the parties.</p> <p>C. Failure by the AAA to take necessary actions required by amendments to this MOU and/or the Program Guide shall constitute a material violation.</p> <p>D. The State reserves the right to revise, waive, or modify the MOU to reflect any restrictions, limitations, or conditions enacted by Congress or the Legislature or as directed by the Executive Branch of State government.</p>
Exhibit D, Article XVI.B	Any notice given to CDA for the Contractor's change of legal name, main address, or name of the Director shall be completed by submitting a Std. 204 form to <a href="mailto:AAAcontactinfo@aging.ca.gov">AAAcontactinfo@aging.ca.gov</a> .	<p>Program Guide, Section 3.10, Item 2</p> <p>Any notice given to CDA for the AAA's change of legal name, main address, or name of the Director shall be completed by submitting a Std. 204 form to <a href="mailto:finance@aging.ca.gov">finance@aging.ca.gov</a>.</p>
New Language in Program Guide, Section 3.10, Item 3		Any notice given to CDA for a AAA's change of staff contact information shall be completed by submitting an email to <a href="mailto:AAAcontactinfo@aging.ca.gov">AAAcontactinfo@aging.ca.gov</a> .
Article XVII, Department Contact	<p>A. The name of CDA's contact to request revisions, waivers, or modifications affecting this Agreement, will be provided by the State to the Contractor upon full execution of this Agreement.</p> <p>B. Contractor shall submit to CDA changes to Contractor's legal name, main address, Director, or any key staff to be added or removed from the distribution list by submitting a Contact Report to <a href="mailto:AAAcontactinfo@aging.ca.gov">AAAcontactinfo@aging.ca.gov</a>. You may request</p>	<p>MOU, Section 5, Department Contact</p> <p>A. The name of CDA's contact to request revisions, waivers, or modifications affecting this MOU or the Program Guide (as referenced in Section 10, below), will be provided by the State to the AAA upon full execution of this MOU.</p> <p>B. AAA shall submit to CDA changes to AAA's legal name, main address, and remit to address to <a href="mailto:bmbsubvention@aging.ca.gov">bmbsubvention@aging.ca.gov</a>.</p>

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	the Contact Report by emailing <a href="mailto:AAAcontactinfo@aging.ca.gov">AAAcontactinfo@aging.ca.gov</a> .	C. AAA shall submit to CDA changes to AAA Director or any key staff to be added or removed from the distribution list by submitting a Contact Report to <a href="mailto:AAAcontactinfo@aging.ca.gov">AAAcontactinfo@aging.ca.gov</a> . You may request the Contact Report by emailing <a href="mailto:AAAcontactinfo@aging.ca.gov">AAAcontactinfo@aging.ca.gov</a> .
Exhibit D, Article XVIII	Information Integrity, and Security Section	Has been replaced in its entirety with Section 3.11 through 3.11.14
New Language in Program Guide, Section 3.13		<p><b>Public Education and Information</b>          (Please note: This differs from the IIIB service categories within the data dictionary that have the same names)          Public Education and Information (PE&amp;I) falls into two categories:</p> <ol style="list-style-type: none"> <li>1. Educational – materials that educate and inform an audience such as activity books, coloring books, brochures, and posters.</li> <li>2. Promotional – material that promotes, supports, or enhances efforts and directly relates to the project objective such as key chains, onboard signs, mugs, pencils, magnets, and litter bags. The State of California and CDA does NOT allow CDA funds to be used for this purpose.</li> </ol> <p>AAAs and subcontractors that use CDA funds to produce educational material must receive approval from the CDA Office of Communications prior to production. Additionally, subrecipients that use CDA funds to produce PI&amp;E materials must receive written approval from the CDA Office of Communications in order to use any CDA logo. Subrecipients should allow a minimum of ten (10) business days for approval; they should contact the CDA Office of Communications for assistance (<a href="mailto:Communications@aging.ca.gov">Communications@aging.ca.gov</a>).</p> <p>AAAs should also advise vendors that all materials used in the production of public outreach materials paid for with</p>

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		<p>grant funds are the property of the AAA and the CDA (i.e., data, plates, digital files, camera-ready artwork, designs, concepts, photographs, video and audio). The CDA reserves the right to use materials developed by the AAA and/or subcontractor.</p> <p>Inclusion of the logo and/or funding line should not interfere with the primary program messaging. Questions regarding the inclusion, size or placement of either logo or funding statement should be directed to the CDA Office of Communications.</p> <p>All documents produced must comply with <a href="#">Federal Acquisition Regulation, Section 508</a>, which governs document accessibility.</p>
New Language in Program Guide, Section 3.13.2		<p><b>Advertising and Public Relations</b></p> <p>All press releases or any program advertisement utilizing the CDA logo must be approved by the CDA Office of Communications prior to dissemination. Approval is also required for all use of CDA logo or mention of CDA in materials. The AAA should email the draft press release to <a href="mailto:communications@aging.ca.gov">communications@aging.ca.gov</a> at least fourteen (14) days in advance of the announcement or event and copy the appropriate CDA Program team.</p> <p>The AAA must coordinate media and kick-off events with the CDA Office of Communications.</p> <p>If CDA funds are used for outreach, including paid and earned advertising, all materials must receive preapproval from the CDA Office of Communications before publication or production. Any mention of the CDA name or organization in press or outreach materials requires prior approval. The appropriate CDA program manager will coordinate this process. Materials should be submitted to the appropriate CDA program manager for the CDA Office of Communications for review. They will be assessed in</p>

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		batches on the first and fifteenth of each month, with a minimum ten (10) business day approval period.
New Language in Program Guide, Section 3.13.3		<b>Copyrights/Trademarks</b> The CDA reserves a royalty-free, non-exclusive and irrevocable license to reproduce, publish or otherwise use, and to authorize others to use, for federal or state government purposes the following: <ol style="list-style-type: none"> <li>1. The copyright/trademark in any work developed under a grant, sub grant or contract under a grant or sub grant.</li> <li>2. Any rights of copyright/trademark to which a AAA or subcontractor purchases ownership with grant funds.</li> </ol>
New Language in Program Guide, Section 3.16		<b>Fiscal Provisions</b> <ol style="list-style-type: none"> <li>1. The MOU must be approved prior to release and disbursement of any program funding included within this Program Guide via the budget displays.</li> <li>2. Upon release of an original or revised budget display, a separate budget for all programs affected shall be submitted electronically to CDA's Local Finance Bureau within 30 days of release.</li> <li>3. Budgets must be approved by CDA's Local Finance Bureau prior to any disbursement of funding.</li> <li>4. CDA cannot disburse funds until the enactment of the Budget Act has occurred and/or CDA has received funding authority.</li> <li>5. Budget Displays reference terms specific to each program funding source, which shall be used to determine disbursement of funding.</li> <li>6. AAAs shall follow other fiscal provisions and terms as outlined in the program guide.</li> </ol>
AP, Exhibit A, Article II.A.5	5. Keep on file a written record/documentation supporting expenditures of Program Development or Coordination	Program Guide, Section 4.4, Item 6

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	activities for three (3) years or until any audit is resolved, whichever is longer.	Keep on file a written record/documentation supporting expenditures of Program Development or Coordination activities for five (5) years or until any audit is resolved, whichever is longer.
TV, Exhibit E, Article I.M.3.a	a. This product was funded by a contract awarded by CDA and the U.S. Department of Labor's Employment and Training Administration.	Program Guide, Section 5.2, Item 13.c.i  SCSEP is funded by a contract awarded by CDA totaling \$XXX,XXX (XX%) with grant funds from the U.S. Department of Labor's Employment and Training Administration with \$XXX.XX (XX%) financed with non-federal sources.
TV, Exhibit E, Article I.M.3.b	b. The product was created by the Contractor and does not necessarily reflect the official position of CDA and the U.S. Department of Labor.	Program Guide, Section 5.2, Item 13.c.ii  The product was created by the "name of the AAA" and does not necessarily reflect the official position of the CDA and the U.S. Department of Labor.
TV, Exhibit A, Article I.EE	EE. "Title V SCSEP Performance and Results Quarterly Progress Report System (SPARQ)" means the DOL system used to process and analyze Title V SCSEP data and the system used to view, print, and save Title V SCSEP quarterly progress reports, data quality reports, and management reports. [OAA § 503(f)(3)-(4)] [20 CFR 641.879(b)] [20 CFR 641.879(e)-(h)]	Program Guide, Section 5.3, Item 31  31. "Title V SCSEP Grantee Performance Management System (GPMS)": the DOL system used to process and analyze Title V SCSEP data and the system used to view, print, and save Title V SCSEP quarterly progress reports, data quality reports, and management reports. [OAA § 503(f)(3)-(4)] [20 CFR 641.879(b)] [20 CFR 641.879(e)-(h)]
TV, Exhibit A, Article I.II	II. "Web Data Collection System (WDACS)" means the DOL web-based data collection system used to input all Title V SCSEP program and participant information into SPARQ. [OAA § 503(f)(3)-(4)] [SCSEP Data Collection Handbook Rev. 7 (March 2017) page i] [20 CFR 641.879(b)] [20 CFR 641.879(e)-(h)]	Program Guide, Section 5.3, Item 35  35. " <b>Web Data Collection System (WDACS)</b> ": the DOL web-based data collection system used to input all Title V SCSEP program and participant information into GPMS. [OAA § 503(f)(3)-(4)] [GPMS User Guide for Grantees



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		Version 1.5 (January 2024)] [20 CFR 641.879(b)] [20 CFR 641.879(e)-(h)]
TV, Exhibit A, Article II.A.20.a	a. Provide participants with twenty-four (24) hours of sick leave at the start of each program year, provided the participant(s) have been with SCSEP longer than ninety (90) days.	Program Guide, Section 5.4, Item t.i  i. Provide participants with forty (40) hours of sick leave at the start of each program year, provided the participant(s) have been with SCSEP longer than ninety (90) days. (CA Labor Code Section 246)
New Language in Program Guide, Section 4.2.2, Item 1.a		Data Reporting for Title III E FCSP shall be in keeping with the OAAPS expanded 16 service categories
New Language in Program Guide, Section 4.4.3, Item 11.a		Title IIIC intake forms must include the DETERMINE Your Nutritional Risk Health checklist questions and scoring as indicated in Title IIIC – Intake and Assessment Forms Guide.
AP, Exhibit A, Article I.A.2	2. Child means an individual who is not more than eighteen (18) years of age.	Program Guide, Section 4.3.1, Item 2  Child: an individual who is not more than eighteen (18) years of age, and has not yet attained the statutory age of majority [Cal. Fam. Code §§ 6500-6502]
AP, Exhibit A, Article I.A.23	To-Go Meals means meals that are picked up by clients (or client's agent) or delivered to clients who are not comfortable dining in a congregate meal setting.	Program Guide, Section 4.3.1, Item 23  To-Go Meals: meals that are picked up by individuals 69 years of age or older (or their agent) or delivered to individuals 60 years of age or older who are not comfortable dining in congregate meal settings.
AP, Exhibit A, Article I.A.25	Title III E Family Caregiver Support Program (FCSP) Categories are:	Program Guide, Section 4.3.1, Item 26

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		Title III E Family Caregiver Support Program (FCSP) Five Required Core Categories are:
AP, Exhibit A, Article II.A.1	<p>1. Implement the statutory provisions of the Title III and Title VII Programs [OAA § 306] in accordance with State and federal laws and regulations. The Contractor shall make every effort to meet the goals and objectives stipulated in the four-year Area Plan and annual updates of the Area Plan's Goals, Objectives, and Service Unit Plan, herein incorporated into this Agreement by reference. Performance shall not be unilaterally reduced or otherwise changed without prior consultation with, and written approval from CDA. A service unit reduction of greater than ten percent (10%) requires written approval from CDA. A service unit reduction of greater than twenty percent (20%) is a major change that effects Area Plan goals and objectives and requires an Area Plan Amendment. [22 CCR 7306(a)]</p>	<p>Program Guide, Section 4.4, Item 1</p> <p>1. Implement the statutory provisions of the Title III and Title VII Programs [OAA § 306] in accordance with State and federal laws and regulations. The AAA shall make every effort to meet the goals and objectives stipulated in the four-year Area Plan and annual updates of the Area Plan's Goals, Objectives, and Service Unit Plan, herein incorporated into this Program Guide by reference. Performance shall not be unilaterally reduced or otherwise changed without prior consultation percent (10%) requires written approval from CDA.</p>
AP, Exhibit A, Article II.A.19	<p>Maintain a four-year Area Plan, with annual updates, as specified in 22 CCR 7300 to 7320. The Area Plan and annual updates are due by May 1st of each year. The annual update shall be effective during the same term as this Agreement.</p>	<p>Program Guide, Section 4.4, Item 2</p> <p>The AAA shall maintain a four-year Area Plan, with annual updates, as specified in 22 CCR 7300-7320. The Area Plan and Area Plan Updates are due May 1st of each year per Title 22 CCR Section 7304. Area Plan Guidance documents are released by CDA each year in preparation of the next Area Plan or Area Plan Update submission and provide additional information along with the template and format requirements. This guidance is released as part of a Program Memo that is sent out to the AAAs and also posted on the CDA website.</p>

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AP, Exhibit A, Article II.A.28	Title III C meals are compliant with the Older Californians Nutrition Program Menu Guidance.	<p>Program Guide, Section 4.4.3, Item 9</p> <p>9. Ensure Title III C meals meet the nutrition requirements of meals:</p> <ul style="list-style-type: none"> <li>a. Comply with the most current Dietary Guidelines for Americans</li> <li>b. Provide one-third of the Dietary References Intakes (DRI) if providing one meal per day, two-thirds of the DRI if providing two meals per day, and 100% of the DRIs if providing three meals per day.</li> <li>c. Comply with the Older Californians Nutrition Program Menu Guidance</li> </ul>
AP, Exhibit A, Article II.B.13	Review and approve claims for Citation Penalties Account funds, Licensing and Certification Program funds, and Skilled Nursing Facility Quality and Accountability funds, CARES Act funds, Elder Justice Act funds, Older Americans Act funds, and Older Californians Act funds.	<p>Program Guide, Section 4.4.1, Item 13</p> <p>Review and approve claims for Citation Penalties Account funds, Licensing and Certification Program funds, and Ombudsman General funds, Older Americans Act funds, and Older Californians Act funds.</p>
AP, Exhibit A, Article II.B.14	Submit monthly fiscal documents to CDA, as determined by CDA, for Citation Penalties Account funds, Licensing and Certification Program funds, Skilled Nursing Facility Quality and Accountability funds, CARES Act funds, Elder Justice Act funds, Older Americans Act funds, and Older Californians Act funds.	<p>Program Guide, Section 4.4.1, Item 14</p> <p>Submit monthly fiscal documents to CDA, as determined by CDA, for Citation Penalties Account funds, Licensing and Certification Program funds, Ombudsman General funds, Older Americans Act funds, and Older Californians Act funds.</p>
New Language in Program Guide, Section 4.4.3, Item 1		Comply with all provisions in CCR 7630 – 7638.13 Elderly Nutrition Program.

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New Language in Program Guide, Section 4.4.3, Item 12		<p>12. Ensure that an eligible individual who receives a meal is given the opportunity to voluntarily contribute to the cost of the meal.</p> <p>a. Comply with provisions for voluntary contributions in Section 4.4. [OAA §325(b)]</p> <p>b. The nutrition services provider must develop a suggested amount. When developing this contribution amount, the income ranges of the older individuals in the community and the provider's other sources of income shall be considered. [CCR 7638.9.(b)]</p> <p>i. Title III C-1: Post signage indicating the suggested contribution for eligible individuals, and the guest fee for non-eligible individuals, near the contribution container at each congregate meal site. The guest fee shall cover all meal costs. [CCR 7638.9.(c)]</p> <p>ii. Title III C-2: Notify C-2 clients of the suggested contribution amount and methods for making voluntary contributions.</p>
New Language in Program Guide, Section 4.4.4		<p><b>Title III D Health Promotion – Evidence-Based</b></p> <p>AAA Shall:</p> <ol style="list-style-type: none"> <li>1. Provide one or more Title IIID evidence-based health promotion programs.</li> <li>2. Provide Title IIID programs that meet ACLs evidence-based requirements through one of the two options:             <ol style="list-style-type: none"> <li>a. Meets the requirements for ACL’s evidence-based definition; or</li> <li>b. Is considered to be an “evidence-based program” by any operating division of the U.S. Department of Health and Human Services (HHS) and is shown to be effective and appropriate for older adults.</li> </ol> </li> </ol>

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		<p>3. Ensure the fidelity of programs is maintained by adhering to the curriculum.</p> <p>4. Offer Title III D services to eligible individuals 60 and older, and the spouse of eligible older individuals.</p> <p>5. Ensure that an eligible individual is given the opportunity to voluntarily contribute to the cost of the service. Comply with provisions for voluntary contributions in Section 4.4. [OAA §325(b)]</p> <p>6. Monitor, on an ongoing basis, the Subcontractor's use of federal and State funds through reporting, site visits, regular contact, or other means to assure the Subcontractor administers federal and State awards in compliance with laws, regulations, and the provisions of contracts and that performance goals are achieved. The AAA must follow up and ensure that the Subcontractor takes timely and appropriate action on all deficiencies pertaining to the Federal programs detected through monitoring and on-site review. [CFR 75.352]. Onsite monitoring for Title III D programs must be conducted every other year at minimum. Onsite Fiscal monitoring must be conducted every two (2) years for Title III D programs.</p> <p>7. Provide support and technical assistance to subcontractors and respond in writing to all written requests for direction, guidance, and interpretation of instructions to include client and performance data.</p>
AP, Exhibit B, Article II.B.1	Personnel Costs – annual full time effort (FTE) wage rates and personnel classifications together with the percentage of time to be charged, specified for each fund source.	<p>Program Guide, Section 4.5, Item 2.a</p> <p>a. Personnel Costs – annual full time effort (FTE) wage rates and personnel classifications together with the percentage of time to be charged,</p>

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		<p>specified for each fund source. 2 CFR 200.430 must be followed for rules regarding allowability of personnel costs. Specific emphasis of section (i) of 2 CFR 200.430:</p> <ul style="list-style-type: none"> <li>i. Charges to Federal awards for salaries and wages must be based on records that accurately reflect the work performed. These records must:             <ul style="list-style-type: none"> <li>1) Be supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated;</li> <li>2) Be incorporated into the official records of the non-federal entity;</li> <li>3) Reasonably reflect the total activity for which the employee is compensated by the non-Federal entity, not exceeding 100% of compensated activities;</li> <li>4) Support the distribution of the employee's salary among specific activities or cost objectives if the employee works on more than one Federal award; a Federal award and a non-Federal award, an indirect cost activity and a direct cost activity; two or more indirect activities which are allocated using different allocation bases; or an unallowable activity and a direct or indirect cost activity.</li> <li>5) Budget estimates (i.e. estimates determined before the services are performed) alone do not qualify as support for changes to Federal awards.</li> </ul> </li> <li>ii. Salaries and wages of employees used in meeting cost sharing or matching requirements</li> </ul>

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		on Federal awards must be supported in the same manner as salaries and wages claimed for reimbursement from Federal awards
New Language in Program Guide, Section 4.5, Item 2.e		Rent – total cost per funding source
AP, Exhibit B, Article II.B.7	Vendor/Consultant Agreements – specified for each fund source	Program Guide, Section 4.5, Item 2.h  Contractual Costs – subcontractor and consultant cost details, specified for each fund source
AP, Exhibit B, Article II.B.10	Allocated Direct Costs – requires submission of a Direct Cost Allocation Plan for prior approval.	Program Guide, Section 4.5, Item 2.k  Allocated Direct Costs – requires submission of a Direct Cost Allocation Plan for prior approval. OR Indirect Costs – costs incurred for a common or joint purpose benefiting more than one cost objective not readily assignable as a direct cost.
AP, Exhibit B, Article II.D.1	The maximum reimbursement amount allowable for indirect costs is ten percent (10%) of the Contractor's Modified Total Direct Costs (MTDC), excluding in-kind contributions and nonexpendable equipment. Indirect costs shall not exceed 10% of the Contractor's MTDC per funding category.	Program Guide, Section 4.5.1, Item 1  1. The maximum reimbursement amount allowable for indirect costs is ten percent (10%) of the AAA's Modified Total Direct Costs (MTDC), per funding category excluding in-kind contributions and nonexpendable equipment.  Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$25,000 of each subaward (regardless of the period of performance of the subawards under the award). MTDC excludes in-kind contributions,

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		equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items may only be excluded when necessary to avoid a serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs. [45 CFR 75.2]
AP, Exhibit B, Article II.B.2	Contractors requesting reimbursement for indirect costs shall retain on file an approved indirect cost rate accepted by all federal awarding agencies or an allocation plan documenting the methodology used to determine the indirect costs.	Program Guide, Section 4.5.1, Item 2  AAAs requesting reimbursement for indirect costs exceeding the maximum ten percent (10%) shall retain on file an approved negotiated indirect cost rate or cost allocation plan.
AP, Exhibit B, Article III.D	Area Plan Administration is comprised of federal funds from Title III B, III C1, III C2, and III E as well as General Funds in no specific subcategory. Federal Area Plan Administration funding may be utilized on Area Plan administration, or program activities and services, or both. General Fund Area Plan Administrative funding must be utilized on Area Plan administration.	Program Guide, Section 4.6.3  Area Plan Administration is comprised of federal funds from Title III B, III C1, III C2, and III E as well as General Funds in no specific subcategory. Federal Area Plan Administration funding may be utilized on Area Plan administration, or program activities and services, or both.
New Language in Program Guide, Section 4.7.2, Item 1.c		The Title III C nutrition augmentation funding may be transferred between General Fund C1 and General Fund C2 as needed to provide services. The funding must not be transferred to other programs or be used to supplant other program funding, including the Federal Title III C1 and Federal Title III C2.
New Language in Program Guide, Section 4.7.3, Item 7.a		The expenditures are related to the needs of caregivers and are attributable to a service category within the National Family Caregiver Support Program (NFCSP).
AP, Exhibit B, Article IV.H	Equipment	Program Guide, Section 4.7.5



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	Equipment/Property with per unit cost over \$5,000 or any computing device regardless of cost requires justification from the Contractor and approval from CDA. To request approval for specific equipment items, requests with justifications shall be sent to <a href="mailto:cdaequipment@aging.ca.gov">cdaequipment@aging.ca.gov</a> . Such items must also be included in Contractor's approved Area Plan Budget. Please not an approved budget is not approval for equipment purchase.	Property  Property with per unit cost over \$5,000 or any computing devices, regardless of cost requires submission of a justification and budget from the AAA. Property requires pre-approval from CDA and must be included on an approved Area Plan budget prior to purchase. To request approval for property, budgets and a justification form shall be sent to <a href="mailto:finance@aging.ca.gov">finance@aging.ca.gov</a> .
AP, Exhibit B, Article V.A	<p>Title III B, III C, III D, III E, VII Ombudsman and VII-A Elder Abuse Prevention, Ombudsman Citation Penalties Account, Licensing and Certification Program funds, Skilled Nursing Facility Quality and Accountability Funds, CARES Act, Elder Justice Act, and Older Californians Act.</p> <p>The Contractor shall prepare and submit a monthly expenditure report in an electronic format to CDA no later than the last business day of each month or as specified by CDA. The report shall include all costs and funding sources for the month prior.</p>	<p>Program Guide, Section 4.8, Item 1</p> <p>Title III B, III C, III D, III E, VII Ombudsman and VII-A Elder Abuse Prevention, Ombudsman Citation Penalties Account, Licensing and Certification Program funds, General Ombudsman funds and Older Californians Act.</p> <p>The AAA shall prepare and submit a monthly expenditure report in an electronic format to CDA no later than the last business day of each month or as specified by CDA. The report shall include all costs and funding sources for the month prior.</p>
AP, Exhibit B, Article V.B	Payments will be made to reimburse expenditures reported unless Contractor pre-selects an Advance method on the budget form at the time of Agreement execution.	<p>Program Guide, Section 4.8, Item 2</p> <p>Payments will be made to reimburse expenditures reported unless AAA pre-selects an Advance method and provides a justification explaining the need for an advance on the budget form at the beginning of a new funding term, as referenced on a budget display.</p>
AP, Exhibit B, Article VI.A	The Area Plan Financial Closeout Report, and reconciliation to Contractor's General Ledger shall be submitted annually to the CDA Local Finance Bureau. All contractors are required to submit Closeout Reports as instructed by CDA.	<p>Program Guide, Section 4.12, Item 1</p> <p>The Area Plan Financial Closeout Report and the Program Property Inventory Certification shall be submitted annually</p>

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	All contractors are required to submit a Program Property Inventory Certification annually, at the time of closeouts, to <a href="mailto:CDAEquipment@aging.ca.gov">CDAEquipment@aging.ca.gov</a> or as instructed by CDA.	to the CDA Local Finance Bureau. All AAAs are required to submit Closeout reports as instructed by CDA.
TV, Exhibit E, Article I.D	The Contractor will comply with an average participation cap for eligible individuals of no more than twenty-seven (27) months in the aggregate, unless requested and approved by DOL, or extended as allowed under the SCSEP provisions of the CARES Act. [OAA § 502(b)(1)(C)] [20 CFR 641.570(c)] [CARES Act Sec.3223(I)(A)] [DOL Training and Employment Guidance Letter (TEGL) 22-19]	<p>Program Guide, Section 5.2, Item 4</p> <p>The AAA will comply with an average participation cap for eligible individuals of no more than twenty-seven (27) months in the aggregate, unless requested and approved by DOL. [OAA § 502(b)(1)(C)] [20 CFR 641.570(c)] [DOL Training and Employment Guidance Letter (TEGL) 22-19]</p>
TV, Exhibit A, Article I.L	“Individual Durational Limit” means a participant can be enrolled in the program for up to forty-eight (48) months, except as extended as allowed under the SCSEP provisions of the CARES Act. [OAA § 518(a)(3)(B)(i)] [20 CFR 641.570(a)] [California Department of Aging (CDA) Program Memo (PM) 10-19] [CARES Act Sec.3223(I)(A)] [DOL Training and Employment Guidance Letter (TEGL) 22-19]	<p>Program Guide, Section 5.3, Item 12</p> <p><b>“Individual Durational Limit”</b>: a participant can be enrolled in the program for up to forty-eight (48) months. [OAA § 518(a)(3)(B)(i)] [20 CFR 641.570(a)] [California Department of Aging (CDA) Program Memo (PM) 10-19] [CARES Act Sec.3223(I)(A)] [DOL Training and Employment Guidance Letter (TEGL) 22-19]</p>
TV, Exhibit B, Article II.B.1	Personnel Costs - monthly, weekly, or hourly rates, as appropriate and personnel classifications together with the percentage of time to be charged to this Agreement.	<p>Program Guide, Section 5.5, Item 2.a</p> <p>a. Personnel Costs – annual full time effort (FTE) wage rates and personnel classifications together with the percentage of time to be charged, specified for each fund source. 2 CFR 200.430 must be followed for rules regarding allowability of personnel costs.</p> <p>i. Charges to Federal awards for salaries and wages must be based on records that accurately reflect the work performed. These records must:</p> <p>1) Be supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated;</p>

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		<p>2) Be incorporated into the official records of the non-federal entity;</p> <p>3) Reasonably reflect the total activity for which the employee is compensated by the non-Federal entity, not exceeding 100% of compensated activities;</p> <p>4) Support the distribution of the employee's salary among specific activities or cost objectives if the employee works on more than one Federal award; a Federal award and a non-Federal award, an indirect cost activity and a direct cost activity; two or more indirect activities which are allocated using different allocation bases; or an unallowable activity and a direct or indirect cost activity.</p> <p>5) Budget estimates (i.e. estimates determined before the services are performed) alone do not qualify as support for changes to Federal awards.</p> <p>ii. Salaries and wages of employees used in meeting cost sharing or matching requirements on Federal awards must be supported in the same manner as salaries and wages claimed for reimbursement from Federal awards.</p>
TV, Exhibit B, Article II.B.4	Indirect Costs	<p>Program Guide, Section 5.5, Item 2.d</p> <p>Allocated Direct Costs – requires submission of a Direct Cost Allocation Plan for prior approval. OR Indirect Costs – costs incurred for a common or joint purpose benefitting more than one cost objective and not readily assignable as a direct cost.</p>
TV, Exhibit B, Article II.B.5	Rent – specify square footage and rate.	Rent - total costs
New Language in Program Guide, Section 5.5, Item 2.i		Staff Training – attendance and cost for necessary training

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TV, Exhibit B, Article II.B.10	Other Costs – a detailed list of other operating expenses	<p>Program Guide, Section 5.5, item 2.j</p> <p>Other Costs – facilities, operating expenses, and other ordinary and necessary costs.</p>
TV, Exhibit B, Article II, D.1	The maximum reimbursement amount allowable for indirect costs is ten percent (10%) of the Contractor's Modified Total Direct Costs (MTDC), excluding in-kind contributions and nonexpendable equipment.	<p>Program Guide, Section 5.5.1, Item 1</p> <p>1. The maximum reimbursement amount allowable for indirect costs is ten percent (10%) of the Contractor's Modified Total Direct Costs (MTDC).</p> <p>Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$25,000 of each subaward (regardless of the period of performance of the subawards under the award). MTDC excludes in-kind contributions, equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items may only be excluded when necessary to avoid a serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs. [45 CFR 75.2]</p>
TV, Exhibit B, Article II, D.2	Contractors requesting reimbursement for indirect costs shall retain on file an approved indirect cost rate accepted by all federal awarding agencies or an allocation plan documenting the methodology used to determine the indirect costs.	<p>Program Guide, Section 5.5.1, Item 2</p> <p>AAAs requesting reimbursement for indirect costs exceeding the maximum ten percent (10%) shall retain on file an approved negotiated indirect cost rate or cost allocation plan.</p>
TV, Exhibit B, Article V.B	Payments will be made to reimburse expenditures reported unless payment method was established as a Request for Funds basis for the contract term at the time of contract execution.	<p>Program Guide, Section 5.8, Item 2</p> <p>Payments will be made to reimburse expenditures reported unless the AAA pre-selects an Advanced method and</p>

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		provides a justification explaining the need for an advance on the budget form at the beginning of a new funding term, as referenced on a budget display.
TV, Exhibit B, Article VI.B	<p>Final expenditures must be reported to CDA in accordance with the budget display in Exhibit B. If the expenditures reported by the Contractor exceed the advanced amount, CDA will reimburse the difference to the Contractor up to the contract amount. If the expenditures reported by the Contractor are less than the advanced amount, CDA will invoice the Contractor for the unspent funds.</p> <p>The invoice is due immediately upon receipt or no later than 30 days from the date on the invoice</p>	<p>Program Guide, Section 5.12, Item 2</p> <p>2. Final expenditures must be reported to CDA in accordance with allocations and funding periods specified in the budget display. If the expenditures reported by the AAA exceed the advanced amount, CDA will reimburse the difference to the AAA up to the program funding allocation amounts listed on the budget display. If the expenditures reported by the AAA are less than the advanced amount, CDA will invoice the AAA for the unspent funds.</p> <p>The payment on the invoice is due immediately upon receipt or no later than 30 days from the date on the invoice.</p> <p>If payment is not received within 30 calendar days, CDA will collect payment from upcoming disbursements. To account for the collected funds from outstanding invoice, the AAA will need to adjust records to move the funds already on hand from the previous fiscal year funding period to the current fiscal year funding period</p>
HI, Exhibit E, Article I.C.4		<p>Program Guide, Section 6.2, Item 3.d</p> <p>3. Materials published or transferred by the AAA and financed with funds under this Agreement shall:</p> <p>a. Use the SHIP Logo and Tagline on all HICAP publications, including websites.</p>

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		<p>b. Identify the name of the entity, the address, and telephone number at which the supporting data is available.</p> <p>c. Acknowledge the support of CDA in writing, whenever publicizing the work under this Agreement in any media.</p> <p>d. Assure that all HICAP related public information materials include the appropriate HICAP Product Disclaimer.</p> <p>The AAA may select the appropriate Template Language that best corresponds with the AAA's, or contracted service provider's HICAP allocation(s). Template language should be edited to replace each reference of "XX" with the appropriate corresponding figure.</p> <p>i. Product Disclaimer Template Option 1:          "This [project/publication/program/website, etc.] [is/was] supported by the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$XX with 100 percent funding by ACL/HHS. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the U.S. Government."</p> <p>ii. Product Disclaimer Template Option 2:          This project/publication/program/website, etc.] [is/was] supported by the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$XX with XX percentage funded by ACL/HHS and \$XX amount and XX percentage funded by non-government source(s). The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the U.S. Government.</p>

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HI, Exhibit E, Article I.G	Contingent upon legislative approval for augmented Local Assistance funds for Fiscal Year 2021-22 and CDA's notice of availability of funds:	<p>Program Guide, Section 6.2, Item 7</p> <p>Contingent upon legislative approval for augmented Local Assistance funds and CDA's notice of availability of funds:</p>
Exhibit A, Article II.S.4	Contracted legal representation services shall not commence without a formal referral from the HICAP Program Manager to the Supervising Attorney, and only after a preliminary counseling session determines the need for referral.	<p>Program Guide, Section 6.4, Item 19.d</p> <p>d. Contracted legal representation services shall not commence without a formal referral from the HICAP Program Manager to the Supervising Attorney, and only after a preliminary counseling session determines the need for referral.</p> <ul style="list-style-type: none"> <li>i. Counseling sessions are required to be conducted by a registered HICAP counselor.</li> <li>ii. The client may be either the person imminently becoming eligible for Medicare, enrolled in Medicare, or their representative.</li> <li>iii.</li> </ul>
HI, Exhibit B, Article II.B.1	Personnel Costs - monthly, weekly, or hourly rates, as appropriate and personnel classifications together with the percentage of time to be charged to this Agreement.	<p>Program Guide, Section 6.5, Item 2.a</p> <p>a. Personnel Costs – annual full time effort (FTE) wage rates and personnel classifications together with the percentage of time to be charged, specified for each fund source. 2 CFR 200.430 must be followed for rules regarding allowability of personnel costs.</p> <p>i. Charges to Federal awards for salaries and wages must be based on records that accurately reflect the work performed. These records must:</p> <ul style="list-style-type: none"> <li>1) Be supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated;</li> </ul>

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		<p>2) Be incorporated into the official records of the non-federal entity;</p> <p>3) Reasonably reflect the total activity for which the employee is compensated by the non-Federal entity, not exceeding 100% of compensated activities;</p> <p>4) Support the distribution of the employee's salary among specific activities or cost objectives if the employee works on more than one Federal award; a Federal award and a non-Federal award, an indirect cost activity and a direct cost activity; two or more indirect activities which are allocated using different allocation bases; or an unallowable activity and a direct or indirect cost activity.</p> <p>5) Budget estimates (i.e. estimates determined before the services are performed) alone do not qualify as support for changes to Federal awards.</p> <p>ii. Salaries and wages of employees used in meeting cost sharing or matching requirements on Federal awards must be supported in the same manner as salaries and wages claimed for reimbursement from Federal awards.</p>
HI, Exhibit B, Article II.B.4	Indirect Costs.	<p>Program Guide, Section 6.5, Item 2.d</p> <p>Allocated Direct Costs - requires submission of a Direct Cost Allocation Plan for prior approval. OR Indirect Costs – costs incurred for a common or joint purpose benefitting more than one cost objective and not readily assignable as a direct cost.</p>
HI, Exhibit B, Article II.B.5	Rent – specify square footage and rate	<p>Program Guide, Section 6.5, Item 2.e</p> <p>Rent – total costs.</p>
HI, Exhibit B, Article II.B.6	Supplies	<p>Program Guide, Section 6.5, Item 2.f</p>



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		Supplies – to include items below the \$5,000 property threshold
HI, Exhibit B, Article II.B.10	Other Costs – a detailed list of other operating expenses	<p>Program Guide, Section 6.5, Item 2.j</p> <p>Other Costs – facilities, operating expenses, and other ordinary and necessary costs.</p>
HI, Exhibit B, Article II.D.1	The maximum reimbursement amount allowable for indirect costs is ten percent (10%) of the Contractor's Modified Total Direct Costs (MTDC), excluding in-kind contributions and nonexpendable equipment.	<p>Program Guide, Section 6.5.1, item 1</p> <p>1. The maximum reimbursement amount allowable for indirect costs is ten percent (10%) of the AAA's Modified Total Direct Costs (MTDC).</p> <p>Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$25,000 of each subaward (regardless of the period of performance of the subawards under the award). MTDC excludes in-kind contributions, equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items may only be excluded when necessary to avoid a serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs. [45 CFR 75.2]</p>
New Language in Program Guide, Section 7.3, Item 10		10. Medicare Part D Low-Income Subsidy (LIS)/Extra Help: a federal program that provides financial assistance with Part D premiums and cost sharing for eligible low-income Medicare beneficiaries.
New Language in Program Guide, Section 7.3, Item 13		13. National Center for Benefits Outreach and Enrollment (NCBOE): an organization that helps organizations enroll seniors and younger adults with disabilities with limited means into the benefits programs for

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		which they are eligible so that they can remain healthy and improve the quality of their lives.
MI, Exhibit B, Article II.B.1	Personnel Costs - monthly, weekly, or hourly rates, as appropriate and personnel classifications together with the percentage of time to be charged to this Agreement.	<p>Program Guide, Section 7.5, Item 2.a</p> <p>a. Personnel Costs – annual full time effort (FTE) wage rates and personnel classifications together with the percentage of time to be charged, specified for each fund source. 2 CFR 200.430 must be followed for rules regarding allowability of personnel costs. Specific emphasis of section (i) of 2 CFR 200.430:</p> <p>i. Charges to Federal awards for salaries and wages must be based on records that accurately reflect the work performed. These records must:</p> <ol style="list-style-type: none"> <li>1) Be supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated;</li> <li>2) Be incorporated into the official records of the non-federal entity;</li> <li>3) Reasonably reflect the total activity for which the employee is compensated by the non-Federal entity, not exceeding 100% of compensated activities;</li> <li>4) Support the distribution of the employee’s salary among specific activities or cost objectives if the employee works on more than one Federal award; a Federal award and a non-Federal award, an indirect cost activity and a direct cost activity; two or more indirect activities which are allocated using different allocation bases; or an unallowable activity and a direct or indirect cost activity.</li> <li>5) Budget estimates (i.e. estimates determined before the services are performed) alone do not qualify as support for changes to Federal awards.</li> </ol> <p>ii. Salaries and wages of employees used in meeting cost sharing or matching requirements on Federal awards</p>

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		must be supported in the same manner as salaries and wages claimed for reimbursement from Federal awards.
MI, Exhibit B, Article II.B.4	Indirect Costs – costs incurred for a common or joint purpose benefitting more than one cost objective and not readily assignable as a direct cost.	Program Guide, Section 7.5, Item 2.d  d. Allocated Direct Costs – requires submission of a Direct Cost Allocation Plan for prior approval. OR Indirect Costs – costs incurred for a common or joint purpose benefitting more than one cost objective and not readily assignable as a direct cost.
MI, Exhibit B, Article II.B.5	Rent	Program Guide, Section 7.5, Item 2.e  Rent – total costs
MI, Exhibit B, Article II.B.6	Supplies	Program Guide, Section 7.5, Item 2.f  Supplies – to include items below the \$5,000 property threshold
MI, Exhibit B, Article II.B.10	Training	Program Guide, Section 7.5, Item 2.i  Staff Training – attendance costs for necessary training, specified for each funding source.
MI, Exhibit B, Article II.B.11	Other Costs – a detailed list of other operating expenses.	Program Guide, Section 7.5, Item 2.j  Other Costs – facilities, operating expenses, and other ordinary and necessary costs.
MI, Exhibit B, Article II.F	F. Unless otherwise specified by CDA, the final budget revision must be submitted at least sixty (60) days prior to the ending date of the Agreement. 1. The original Contract Budget is due electronically to the Contractor's CDA Local Finance Analyst no later than thirty (30) days from the date of the	Program guide, Section 7.5, Item 6  Unless otherwise specified by CDA, the final budget revision must be submitted at least sixty (60) days prior to the ending date of the budget period, as outlined on the program Budget Display.

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	transmission of the Budget Display and Agreement.	
New Language in Program Guide, Section 7.5, Item 7		The budget is due electronically to the Local Finance Bureau no later than thirty (30) days from the date of the transmission of the Budget Display and MOU.
New Language in Program Guide, Section 7.5, Item 8		Funds made available under this Program Guide and the MOU shall supplement, and not supplant, any federal, State, or local funds expended by a State or unit of general-purpose local government.
MI, Exhibit B, Article V.A	The MIPPA Financial Closeout Report shall be submitted annually to the CDA Local Finance Bureau. All contractors are required to submit Closeout Reports electronically as instructed by CDA.	<p>Program Guide, Section 7.10, Item 1</p> <p>The MIPPA Financial Closeout Report and the Program Property Inventory Certification shall be submitted annually to the CDA Local Finance Bureau. All AAAs are required to submit Closeout Reports with actual expenditures, electronically, as instructed by CDA.</p>