Taxonomy and Assessment

October 7, 2022

TAXONOMY AND DAIL-APPROVED ASSESSMENT TOOLS

INTRODUCTION

The Kentuckiana Regional Planning and Development Agency (KIPDA), which houses the Area Agency on Aging for Jefferson, Trimble, Henry, Oldham, Bullitt, Spencer, and Shelby counties, has been transitioning to a new database for several months as the time of this writing. The database, commonly referred to as SAMs, is the preferred reporting system for aging-related programs by the state of Kentucky's Department of Aging and Independent Living (DAIL).

Most of these aging-related programs are supported under Title III, which is also known as the Older Americans Act (OAA).

For fiscal year 2023 (beginning July 1, 2022), KIPDA's leadership decided to move most programs that are connected to Title III (commonly referred to as "aging programs") into SAMs, and move away from the previously used database known as ServTracker. This is a process that will be completed in stages, and it will require a couple of years to fully implement.

In conjunction with KIPDA's move into the SAMs' database, DAIL issued a new taxonomy for FY 2023 that coincides with the DAIL Approved Assessment Tool that is the gateway to many aging programs, and it is housed in the SAMs' data base.

The DAIL Approved Assessment Tool is generally completed by the provider that will serve this individual through various programs, and specific services that fall under these programs. This assessment helps determine which programs individuals are eligible to pursue. Exceptions to this process are noted on an individual program basis.

DAIL's new taxonomy (effective July 1, 2022) designates which section of the Assessment Tool needs to be completed for which service within each applicable program. Occasionally, a different assessment or supplemental assessment is required. Providers should reference the specific program and service in the DAIL taxonomy.

Policy: All providers should review the FY 2023 taxonomy and utilize the corresponding assessment tool and section as appropriate whenever they receive a referral for Aging services from any source. Providers should enter corresponding units and information into SAMs based on the FY 2023 taxonomy.

Procedures:

- Providers will complete the assessment associated with their programs and services in the taxonomy before service delivery and as needed afterwards.
- If services are unavailable, providers will keep and maintain a waiting list in the appropriate database per program requirements.
- Videos and Help Sheets for data entry into SAMs are available from KIPDA.

Appendix for Taxonomy and the DAIL-Approved Assessment Tool

- FY 2023 Taxonomy (available upon request)
- The DAIL-Approved Assessment Tool (available upon request)