



Connecting Older Adults with Community-based Resources and Options

Reporting Requirements and Due Dates FY 2026

Red indicates end of reporting for FY2025 data.
Green indicates start of reporting for FY2027 data.

Program Reports	Staff contact	How to submit	Month & Day												
			Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct
Monthly															
ADRD Gap Filing Applications	See MS Forms link:	https://forms.microsoft.com/r/FLjPtLBr2x	5	5	5	5	5	5	5	5	5	5	5	5	5
NAPIS (National Aging Program Information System) Data (AgingIS or interface)	Lucas Dvorscak	Enter/interface into AgingIS	15	15	15	15	15	15	15	15	15	15	15	15	15
SHAP/MIPPA Program Reports	Jennifer DiNicola/Mauria Owens	bireports@ageoptions.org	10	10	10	10	10	10	10	10	10	10	10	10	10
Quarterly															
GRG State Funds Stipend Usage Report	Cynthia Ayala	cynthia.ayala@ageoptions.org	31			31			30		31			31	
Title IIIB, IIIC1, IIIC2, IID, IIIE, Ombudsman Quarterly Service Cost Reports	Irma Lopez-Heredia or Valencia Myles	Grants Portal				15			15		15				10
Title IIIC1 (Congregate) Outreach Plans	Phillip Lanier	reports@ageoptions.org	1						1						1
Annually															
Audit Reports	Sandra Pothast	Grants Portal (Organization Profile)	Either 6 or 9 months after the provider's audited fiscal year, determined by federal spending levels (see General Requirements).												
Final Budget	Irma Lopez-Heredia or Valencia Myles	Grants Portal	8/22/2025												
Inventory of Assets Purchased with Title III Funds	Irma Lopez-Heredia or Valencia Myles	Grants Portal		10											10
Performance Plan	Irma Lopez-Heredia or Valencia Myles	Grants Portal	After budget is approved												
Title IIIC Fire and Health Inspections	Phillip Lanier	In person	At annual nutrition site visit												
As needed															
Budget Revisions	Paula Bartolozzi	Grants Portal	As needed throughout the fiscal year up to August												
Title IIIC Menus	Kristin Leicht	menus@ageoptions.org	Four weeks in advance of service												

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