



Connecting Older Adults with Community-based Resources and Options

Reporting Requirements and Due Dates FY 2027

Red indicates end of reporting for FY2026 data.
Green indicates start of reporting for FY2028 data.

Program Reports	Staff contact	How to submit	Month & Day													
			Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov
Monthly																
ADRD Gap Filling Applications	See MS Forms link:	https://forms.microsoft.com/r/FLjPtLBr2x	5	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	15
SHAP/MIPPA Program Reports	Jennifer DiNicola/Mauria Owens	biereports@ageoptions.org	10	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, IIID, 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	8/21/2026													
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	With Final Budget (August)													
Title IIIC Fire and Health Inspections	Phillip Lanier	In person	At annual nutrition site visit													
As needed																
Budget Revisions	Zhanyl Mukashova	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													