



# NEW MEXICO POLICIES & PROCEDURES

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## SECTION CONTENTS

### AGING NETWORK DIVISION DATA UNIT

THE DOCUMENT CONTAINED HEREIN IS SUBJECT TO CHANGE.

VERSION: 8.2025

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## NEW MEXICO STATE UNIT ON AGING (SUA)

### AGING NETWORK DATA UNIT POLICIES AND PROCEDURES

Updated for (45 C.F.R. §1321.85, §1321.87, §1321.89, and §1321.91)

### SUA.AND.DATA UNIT

#### 1.0 PURPOSE

- (A) The purpose of this policy is to establish the Aging and Long-Term Services Department's (ALTSD) Aging Network, Data Unit, Policies and Procedures (Required for SUA, AAAs, and Providers) by §1321.87, §1321.91.
- (B) If any provision of this policy conflicts with a provision of an applicable Collective Bargaining Agreement (CBA), the CBA shall control.

1. **DEFINITIONS:** See the link to Resources in **REFERENCES AND LINKS** below.

2. **POLICY**

ALTSD is dedicated to providing high-quality, responsive, person-centered services to older New Mexicans, individuals with disabilities, and their caregivers which is ensured by the effective implementation of available services. Transparency is essential to ensure constituents have confidence in ALTSD management to make informed decisions about working with providers and their programs, implementing policy, and standards for service delivery, frequency, and protocols.

3. **PROCEDURE**

1. **Ad Hoc Data Requests—Use the Data Request Form (DRF)**

a. Complete the Data Unit (DU) DRF request form which contains the following:

- i. Urgency Level
- ii. Requested by
- iii. Date of Request
- iv. Due Date
- v. Time Needed
- vi. Format (PDF/Excel/Word)
- vii. Provide a description of the Request

2. **DBOG**—A comprehensive resource entitled “Database Business Operations Guide (DBOG)” has been developed and contains the following resources:

ALTSD Database Business Operations Guide (DBOG) Contents		
About Community Living	Older Americans Act	OVERVIEW
Purpose	Background	Authority
Applicability	Distribution	Accessibility
Revision History	State Unit on Aging (SUA) Update July 2023	Aging & Disability (A&D) [Formerly SAMS] Users
ALTSD Data System User Group	ALTSD Data System User Group Lead	System Administrators (NMAALTSD)
Agency Users	All Aging & Disability (A&D) Users	Provider Users

<b>ALTSD Database Business Operations Guide (DBOG) Contents (continued)</b>		
Purpose, State Responsibilities, AAA Responsibilities, Resources	ENTERING CONSUMER DATA	Privacy and Confidentiality
Use of Data	Security	Registering Consumers
Minimum Standards of Required Data to be Collected from Consumers	Consumer Groups for Non-Registered Clients Only	Registration Process
Linking Caregivers to Care Recipients	Registration for a Waiting List	Frequency of Data Collection
Data Reconciliation, Verification and Validation	Working in Aging & Disability (A&D)	Reporting
Change Request Forms	WellSky Human Services/APSS Database	Adult Protective Services (WellSky/APSS) Users
Ombudsman	ATTACHMENT 1—References	ATTACHMENT 2—Forms —Confidentiality Agreement— NMALTS WellSky Portal User Request —WellSky—A&D Training for NMALTS, Agencies, and Providers
Summary 2023 Aging and Long-Term Services Department Enhancements	ATTACHMENT 3—Abbreviations, Acronyms, and Terms	ATTACHMENT 4—AAA/Provider Minimum Required Elements for Assessments
ATTACHMENT 5—ALTSD Desk Reference Title III Clusters		

3. Scheduled Data Unit Reports—Data requested may vary with Federal, Department and Division requests and guidelines.
  - a. Food Initiative data due Monthly
  - b. Governor’s Report data due Monthly
  - c. Older Americans Act Performance System (OAAPS) due January 31 annually
  - d. Performance Measures data due Quarterly
4. This information shall be kept on file and be available for review by the Area Agency on Aging (AAA), the New Mexico Aging & Long-Term Services Department (ALTSD), Federal regulatory agencies, State and Local Public Health Departments, and others needing it for purposes of audit or compliance review.
5. **MONITORING PROCEDURE**
  1. The monitoring procedure is detailed throughout the “Database Business Operations Guide”.
  2. The number and type of services are recorded in the State database with demographic details about the consumer.
  3. This data is validated and compiled for submission annually by January 31, in the Older Americans Act Performance System (OAAPS).

6. **GUIDES**

The Database Business Operations Guide (DBOG) is under review by ALTSD management.  
The OAAPS is available on the ACL OAAPS site.

7. **REFERENCES AND LINKS**

Authority: 45 C.F.R. section 1321.9(c)(2), 45 C.F.R. section 1321.49, and the Fair Labor Standards Act  
29 U.S.C. section 201 et seq.

Link: [ACL OAAPS](#)

Link: [https://www.aging.nm.gov/wp-content/uploads/2025/10/RESOURCE.Acronyms.Definitions.UnitsofService.UCIT\\_.WEBSITE.pdf](https://www.aging.nm.gov/wp-content/uploads/2025/10/RESOURCE.Acronyms.Definitions.UnitsofService.UCIT_.WEBSITE.pdf)

**Revision History**

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