



Dear Members,

EOEA has issued a memo with instructions on submitting the Annual Financial Statements utilizing an on-line instrument, which will also involve completing a brief survey. They have provided [this link](#) to access the survey and the submission form. Further instructions can be accessed [here](#). Please see below for the full email sent by EOEA late yesterday.

In accordance with 651 CMR 12.04(13)(a)(1), (13) A Sponsor of an ALR shall file annually, within 90 days following the end of an Assisted Living Residence's fiscal year, a financial disclosure form prescribed by EOEA which sets forth a statement by the Sponsor based on reviewed or audited financial statements prepared by a certified public accountant. All financial statements must be sufficient to permit EOEA to assess the Residence's fiscal condition and ability to meet the requirements of the service plans established for its Residents is adequate. Upon written request to EOEA, the Secretary may extend such 90-day period by an additional period, not to exceed 30 days.

To minimize the burden on ALRs to meet the annual reporting requirement, EOEA is now collecting the annual Financial Disclosure Statements using an online instrument where you complete a brief survey and upload the completed form. The following highlighted link will bring you to the Key Survey to tool <https://app.keysurvey.com/f/41613745/ab04/>

If you have questions or issues with the submission, please contact Michael Venditto at michael.venditto@mass.gov with any questions.

We appreciate your feedback. Please send any questions or comments to ALRAnnualReport@mass.gov.

Please note that “Failure to timely submit each annual report will result in a finding of noncompliance at the next Certification review.” **This is the only correspondence you will receive regarding this requirement.**

Thank you for your time and attention to this request.

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