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Dear Members,

EOEA has issued a memo with instructions for submitting the Annual Aggregate Data Report (AADR) and Annual Financial Disclosure Statements (FDS). Please see below for the full EOEA email and attachments, and be mindful of the March 1 deadline and penalty for noncompliance.

- [AADR Memo with Instructions](#)
  - [AADR Single Site](#)
  - [AADR Multiple Sites](#)
  - [ALR Financial Disclosure Statement Form](#)
  - [EOEA Financial Disclosure Statement Form](#)
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Good afternoon, this email contains instructions to complete two (2) annual submissions required by regulation for all certified Assisted Living Residences (ALRs) in Massachusetts. As noted in the regulation: “Failure to timely submit each annual report will result in a finding of noncompliance at the next Certification review.”

- 1. Annual Aggregate Data Report (AADR): In accordance with 651 CMR 12.04(13)(a)(2), an accurate report of 2023 information must be submitted to the Executive Office of Elder Affairs (EOEA) on or before March 1<sup>st</sup>. Attached are two related PDFs: the first includes instructions for the data collection instrument and the second provides a PDF version of the instrument.**

To minimize the burden on ALRs, EOEA is collecting the data using an online instrument. ALRs can access the instrument on two different websites; the information requested is identical, but one version allows respondents to complete instruments for multiple ALRs from the same Internet Protocol (IP) address. **Respondents providing data for more than one ALR** should use the “Multiple Sites AADR” link listed below. This version doesn’t enable saving but does allow multiple instruments to be completed by someone using the same IP address. **Respondents providing data for only one (1) ALR** should use the “Single Site AADR” version link listed below. The form automatically saves data and brings the respondent back to the same place if the instrument is closed (the data are linked to the IP address of the respondent).

- 1. Financial Disclosure Statement: In accordance with 651 CMR 12.04(13)(a)(1), each Massachusetts assisted living residence (ALR) sponsor shall annually file a financial disclosure form with the Executive Office of Elder Affairs (EOEA). The form must be filed for each ALR within 90 days of the end of the ALR's fiscal year. EOEA prescribes the form (see attached). Please complete the form and then file (upload the form) using a web-based instrument.**

The links to each of web-based instruments:

- Single Site AADR: <https://app.keysurvey.com/f/41704879/28de/>
- Multiple Sites AADR <https://app.keysurvey.com/f/41703595/8b81/>
- Financial Disclosure Form: <https://app.keysurvey.com/f/41705341/10f4/>

We appreciate your feedback. Please send any questions or comments to [ALRHelp@mass.gov](mailto:ALRHelp@mass.gov).

Thank you,

Trisha Marchetti

Patricia C. Marchetti, Director  
Assisted Living Certification & Compliance  
Executive Office of Elder Affairs

Direct: 617-222-7503

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