Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
State General Revenue Programs
Service Provider Application
Guidelines and Instructions
7/01/2027 – 6/30/2028 Contract Period

This packet contains programmatic instructions for the Service Provider Application to be used by Lead Agencies receiving funding under the following Department of Elder Affairs State General Revenue funded programs:

- Community Care for the Elderly
- Home Care for the Elderly
- Alzheimer’s Disease Initiative

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II.A. Program Module - General Requirements

1. Demographics and Community Care Service System

Lead Agencies must accept Area Agency on Aging of Palm Beach/Treasure Coast, Inc. referrals and provide case management and coordination of contracted services on a Community Care Service Area-wide basis for all eligible consumers residing in the specific Community Care Service Area. The CCE Lead Agencies for each Community Care Service Area in PSA 9 must coordinate the system of community based services to meet the needs of newly referred and existing clients who are functionally impaired, persons assessed for services, and targeted elderly persons identified through outreach and referral activities during the program year.

Case management and case aide are considered separate from other contracted services delivery. Case Management and case aide must be provided directly by a Lead Agency and by the Lead Agency only. Case aides will support case management and if charged to Area Agency on Aging of Palm Beach/Treasure Coast, Inc. must be reflected as a separate service.

2. Consumer Identification

The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. and Lead Agencies are charged with the responsibility to identify and inform frail elders and their caregivers of the range and availability of services. This may be carried out in cooperation with church, civic, social, and medical organizations. The target group consists of those individuals most likely to fall into the high-risk category (priority levels 4 and 5) when assessed.

Lead Agency staff should participate in local networks and consortiums where hospital, home health, social and medical providers, and Memory Disorder Clinics are represented, since these may be sources of referrals on such high-risk individuals.

It is important that this section includes a strategy utilized by the agency to gather public input from key stakeholders for organizational service planning, evaluation and feedback.

3. Care Management and Lead Agency Requirements

Coordination

Lead Agency case managers will coordinate all community resources for functionally impaired elderly people in a community care service system which is designed to provide a continuum of care as the needs of consumers change.

Programs Administered

This includes administering and managing: Community Care for the Elderly (CCE) program, Home Care for the Elderly (HCE) program, and Alzheimer's Disease Initiative (ADI) program.

These programs are funded individually and carry distinct program responsibilities. Alternative funding (City, County, Local, etc.) must be used to fund client services prior to utilizing Area Agency on Aging of Palm Beach/Treasure Coast, Inc. contracted funds.

Aging and Disability Resource Center (ADRC) Intake

The intake process begins when an older person, caregiver, or family member makes contact with or is referred to the ADRC. Outsourced Lead Agencies must refer all potential consumers in need of service to the ADRC for screening and intake, following the established referral process. Essential information about the nature of the person's problem, as well as general background information, is obtained to assist in screening for eligibility and appropriate service referrals.

Initial Screening

The screening process begins with a determination of the urgency of a person's need and the type of assistance required. The purpose of the Initial Screening is to assess the severity of the consumer's situation and to prioritize each person who is to receive an in-home comprehensive assessment by placing them on the assessed priority consumer list. The Initial Screening, utilizing the DOEA Form 701S, does not take the place of the comprehensive in-home assessment, DOEA Form 701B, which is required before care plan development and the commencement of service(s) delivery.

Eligibility Determination

As defined under Section 430.203(7), F.S., a "functionally impaired elderly person" means any person, 60 years of age or older, having physical or mental limitations that restrict individual ability to perform the normal activities of daily living and that impede the capacity to live independently without the provision of core services. Functional impairment shall be determined through a functional assessment administered to each applicant for Community Care for the Elderly core services. The functional assessment shall be developed by the Department of Elder Affairs.

Final determination of eligibility is the responsibility of the Lead Agency. A potential consumer will be determined eligible only after a comprehensive assessment has been completed to establish age, need and risk of institutional placement without services.

Prioritization

The 701B Comprehensive Assessment developed by the DOEA must be used by the Lead Agency case manager to determine an individual's level of need and risk factor. Scores obtained through use of the assessment will rank consumers as being at a high, moderate, or low risk of institutional placement.

Those elderly persons determined to be victims of abuse, neglect, or exploitation and who are referred by the Department of Children and Families Adult Protective Services Unit, shall be given primary consideration for receiving Community Care for the Elderly Services.

ADRC Pre-enrollment List Management

The ADRC will manage and maintain the Pre-enrollment List for formal services funded by State General Revenue.

Coordination of Case Management and Consumers to be Case Managed

Each consumer will be assigned one and only one case manager, even if the consumer is enrolled in more than one program. This means that Area Agency on Aging of Palm Beach/Treasure Coast, Inc. will reimburse for the services of only one case manager at any given time or date. Case management providers are strongly encouraged to cost-share case managers across programs to assure consumers receive the most appropriate mix of services.

- Multiple assessments during the year will not be conducted unless a significant change in the consumer's status occurs that warrants such an action. Providers will check eCIRTS to determine if a current assessment has been completed prior to conducting an assessment. For clients dually enrolled in CCE, HCE or ADI, the Lead Agency will follow Area Agency on Aging of Palm Beach/Treasure Coast, Inc. Clients in Common Procedures for decision of the case management funding source.

The case manager is the gatekeeper in the community care service system with the knowledge and responsibility to link consumers to the most beneficial and least restrictive array of community services and resources irrespective of funding source or program. Case managers serve as a contact between health care and social service delivery systems, particularly physicians, hospitals, health maintenance organizations, nursing homes and home health agencies.

Consumer choice is the primary consideration in determining service referrals. In those instances when there is more than one subcontractor available for a given service, and the consumer expresses no preference, the Lead Agency should make the referral based on geographical and cost efficiency considerations. The procedures and referral formats used are to be developed by the Case Management/Lead Agency.

A complete listing of the services funded under all programs managed by the Department of Elder Affairs and descriptions for each of these services may be found in the Programs and Services Handbook, which can be accessed at the following web site: https://www.aaapbtc.org/public-documents/

Comprehensive Assessment of Eligible Consumers

Comprehensive Assessments of clients selected through the screening process must be completed by the case manager using DOEA Comprehensive Assessment Form 701B. The assessment will determine the person's level of functioning, existing resources, and service needs. Further information on Comprehensive Assessment requirements may be found in the Programs and Services Handbook, Chapter 2 and the 701D Assessment Instructions.

Determination for Level of Risk

A person's risk level is determined by the scores obtained on the DOEA Form 701B. (See above section on prioritization). The total score obtained after all sections of the Comprehensive Assessment have been tallied must be compared to a scale, which contains a range of scores reflecting consumer frailty and risk of institutional placement.

Determination of Functional Status

A consumer's functional status is determined by the scores received on the Activities of Daily Living (ADL) and on the Instrumental Activities of Daily Living (IADL) sections of the 701B Comprehensive Assessment Instrument.

Establishing Service Needs

The end result of the Assessment process is the establishment of the consumer care plan, which comprehensively addresses all service needs of the functionally impaired consumer.

Service Care Plan

Case managers must prepare a plan of care for each eligible consumer, utilizing the format prescribed by the DOEA. The plan of care is developed in coordination with the consumer and/or caregiver, if applicable, and must address all of the consumer's needs. It is the responsibility of the case manager to consider the most appropriate resources to provide the services needed, as indicated in the care plan. Consumers or caregivers may accept or decline services or providers of services. Consumer choice should be the primary consideration when there is more than one subcontractor available for a given service.

Case managers must manage the consumer care plan by arranging for the services accepted and monitoring the quality of service delivered to their clients. Periodic review of the continuing appropriateness of the care plan should occur semi-annually at a minimum. All consumers must be reassessed annually with updates completed to document any significant changes. Care plans must reflect changing or ongoing consumer needs.

Resource Management and Development

The Lead Agency must ensure that all other funding sources available have been exhausted before requesting use of the grant funding. Additionally, the Lead Agency must prepare and forward surplus/deficit/encumbrance analysis reports to Area Agency on Aging of Palm Beach/Treasure Coast, Inc. monthly. Lead Agencies must ensure that coordination is established with all community-based health and social services programs for functionally impaired older persons funded wholly or in part by federal, state, and local funds, in order to provide a continuum of care.

Co-Payment

In accordance with rules and guidelines adopted by the DOEA, Case managers must assess all non-exempt CCE and ADI consumers for services rendered based on ability to pay. Co-pay Guidelines are included in the DOEA's Programs and Services Handbook and any policy memoranda on this subject, issued subsequently.

The Lead Agency is responsible for billing and collecting assessed co-payments for all services provided under the CCE and ADI programs. This includes coordinating with other service provider agencies with which CCE and ADI consumers are shared in common.

The collected funds must be reported to Area Agency on Aging of Palm Beach/Treasure Coast, Inc. on a monthly basis with the invoice, and annually with the Annual

Co-Payment Collection Report. All collected co-payment funds must be used to expand consumer services under the CCE and ADI programs.

4. Services

The Lead Agency must provide information on services provided directly and services that are subcontracted.

4a. Subcontract Monitoring Schedule

The Lead Agency must submit a subcontract monitoring schedule for all services which will be subcontracted with State General Revenue funding. The following information must be included: 1) Subcontractor or Vendor name and address, 2) proposed date of the monitoring visit, 3) program to be monitored, and 4) services to be monitored. If monitoring dates are changed from the original schedule, an updated subcontract monitoring schedule must be provided to Area Agency on Aging of Palm Beach/Treasure Coast, Inc.

5. Quality Assurance

In order to assure the delivery of quality services, Lead Agencies must participate in pre-service and in-service training.

The Lead Agency will self-monitor and self- evaluate the quality of service delivery by its own agency staff. Additionally, Area Agency on Aging of Palm Beach/Treasure Coast, Inc. will conduct independent monitoring visits and evaluations of all Lead Agencies.

The degree of client satisfaction with service quality and staff effectiveness must be evaluated periodically during the contract period. A consumer survey must be conducted, the compiled results evaluated and reported to the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. Survey results must be used to develop continuous quality assurance initiatives to ensure improvement of case management and other service delivery.

6. Incident Reporting, Complaint and Grievance Procedures

The Lead Agency must develop and maintain procedures that provide for handling incident reporting and for processing complaints and grievances regarding denial, reduction or termination of services.

These procedures must include the process for receiving, reporting and remediating incidents, complaints and grievances.

In addition, a grievance process is required to inform consumers of the appeal process and must include prior written notification to the consumer of activities related to filing a grievance appeal and assistance to consumers when they desire to file a grievance/appeal.

When a client appeals a termination, suspension or reduction of services, the Provider must ensure that the grievance review team reviews the client file and considers the needs, risks, and safety specific to that client in their evaluation. Detailed information regarding grievance and appeal requirements may be found in the Standard Agreement. The Standard Agreement language supersedes the Programs and Services Handbook language in this area.

7. Reporting

The Lead Agency is required to compile CCE, HCE, and ADI service delivery statistics and other data and report to the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. and the Department of Elder Affairs if requested, as prescribed in the Standard Agreement.

Monthly reporting requirements for eCIRTS require all client and service data for the previous month to be entered into eCIRTS as prescribed in the Standard Agreement. Information is to be reported in the following categories:

- Consumer, and where applicable, Caregiver Demographics
- Consumer Program Enrollment
- Consumer Assessment Information
- Consumer Care Plan Information
- Consumer Services
- Units of Service

Case management, case aide and any CCE, ADI, or HCE service provided by the Lead Agency must be reported on a monthly basis in eCIRTS by the Lead Agency. Additionally all request for payment reporting requirements must be submitted within the timeframe established by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc.

The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. requires the proper storage, protection, security, and preservation of source documentation, including case files, vendor invoices, case management time, and client log sheet information. e CIRTS data must also be protected. Maintenance will include valid backup and retention of electronic data on a regular basis.

8. Confidentiality & Security

Information about functionally impaired elderly people who receive services under the Community Care for the Elderly, Home Care for the Elderly, and Alzheimer's Disease Initiative Programs is confidential (s. 430.207, F.S.). Information received through files, reports, inspections, or otherwise, by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc., DOEA, or by departmental employees, by persons who volunteer services, or by persons who provide services through contracts with the Department, area agencies on aging, lead agencies or other contracting agencies, is confidential and exempt from the provisions of Section 119.07(1), F.S.

Such information may not be disclosed publicly in a manner as to identify a functionally impaired elderly person, unless that person or their legal guardian provides written consent.

The Lead Agency must ensure confidentiality of consumer information by all employees, service providers and volunteers as required by state and federal laws. It is essential that training be established to promote security of information, including protection from loss, damage, defacement, or unauthorized access.

<u>HIPAA</u>

The Lead Agency must comply with all requirements of the Health Insurance Portability and Accountability Act (HIPAA) of 1996. The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. and the Lead Agency maintain a “Covered Entity” and “Business Associate” relationship under the terms of HIPAA. As such, each agrees to the terms as written in the Standard Agreement.

<u>Social Security Disclosure</u>

The Lead Agency must comply with all requirements of the Social Security number confidentiality and security measures as required by Section 119.07(5), F.S. Whenever possible, please submit reports which include client identifying information to the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. using encrypted transmission and the assigned client eCIRTS id in lieu of the individual’s social security number

<u>E-Verify Requirements</u>

The Lead Agency must comply with all requirements pursuant to Presidential Executive Order 12989, as amended, the State of Florida Executive Order Number 11-116, section 448.095(5), F.S., and all applicable DOEA Notices of Instruction related to the requirements to utilize the U.S. Department of Homeland Security’s E-verify system to verify the employment of all new employees hired by the agency.

Background Screening

The Lead Agency must comply with all background screening requirements in Section 430.0402 and Chapter 435, Florida Statutes, applicable DOEA Notices of Instruction, and terms as written in the Standard Agreement.

9. Disaster Preparedness

Lead Agencies are required to enter disaster preparedness data for all active consumers in eCIRTS. In addition to basic identification, location, emergency contact, and handicap information, this data includes fields to indicate if a consumer needs help with emergency evacuation; specially equipped shelter; and a special disaster registry listing.

Lead Agencies must be prepared to use eCIRTS reports to routinely provide registry information to the local emergency management team and to identify, locate, and assist with the evacuation and other needs of endangered elderly in the event of a disaster.

To prepare for an emergency/disaster event, the Lead Agency will cooperate, coordinate and train with the local emergency management agency to the fullest extent possible. The Lead Agency will maintain a current Disaster Plan to be implemented, at the direction of the DOEA or the Area Agency on Aging of Palm Beach/Treasure Coast, Inc., in the event that a disaster is declared by federal, state or local officials. Key elements include the following:

- Designation of a Disaster Coordinator and alternate.
- Plans to ensure continuity of operations and services following a disaster.
- Plans for contacting all at-risk consumers, on a priority basis, prior to and immediately following a disaster.
- Plans for collecting and communicating information to the AAA on disaster response such as services delivered and unmet needs.
- Plans to receive referrals, conduct outreach, and deliver services, before and after a disaster, to elderly persons who may or may not be current consumers.
- Plans to help at-risk consumers register with the Special Needs Registry of the local emergency management agency.

- Plans to deliver meals to consumers prior to and following a disaster.

10. Volunteers

Lead Agencies must provide assurance and demonstrate staffing capable to train and supervise volunteer staff and volunteer supervisors. All Lead Agencies must submit a written plan to address recruitment, training, utilization, and retention of volunteers, to assist with the activities of the Lead Agency.

11. Organizational Chart

An organizational chart for staffing for the three programs related to this RFP (including existing and proposed positions) and which illustrates the structure and relationship of positions, units, supervision, and functions must be developed and submitted by the Lead Agency as part of the proposal.

Staffing and Facility Requirements

Each Lead Agency's Governing Board must designate a local representative or employee with legal authority to act on behalf of the agency and/or the Community Care for the Elderly program. This individual must devote sufficient time to ensure the CCE program is administered and managed in accordance with DOEA requirements.

All services (including case management) must be delivered by qualified staff in accordance with service standards and program requirements included in the DOEA Programs and Services Handbook. The number of staff should be sufficient to ensure the delivery of service to all agency consumers in a timely manner.

All Lead Agencies must be open and accessible to the public a minimum of 40 hours per week, Monday through Friday, between the hours of 8:00 AM and 5:00 PM. During all other hours, telephone coverage via answering machine must be provided. The office or facility should be reasonably accessible to persons seeking assistance and/or information; it is preferable that the Lead Agency be centrally located within the

Community Care Service Area, and that it be handicapped accessible. When practicable, the activities of the Lead Agency must be directed from a multi-service senior center and coordinated with other services offered there. Community Care for the Elderly programs in existence prior to July 1, 1995 are not required to relocate.

Lead Agencies must demonstrate they have sufficient resources, in terms of both trained staff and equipment, in order to complete timely eCIRTS data entry and access electronic mail from the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. Lead Agencies must present evidence of an adequate number of trained staff to meet the case management, data entry, and data maintenance requirements of the programs in a timely fashion.

Case coordination by a Lead Agency case manager must be available on a 24 hour/seven days per week basis for elderly victims of abuse, neglect or exploitation who are referred by an Adult Protective Services investigator.

<u>Training</u>
All DOEA services require a general pre-service orientation along with training specific to the service being provided. Lead Agencies shall be responsible for provision of the pre-service and in-service training for all paid and volunteer staff. Required training will include, but not be limited to; intake and screening assessment instruments; care plan development; costing; and training on the Abuse Registry Tracking Tool (ARTT) and the APS Referrals Operations Manual policies/procedures. In-service training hours and topics shall include, at a minimum, those topics as updated in the DOEA Programs and Services Handbook.

<u>Service Provider Training</u>
It is essential that Lead Agencies meet with all contracted service providers to establish necessary protocol and procedures for authorization of services, paperwork and reporting, unusual incident reports and general expectations for coordination. Service providers must recognize case managers are the gatekeepers and have responsibility for coordinating and

authorizing service to clients.

Personnel Standards and Employee Benefits

Personnel policies, which are incorporated into agency operating procedures, must be developed which address at least, the following topics:

1. Employee recruitment and hiring.
2. Lines of authority and supervision.
3. Working schedules and hours of operation.
4. Employee compensation.
5. Employee fringe benefits.
6. Employee evaluation and promotion.
7. Leave.
8. Confidentiality and privacy.
9. Employee discipline and termination.
10. Employee grievance procedures.
11. Accidents, safety, and unusual incidents.
12. Travel and transportation policies.
13. Employee conduct.
14. Employee pre-and in-service training and staff development.
15. Assurance of agency compliance with all applicable federal and state laws and regulations.

Job descriptions must be established for each funded and associated unpaid position. Job descriptions for funded positions must include salary ranges, and must be submitted as part of the proposal. In addition, the minimum education, training, experience and qualifications necessary for each position must be included.

A salary range for each paid position must be established and approved by the Board of Directors or other governing body. Salary ranges must be reasonably consistent with equivalent positions in the Community Care Service System.

12. Description of Service Delivery

The "Description of Service Delivery" section of the Service Provider Application includes subcontractor information, training requirements and unit tracking methodology. A "Description of Service Delivery" form must be completed for <u>each</u> funded State General Revenue service provided through this grant (i.e. CCE, ADI, and HCE). To complete item "d – Activities" The DOEA <u>Programs and Services Handbook</u> should be reviewed for a description of <u>services</u> and the specific standards, record keeping, and reporting requirements. Case management agencies must specify how consumers in common programs, i.e., CCE, ADI, MLTC, HCE, or OAA, will be case managed on the "Case Management- Description of Service Delivery" form.

A "Unit Tracking Methodology" section is included in the "Description of Service Delivery" item. The Area Agency on Aging's Fiscal and Program staff will review the provider's response to ascertain if the steps to validate service units are clear and concise.

13. Strategies and Performance Measures

In keeping with the legislatively mandated requirements for performance-based budgeting, the State of Florida Department of Elder Affairs has identified four (4) performance measures which serve as overarching goals to planning and developing implementation strategies in order to assist the Department in achieving statewide outcome measures. These performance measures are:

- PERFORMANCE MEASURE 1: Adult Protective Services (APS) referrals who need immediate services to prevent further harm who are served within 72 hours.
- PERFORMANCE MEASURE 2: New service recipients' Activities of Daily Living (ADL) assessment scores have been maintained or improved.
- PERFORMANCE MEASURE 3: New service recipients' Instrumental Activities of Daily Living (IADL) assessment scores have been maintained or improved.
- PERFORMANCE MEASURE 4: Improving the environment scores for elders assessed

with high or moderate risk environments.

All Lead Agencies are required to describe in detail the strategies they intend to implement and follow in order to increase the performance percentage for each of these measures.

The 2027-2028 Service Provider Application Format contains the pertinent performance standards for which all Lead Agencies are responsible. To complete this section of the SPA, providers must document the strategies required to increase the performance percentage for each of the performance measures defined by the Department of Elder Affairs and the Florida State Legislature.

14. SPA Appendix

The SPA Appendix is to include requested Program Module general requirement documentation as referenced in the Service Provider Application Update (i.e. any updated Policies and Procedures, Consumer Complaint and Client Confidentiality documents, Subcontracts, and Sample Survey).

15. SPA Program Module Checklist

The SPA Program Module Checklist must be completed to indicate that each Program Module Requirement is included and the page location for each item.

II.B CONTRACT MODULE INSTRUCTIONS

General Requirements:

The **Contract Module** is comprised of the Department of Elder Affairs' **Unit Cost Development Worksheets**, the **Match Commitment**, and the **Availability of Documents**. The Unit Cost Development Worksheets and detailed instructions are included with the Excel workbook entitled "2027-2028 SGR Contract Module Worksheets.xls." All Contract Module documentation must be completed using the required Word documents and Excel worksheets. The Excel worksheets include formulas and links intended to assist the applicant. These formulas and links must not be overwritten or altered. It is important that the applicant review the detailed instructions and worksheets before beginning the unit cost development process.

AAAPBTC reserves the right to request written clarification regarding information contained within an applicant's submitted Contract Module. Any such request shall be limited to clarification of information already provided and shall not constitute an opportunity to revise, enhance, or materially supplement the submission. Applicants are responsible for ensuring that all required information is complete and accurate at the time of submission.

Section II.B.1 – Personnel Allocations Worksheet:

The **Personnel Allocations Worksheet** is located in the Excel workbook entitled "2027-2028 SGR Contract Module Worksheets.xls." This spreadsheet is the first of the three **Unit Cost Development Worksheets** to be completed by the applicant. The **Personnel Allocations Worksheet** develops the staff time allocations for each DOEA funded service. It is intended to include all staff positions within the applicant's agency. The allocation of staff time must be based on recent time studies or other accurate and verifiable documentation.

Section II.B.2 – Unit Cost Worksheet:

The **Unit Cost Worksheet** is located in the Excel workbook entitled “2027-2028 SGR Contract Module Worksheets.xls.” This spreadsheet is the second of the three **Unit Cost Development Worksheets** to be completed by the applicant. The **Unit Cost Worksheet** develops an “agency-wide” unit rate for each DOEA funded service. It is intended to include all of the agency’s budgeted units and costs for the proposed annual period no matter what the funding source.

Personnel wages for each service are linked to the **Personnel Allocations Worksheet**. Personnel benefits are calculated by formula, unless more accurate manual allocations are documented and made. Specific cost categories for other budgeted costs are identified. Budgeted costs that can be directly charged to a service should be manually included. Budgeted costs that apply to all services can be included and allocated by formula using the “Management & General Cost Pool” and the “Facilities & Maintenance Cost Pool.” Considerations and allowances are given to applicants who may include service subcontractors or in-kind costs in their budgets.

The **Unit Cost Worksheet** develops an “agency-wide” or “total” unit rate by taking the total budgeted cost for each service, and dividing this cost by the proposed “agency-wide” or “total” units to be achieved during the first year of the contract period. This total unit rate becomes the basis for the applicant’s proposed unit rate for the services funded by the Area Agency.

Section II.B.3 – Supporting Budget Schedule By Program Activity:

The **Supporting Budget Schedule By Program Activity Worksheet** is located in the Excel workbook entitled “2027-2028 SGR Contract Module Worksheets.xls.” This spreadsheet is the Third of the three **Unit Cost Development Worksheets** to be completed by the applicant. The **Supporting Budget Schedule By Program Activity**

Worksheet develops the “adjusted cost per unit of service” for each service funded by the Area Agency. It is intended to include any required match and other resources that may affect the proposed unit rate.

Unlike the first two worksheets, the **Supporting Budget Schedule By Program Activity Worksheet** reflects only the proposed units and funding available for the specific program and services funded by the Area Agency. It is not an “agency-wide” spreadsheet. The unit rate developed on the **Unit Cost Worksheet** is linked to the **Supporting Budget Schedule By Program Activity Worksheet** for each funded service. This rate is then “adjusted” for match (CCE and ADI only, 10% match required), client co-payments, program income, or other resources contributed by the applicant. These factors and the allocation determined by the Area Agency on Aging of Palm Beach/Treasure Coat, Inc. will result in the proposed units to be achieved and the proposed unit rate.

Section II.B.4-9 - Match Commitments:

The **Match Commitment** pages are located in the Service Provider Application (Ap Va) as Word.docs. These pages are provided to assist the applicant in documenting the required match. The required match (CCE and ADI only) is 10% of the total budgeted funds (calculated by taking the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. allocation and dividing by 90%). The required match can be cash or in-kind.

The Proposal must include a signed commitment form or comparable document (i.e. letter from a funding source) guaranteeing the Bidder’s ability to provide adequate matching funds. **Failure to submit signed commitment forms or comparable document guaranteeing the bidder’s ability to provide adequate matching funds constitutes a fatal flaw and will automatically disqualify a proposal from further review and consideration.**

Section II.B.10 – Availability of Documents:

The **Availability of Documents** is located in the Service Provider Application (Ap Vb) as a Word.doc. The **Availability of Documents** identifies required documentation that must be maintained and available at the applicant's administrative office. If requested, the documentation must be accessible for review by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc.

Section II.B.11 – SPA Contract Module Checklist

The SPA Contract Module Checklist (Ap Va) is to be completed and indicate that each Contract Module Requirement is included and the page location for each item.