

Northwest Florida Area Agency on Aging, Inc.
2024-2025

Program Evaluation Instrument
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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
II. A	Program Module - General Requirements		
1	Demographic and Community Care Service System		MAXIMUM POINT VALUE = 4
	<p>Bidder presented material in a clear, concise and detailed manner.</p> <p>a.) The bidder has provided an overview of the social economic and demographic characteristics of their count with focus given to geographic areas and population groups within the county that have special needs.</p> <p>b.) The bidder has the ability to accept referrals and provide services on a countywide basis. This must include administering and managing Programs for Community Care for the Elderly (CCE), Home Care for the Elderly (HCE), Alzheimer's Disease Initiative (ADI) and the Local Service Program (LSP), if applicable.</p> <p>c.) The bidder's plan for administering and managing each of the following is presented in a clear, concise, and thorough manner. The bidder's plan meets all state program guidelines and includes consumer enrollment and service plan design. New bidders include start up and implementation processes and procedures in their plan.</p> <p>d.) Describe your agency's efforts to participate in local networks and consortiums where hospitals, home health, social and medical providers are represented in order to target high-risk individuals in need of services.</p> <p>It is important to include strategies for gaining input from the public in your agency's planning process. This should address how your agency will reach out to the community for feedback when significant program service changes are being considered (i.e. discontinuation of service or change in model being used to provide services).</p> <p>1.) Community Care for the Elderly (CCE) 2.) Home Care for the Elderly (HCE) 3.) Alzheimer's Disease Initiative (ADI)</p>		
2	Consumer Identification		MAXIMUM POINT VALUE = 4
	The following procedures, practices and processes meet all state program guidelines. All material was provided in detail and presented in clear, concise and thorough manner.		

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	<p>a.) Planned outreach activities will identify and inform frail elders and their caregivers of the range and availability of services.</p> <p>b.) The bidder has described outreach efforts and the process of coordinating all formal and informal resources to meet client needs (ARC, EHEAP, Food Stamps, etc...)</p> <p>c.) The bidders have described their process for referral to the ADRC for Intake and Screening, assessment and eligibility determination of consumers.</p>		
	<p>d.) The process and procedure for responding to referrals from Adult Protective Services complies with all state statues and meets program guidelines.</p> <p>e.) Describe what procedures are in place to request enrollment of wait listed clients through communication with the ADRC following wait list enrollment protocols.</p> <p>f.) The plans and procedures are described adequately to request enrollment of their waitlist through communication with the ADRC and adhere to Waitlist enrollment procedures.</p> <p>g.) Describe how your Agency will staff referrals from the Department of Children and Families for Aging Out and Adult Protective Services (APS) moderate and low risk clients and other assessed priority ranked community referred clients using the required priority ranking guidelines.</p> <p>h. Provide current copies of the internal procedures that will ensure first priority service delivery to APS High Risk clients.</p> <p>i. Provide copies of the current procedures your agency uses to ensure client data entry into APS Referral Tracking Tool (ARTT) and eClient Information and Registration Tracking System (eCIRTS) occurs as required. Include the agency's internal tracking log and provide assurance all required case managers have received the necessary ARTT Training Tutorial and certifications. The training log and case manager certification(s) assuring compliance must be included in the agency's Appendix to the Service Provider Application.</p>		

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	<p>j. Provide current copies of the internal procedures which ensure prioritization as well as appropriate and timely follow through on referrals through the ADRC. The procedure should include each step from the initial receipt of the referral through all required and documented actions.</p> <p>k. What plans and procedures are in place to interface with the ADRC's Information and Referral function? Describe the steps and criteria your agency will use to determine if a caller should be referred to the ADRC's Helpline. Provide current copies of your agency's ADRC interface and determination policies and procedures in the Service Provider Application (SPA) Appendix.</p>		
3	Case Management Functions		MAXIMUM POINT VALUE = 4
	<p>The following procedures, practices and processes meet all state program guidelines and were provided in a clear, concise and thorough manner.</p> <p>a.) Case Mgt functions for consumer assessments and care plan development includes actions steps; number of staff involved; consumer to case manager ratios and average timelines. Specifically address the timeline procedures from the ADRC wait list enrollment authorization date through service initiation. The timeline should correlate with the current applicable wait list enrollment guidelines and with processes streamlined to ensure consumers are promptly assessed and enrolled.</p> <p>b.) Includes information on the provision for overall coordination of the proposed method of informing consumers of all the programs and services accessible through the lead agency.</p>		

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	<p>c.) Includes the procedures for reviewing ongoing eligibility for transfer of consumers from general revenue funded programs into the Medicaid program.</p> <p>d.) Explain your agency's process for reviewing general revenue funded clients for potential services in other DOEA funded and non-funded programs, including steps staff will use when wait listing clients.</p> <p>Please note – The Lead Agency's process should include a mechanism for notifying the ADRC when an individual appears to be eligible for State Medicaid Managed Care Long Term Care (SMMC LTC) services; however, it is the ADRC's responsibility to enroll the individual on the Assessed Prioritized Client List (i.e. APCL for LTCC) for Medicaid services (preferred method is a fax referral).</p> <p>e.) Describes how all other available alternative resources for consumer services will be explored, used and documented prior to using state general revenue funding to provide services.</p> <p>f.) Includes bidder's internal procedures for assessing and collecting co-payments. Identify any changes your agency plans to make to the internal procedures to improve the assessing, billing or collection of co-payments.</p>		
4	Services		MAXIMUM POINT VALUE = 4
	<p>Bidder presented material in a clear, concise and thorough manner. It is important lead agencies ensure a variety of home-delivered, day care services, and other basic services needed to prevent institutionalization are available in your service area. When planning your agency's service array, please take into account the recent Area Plan indicating priority service needs include access to chore, homemaking, personal care, nutrition and transportation.</p> <p>Material included:</p> <p>a.) List the services your agency will offer other than Case Management. Note: A detailed explanation of each service must be provided in section "II.A.12. "Description of Service Delivery".</p> <p>b.) The bidder has indicated which services will be provided directly.</p> <p>c.) The bidder has indicated which services they intend to subcontract.</p>		

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	<p>d.) IF APPLICABLE - The bidder provided the procedure(s) used for selection of qualified subcontractors.</p> <p>e.) Outline the process for ensuring all required subcontractor employees/volunteers have successfully completed a level 2 background screening.</p> <p>f.) IF APPLICABLE - The bidder has included an action plan for monitoring subcontractors. The action plan includes a monitoring schedule and report timeline. Presented in a clear, concise and thorough manner.</p> <p>g.) Complete the attached "Subcontract Monitoring Schedule" on the following page. Include information on all subcontractors who will provide services with State General Revenue funding.</p> <p>h.) Copies of all subcontracts were submitted with the SPA. NEW BIDDERS ONLY: AAA will require any newly appointed Lead Agency to provide copies of CCE subcontracts by <i>[Insert Date]</i>.</p>		
5	Quality Assurance		MAXIMUM POINT VALUE = 4
	<p>Bidder presented material in a clear, concise and thorough manner. Material included:</p> <p>a.) The bidder provided a description of the methods and procedures to be used to assure delivery of quality service(s). The description included process and frequency. Provide current copies of your Quality Assurance/Quality Initiative procedures in the SPA Appendix.</p> <p>b.) IF APPLICABLE - The bidder provided a description of the methods and procedures used to assure delivery of quality service(s) by its subcontractors. The description included process and frequency.</p> <p>c.) The bidder provided a description of how the results of the quality assurance process will be used to improve services and/or service delivery. Provide a narrative of quality improvement initiatives undertaken by your agency during the preceding calendar year, as appropriate.</p>		

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	<p>d. In-Service Case Management Staff Training</p> <p>1. Describe your plan to provide the required six hours of in-service training to case management staff. Your plan should include the minimum standards as outlined in the DOEA Programs and Services Handbook.</p> <p>2. List and describe all case management staff training lesson topics and your anticipated schedule for training dates (see Chapter 2, In-Service Training Program for required standards).</p> <p>3. For current Lead Agencies: Include a copy of the agency's current Case Management Training Log in the SPA Appendix to provide assurance all case managers are current and have received the required training for their positions. Include certification documents for all currently employed case managers to ensure they have received the required training on the new DOEA Comprehensive Assessment (DOEA 701B) screening form.</p>		
	<p>e. Provide current copy of the policies and procedures your agency uses to evaluate consumer satisfaction in the SPA Appendix. The policies should include: 1) proposed survey schedule, 2) proposed sample size, 3) tabulation information, 4) analysis and follow up process, 5) information on how the results are used to make improvements to services, and 6) timeframe for forwarding results of the survey to the Area Agency on Aging.</p> <p>Please provide a sample survey, copy of the agency's prior year consumer satisfaction survey results, including analysis and any necessary follow-up in the SPA Appendix.</p>		
6	Process for Consumer Complaints/Reducing/Term. Svcs.		MAXIMUM POINT VALUE = 4
	<p>Bidder presented material in a clear, concise and thorough manner. Material included:</p> <p>The bidder provided a description of the process for dealing with complaints and processing appeals for denial, reduction or termination of services.</p> <p>a.) Explain your agency's policies and procedures for ensuring compliance with the required reporting of adverse incidents as outlined in AAA Policy and Procedure related to Client Adverse Incident Reporting, and consistent with Chapter 415, F.S., DOEA Programs and Services Handbook (See Appendix D, Minimum Guidelines for Recipient Grievance Procedures) and all related AAA notices, policies and procedures. Include a copy of your agency's Adverse Incident Procedure and blank log in the SPA Appendix.</p>		

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	<p>b.) The procedures included a method of informing all consumers of the grievance/appeal process. Include a copy of the agency's Complaint Procedures and blank log in the SPA Appendix.</p> <p>The grievance procedure complies with the guidelines set forth in Attachment V. of the Master Agreement.</p> <p>c.) Explain your agency's process for handling consumer grievances; along with the process for appeals regarding denial, reduction, or termination of services. The grievance procedures must provide for informing all consumers of the grievance/appeal process and providing assistance to consumers desiring to file a grievance/appeal.</p> <p>d.) A copy of the grievance procedure is included with the bidder's proposal.</p>		
7	Reporting		MAXIMUM POINT VALUE = 4
	<p>Bidder presented material in a clear, concise and thorough manner. Material included:</p> <p>a.) The bidder outlined the procedures for accurate and timely entry of all service and consumer specific information into the eCIRTS database.</p> <p>b.) The bidder included the procedures for the ongoing accurate and timely updating of all service and consumer specific information into the eCIRTS database.</p> <p>c.) The data integrity maintenance process is thorough and designed to ensure accuracy, including a list of all reports run, schedule for running the eCIRTS reports and required follow-up due dates for staff addressing any exceptions noted as part of this process.</p> <p>d.) The bidder's process includes a sufficient method of checking and cross checking data entered into eCIRTS to ensure accuracy. Provide current copies of your agency's internal policies and procedures used to ensure timely and accurate CIRTS reporting in the SPA Appendix.</p>		
8	Client Confidentiality		MAXIMUM POINT VALUE = 4
	<p>Bidder presented material in a clear, concise and thorough manner. Material included:</p>		

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	<p>a.) The bidder's security measures ensure confidentiality of consumer information by all employees, service providers and volunteers. Describe what security measures are in place to address confidentiality and consumer-specific information as it relates to state and federal (HIPAA) requirements. Submit a copy of your Privacy Notice. The applicant's Privacy Notice must be HIPPA compliant and included in the SPA Appendix.</p> <p>b.) Bidder's security measure meet HIPAA requirements. The Lead Agency must ensure consumers are notified of the purpose for collecting an individual's social security number in compliance with section 119.071(5), F.S. Whenever possible, when a CIRTS identification number is available, it is to be used for reporting purposes in lieu of a social security number. For example, when communicating information for billing or client concerns, the provider should use the CIRTS identification number provided by DOEA. Include a copy of your agency's current consumer notification which discloses the purpose for which the client's social security number is being collected in the SPA Appendix.</p> <p>c.) Bidder includes providing each client with a Privacy Notice as required by HIPAA where applicable. The Lead Agency is responsible for complying with Executive Order Number 11-116 and all applicable AAA Notices of Instruction related to requirements to use the U.S. Department of Homeland Security's E-verify system to verify the employment of all new employees hired by the agency. Include a brief summary of the procedures implemented by your agency to be certain all required employees are properly verified and determined eligible for hire through the U.S. Department of Homeland Security's E-verify system. Provider is required to maintain documentation to assure new employees hired by the agency within the contract period are eligible for employment. Verification of eligibility must be maintained for monitoring purposes by the AAA.</p>		

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	d.) The bidder included a copy of the Privacy Notice. The Lead Agency must ensure all employees, volunteers and contractors have successfully completed the background screening process pursuant to Chapter 2010-114, Laws of Florida (L.O.F.) and Sections 430.0402 and 435.01(2) Florida Statutes and all applicable Notices of Instruction. Include a brief summary of the procedures implemented by your agency to be certain all applicable parties are properly screened and determined to have no disqualifying offenses prior to employment. Be sure to include your agency's process for notifying the Department of Elder Affairs when staff/volunteers are no longer employed by your organization. Provider is required to maintain documentation to assure required direct service providers used by the agency have successfully completed the level 2 background screen through the Department of Elder Affairs. Verification assuring compliance must be maintained for monitoring purposes by the AAA.		
9	Disaster Preparedness		MAXIMUM POINT VALUE = 4
	Bidder presented material in a clear, concise and thorough manner. Material included: a.) NEW BIDDER - The bidder included a full copy of the disaster plan with the proposal. b.) All bidders should include the following information within the Service Provider Application. 1.) Key personnel are identified. 2.) Contact information for all subcontractors is included. 3.) An alternative office site location is designated		
	4.) Emergency Coordination Office and alternate is identified and contact information is provided. 5.) The bidder described how the bidder's services are integrated with the local County Emergency Plan. 6.) The bidder provided in detail the process for coordinating efforts for special needs clients. 7.) The bidder's disaster preparedness plan is written from the viewpoint of disaster preparedness, not hurricane preparedness.		
10	Volunteer Plan		MAXIMUM POINT VALUE = 4
	The Bidder included a written plan of action to assure it maintains procedures on recruitment, training, utilization and retention of volunteers to assist with agency functions.		
11	Organizational Chart		MAXIMUM POINT VALUE = 4

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	The Bidder included an approved organizational chart illustrating the structure and relationship of positions, units, supervision and functions of the agency.		
12	Description of Service Delivery (by Service)		MAXIMUM POINT VALUE = 4
	<p>Bidder presented material in a clear, concise and thorough manner. Material included:</p> <p>a.) The bidder fully completed Section II.A.10. Description of Service Delivery for each service including case management.</p> <p>a) Subcontractor: Will your Agency provide this service directly? ____ Yes ____ No If your Agency will subcontract this service then list all subcontractors below: Subcontractor(s) Business Name: Address: Phone Number: License Number (if applicable): Contract Start/End Date: Anticipated Monitoring Date:</p> <p>b. Site Location: (Bidder may attach a list of site locations.)</p> <p>c. Days And Hours Of Operation</p> <p>d.) The bidder described the specific activities provided for each service.</p> <p>e.) The bidder's orientation and annual in-service training required of direct service staff providing the service, is adequate, sufficient and meets all program requirements.</p> <p>f.) The bidder's method of reconciling and validating service units from referral, to service delivery, to billing is adequate, sufficient and appears to ensure accuracy.</p> <p>g.) The bidder's validation and reconciliation processes and procedures includes CIRTTS service unit data entry and accuracy.</p>		
13	Performance and Outcome Measure Objectives		MAXIMUM POINT VALUE = 4
	In keeping with the legislatively mandated requirements for performance-based budgeting, the Bidder provided implementation strategies to be used in keeping with the six key goals outlined by the DOEA for the Aging Network.		

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	The Bidder provided implementation strategies and action steps designed to ensure achievement of the 15 legislatively mandated outcome measures.		
	Total Rating:		
	Divided by Number of Questions:	13	
	Section Total:		
	Weight		