

# Guide to Request for Qualification

for the selection of providers to provide

## Homemaker Services Respite Services

**Area Agency on Aging *Serving Southwest Idaho***



**Southwest Idaho Area Agency on Aging (SWIA3)  
1505 South Eagle Road, Suite 120  
Meridian ID 83642  
(208)-898-7077**

**Completed Proposals must be physically turned in to the Southwest Idaho Area Agency on Aging**

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Sections I through III provide the information, background, and instructions for completion of Requests for Proposals for Homemaker, and Respite Services.

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# I. PUBLIC NOTICE

## Legal Advertisement

### Request for Qualifications

The Southwest Idaho Area Agency on Aging (SWIA3), the designated Area Agency on Aging (AAA) serving Southwest Idaho, announces its intent to accept proposals from interested service providers for homemaker and respite services in various locations in Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley and Washington counties.

The Request for Qualifications Guide and Application materials are available on SWIA3's website at: <https://www.a3ssa.com/administration/documents/request-for-proposals/>. Providers may submit proposals for one or more services in any or all of the designated cities and counties. Contracts will be issued with the winning providers beginning on July 1, 2024. New providers can submit applications afterwards at any time.

Providers with questions regarding the application packet should contact the SWIA3 Contracts Specialist, Zackery Reed by telephone at (208) 898-7093 or by e-mail at [Zackery.Reed@a3ssa.com](mailto:Zackery.Reed@a3ssa.com).

Interested providers must submit proposals to the SWIA3 office at 1505 South Eagle Road, Suite 120 Meridian, Idaho 83642.

Award announcements will be made quarterly, via email. Consistent with board meetings/approvals. There will be subsequent mandatory provider meetings and training to finalize awarded contracts.

SWIA3 does not discriminate against any person on the basis of race, color, national origin, creed, ability to speak English, disability, sex, sexual orientation, age or marital status in admission, treatment, or participation in its programs, services, and activities, or in employment.

## II. CONTRACTING PROCESS AND SCHEDULE

The following is a schedule of events concerning the proposal process:

Schedule	
Event	Date and Time
Initial RFQ Announcement	
Email distribution of RFQ to current providers	Friday, April 26, 2024
Official newspaper announcement (Idaho Statesman and local newspapers)	The week of April 26, 2024
All providers wanting to provide services at the beginning of the state fiscal year, must submit an application by this date.	May 24, 2024
RFQ Approvals and Timeline (After July 1, 2024)	
Provider Submits Application	Anytime
Contracts Manager Application Review	14 days from submission
Executive Director Application Approval	5 days from receipt
SWIA3 Board of Commissioners Application Approval	Quarterly Board Meeting 2024 Dates (tbd)
Awards announced to winning award bidders; Email announcement	Within 48 hours of Quarterly Board meeting
Discussions with winning bidders to modify methodology (if applicable)	7 days from notification of approval or denial
Deadline to submit written objections (if any) to award	7 days from notification of approval or denial
Contract signing, training, and Board response to written objections (if any). Location: SWIA3 1505 South Eagle Road, Suite 120 Meridian, Idaho 83642	Within 30 days of application approval
Contracts will be renewed on an annual basis to cover: Performance, rates and updated documentation.	Annually
Providers will be asked to update application documentation.	Every 3 years

All questions regarding the requirements necessary to complete a proposal should be directed to SWIA3 Contracts Manager, Zack Reed, via email at [Zackery.Reed@a3ssa.com](mailto:Zackery.Reed@a3ssa.com) or via telephone at 208-898-7077.

All dates and locations are subject to change at SWIA3's discretion.

Any communications with SWIA3 regarding this RFQ should be with Zack Reed at the contact information listed above.

### **III. GUIDE TO THE REQUEST FOR PROPOSAL PROCESS AND APPLICATION**

#### **A. PURPOSE**

SWIA3 is responsible for planning, developing, advocating for, and coordinating a comprehensive service system for persons 60 years of age and older residing in the ten counties of Southwest Idaho. A significant part of this responsibility is accomplished through utilization of contracted service providers (hereinafter “providers”).

Through this request for qualifications (RFQ) process, SWIA3 is accepting proposals from interested providers for provision of homemaker and respite services in Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley, and Washington Counties. SWIA3 recognizes that cost-effective solutions may vary in type and approach, particularly given the diversity within this region of geography, resources, and personnel. Price is not the sole determining factor for selection because the reimbursement rate is already set.

SWIA3 reserves the right to enter into separate contractual relationships with the interested providers in the sole discretion of the SWIA3 Board of Directors. This RFQ serves as a tool to formalize negotiations to enter into a contract or contracts with chosen providers, if any.

#### **B. SERVICE CONTRACTS**

- SWIA3 contracts are performance-based. SWIA3 seeks providers that can implement services efficiently and effectively within the required guidelines and specifications.
- All successful providers will be designated as provider(s) for the period beginning July 1, 2024. SWIA3 determines the rate of reimbursement (currently \$24.00 per hour) and will refer consumers to providers based on consumer choice. Consumers are provided with a list of providers and will select who they want to provide the service.
- Final funding levels are dependent on the availability of federal (Older Americans Act) and state (Idaho Senior Services Act) funds or any other applicable funds.
- Changes in the governing federal and state statutes, regulations, rules, and program manuals/guidelines including, but not limited to, those of the Idaho Commission on Aging (ICOA), may require modifications of the contract between SWIA3 and a provider selected through this RFQ process.
- Any provider that subcontracts with another entity to provide services shall ensure that such subcontractor has a clear understanding of the methodology used to determine compensation under the subcontract.

#### **C. PROVIDER APPLICATION**

To be considered for a contract with SWIA3, providers must satisfy all of the following requirements:

- Have an identified business e-mail address for communicating and otherwise conducting business with SWIA3.

- Satisfy organizational requirements. A provider must be one of the following:
  - A provider that is a not-for-profit entity must be legally incorporated, registered to do business in Idaho, have an Internal Revenue Service 501(c)(3) designation, and have a demonstrated history of satisfactory human services performance.
  - A provider that is a for-profit entity must be legally organized and registered to do business in Idaho.
- Provide and document outreach functions to locate persons in the community who are not participating in available programs or receiving services for which they qualify, identify their service needs, provide them information about aging programs and services available in their communities, and assist them with accessing services they need or programs in which they want to participate.
- Provide information detailing the provider's ability to make accommodations for individuals who are geographically inaccessible, non-English speaking, from another culture, and/or have disabilities.
- Provide information on the provider's utilization of trained volunteers.
- Provide comprehensive and detailed information that reflects the background of the provider relative to the proposed services.
- Hold, or be able to obtain before the beginning of the contract term, all necessary certifications and licensures, and be able to comply with all federal, state, and local requirements.
- Be capable of **electronically** reporting accurate fiscal and program data, on time, as required or as requested.
- Comply with SWIA3 assessments, program evaluations, and audit activities.
- Be willing to accept SWIA3's reimbursement rate (currently \$24 per hour).
- Demonstrate the ability and willingness to provide services and utilize funding in accordance and compliance with the contract terms, the Older Americans Act, as amended, the Older Americans Act: Federal Title III Regulations, the Idaho Senior Services Act, the ICOA Rules Governing Senior Services Program (IDAPA 15.01.01) and Rules Governing Older Americans Act Services (IDAPA 15.01.21), and all Idaho Commission on Aging and SWIA3 Program and Operations Manuals and Service Implementation guides. These documents are available for review at SWIA3 during regular business hours. They may also be found online at:

**Federal Statute:**

Older Americans Act of 1965, Public Law 109-365

<https://public-inspection.federalregister.gov/2024-01913.pdf>

**Federal Regulations:**

45 CFR Part 1321

[https://www.ecfr.gov/cgi-bin/text-id?SID=44881df283b5afeec950e2b78b7a6efb&mc=true&tpl=/ecfrbrowse/Title45/45cfr1321\\_main\\_02.tpl](https://www.ecfr.gov/cgi-bin/text-id?SID=44881df283b5afeec950e2b78b7a6efb&mc=true&tpl=/ecfrbrowse/Title45/45cfr1321_main_02.tpl)

**State Statutes:**

Idaho Senior Services Act, IC §67-5001 et seq

<https://legislature.idaho.gov/statutesrules/idstat/Title67/T67CH50/>

**Rules:** Rules of the Idaho Commission on Aging

IDAPA 15.01.01 – Rules Governing Senior Services Programs

<http://adminrules.idaho.gov/rules/current/15/index.html#Blind>

**ICOA Operations Manual & Service Implementation Guides:**

<https://aging.idaho.gov/wp-content/uploads/2024/01/ICOA-Operations-Manual-Final-2023-update-January-2024-v.2.pdf>

**D. SUBMISSION INSTRUCTIONS**

Each provider must carefully read this RFQ and follow the instructions contained in it. Failure to carefully follow the instructions may cause SWIA3 to reject the proposal.

Each provider must submit a complete proposal. Submitting a complete proposal requires, at a minimum, (1) submitting a completely filled-out and signed application form, and (2) attaching all documentation requested in the application form. **Answers to all parts of the application must be typed or computer printed.** Documentation requested on the application form includes the following:

- Non-Profit – Article of Incorporation, Bylaws, and 501(c)(3) status (if applicable)
- Non-Profit Audit – (if applicable)
- Small Business Programs designation (if applicable)
- Financial Soundness
- Insurance Coverage: Proof
- Drug-Free Workplace Policy
- Job Descriptions
- Facility Lease (if applicable)
- Grievance Resolution Procedures
- Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion, Lower Tier Covered Transactions

Failure to submit all information requested may result in the proposal being classified as “unacceptable” or rejected on the basis of being incomplete.

It is the responsibility of all providers to examine the entire RFQ package and seek clarification of any item or requirement that may not be clear. Each provider must check all information for accuracy before submitting a proposal. Providers should fully describe their background, experience, and procedures in the proposal.

Each proposal must be submitted in its entirety, together with any supporting documents on single-sided pages. Any attachments should be on 8 1/2" x 11" white paper, and must not be double-sided. The proposal must be placed in proper packaging so that the proposal is not folded. Do not bind or staple the proposal. Secure the proposal in the upper left-hand corner with a clip.

**Each provider must submit one original proposal, in addition to one copy. Proposals should be clearly labeled "PROPOSAL," and delivered to the following address:**

Mailing/Street Address: Southwest Idaho Area Agency on Aging  
Attn: Contracts Manager  
1505 South Eagle Road, Suite 120  
Meridian, ID 83642

**SWIA3 recommends hand delivery rather than mailing.** Receipt of deposit for hand-delivery will be provided if requested.

#### **E. QUESTIONS AND REQUESTS FOR CLARIFICATIONS**

Questions and requests for clarifications to the RFQ will be considered only if they are submitted in writing utilizing the Provider Question form (**Exhibit B**) and received by SWIA Contracts Manager, via U.S Mail at 1505 South Eagle Road, Suite 120, Meridian, ID 83642 or email at [zackery.reed@a3ssa.com](mailto:zackery.reed@a3ssa.com). Questions, requests for clarification, and objections that are not timely submitted will be deemed waived. No facsimile questions or clarification will be accepted.

All questions will be addressed as a written addendum to the proposal. Only written clarifications and answers from the SWIA3 should be considered as final.

#### **F. PROTEST OF RFQ REQUIREMENTS/QUESTIONS**

Any provider who wishes to protest the requirements, standards, specifications, or process outlined in this RFQ may submit a written, signed notification to the SWIA3 Contracts Manager, via mail at 1505 South Eagle Road, Suite 120, Meridian, ID 83642 or email at [zackery.reed@a3ssa.com](mailto:zackery.reed@a3ssa.com). No facsimile protest will be accepted. The notification shall state the exact nature of the protest, describe the location of protested portion or clause in the RFQ documents, explain why the provision should be modified, and propose a detailed correction and alternative language. In response to a protest, SWIA3 will act as it sees fit, which may include but is not limited to the following: modifying the RFQ documents, or rejecting all or part of the protest. The Executive Director will make a final determination and response to protests.

#### **G. SELECTION PROCESS**

The selection process may consist of the following process:

- **Contracts Manager review:** SWIA3 Contracts Manager will review each proposal to ensure that it is complete, and includes all required documents. The Contracts Manager will also determine if the provider is able to sign the contract as written or without substantial modifications. The review process may include:



- Review of the application form and attached documentation;
  - Communications with the provider’s references and business contacts;
  - Determination as to recommended changes to the proposal;
  - Oral interview with the provider and on-site visit if deemed necessary and believed that the provider is a finalist;
  - Completion of a scoring sheet for the proposal.
- Contracts Manager recommendation: The Contracts Manager will forward their recommendations to the Executive Director (hereinafter the “ED”) and SWIA3 Board of Directors (hereinafter the “Board”).
  - Executive Director review: The ED will review and approve the proposals and documentation from the Contracts Manager, as well as the Contracts Manager’s recommendations. The ED may choose to conduct their own investigation and review to supplement any perceived deficiencies in the information presented.
  - Board review: The Board will review the proposals and documentation from the ED, as well as the Contracts Manager’s recommendations. The Board may choose to conduct its own investigation and review to supplement any perceived deficiencies in the information presented.
  - Board will approve or reject any applications.
  - Awards will be announced within 48 hours of the Board decision.

**H. EVALUATION**

Before scoring the proposals, SWIA3 Contracts Manager will review the proposals to determine if any of the proposals do not satisfy the minimum requirements. To avoid rejection at this review stage, the proposals must satisfy the following at a minimum:

- The proposal must have been submitted on time, be complete, and include all required documentation.
- The provider must be able to sign the sample terms and conditions contract (Exhibit A) as written or without substantial modifications that would make the contract unfeasible for SWIA3.
- The provider must not be debarred, suspended, or otherwise excluded from or ineligible for participation from the RFP.

Once the initial staff review is complete, the Committee and the Board will evaluate the proposals by determining the perceived congruence of its selection criteria and needs against the submitted proposals. Specifically, the Committee and the Board will score the proposals according to the scoring methodology below:

<b>Provider submission information</b>	<b>60 Max Score</b>
Application itself is completely filled out.	10
All required documentation is attached.	10
The provider covers multiple counties including rural counties.	20

The provider is currently financially stable, and has a history of financial stability.	10
The provider is recognized as a Small Business high priority organization	5
The provider's proposed management structure indicates proper oversight and supervision of the services provided.	5
<b>Proposal narrative and past performance</b>	<b>125 Max Score</b>
The provider implements other senior programs that will benefit homemaker and respite consumers.	10
The provider's strengths, as corroborated with references and business contacts, are relevant and will enhance the program.	20
The provider has a history of implementing good quality assurance plans and measures.	25
The provider identified a process that ensures consumers complaints are being recognized and a process to resolve these grievances.	5
The provider has a history of implementing and executing a good grievance resolution process.	25
The provider's staff is trained to work with seniors.	20
The provider has a reputation for integrity and compliance with the law.	20
<b>Cost-effectiveness, budget, and line items</b>	<b>40 Max Score</b>
The provider will provide various activities that will provide additional support for SWIA3 funded services	20
The provider provided a promising volunteer program plan, which included how volunteers are going to be recruited, placed, duties, etc.	20
<b>Collaboration</b>	<b>20 Max Score</b>
The provider has reasonable networking strategies that will draw support for the programs	10
The provider listed organizations they will collaborate with and how they will support the SWIA3 program	10
<b>Max Score</b>	<b>245</b>

Provider scores under 200 will be rejected. The score is based on average scores of applications we have accepted in the past. SWIA3 reserves the right to waive the score if deemed necessary.

References may be required. In addition to contacting the references listed on the application form, SWIA3 may communicate with any business contacts of the provider during this RFQ process. The Contracts Manager, Executive Director, and the Board may also take into consideration information from its own staff if the provider has contracted with SWIA3 at any time in the past.

References and business contacts may be asked the following types of questions:

- How would you rate the provider's ability to provide accommodations to consumers with disabilities?
- How would you rate the provider's ability to provide accommodations to consumers who do not speak English, or whose first language is not English?
- How would you rate the provider's ability to maintain the confidentiality of consumer information?
- How would you rate the satisfaction level of the provider's consumers?

- How would you rate your satisfaction level with the provider? Please explain your answer, providing details and specific instances if at all possible.
- How would you rate the provider's preparedness to provide the services set out in this RFP?
- How would you rate the professionalism and training of the provider's employees?
- How would you rate the provider's ability to implement a quality assurance plan?
- How would you rate the provider's ability to implement a grievance resolution process, and to resolve grievances in a satisfactory and timely manner?
- How would you rate the provider's integrity, as well as the provider's ability and determination to comply with the law?
- List the provider's three greatest strengths.
- List the provider's three greatest weaknesses.
- How would you rate the provider's ability to provide timely, detailed, and organized reports and invoices? Please explain your answer, providing details and specific instances if at all possible.
- To what other organizations or individuals has this provider provided services who are not listed as references?

At any point in the evaluation process, SWIA3 reserves the right:

- To reject any or all proposals, or any part thereof;
- To reject any proposal that, in the opinion of SWIA3, contains statements intended to mislead SWIA3 in its evaluation of the proposal;
- To reject any proposal that does not provide a response to each of the required sections of the application or does not provide required documentation;
- To waive any minor defects in the submittal if this is to the advantage of SWIA3;
- To accept the submittal that is in the best interest of SWIA3.

SWIA3's decision shall be final. Waiver by SWIA3 of a minor defect in a proposal shall in no way modify the RFQ or excuse the provider from full compliance with contractual and legal requirements if the provider is awarded a contract.

#### **I. NOTIFICATION OF AWARD**

The providers will be notified of the results of the RFQ within 48 hours of the quarterly board meeting. Unsuccessful providers may request to be informed of the reasons they did not receive the contract.

#### **J. CONTRACT NEGOTIATION**

After the proposal has been scored, SWIA3 may recommend changes in the provider's proposed methodology. If SWIA3 recommends changes, then the provider must negotiate in good faith on those changes.

Subject to agreement upon changes resulting from the recommendations of SWIA3, if any, the contract shall be in a form as provided by SWIA3.

#### **K. APPEALS**

Unsuccessful providers may appeal the decision by responding in writing to the SWIA3 by 5 business days of the date of application denial. Such appeals must include a reason or the reasons that the award decision of the Board is in error.

Upon receipt of the appeal, the SWIA3 board shall review its decision and determine whether to affirm its prior award, modify the award, or choose to re-bid, setting forth its reason or reasons therefor. After completion of the review process, SWIA3 may proceed as it deems to be in the public interest.

**L. CONTRACT SIGNING**

The final step in effecting a contract is the signature process. No contract exists until it is signed by both the Executive Director and the provider. The proposed contract becomes a binding agreement only upon the effective date and upon signature by both parties. Within 30 days of contract signing, the provider must attend a mandatory provider orientation with SWIA3.

**RFQ Updates and Changes:**

This RFQ will be updated annually. Updates to the RFQ will be recorded and logged and available on the website. Existing providers will be required to provide any additional information prompted by any changes to the RFQ and/or sign a contract modification. Information that would be looked at annually will be the following:

- Performance
- Reimbursement rates
- State and Federal requirements
- Contract information

**Provider Updates:**

Existing providers under this RFQ will be asked to update information and paperwork every 3 years.

**M. BACKGROUND INFORMATION**

According to the 2019 US Census, the county breakdown for the total senior population over the age of 60 in the ten-county planning and service area (hereinafter “PSA”) is as follows:

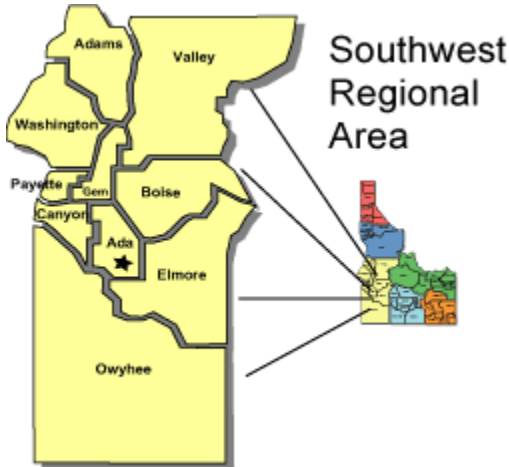
<b>County</b>	<b>2020</b>
Ada County	105,975
Adams County	1,885
Boise County	3,157
Canyon County	46,923
Elmore County	5,417
Gem County	5,730
Owyhee County	3,032
Payette County	6,283
Valley County	4,216
Washington County	3,529
<b>Total</b>	<b>186,147</b>

*Produced by the U.S. Census Bureau in collaboration with the National Center for Health Statistics (NCHS), Bridged-Race Population Estimate.*

## IV. SERVICE AREA MAPS

Service Area Maps:

The service area maps on the following pages are intended to identify the PSA of SWIA3.



SWIA3 – Planning and Service Area

**Note: The Planning Service Area spans a total of 21,879 square miles.**

The Boise Metropolitan Statistical Area (MSA) is Idaho’s “megacity”, sprawling over two counties (Ada and Canyon) and includes the cities of Boise, Meridian, Nampa, and Caldwell, along with several formerly small communities that have recently grown into adjoining satellite cities. The area is collectively known as the Treasure Valley. The metropolitan area’s quality of life is further enhanced by the presence of several colleges and universities.

## V. CONTRACTING STATISTICS BY PROGRAM

### A. HOMEMAKER STATISTICS – SFY 2023

Consumers Served by Homemaker providers in SFY 2023 (July 2022 to June 2023)

County	Number of consumers served	Number of units (hours) provided
Ada	102	5,239
Adams	0	0
Boise	10	402
Canyon	106	4320
Elmore	12	596
Gem	10	729
Owyhee	3	164
Payette	20	1373
Valley	11	571
Washington	9	594
<b>TOTAL</b>	<b>283</b>	<b>13988</b>

### B. RESPITE STATISTICS – SFY 2023

## Consumers Served by Homemaker providers in SFY 2023 (July 2022 to June 2023)

County	Number of consumers served	Number of units (hours) provided
Ada	89	4304
Adams	9	482
Boise	1	73
Canyon	106	6695
Elmore	16	2164
Gem	20	750
Owyhee	14	1014
Payette	11	1526
Valley	7	238
Washington	24	547
<b>TOTAL</b>	<b>297</b>	<b>15,482</b>

## VI. PROGRAM FUNDING HISTORIES:

The program funding histories provide important background information about funding levels of major programs.

### A. HOME MAKER SERVICES

**Funding Source:** (Actual expenditures for completed years and budget for current year)

<u>State Fiscal Year (SFY)</u>	<u>State</u>	<u>Federal</u>	<u>Total</u>
SFY 2020 (July 2020- June 2021) Actual	\$188,151	\$35,986	\$224,137
SFY 2021 (July 2021 – June 2022) Actual	\$245,480	\$0*	\$245,480
SFY 2022 (July 2022 – June 2023) Actual	\$184,237	\$47,712	

\*SWIA3 budgeted solely out of State Funds for SFY2021. Budgeting homemaker solely out of state funds allows SWIA3 screeners to consider members living in the household's income.

### B. RESPITE SERVICES

<u>State Fiscal Year (SFY)</u>	<u>State</u>	<u>Federal</u>	<u>Total</u>
SFY 2020 (July 2020- June 2021) Actual	\$0	\$212,502	\$212,502
SFY 2021 (July 2021 – June 2022) Actual	\$0	\$135,226	\$135,226
SFY 2022 (July 2022 – June 2023) Actual	\$0	\$122,075	\$122,075

## VII. FUNDING PROPOSAL AND PROFILE

**Consumer Choice:** Each consumer is assessed and authorized to receive specified services. The consumer is provided with a list of SWIA3's authorized providers and designates the provider of his/her choice. A consumer may, at any time and in his/her sole discretion, terminate the services of a provider and designate another authorized provider.

Unit of Service: A service unit equals one hour, or fraction thereof, in service to the consumer. Transportation to and from the consumer's home may not be included as part of the service unit.

Rate: SWIA3's reimbursement rate is currently set at \$24 per hour for homemaker and respite services.

Reimbursement: SWIA3 reimburses not more than once per month in amounts not to exceed those authorized by the SWIA enrollment form. The enrollment form indicates the amount that SWIA3 will reimburse and the amount the consumer is to be billed. **NOTE: SWIA3 reserves the right to deny any claim in excess of the hours authorized by SWIA3. It is the provider's responsibility to monitor the scheduling of services in accordance with the authorized amounts.**

Fees: A consumer's payment is determined by SWIA3 during the initial screening process to ensure the consumer consents to the fee, if required. Consumers whose self-declared income exceeds one hundred percent (100%) of the federal poverty level, as established annually by the United States Department of Health and Human Services, are required to pay a fee for service. All fees are based on a sliding fee scale provided annually by the Idaho Commission on Aging.

**The provider is solely responsible for collecting the consumer's portion of the fee for service. The provider must invoice the consumer promptly. The consumer is not responsible for payment of fees for services if invoiced by the provider more than ninety days after the month in which services were rendered.**

The provider must establish a standardized system for billing and collecting fees. The consumer's share of cost must be subtracted from the SWIA3 invoice. The provider must maintain accounting records of all fees and monies expended from these sources.

Consumers whose annual income falls below the federal poverty level shall be given the opportunity to make voluntary donations. The provider must submit any such donations to SWIA3.