



## Individual Consumer Purchase of Service Vendor List Application Form and Agreement SFY26

Provider –	Email –
Address –	Phone –
Billing Contact	Services Contact

Service	Provider Rate	MILESTONES Maximum Rate
Chore		\$22 per hour
Homemaker		\$32 per hour
Personal Care/Home Health Aide		\$40 per hour
Respite Care/In Home		\$40 per hour
Personal Emergency Response System		\$35/month

**The counties you serve -**

- |                                    |                                  |                                    |                                     |                                  |                                    |
|------------------------------------|----------------------------------|------------------------------------|-------------------------------------|----------------------------------|------------------------------------|
| <input type="checkbox"/> Appanoose | <input type="checkbox"/> Clinton | <input type="checkbox"/> Davis     | <input type="checkbox"/> Des Moines | <input type="checkbox"/> Henry   | <input type="checkbox"/> Jefferson |
| <input type="checkbox"/> Keokuk    | <input type="checkbox"/> Lee     | <input type="checkbox"/> Louisa    | <input type="checkbox"/> Lucas      | <input type="checkbox"/> Mahaska | <input type="checkbox"/> Monroe    |
| <input type="checkbox"/> Muscatine | <input type="checkbox"/> Scott   | <input type="checkbox"/> Van Buren | <input type="checkbox"/> Wapello    | <input type="checkbox"/> Wayne   |                                    |

Provider signature certifies that the above information is current and accurate, and provider will comply with Milestones Consumer Purchase of Service Provider Rules for State Fiscal Year 2026 (July 1, 2025 – June 30, 2026).  
 Provider signature certifies there are no known potential conflicts of interest between Milestones and the Provider Agency.

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Provider - Signature of Authorizing Official; Title Date

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MAAA - Signature of Authorizing Official; Title Date

Email this page to Kantina Schmiers: [kschmiers@Milestonesaaa.org](mailto:kschmiers@Milestonesaaa.org)  
 or mail to:  
 Milestones Area Agency on Aging  
 509 Jefferson Street  
 Burlington, IA 52601-5427

**MILESTONES AREA AGENCY ON AGING**  
**Person-Centered Funding Program Provider Rules**  
**SFY26 – July 1, 2025 to June 30, 2026**

The Milestones Area Agency on Aging (MAAA) Person-Centered Funding Program funds home and community-based services for older adults who are of greatest economic need, frail, and at risk of institutionalization. This program supports older adults, adults with disabilities, and family caregivers.

The MAAA Person-Centered Funding Program purchases services from its contracted providers. Consumers may choose any contracted provider that is willing and able to provide the service.

Services available to consumers under this monthly purchase plan include:

- Homemaker Services
- Nutrition Counseling
- Personal Care/Home Health Aide
- Respite Care/In Home
- Respite Care/ Out of Home

**I. FUNDING SOURCE/REIMBURSEMENT STRUCTURE**

Authorized by the Older Americans Act (OAA) and Iowa HHS Division of Aging and Disability Services, MILESTONES utilizes federal, state, and local funds as a last resort and only in cases where Medicare, Medicaid, Medicaid Waivers, or third-party payment are not available. Consistent with OAA requirements, MILESTONES sends voluntary contribution letters to participants receiving services on a monthly basis. 100% of contributions are returned to the Program to directly fund services and support more people.

In the event of a disaster, natural or man-made, MILESTONES reserves the right to shift funds to respond to the disaster. MILESTONES reserves the right to alter the eligibility guidelines for consumers and Provider Agencies in times of disaster in response to the disaster.

The need for critical home and community-based services far outpaces MILESTONES's ability to fund them. As such, MILESTONES prioritizes individuals based on their needs and implements a waiting list for individuals applying to Person-Centered Funding. Individuals with the greatest combination of needs are offered services first.

MILESTONES staff and the consumer develop an individualized service plan. Consumers choose the provider. Once a provider is selected, MILESTONES staff sends the provider a service authorization form describing the service authorized and the maximum monthly units that a provider may bill for reimbursement.

MILESTONES funds a maximum of \$300 per person per month. In exigent circumstances, MILESTONES may approve an exception to policy and fund services beyond the maximum allotment. In such circumstances, providers will receive an updated service authorization from MILESTONES.

MILESTONES reimburses providers monthly. Upon executing this agreement, MILESTONES staff will provide a roster for each provider. Providers MUST use the roster and reimbursement

form to ensure timely payment. Invoices must be submitted for reimbursement by the 10<sup>th</sup> of the month following the month service was provided. Bills submitted after the 10<sup>th</sup> of the month may not be honored.

Service units shall be reported to the nearest .25 hour.

## II. TARGET POPULATION

MILESTONES staff determine consumers' eligibility for services and the best available funding source. MILESTONES prioritizes funding to support individuals of greatest economic need, greatest social need, at risk for institutional placement, and frail populations.

- a. **Greatest Economic Need.** The need resulting from an income level at or below the poverty line.
- b. **Greatest Social Need.** The need caused by noneconomic factors, which include:
  - Physical and mental disabilities
  - Language barriers
  - Cultural, social, or geographical isolation, including isolation caused by racial or ethnic status, that
    - Restricts the ability of an individual to perform normal daily tasks; or
    - Threatens the capacity of the individual to live independently.
- c. **At Risk for Institutional Placement.** An individual that is unable to perform at least two activities of daily living without substantial assistance (including verbal reminding, physical cuing or supervision) and is determined by the State involved to be in need of placement in a long-term care facility.
- d. **Frail.** The older individual is determined to be functionally impaired because the individual: (A)(i) Is unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cuing, or supervision; or (ii) At the option of the State, is unable to perform at least three such activities without such assistance; or (B) Due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual.

## III. CONSUMER REFERRALS

MILESTONES coordinates with health systems, clinics, social service agencies, public agencies, and other community-based groups to identify individuals in need and refer them for more support.

Additionally, MILESTONES encourages individuals, caregivers, and family members to call MILESTONES directly at 855-410-6222 and discuss their situation with MILESTONES staff. If staff determines that the individual qualifies for the program, they add them to the waiting list. Once the individual reaches the top of the list, MILESTONES staff will coordinate with the provider selected by the individual and send them a service authorization. Consumers wait between 3-6 months on average.

#### **IV. PROVIDER SELECTION**

Consumers choose the provider from a list of contracted providers who serve their county. If the consumer does not choose the provider, MILESTONES selects providers on a rotating basis. MILESTONES is “provider agnostic” among its contracted providers and does not suggest a preferred provider to the consumer. This is to ensure fairness among providers.

#### **V. PROVIDER QUALIFICATIONS AND ELIGIBILITY STANDARDS**

##### **A. Minimum qualifications – To qualify, organizations must**

- a. Operate legally and provide services in the State of Iowa for a minimum of 1 year.
- b. Offer services that align with the MILESTONES Funding Service Definition Taxonomy.
- c. Serve at least 1 of the Iowa counties of Appanoose, Clinton, Davis, Des Moines, Henry, Jefferson, Keokuk, Lee, Louisa, Lucas, Mahaska, Monroe, Muscatine, Scott, Van Buren, Wapello, and/or Wayne.
- d. Timely and accurately submit this agreement, fulfill all requirements and agree to all rules stated herein.

##### **B. Indemnification:**

The Work performed by the Provider shall be at the risk of the Provider exclusively. To the fullest extent permitted by law, Provider shall indemnify, defend (at Provider’s sole expense) and hold harmless Milestones Area Agency on Aging, affiliated companies and their partners, joint ventures, representatives, members, designees, officers, directors, shareholders, employees, agents, successors, and assigns (“Indemnified Parties”), from and against any and all claims for bodily injury, death or damage to property, demands, damages, actions, causes of action, suits, losses, judgments, obligations and any liability costs and expenses (including but not limited to investigation and repair costs, attorneys’ fees and costs and consultants’ fee and costs) (“Claims”) which arise or are in any way connected with Work performed, Materials furnished, or Services provided under this Agreement by Provider or its agents. These indemnity and defense obligations shall apply to any acts or omissions, neglect or willful misconduct of Provider, its employees or agents whether active or passive. Said indemnity and defense obligations shall further apply, whether or not said claims arise out of the concurrent act, omission, or negligence of the Indemnified Parties, whether active or passive. Provider shall not be obligated to indemnify or defend Milestones Area Agency on Aging, for claims found to be due to the sole negligence or willful misconduct of Indemnified Parties.

Provider’s indemnification and defense obligations hereunder shall extend to Claims occurring after this Agreement is terminated as well as while it is in force and shall continue until it is finally adjudicated that any and all actions against the Indemnified Parties for such matters which are indemnified hereunder are fully and finally barred by applicable Laws.

- ##### **C. Potential Conflicts of Interest with Businesses:**
- Transactions with outside firms must be conducted within a framework established and controlled by the Milestones Area Agency on Aging's Board of Directors. Business dealings with outside firms should not result in unusual gains for those firms or Milestones Area Agency on Aging's

employees. Unusual gain refers to bribes, special benefits, and other windfalls designed to ultimately benefit the employer, the employee, or both. Any actual or potential conflict of interest must be disclosed as soon as possible so that safeguards can be established to protect all parties. By signing the Purchase of Services Application and Agreement Form you attest to having no known potential conflict of interest with MILESTONES or their employees.

- D. Insurance:** Service providers shall have sufficient insurance to indemnify loss of federal, state, and local resources due to casualty or fraud, and to cover the fair market value of the asset at the time of loss.

Required Insurance:

- workers compensation
- unemployment
- property and theft coverage
- fidelity bonding (for persons handling cash)
- facility insurance (for facilities purchased with federal and/or state funds)
- no-fault vehicle insurance (for agency owned vehicles)

Proof of insurance must be provided to MILESTONES upon request. All first-time contracts must submit proof of insurance prior to providing any services under this agreement.

Upon execution of this Agreement, and prior to the Provider's commencing any work or services with regard to the Program, the Provider shall carry **commercial general liability** as well as **professional liability insurance** and the Provider shall supply Milestones Area Agency on Aging, a **Certificate of Insurance and Additional Insured Endorsement**, naming Milestones Area Agency on Aging, as Additional Insureds hereunder.

Additional insured coverage shall apply as primary insurance with respect to any other insurance afforded to Milestones Area Agency on Aging.

The coverage available Milestones Area Agency on Aging, as Additional Insured shall not be less than \$1 million dollars Each Occurrence, \$2 million General Aggregate, \$2 million Products/Completed Operations Aggregate and \$1 million Personal and Advertising Injury limits. Such insurance shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal and advertising injury, and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

All coverage shall be placed with an insurance company duly admitted in the State of Iowa and shall be reasonably acceptable to Milestones Area Agency on Aging. All Provider insurance carriers must maintain an AM Best rating of "A-" or better. Coverage shall be afforded to the Additional Insureds whether or not a claim is in litigation.

- E. Hiring and Employment Practices** – MILESTONES is an Affirmative Action / Equal Employment Opportunity employer. As such, providers must demonstrate that their personnel policies prohibit discrimination in employment on the basis of race, color, creed, religion, national origin, sex, sexual orientation, gender identity, mental or physical disability, age, or marital status.

- F. Confidentiality** – Service providers shall have procedures to protect and assure the confidentiality of information about the persons they serve. No information will be disclosed without the prior informed consent of an individual and/or his/her legal representative. Disclosures may be allowed by court order or for program monitoring by authorized federal, state or local agencies (which are also bound to protect the confidentiality of consumer information) so long as acting in conformity with the Privacy Act of 1974. All consumer information shall be maintained in controlled access files. Only pertinent consumer information to provide approved service is shared between MILESTONES and Provider Agency. Provider Agency shall not disclose consumer personal data beyond data necessary to provide service. Documents detailing policies and procedures regarding confidentiality must be provided to MILESTONES upon request.
- G. Audit Standards** – The provider agrees to maintain records to easily identify the utilization of MILESTONES funds and make those records available for audit and assessment for three years beyond the end of the award period. Documents detailing policies and procedures regarding audit standards must be provided to MILESTONES upon request.
- H. Provider Standards and Assurance Against Debarment** – No MILESTONES Funds will be contracted to a provider that has been prohibited from participating in the Medicare, Medicaid, or medical assistance programs. Providers shall not be debarred, suspended or otherwise excluded from or ineligible for participation in Federal programs or activities. MILESTONES will perform a debarment evaluation of all providers prior to execution of the Person-Centered Funding Agreement.

The provider shall ensure that all employees providing in-home care to consumers have had a criminal background check and been cleared for said functions in accordance with Iowa Code Chapter 135C.33.

- I. Grievance Policy** – The provider shall have a formal grievance and appeals procedure for perceived discrimination and/or decisions that appear unfavorable to consumers concerning the provision of service. Documents detailing policies and procedures regarding consumer grievances must be provided to MILESTONES upon request.

MILESTONES has in place a grievance policy and appeals procedure for perceived discrimination and/or decisions that appear unfavorable to consumers concerning the appropriation of service. This consumer appeal process extends beyond the service of all participating providers and includes a process for consumer complaints and informs the consumer of the process.

1. Any Consumer denied access to MILESTONES Funding, after the initial denial by The MILESTONES Funding Program, will have the right to appeal that decision within thirty days to Milestones Area Agency on Aging for reconsideration. All consumers involved in an appeal have the right to have an advocate present with them when they meet with Milestones Area Agency on Aging.
2. Milestones Area Agency on Aging will meet with the consumer within five working days of notification of the appeal. Milestones Area Agency on Aging will review

the consumer information within ten working days of the meeting with the consumer and notify the consumer of the decision.

3. The decision of Milestones Area Agency on Aging after the above review will be final, unless the status of the consumer changes.

## VI. PROGRAM RULES

- A. **Service Taxonomy** – Service definitions have been established for each type of service available. Providers shall comply with these service definitions.
- B. **Compliance** – MILESTONES will audit all providers from time to time, either in the form of a desk audit or an on-site audit. Upon request, agencies shall provide the following:
  - Documents detailing policies and procedures regarding compliance with applicable employment and EEOC laws.
  - Proof of insurance
  - Documents detailing policies and procedures regarding confidentiality
  - Documents detailing policies and procedures regarding audit standards
  - Documents detailing policies and procedures regarding consumer grievances
  - Documents detailing services provided and services billed.
- C. **Non-Exclusivity** – It is expressly understood and agreed by MILESTONES and the Provider that this is not an exclusive agreement. Nothing in this Agreement shall be construed as creating an exclusive arrangement with the Provider Agency or Prohibit MILESTONES from either acquiring similar, equal or the like services from executing additional contracts with other entities or sources.
- D. **Termination** – Funds awarded by MILESTONES may be terminated at any time for violations of any terms and requirements of the funding source. MILESTONES and Provider may terminate this Agreement, without cause and for convenience, upon thirty (30) days written notice to the non-terminating party.

MILESTONES reserves the right to shift funds from one taxonomy or Provider to another taxonomy or Provider, with or without cause or convenience upon thirty (30) days written notice.
- E. **Proof of Service Provided** – Provider shall verify that service units provided to consumers match the units on the monthly submitted roster. MILESTONES staff talk to all consumers at least monthly to check on their status, the effectiveness of the services they are receiving, and to verify that services are provided in accordance with the service authorization form. When billing discrepancies are identified, MILESTONES staff will contact the Provider to discuss the situation and request verification that services were provided. MILESTONES will not reimburse services if the provider cannot provide proof that they were provided.
- F. **Consumer No Show Policy** – In situations where consumers who are not home or did not cancel prior to scheduled service provision, the Provider shall call consumer and consumer's emergency contact. The Provider must then notify the MILESTONES Case Manager upon confirmation of consumer no-show. The Provider shall not bill

MILESTONES or the consumer for service provision beyond the time necessary to contact the consumer and MILESTONES as described above.

- G. Mileage** - MILESTONES does not reimburse mileage. Services begin when Provider arrives at the consumer's location and ends when the Provider leaves the consumers location.
- H. Cost Sharing** – Consumers shall encumber no financial obligation by receiving services under this agreement. Providers **shall not bill the consumer** for any rate difference in the event the agreed upon rate is less than the Provider's standard rate.
- I. Maximum Reimbursement Rate** – Providers shall not charge MILESTONES a rate higher than the Provider rate submitted in this bid.

## **VII. REPORTING AND PAYMENT**

Upon execution of this agreement, MILESTONES will provide a service roster to all Providers. Providers must submit their monthly rosters accurately and on time.

### **A. Reimbursement Request for Individual Purchase of Service**

Providers receive payment for services monthly by submitting the approved Reimbursement Request to MILESTONES. Reports must cover a one-month period – from the first day of the month through the last day of the month. **To receive payment, reports are due to MILESTONES by the 10<sup>th</sup> day of the following month and must be correct and complete.** Payment will be issued within no more than 30 working days following the approval. Incomplete and/or incorrect submission will delay payment.

E-Mail monthly rosters and reimbursement requests to: [kschmiers@milestonesaaa.org](mailto:kschmiers@milestonesaaa.org)

Providers may mail Reimbursement Requests for Individual Consumer Purchase of Service to:

Milestones Area Agency on Aging  
509 Jefferson Street  
Burlington, IA 52601-5427



**MILESTONES AREA AGENCY ON AGING  
APPLICABLE SERVICE DEFINITIONS  
FY26 - July 1, 2025 - June 30, 2026**

- 1. Chore (One Unit = One Hour)** – Performance of heavy household tasks provided in a person’s home. Tasks may include yard work or sidewalk maintenance/snow removal in addition to heavy housework.
  
- 2. Homemaker (One Unit = One Hour)** – Providing assistance to persons having difficulty with one or more of the following instrumental activities of daily living: medication management, preparing meals, shopping for personal items, managing money, using the telephone, or doing light housework. Units Service units shall be reported to the nearest .25 hour.
  
- 3. Personal Care/Home Health Aide (One Unit = One Hour)** – Providing personal assistance, stand by assistance, supervision or cues for persons having difficulties with one or more of the following activities of daily living: eating, dressing, bathing, toileting, and transferring in and out of bed. Units Service units shall be reported to the nearest .25 hour.
  
- 4. Respite Care/In Home (One Unit = One Hour)** – Service which offers temporary, substitute supports or living arrangements for older persons in order to provide a brief period of relief or rest for family members or other caregivers. Units Service units shall be reported to the nearest .25 hour.
  
- 5. Personal Emergency Response System (PERS)** – Service provided to a consumer that includes the installation and monthly fee for an emergency response [medical alert] system