



Butler County Elderly Services Program (BCESP) Services Committee Meeting

March 09, 2022

1:30 pm – 3:00 pm

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AGENDA

- | | |
|--|--------------|
| 1. Call to Order | Katy Abbott |
| 2. December 9, 2022, Minutes (Action Needed) | Katy Abbott |
| 3. Provider Network Report | Lisa Portune |
| - 2021 Executive Summary Report of
Provider Reviews | |

OLD BUSINESS

- | | |
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| 4. West Chester Senior Center | Ken Wilson |
| 5. Fiscal Intermediary RFP | Ken Wilson |
| 6. Home Health Aide App & Aging Friendly Oxford | Ken Wilson |

NEW BUSINESS

- | | |
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| 7. Independent Living Assistance Service Specification Changes (Action Needed) | Monica Schulze |
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ADJOURNMENT

Katy Abbott

NEXT MEETING:

June 09, 2022

Butler County Elderly Services Program (BCESP)

Services Committee Meeting

December 9, 2021

Committee Report

Present: Katy Abbott, Christine Maticic, Sherrill Swann, Jennifer Lake, Kate Laubenthal, and Ken Wilson.

Call to Order: The December 9, 2021, meeting of the BCESP Advisory Council Services Committee meeting was called to order at 1:35 p.m. by Katy Abbott.

Approval of Minutes: Katy Abbott called for a motion to approve the September 9, 2021, BCESP Services Committee Minutes.

Motion: Jennifer Roth made a motion to approve the minutes as presented.

Second: Christine Maticic seconded the motion.

Action: The September 9, 2021, minutes were unanimously approved as presented.

Provider Network Report:

Ken presented the Provider Network Report. COA continues to distribute PPE to the providers from a supply received through ODA. In some cases, ODA is shipping PPE to some of the Home Health Providers directly.

Home Care Assistance will be discussed in further detail later in the meeting. The workforce shortage continues to be a challenge.

The Oxford Center is the only Adult Day Center in Butler County that has reopened. This is happening across the region. Centers are struggling to reopen because staff moved on when the centers were shut down via the Health Order in 2020. The problem is worse when they are trying to staff director positions as well as other staff. COA is looking at Federal funding to see if they can help incentivize bringing the Adult Day Centers back.

Transportation Providers are now starting to see staffing challenges. This had not been a significant problem until recently. Partners in Prime just went on hold because they are short drivers. Ken does not recall this ever happening. Katy asked what it meant to be placed on hold and if that meant they just won't accept any new clients. Ken explained that they won't accept any new clients until they let COA know they have the capacity to do so. They are still providing transportation to those clients currently assigned to them, but they are not able to take any more clients right now. Katy asked if there was another provider that they need to bring on board. Ken advised there are several new providers that did come on board, so he thinks this isn't a crisis but something to keep an eye on. He's not hearing about people going without transportation like he is with home care assistance.

There are staffing challenges with Independent Living Assistance as well. This is the service that helps seniors with their checkbooks, mail, applying for Medicaid benefits, food stamps, etc. Partners in Prime, who does most of the ILA, is on hold for new referrals because of their staffing limitations.

The Senior Farmers Market Program just wrapped up its second year in the region. This is a Federally funded program and 347 seniors participated in Butler County. COA is working to continue the program for a third year next year. As a reminder, the origins of this program came from this Committee when Cynthia Stever was a member, and she brought this program forward. It was then pursued locally and then brought to the region. Ken just wanted to point out that this Committee does make an impact.

The Restaurant Meal Program continues and is funded through the CARES Act. Meals are delivered to low income senior buildings. Katy asked how frequently they are getting meals. Ken explained they rotate buildings so roughly once a month.

For Electronic Monitoring Systems, 3G is being phased out. As a result, there are some older adults that are using 3G cellular service to run their call button. In those cases, the provider Guardian Medical is replacing their equipment by February 1st so there is no disruption in services.

Structural Compliance Reviews are completed onsite for the providers. Ken provided the proposed schedule to the Committee. The last two years, the schedule has been disrupted by COVID, but the hope is to be able to stick to the schedule in 2022. Some of the things they are looking for is just making sure they are doing everything that they agreed to do in their contract. For example, making sure their staff are background checked, they had appropriate training, and they have the right insurance in place, etc.

The RFP schedule for 2022 has changed a lot over the last few weeks. The biggest impact is the federal funding because there is a required cycle that goes with this schedule that's tied into an area plan that COA submits to ODA. Next year, any service that is receiving federal funding, must go out for a competitive RFP. This is going to be a pretty heavy schedule. It includes all of the Title III services like the congregate meal program, transportation, home delivered meals, Adult Day services, and the catering contract. COA also added Independent Living Assistance because they are concerned about the capacity, although it is not subjected to the Title III federal funding.

Katy asked how it works for Adult Day when there is only one provider. Ken advised that's what he's worried about and that is a question he has for ODA. He feels like an RFP doesn't make a lot of sense right now because they are struggling to reopen. He also feels they need to be taking a pass this year and help them reopen rather than making them go through the process of submitting an RFP. Ken plans to pose this question back to ODA to see if there's any flexibility in that. As it stands right now, if they draw down the federal dollars, they have to put it out for an RFP. Katy then asked if it could possibly be a simplified RFP or if their application from last time could be reused. Ken explained they can't reuse the old application, but the team is looking at it right now to see how they can simplify the process the best that they can. Some providers will be responding to multiple RFPs while others may only respond to one. If they are responding to multiple, COA is trying to find a way to simplify it such as submitting some of the documents only once. A lot of this is driven by procurement rules in the State of Ohio so there are certain things they can and can't do. One thing they will definitely be doing is ramping up their communication around this. They need to get in front of the providers to let them know what's happening and get timelines together for them.

The Fiscal Intermediary RFP was sent out. COA has been contracting with Acumen for years. They are a vendor that helps support the Consumer Directed Care Program. This is the program where the

older adult or authorized representative hires their own care worker. The Fiscal Intermediary's job is to process payroll, complete background checks, and make sure taxes are paid. COA received six proposals and decided to recommend going with Palco. Right now, they are doing a readiness review to make sure they're ready to go. If they are, COA will award them the contract and transition to them by April 1st, which is a big lift. COA is optimistic that this new provider will be able to deliver better service. As this program has grown, especially in the last couple of years, the process for enrolling new clients has become more and more cumbersome. Acumen has struggled with the volume. Katy asked if all the current folks had to resubmit all of their payroll documents to the new provider or can they be transferred. Ken advised COA is looking at a transfer plan. There will probably have to be some paperwork to fill out, but they are working toward making it as seamless as possible. Their hope is that this will improve the quality of the program and make it easier for new clients- especially in this new environment of workforce shortages. They also hope to use the same vendor to support the home health aide app.

Provider Quality Report:

Ken gave a brief overview of the Provider Quality Report. This report is ran quarterly but is shared with the Committee twice a year. It is used to measure quality and compare providers to each other to see what's going on and incentivize quality improvement.

A Home Care Assistance RFP was published last year and COA added some new providers. The number of providers delivering services in Butler County has grown. Some providers are showing up on this report for the first time this past quarter and are starting to pick up cases: Always There Healthcare, Comfort and Care Home Health Agency, Quality Care, and Southwestern Ohio, LLC. This has helped but is not solving the overall problem because many providers are shrinking in market size as they don't have enough staff. For example, Interim used to have 23% of the market share and is down to 19% of the market share. Assisted Care by Blackstone has half of what they used to have a year ago going from 11% to 6%. There is a lot of shifting going on with the providers. The good thing is, is there are a lot of them and none of them control the market. The biggest provider is A Miracle who has grown but they only have a third of the clients.

The Home Care satisfaction surveys are given to the older adults receiving services and is broken out by question. The red scores are statistically significant under the benchmark, the green is statistically significant above the benchmark, and the white are an average performing provider. The ones shaded in gray are the ones who don't have enough of a sample size to say those results are statistically accurate. What COA is seeing, for example, is A Miracle Home Care, which is the fastest growing provider, is struggling with quality but COA has to use them because they are accepting cases. Katy asked if A Miracle Home Care was on a performance plan. Ken explained that COA is talking with them, but they are not currently in a performance plan. COA is a little reluctant to do that because of the staffing shortages. In the past, they would have been placed on hold until they got their scores back up, but COA can't afford to do that with the number of clients waiting on a provider who has staff available to deliver the in home services.

Sherrill asked if the participation in the surveys was high. Ken informed that every client is surveyed twice a year by their care manager and participation is really high. People can decline and Ken knows COVID has disrupted some of the normal volume. Katy asked why Warren County Community Services was on the report for home delivered meals. Ken explained that their kitchen is in Middletown, and they service part of Butler County. Katy then asked if Meals on Wheels of SW Ohio

and Northern Kentucky was out of business. Ken advised they weren't, and they merged with Cincinnati Area Senior Services. Prior to that, meals on Wheels had dropped their transportation contract, but CASS had a transportation contract, so when they merged, transportation came back. Katy asked that when COA is talking to the providers with a quality issue, what are they talking to them about since they can't place them on hold. Ken explained that they are asking them what their plans are to improve their performance. For example, their responsiveness problem, but it all depends on what the issue is. Sherrill asked if COA would drop a provider if the quality was really bad. Ken advised that they would. It is a difficult environment to do that right now because if they drop a provider, there aren't any providers that could pick those clients up. Katy asked if there are any innovations happening such as wage passed through legislation in any areas of the country that are seeming to help this issue. Ken advised that he hasn't, but COA is trying a lot of different things. Although it's frustrating because nothing is helping much. There are several projects in the works to try to address the issue.

OLD BUSINESS

Medicare Advantage Plan Update:

Kate provided the Medicare Advantage Plan Update. Ken added that a student through Miami University did an analysis of all the Medicare Advantage Plans in the region and looked at the benefits included that are also provided in ESP. Ken shared some of those findings a while ago, but this is action COA has taken since then. They took her information and implemented it into the program to ensure payor of last resort and also to make sure older adults are receiving the Medicare benefits they are eligible for. Kate stated that a benefits specialist (Cynthia) was hired in spring of 2021 knowing that roughly 40% of older adults in the region have a Medicare Advantage Plan. As it's discovered that a client has a Medicare Advantage Plan, the care manager sends the referral to Cynthia, she talks with the client to let them know about their plan and will then make a call with the client to the Advantage Plan. Many clients have reported this is incredibly helpful. In Butler County, there were 32 referrals between September and October, and 18 of them had services transitioned to their Medicare Advantage Plan.

Cynthia makes sure she helps the clients understand their benefits even if they aren't able to transition any services onto their Advantage Plan. This includes many OTC benefits they may have. The mass majority are clients with transportation or Lifelines and tend to be what most Advantage Plans are offering. It was estimated that there has been roughly \$20,000 in savings from September to October. There are some limitations with this process especially due to the pandemic. They are relying on self-reporting from clients in regard to their insurance information since most visits have been telephonic. Some benefits through the Advantage Plans are more complex to access. For example, some of them are dependent upon knowing exactly when a client entered the hospital and was discharged. Katy asked if they needed to reenroll in their Medicare Advantage Plan every year. Kate explained they do not. Katy asked if this was an annual review going forward. Kate informed that staff are expected to review a client's insurance information when they go out for their yearly visit or if they are seeing a new need with a client. Christine added that she just went through the process of enrolling in a Medicare Advantage Plan herself. One of the things emphasized to her was that if she didn't like her plan, she had time next year to change it, but that she will have to re-up every year. Ken added that this project has been very important to COA for a number of reasons. They want to make sure they are stretching the levy dollars as far as they can.

Christine asked if programs like Silver Sneakers could possibly fall under the category of Daycare. Ken explained that the majority of the individuals who attend Adult Day Care have dementia. They do have activities and programming at the centers, but Silver Sneakers is more for older adults who are well. Jennifer asked if COA is looking at the hospice piece of things. Ken advised that COA does, and hospice benefits run really nicely with ESP. They encourage people to seek that Medicare benefit. Jennifer then asked if the care managers that go out are educated to have that conversation once they recognize the person might be appropriate for hospice. Kate explained that they do, and they will encourage the client to have that discussion with their doctor.

West Chester Senior Center Update:

Ken gave an update on the West Chester Senior Center that was discussed the last Committee meeting. He had been contacted by the Township Administrator for Ken to come out and give a presentation on ESP to the Trustees. When he showed up, seniors had been picketing all day because they were upset about the senior center closing. He gave an overview of ESP and one of the trustees, asked if West Chester was getting their fair share of the levy dollars. The West Chester Senior Center had closed and the seniors that used to go there were upset and had been going to the Township asking what they were going to do to get it reopened. Ken explained to them that ESP is focused on keeping people independent at home and not operating senior centers. He did advise them that they could work together to create a program because there is federal funding available for services such as congregate meals.

Since then, Ken has had a several follow up conversations with the seniors. He followed up with the Township asking them to organize a meeting. The Township provided contacts at the library to follow up. Ken set up a few meetings with the library. He also met yesterday with the library, Meals on Wheels of SW Ohio, and a group of the seniors for a brainstorming session. They went over what their needs were, what it was that they were missing, and a lot of it was around social isolation as well as a little around nutrition needs. A new program is going to start every Friday from 10am to 2pm in January, COA will pay for congregate meals at the library. The space at the library is very nice. The meeting went very well, and the seniors were very engaged in the solution. They will see how the program goes from here and if they want to expand it.

Ken is very concerned about the confusion over the role of the senior services levy. The levy is a county wide program and it's about providing services to any senior in the county. Jennifer asked if there would be opportunities to offset some costs by having people in the industry providing lunches and bringing in informational speakers if it's a topic the seniors might be interested in learning more about. Ken thinks there is a match there. His first priority is to get this going and will be working on a schedule of activities and programming. He advised Jennifer that he would love to get her connected at some point to that. Christine offered her help to Ken, and he informed her he might need her help, but he just doesn't know with what yet.

Home Health Aide App:

Ken gave an update on the Home Health Aide App. COA was selected by Senator Sherrod Brown to receive proposed funding for the app and rollout. That still needs to make its way through Congress and hasn't happened yet. Ken will be meeting with Aging Friendly Oxford tomorrow to speak with them about assisting COA with the piloting and rollout of the app. Oxford is one of the most difficult to serve communities in Butler County (staff availability). It seems like a really good place to engage

volunteers and community members that are already working on making Oxford aging friendly. Ken also offered that if anyone on the Committee was interested in being engaged with this project to let him know. COA is hopeful that this will generate a new workforce currently not being tapped into. This will connect the client or family with the aide and the aide will have control over their schedule which is often a complaint. Katy asked about the Miami University student population and if he is thinking of involving them. Ken advised it was on his radar because he's seen students be really good home health aides. Katy suggested a flyer created for the student community to draw them to the app. Her concern is gaps in coverage for when students are on break. Ken agreed but there are some students that live local enough that it wouldn't be an issue for some. Jennifer asked if there was going to be the education piece with the app. Ken advised there would be.

NEW BUSINESS

Committee Officers for 2022:

Katy asked if anyone on the Committee would be interested in taking over as the Committee chair for 2022. She will be transitioning off the Committee after next year and this would allow her to pass the torch and be of help. The work on her end is minimal. She runs the meeting and takes brief notes to give a report at the Advisory Council. No one spoke up to volunteer to take that spot. Katy advised will bring up again at the next meeting and asked them to please consider.

2022 Meeting Dates:

The 2022 meeting dates were presented. Katy has a conflict on March 10th, so it was decided to hold the meeting virtually on March 9th instead for the same time of 1:30pm to 3pm.

HEARING THE PUBLIC

No individuals from the public requested to speak.

ADJOURNMENT

With no further business to discuss, the meeting was adjourned at 2:50pm.

NEXT MEETING

March 10, 2022

Butler County Provider Network Report March 2022

Personal Protective Equipment (PPE)

The Ohio Department of Health has PPE supplies available for providers of Adult Day, Home Health Care, and Senior Centers. Communication on how to request supplies was sent to the applicable providers.

Home Care Assistance (HCA)

HCA providers continue to experience staffing/aide shortages. We continue to meet with providers to look for ways to streamline our processes to meet the needs of our clients.

Financial Management Service (FMS) for Consumer Directed Care (CDC)

An RFP was published in June 2021 to find a new Financial Management Service for Consumer Directed Care. We were working with a very tight timeline to avoid a bifurcated tax year for the provider. As a result, we did not receive an adequate number of submissions, so a new RFP was developed to address this concern.

COA worked with a consultant in the field of Fiscal Intermediary or FMS services. Based on her feedback and expertise, a newly designed RFP was published in September 2021, to procure providers to serve as the FMS for CDC. We received six submissions.

After a scoring team reviewed the proposals, and the highest scored bidder completed a Readiness Review with our consultant, a new FMS provider was selected. Palco will be our new FMS provider for CDC.

We are currently working with Acumen to transition existing clients to the new provider. The transition of this service is large and will take several months to complete.

Adult Day and Senior Operations

No changes from the previous report.

Transportation

Partners in Prime requested to be placed on hold for Medical and Non-Medical Transportation effective 11/21/21. The provider will continue to provide these services to their current clients but will not be able to accept new referrals at this time due to major staffing shortages.

Independent Living Assistance (ILA)

Partners in Prime requested to place their ILA program on hold for new referrals due to major staffing shortages.

Central Connections is in the process of expanding their ILA program. They have hired staff and are actively taking new referrals in Butler County. They are currently in one zone in Butler County but are looking to expand.

An RFP for ILA will be published in February 2022. The proposal has a due date in March 2022.

As part of the development process of the RFP, we met with our existing ILA providers and COA Management staff to review the service specification. Minor suggestions for revisions were made.

Please see the attached tracked changes version, as well as a final version, of the ILA Service Specification we would like to propose to be effective in March.

During our discussions with the providers, feedback was given as to the need to allow ILA providers to deliver the service to the client even if they are on hold or suspension. The providers expressed concerns that a person could lose their housing if the provider is not permitted to assist them with paying their rent or house payment while in a rehab facility, hospital, or nursing facility. This is a large concern. After further discussion with COA Management staff, the decision was made to allow the provider to deliver ILA service while a client is on hold or suspended.

Senior Farmers Market Nutrition Program

COA has signed the grant agreement for the 2022 Senior Farmers Market Nutrition Program and submitted it to the Ohio Department of Aging. This will be our third year to offer this program in our five-county region. The 2022 plan includes both coupon distribution to seniors to spend at participating farm markets and bulk produce delivery to select senior housing locations.

Restaurant Meals

The COA Restaurant Meal program continues to deliver comfort meals to Butler County seniors who may be experiencing continued isolation or food insecurities during the Pandemic. The meal deliveries in Butler County are sponsored by Humana and ProSeniors. Meals for first quarter of 2022 are provided by Taste of Belgium, Frisch's, and Personal Chef Anthony Jordan.

Electronic Monitoring Systems – Cellular Equipment Upgrades

Guardian continues efforts to update the equipment for 5 BCESP clients. Family members are working with Guardian to schedule the installation of the new equipment. 3G towers, which are used to communicate signals from cellular equipment used by Guardian and other EMS providers, are slated to shut down at the end of February 2022.

The EMS Request for Proposals (RFP) previously anticipated in 2022 has been removed from the RFP schedule for this year. Guardian has agreed to continue to provide services to ESP clients at their current rates through September 30, 2024. COA Provider

Services, led by LaTricia Long – Business Relations Partner, will take this time to research and explore the various equipment and options that currently exist to ensure the service is beneficial to the clients and to help develop a better RFP for this service.

2021 Executive Summary of Provider Reviews

Butler County Provider List	Review Frequency	Review Date	Services Provided	Findings Detail	Corrective Action required?	COA Follow up Strategy	Reports Completed
A Miracle Home Care	Annual	9/15/21	Home Care Assistance	n/a	n/a	n/a	yes
All Gone Termite & Pest Control	Biennial	7/29/21	Environmental Services	n/a	n/a	n/a	yes
American Ramp Systems	Biennial	9/8/21	Minor Home Modifications and Durable Medical Equipment	n/a	n/a	n/a	yes
Assisted Care by Black Stone	Annual	1/7/21	Home Care Assistance	n/a	n/a	n/a	yes
Bayley Adult Day	Annual	9/15/21	Adult Day Services and Adult Day Service Transportation	n/a	n/a	n/a	yes
Central Connections (Middletown Area Sr Citizens, Inc.)	Annual	1/4/21	Home Delivered Meals, Independent Living Assistance and Transportation	n/a	n/a	n/a	yes
Custom Elevator	Biennial	11/24/21	Minor Home Modifications	n/a	n/a	n/a	yes
Helping Hands Health Home Care Assistant	Annual	1/5/22	Home Care Assistance	n/a	n/a	n/a	yes
Interim HomeStyles of Greater Cincinnati	Annual	11/10/21	Home Care Assistance	n/a	n/a	n/a	yes
Lifespan CM & Screening	Annual	11/30/21	Care Management & ILA Services	n/a	n/a	n/a	yes
Lifespan ESPILA	Annual	11/30/21	Care Management & ILA Services	n/a	n/a	n/a	yes
Meda-Care Transportation	Annual	10/22/21	Transportation	n/a	n/a	n/a	yes
MedAdapt	Biennial	9/28/21	Home Medical Equipment and Minor Home Modification	n/a	n/a	n/a	yes
Nova Home Care Co. 2020	Annual	3/16/21	Home Care Assistance	n/a	n/a	n/a	yes
Otterbein Lebanon Adult Day Service	Annual	2/24/22	Adult Day Services and Adult Day Transportation	n/a	n/a	n/a	yes

Partners In Prime	Annual	7/27/21	Home Delivered Meals and Independent Living Assistance	n/a	n/a	n/a	yes
Prime Home Care, LLC	Annual	7/20/21	Home Care Assistance	n/a	n/a	n/a	yes
Stateline Medical Equipment	Biennial	7/26/21	Minor Home Modification	late 5-year recheck	Corrective Action Plan completed	n/a	yes
Warren County Community Services, Inc.	Annual	12/29/21	Home Delivered Meals, Transportation and Care Management	n/a	n/a	n/a	yes
Wesley Community Services	Annual	4/30/21	Home Delivered Meals, Independent Living Assistance, non-Emergency Medical Transportation, and non-Medical Transportation	n/a	n/a	n/a	yes

2022 BCESP SCR Schedule (a highlight indicates a change)

BUTLER COUNTY ESP STRUCTURAL COMPLIANCE REVIEW SCHEDULE – 2022 (Please find below the list of Butler County Providers of ESP Services and the Tentative dates for annual review for 2022).		
Butler County ESP Providers	Review Type	Review Tentative Date
A Best Home Care, Inc.	Annual	Nov-22
A Miracle Home Care	Annual	Apr-22
Active Day of Cincinnati	Annual	Jun-22
Always There Homecare	Annual	May-22
Bayley Adult Day Program	Annual	Oct-22
Central Connections	Annual	Jan-22
Comfort and Care Home Health Agency	Annual	Jun-22
Helping Hands Private Duty Homecare	Annual	Oct-22
Home Care by Black Stone	Annual	Apr-22
Home Care Network, Inc.	Annual	Oct-22
Home First Non-Medical	Annual	Jun-22
Interim HomeStyles of Greater Cincinnati	Annual	Oct-22
LCD Home Health Agency	Annual	Oct-22
LifeSpan (BCESP Care Management subcontractor)	Annual	Dec-22
Maple Knoll Outreach Services for Seniors	Annual	Jun-22
Meda-Care Transportation, Inc.	Annual	Aug-22
Northwest Adult Day Services	Annual	Oct-22
Nova Home Care Co.	Annual	Nov-22

Otterbein Lebanon Adult Day Service	Annual	Jan-22
Oxford Senior Citizens, Inc.	Annual	Jul-22
Oxford Seniors Community Adult Day Service	Annual	Jul-22
Partners in Prime	Annual	Feb-22
Prime Home Care, LLC	Annual	Feb-22
People Working Cooperatively (PWC)	Biennial	Apr-22
Senior Deserved Day	Annual	Jun-22
Senior Helpers of Greater Cincinnati	Annual	Jul-22
Warren County Community Services, Inc.	Annual	Mar-22
Wesley/Meals on Wheels of Southwest OH & Northern KY	Annual	Mar-22

2022 Draft Request for Proposal (RFP) Schedule

COA has revised the proposed 2022 Request for Proposals (RFPs) schedule. Our intent is to issue the following RFPs during 2022:

- Catering
- Homemaking and Personal Care/Respite (Clinton County only)
- Minor Home Modification & Repair
- Independent Living Assistance – (Butler, Hamilton, & Warren Counties only)

The RFP evaluations will have 4 categories:

- **Financial Analysis and Stability:** This will be a Go/No-Go criteria. Proposals that do not demonstrate financial stability will not move forward in the evaluation process.
- **The Organization and Capabilities Overview:** Has the Proposal demonstrated the company's ability to provide and sustain these services? Has the Proposal demonstrated the company's previous commitment to serving the aging population? Does the provider have a county presence in our county/counties? Proposals demonstrating a county presence will receive additional scoring.
- **Personnel, Staffing and Training:** Has the Proposal demonstrated the company's ability to recruit, hire, train, and retain staff to insure delivery of services? Does the provider demonstrate retention and tenure in leadership positions?

Pricing: Does the Proposal demonstrate competitive pricing with respect to other proposals received?

FINANCIAL MANAGEMENT SERVICE (FMS) SUMMARY

CDC Overview

Consumer Directed Care (CDC) is another option for delivering home care services. Instead of using traditional agencies, clients or their authorized representatives become employers and hire their own employee(s) to provide the care and services they need. This allows a client to choose their home care aide to assist and support them tasks such as personal care, homemaking, companion, and respite.

For this service to be available to our clients, it requires that COA maintains a contract with a Fiscal Intermediary who manages employee background checks, timesheets, payroll, and tax documents.

Financial Management Service RFP Overview

In 6/2021, COA published a Request for Proposal (RFP) for a Fiscal Intermediary, now known as a Financial Management Service (FMS). The FMS supports the ESP clients receiving Consumer Directed Care (CDC). The proposal due date was 7/1/21. We received one proposal. After the scoring evaluation was complete, we found that the proposal did not meet our needs as an FMS partner.

We retained the assistance of an FMS expert, Sue Flanigan, and developed another RFP. This RFP fell in line with the industry standard. The breakdown consisted of:

- 60% Technical (50% evaluations and 10% for financials)
- 40% Cost
- 5% Bonus Opportunity (ability and willingness to work with our HHAA)

The new RFP, Vendor Fiscal/Employer Agent (VF/EA) Financial Management Service (FMS), was published with a due date of 10/22/21. We received three proposals. The proposal contained a tight timeline to avoid a bifurcated tax year. However, this resulted in a limited number of proposal submissions and significant implementation challenges. Therefore, we amended the RFP to have a longer transition time and a new due date of 11/19/21. We then received a total of 6 proposals. The proposals were scored and Palco was selected as our new FMS provider. Palco received the highest overall score from the RFP, 102.5 points out of a possible 105 points.

The Palco contract was fully executed on 1/10/22 and the process of transitioning our current Consumer Directed Care (CDC) clients is currently underway.

We requested a contract extension from our current FMS provider, Acumen, to ensure accuracy in the transition process. Acumen's contract extension is effective until 6/30/22.

We were also looking for a provider that would partner with us to support our home health aide app. Palco was able to meet our needs for both an FMS and Home Health Aide App provider.

Home Health Aide App Overview

Home Health Aide App (HHAA), now known as AddnAide is an investment by COA to give aides and clients autonomy over their schedules, allows for transparent communication between everyone involved in the care plan, and empowers clients and their families/caregivers to have more control over their care. It also helps COA staff more quickly identify critical gaps in care.

Following the framework of Consumer Directed Care (CDC) as a baseline, the app allows the client to become an employer and hire their own employees/home care aide. It is an alternative to the traditional option of procuring a home care agency. The employee provides the same services that would be available through the home care agency, including help with chores and transportation. The goal of the HHAA option is to provide more choice, independence, and increase client satisfaction while using ESP resources more effectively and increasing the home health aide workforce by targeting additional workforce currently not participating in home care services.

HHAA is designed to be universal and to serve individuals accessing in-home care services through a variety of programs and sources. The app will be available in all major app stores for tablet and mobile devices, designed with older adults in mind.

Our mobile application will:

- Increase compatibility and flexibility between home health aides and their care recipient.
- Expand the Consumer Directed Care workforce to help alleviate the aide shortage.
- Improve communication between clients, informal caregivers, home health aides, and the care management team.
- Provide training, best practices, and payment for services for home health aides, all in one space.
- Make timely payments to home health aides for services rendered based on built-in checks and balances leveraged by electronic visit verification (EVV).

Cost Analysis

Palco received the maximum percentage points within the RFP specific to the cost evaluation section.

Their cost covered the following:

One time start up and monthly per member per month (PM/PM) VF/EA FMS payment.

- A one-time payment for the services and deliverables described in this RFP.
- The PM/PM payments shall be the sole compensation to the Contractor for all work on the FMS performed pursuant to the contract awarded from the RFP.
- If COA's client record is not updated reflect death or suspension of the previous month by the 1st of the PM/PM month calculation, COA can make an adjustment for any payment issued.

The level of service outlined in the new contract is higher than the service that has been provided. This is expected to result in more timely and simplified onboarding of clients and their employees into this care option.

**ELDERLY SERVICES PROGRAM (ESPSM)
INDEPENDENT LIVING ASSISTANCE (ILA)
SERVICE SPECIFICATION**

**EFFECTIVE MARCH 2022
(BCESP) (HCESP) (WCESP)**

INDEPENDENT LIVING ASSISTANCE SERVICE SPECIFICATION

1.0 OBJECTIVE

To advocate for the client and assist them to remain independent in their home and in the community.

2.0 UNIT OF SERVICE

a) A unit of service is equal to 15 minutes. Notification should be given to care management staff if additional units are needed fulfill the client's care plan.

3.0 ILA SERVICES

a) Completion of Applications and Program Review

- Homestead Exemption
- Home Energy Assistance Program (HEAP)
- Percentage of Income Payment Plan (PIPP)
- Subsidized housing
- Prescription assistance
- Job and Family application
- Food Stamps
- PASSPORT
- Qualified Medicare Beneficiary (QMB)
- Veterans Administration application
- Commodity box yearly application

b) Commodity Box and Food Pantries

- Yearly applications
- Pick up and distribution of food boxes
- Authorized representative to pick up food boxes

c) Housing

- Assist with mortgage refinancing and loan applications
- Work with Cincinnati Metropolitan Housing Authority
- Assistance with finding appropriate housing to meet the needs of the client
- Work with client to ensure rent or house payments are made to maintain housing

d) Assisting with Health Insurance and Benefits

- Assist with completion of paperwork for doctors
- Review of Explanation of benefits (EOB) from insurance companies
- Organizing and coordinating health insurance records including the completion of Medicare and other third-party payer claim forms for reimbursement of health care expenses.
- Assisting the client in selection and applying for a new insurance plan

e) Bill Pay

- Ensuring bills are paid on time

- Making over the phone payments, if applicable
- Setting up auto pay or electronic bill pay, if preferred by the client

f) Banking

- making routine deposits and withdrawals
- purchasing money orders
- writing personal checks
- paying bills in person or by mail
- balancing and reconciling checkbooks
- reconciling monthly checking account statements

g) Assisting with business and personal correspondence

- writing letters
- help maintain benefits
- purchasing stamps
- delivering correspondence to or from the post office

h) Mail

- Organize and sort mail
- Identify bills that need to be paid
- Removal of junk mail

i) Assist with making appointments

- Transportation
- Doctor's appointments
- Schedule appointments to meet the needs of maintaining yearly applications for JFS, Medicaid, etc.
- Assisting the client with phone calls.

j) Patient Assistance Programs and Community Assistance

- Working with clients to assist with pharmacy programs, such as St. Vincent de Paul pharmacy, people working cooperatively, habit for humanity, rent and mortgage assistance programs
- Work with hospitals to complete application to lower client financial responsibility for a hospital stay

k) Follow up necessary if a client was involved in any scam activity.

l) Calling clients at times that no other in-home services are being provided to confirm that clients are functioning safely in the home environment.

4.0 PROVIDER REQUIREMENTS

a) The Provider must become the client's authorized representative or have documentation of written permission from the client or on client's behalf to assist with tasks of a financial or personal nature.

b) The Provider must have the capacity to address client's concerns and respond during normal operational hours.

c) The Provider must maintain individual records for each episode of service. Documentation

must include:

- i. Date of service
 - ii. A description of the service performed
 - iii. The name of the individual performing the service
 - iv. The arrival and departure times or telephone start and end time of the individual performing the service
 - v. The written or electronic signature of the person performing the service
 - vi. The client's or client's caregiver's signature for each episode of in-home service delivery unless an electronic verification system is used by the Provider.
 - vii. A client signature is not required when ILA activities are telephonic.
- d) If the Provider experiences a change in a client's status, the Provider will notify the Care Manager within one business day of becoming aware.
- e) The Provider must deliver services as authorized in the client's care plan.
- f) The Provider must be able to document they have the capacity to deliver services five (5) days per week.
- g) The Provider must have a substitute to utilize in the event the scheduled staff member could not deliver the service as outlined in the client's care plan.
- h) The Provider must review personnel time sheets, at a minimum of every 30 days, to ensure tasks performed coincide with the tasks on the assignment sheets.

5.0 QUALIFICATIONS OF ILA WORKER

The ILA Provider shall ensure the ILA worker has appropriate skills such as:

- a) Ability to balance and reconcile a checkbook. Can complete a check book register.
- b) Knowledge of health insurance plans including but not limited to Medicare, Medicaid, and MyCare Ohio.
- c) Advanced knowledge of community resources.
- d) Can effectively assist the client with managing finances and budget needs
- e) Computer literate.
- f) Understanding of ethics, boundaries, and legal compliance regarding working with clients.
- g) Understand community agencies that may provide legal assistance to clients, such as Legal aid and ProSeniors

6.0 QUALIFICATIONS FOR ILA SUPERVISOR

- a) The ILA Supervisor must possess a Bachelor's or Associate Degree in Gerontology, Health Care, Business, Family and Client Services, Human Services, Social Work degree as a Licensed Social Worker licensed in the State of Ohio or related degree; or a minimum of three (3) years of employment experience in the provision of social services.

b) Must also meet all the qualifications for an ILA worker.

7.0 ILA SUPERVISION

a) The Supervisor must complete and document an initial home visit to develop the client's task sheet to meet the needs of the client, assuring consistency with the Care Manager's authorized care plan.

b) A supervisory home visit or phone call must be completed annually. The phone call or visit will include an evaluation of the ILA personnel performance, compliance with the care plan, and client satisfaction.

c) The Supervisor must notify the Care Manager within one business day of becoming aware of any significant changes in the client's health and safety or any recommended service modifications.

**ELDERLY SERVICES PROGRAM (ESPSM)
INDEPENDENT LIVING ASSISTANCE (ILA)
SERVICE SPECIFICATION**

**EFFECTIVE March
2022~~MAY 1, 2019~~
(BCESP) (HCESP)
(WCESP)**

INDEPENDENT LIVING ASSISTANCE SERVICE SPECIFICATION

1.0 OBJECTIVE

~~To advocate for the client and assist them to remain independent in the community. To advocate for the client and assist them to remain independent in their home and in the community.~~

2.0 UNIT OF SERVICE

a) A unit of service is equal to 15 minutes. Notification should be given to care management staff if additional units are ~~needed fulfill the client's care plan.~~
~~needed in order to fulfill the client's care plan at the end of the care plan year.~~

3.0 ILA SERVICES

a) Completion of Applications and Program Review

- Homestead Exemption
- Home Energy Assistance Program (HEAP)
- Percentage of Income Payment Plan (PIPP)
- Subsidized housing
- Prescription assistance
- Job and Family application
- Food Stamps
- PASSPORT
- Qualified Medicare Beneficiary (QMB)
- Veterans Administration application
- Commodity box yearly application

b) Commodity Box and Food Pantries

- Yearly applications
- Pick up and distribution of food boxes
- Authorized representative to pick up food boxes

c) Housing

- Assist with mortgage refinancing and loan applications
- Work with Cincinnati Metropolitan Housing Authority
- Assistance with finding appropriate housing to meet the needs of the client
- Work with client to ensure rent or house payments are made to maintain housing

d) Assisting with Health Insurance and Benefits

- Assist with completion of paperwork for doctors
- Review of Explanation of benefits (EOB) from insurance companies
- Organizing and coordinating health insurance records including the completion of Medicare and other third-party payer claim forms for reimbursement of health care expenses.
- Assisting the client in selection and applying for a new insurance plan

e) Bill Pay

- Ensuring bills are paid on time
- Making over the phone payments, if applicable
- Setting up auto pay or electronic bill pay, if preferred by the client

f) Banking

- making routine deposits and withdrawals
- purchasing money orders
- writing personal checks
- paying bills in person or by mail
- balancing and reconciling checkbooks
- reconciling monthly checking account statements

g) Assisting with business and personal correspondence

- writing letters
- help maintain benefits
- purchasing stamps
- delivering correspondence to or from the post office

h) Mail

- Organize and sort mail
- Identify bills that need to be paid
- Removal of junk mail

i) Assist with making appointments

- Transportation
- Doctor's appointments
- Schedule appointments to meet the needs of maintaining yearly applications for JFS, Medicaid, etc.
- Assisting the client with phone calls.

j) Patient Assistance Programs and Community Assistance

- Working with clients to assist with pharmacy programs, such as St. Vincent de Paul pharmacy, people working cooperatively, habit for humanity, rent and mortgage assistance programs
- Work with hospitals to complete application to lower client financial responsibility for a hospital stay

k) Follow up necessary if a client was involved in any scam activity.

l) Calling clients at times that no other in-home services are being provided to confirm that clients are functioning safely in the home environment.

~~a) Applying for programs such as Homestead Exemption, Home Energy Assistance Program, subsidized housing and prescription assistance.~~

~~b) Completion of applications: i.e. JFS and PASSPORT applications.~~

~~c)a) Mortgage refinancing and loan applications.~~

~~d) Organizing and coordinating health insurance records including the completion of Medicare and other third-party payer claim forms for reimbursement of health care expenses.~~

~~e) Assisting or acting as the client's authorized representative for maintaining or applying for public benefits: i.e. food stamps, etc.~~

~~f) Assistance with finding appropriate housing to meet the needs of the client.~~

~~g) Assisting the client in selection and applying for a new insurance plan.~~

~~h) Banking which may include making routine deposits and withdrawals, purchasing money orders, writing personal checks, paying bills in person or by mail, balancing checkbooks and reconciling monthly checking account statements.~~

~~i) Assisting with business and personal correspondence including writing letters, purchasing stamps and delivering correspondence to the post office.~~

~~j) Monitoring of mail received for bills that are due.~~

~~k) Arranging appointments.~~

~~l) Assisting the client with phone calls.~~

~~m) Follow up necessary if a client was involved in any scam activity.~~

n)b) 4.0 PROVIDER REQUIREMENTS

a) a) The Provider must become the client's ~~legally~~ authorized representative or have documentation of written permission from the client or on client's behalf to assist with tasks of a financial or personal nature.
~~e) to bank on client's behalf.~~

b) b) The Provider must have the capacity to address client's concerns and respond during normal operational hours.
~~p) answer the telephone and respond during normal operational hours within 24 business hours.~~

c) c) The Provider must maintain individual records for each episode of service.
Documentation must include:

- i. Date of service
- ii. A description of the service performed
- iii. The name of the individual performing the service
- iv. The arrival and departure times or telephone start and end time of the individual performing the service
- v. The written or electronic signature of the person performing the service
- vi. The client's or client's caregiver's signature for each episode of in home service delivery, unless an electronic verification system is used by the Provider.
- vii. A client signature is not required when ILA activities are telephonic.

c) e) If the Provider experiences a change in a client's status, the Provider will notify the Care Manager within one business day of becoming aware.

d) The Provider must deliver services as authorized in the client's care plan.

f) The Provider must be able to document they have the capacity to deliver services five (5) days per week.

g) The Provider must have a substitute to utilize in the event the scheduled staff member could not deliver the service as outlined in the client's care plan.

h) The Provider must review personnel time sheets, at a minimum of every 30 days, to ensure tasks performed coincide with the tasks on the assignment sheets.

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5.0 QUALIFICATIONS OF ILA WORKER

The ILA Provider shall ensure the ILA worker has appropriate skills such as:

a) Ability to balance and reconcile a checkbook. Can complete a check book register.

~~a) Ability to balance a checkbook.~~

b) Knowledge of health insurance plans including but not limited to Medicare, Medicaid, and MyCare Ohio.

c) Advanced knowledge of community resources.

a) ~~Ability to do simple math~~ Can effectively assist the client with managing finances and budget needs

d) Computer literate.

e) Understanding of ethics, boundaries, and legal compliance in regard to working with clients.

e)f) Understand community agencies that may provide legal assistance to clients, such as Legal aid and ProSeniors

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6.0 QUALIFICATIONS FOR ILA SUPERVISOR

a) The ILA Supervisor must possess a Bachelor's or Associate Degree in Gerontology, Health Care, Business, Family and Client Services, Human Services, Social Work degree as a Licensed Social Worker licensed in the State of Ohio or related degree; or a minimum of three (3) years of employment experience in the provision of social services.

b) Must also meet all of the qualifications for an ILA worker.

7.0 ILA SUPERVISION

a) The Supervisor must complete and document an initial home visit to develop the client's task sheet to meet the needs of the client, assuring consistency with the Care Manager's authorized care plan.

b) A supervisory home visit or phone call must be completed annually. The phone call or visit will include an evaluation of the ILA personnel performance, compliance with the care plan, and client satisfaction.

c) The Supervisor must notify the Care Manager within one business day of becoming aware of any significant changes in the client's health and safety or any recommended service modifications.