AGENDA
BCESP Advisory Council Meeting
September 14, 2023, at 3:00 pm – 5:00 pm

LifeSpan, Inc. – 1900 Fairgrove Avenue, Hamilton, OH 45014 – Bever Room

https://councilonaging.webex.com/councilonaging/j.php?MTID=m91212d594be726da7287b2a11dd855ab

Meeting number: 2335 420 9319
Password: anPPJ9Jt2k6 (26775958 from video systems)

Join by phone
1-844-621-3956 United States Toll Free
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Access code: 233 542 09319

CALL TO ORDER	Jennifer Roth
APPROVAL OF MINUTES ❖ June 8, 2023, Minutes (Action Needed)	Jennifer Roth

QUARTERLY REPORTS
❖ Program Dashboard & Financial Report
   o Program Update Report
   o Central Connections Update
	Ken Wilson & Ronnie Spears

COMMITTEE REPORTS ❖ Governance Committee - Expiring Member Terms (Shawn, Jennifer H., Sabrina, Sherrill)	Kevin Kurpieski
OLD BUSINESS	Jennifer Roth

NEW BUSINESS
❖ Draft Budget (Action Needed)
   o Healthy Aging Grants
❖ Service Specification Changes:
   o Intake and Assessment (Action Needed)
   o Home Medical Equipment (Action Needed)
	Ronnie Spears
	
	Ken Wilson

HEARING THE PUBLIC	Jennifer Roth
ADJOURNMENT	Jennifer Roth

NEXT MEETING
December 14, 2023

ATTENDANCE

Members Present:	*COA Staff:*	*Guests:*
Michael Berding, *in person* Victoria Cheng, *virtual* Shawn Cowan, *in person* Jennifer Heston-Mullins, *in person* Sabrina Jewell, *in person* Kevin Kurpieski, *in person* Jennifer Roth, President, *in person* Sherrill Swann, *virtual* Nancy Williams, *virtual*	Suzanne Burke Paula Smith Ronnie Spears Ken Wilson	Joyce Kachelries, LifeSpan
Excused:	*Facilitator:*	*Scribe:*
Laura Lacy John McCarthy	Jennifer Roth, President	Heather Junker
Absent:		

CALL TO ORDER

The June 8, 2023, Butler County Elderly Services Program (ESP) Advisory Council was called to order at 3:04 p.m. by Jennifer Roth.

APPROVAL OF MINUTES

Jennifer Roth called for a motion to approve the March 9, 2023, Butler County ESP Advisory Council meeting minutes.

Motion: Sabrina Jewell made a motion to approve the March 9, 2023, minutes as presented.
Second: Kevin Kurpieski seconded the motion.
Action: The March 9, 2023, minutes were unanimously approved as presented.

QUARTERLY REPORTS

Five Year Levy Projections

Ken reviewed the Five Year Levy Projections and the Levy Presentation (please see handouts in packet for full details) that included explanations about rising costs. Ken and Suzanne met with Judi Boyko recently to provide updates on a number of changes with levy.   Expenses will grow on the program as staff capacity is beginning to improve with home care providers.

Sabrina asked what the greatest length of stay is for overnight respite. Ken advised it is up to seven days. Kevin asked if this is a continuous seven days or if the individual only stays at night and goes home during the day. Ken explained it's a continuous seven days. Sabrina asked how many weeks per year someone can get overnight respite. Stephanie advised it is typically once per year. Kevin asked if this is

a service determined ahead of time and is on their care plan. Stephanie explained that we can provide overnight respite to a client if the need arises. We ideally would like two weeks' notice but can do an immediate placement if a facility is available to take them. Sabrina asked if there are any facilities in Oxford. Stephanie advised she would look and pass along that information to her. Jennifer H. asked if the 7 days can be split up into separate stays. Stephanie advised we could look into breaking it up that way if someone needed a weekend stay a couple of times within that year for example.

Jennifer R. asked if the family is required to bring medications during these stays or if the facility provides them. Stephanie explained that with some facilities the medications are part of the daily rate. Ken added that the overnight respite has been funded using federal dollars. We will be coming back to the next meeting with service specifications as respite is an approved service with the levy. This is just providing the respite service in a different way. Michael made note that the number of clients served for overnight respite and the number of stays don't add up. Stephanie explained there were some instances where stays were extended based on individual circumstances.

We are concerned about the financial sustainability of Central Connections, and they are currently on hold for all new referrals. Sherrill asked if individuals could pick up their meals. Ken explained that it's home delivery of those meals. Sabrina noted that a driver can heat up a meal and asked what that meant. Ken explained that for some individuals, the driver can come in and put their meal in the microwave if the individual is not able to do so themselves. Nancy asked if most of the home delivered meal drivers are volunteers. Ken advised that some are volunteers, and some are paid employees.

Ronnie and Ken recently met with the Judi Boyko as well as other levies in the county: Developmental Disabilities, Mental Health, and Children's Services. All other levies aside from Children's Services need an increase. Ken is concerned because we are all within the same time period to go on the ballot. Decisions will need to be made over the course of this year as to whether to put the levy on the ballot a year early or go on the primary ballot in 2025. We have gone 20 years without an increase in the levy. Sabrina asked to confirm that property taxes are going up. Ken confirmed that is another factor with local government portions of property taxes. Unfortunately, our levy doesn't increase as property values go up- only for new construction.   There is also state legislation being considered right now to cap the property taxes.   Ken made note that legislation has already passed on how levies show up on the ballot as they will now show the dollar amount impact.

Follow-up: Stephanie to provide respite facilities in Oxford.
After Meeting Action: Heather shared respite facilities in Oxford via email after the meeting.

Program Dashboard & Financial Report

Ken gave an overview of the Program Dashboard (please see handout for full details). Sabrina asked what "needs otherwise met" scenarios would be. Ken explained that it can vary but it usually means family can now help that individual. Sabrina asked if some clients have the same caregiver to which Ken advised some do have the same caregiver. Sabrina asked how many clients have electronic monitoring only. Ken stated he would look that information up and send it to her.

Ronnie reviewed the Financial Report (please see handout for full details). Sabrina asked why there was such a big difference between the budget and actual in adult day. Ronnie explained it's because some adult day centers are starting to open again. Sabrina asked if we take into account VA coverage with the clients. Ken explained we do, and the VA benefit pays first before the levy does.   Sabrina asked if we track that. Stephanie advised that we only track if a client is a veteran.

COMMITTEE REPORTS

Services Committee

Jennifer Heston-Mullins gave the Services Committee Report. Lisa Portune from COA gave an update on programs. Ken shared that COA is working with Central Connections amid some financial sustainability concerns. There were updates on laundry services and overnight respite. Stephanie provided an ESP evaluation implementation update and how that's moving along. Stephanie also gave an update on Fast Track Home. This is currently being paid for by ARPA funds. There have been 71 clients served since May 31st. Only 28 of those clients enrolled on ESP for long term services. Jennifer H. made note that there is now a mobile urgent care called Dispatch Health.

After Meeting Action: Heather shared an informational flyer for Dispatch Health via email after the meeting.

Governance Committee

Kevin gave the Government Committee Report. He made note that if anyone would like to join the Governance Committee to let him know. He provided information on an applicant that he plans to present the Commissioners with. There are still some additional spots to fill.

OLD BUSINESS

There was no old business to discuss.

NEW BUSINESS

Annual Report

Paula reviewed the Annual Report (please see handout in packet for full details). Sabrina asked what adaptive cleaning equipment consists of. Stephanie explained they are items such as a Swiffer or grabber.

HEARING THE PUBLIC

No one from the public requested to speak.

ADJOURNMENT

With there being no further business to discuss Jennifer Roth made a motion to adjourn the meeting.

Second: Kevin Kurpieski seconded the motion.
Action: It was unanimously agreed to adjourn at 4:34 p.m.

NEXT MEETING

September 14, 2023

Butler County ESP
Program and Financial Report
Quarter 2, 2023 (April - June 2023)

Butler County ESP
Quarter 2, 2023 (April - June 2023)
EXECUTIVE SUMMARY

Highlighted Findings

1. Census Trends

A. Compared to last year (Quarter 2, 2022), census increased by 7 clients (from 3,098 to 3,105) or 0.23%.

B. Compared to last quarter (Quarter 1, 2023), census increased by 54 clients (from 3,051 to 3,105) or 1.77%.

2. Financials

A. <u>Total Levy Revenue:</u> The amount needed to be drawn down from the levy is $12.5 million through the second quarter, as compared to the budgeted amount of $13 million. The variance as compared to budget is under by $452,913 or 3.5%.

B. <u>Total Expenses:</u> The expenses incurred through the second quarter is $13.9 million as compared to $14.2 million in the budget. The variance as compared to budget is under by $359,540 or 2.5%

C. <u>Purchase Services:</u> The purchased services expenses were lower by $130,785 or 1.3% as compared to budget.

Quarter-End Census by Program

Year	2022		2023	
Quarter	3	4	1	2
ESP	**3,106**	**3,070**	**3,051**	**3,105**
Medicaid Programs	**1,360**	**1,426**	**1,478**	**1,448**
Passport	272	280	304	319
Assisted Living	111	118	118	115
Molina	361	397	437	401
Aetna	616	631	619	613

Quarter-End Census, New Enrollments, and Disenrollments[1]

Year	2022		2023	
Quarter	3	4	1	2
Quarter-End Census	3,106	3,070	3,051	3,105
New Enrollments	273	235	282	269
Disenrollments	260	272	295	222

Disenrollment Outcomes

Year	2022		2023	
Quarter	3	4	1	2
Deceased	72	81	77	60
Transferred to PSP/Other Program	30	23	46	25
Moved or No Longer Eligible	29	30	30	21
Need Otherwise Met	61	63	71	62
All Other Reasons Not Listed	5	1	1	0
Client Refused/Declined Services	27	31	27	24
Dissatisfied with Svc/Program	3	5	8	3
Entered Nursing Facility	33	38	35	27
Total	**260**	**272**	**295**	**222**
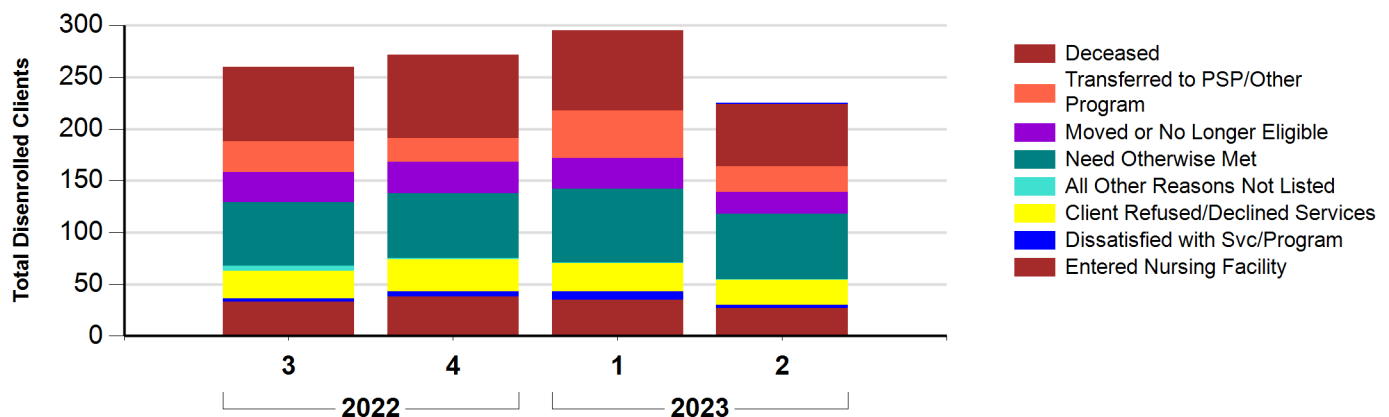
Average Monthly Cost per Client[1]

	3	4	1	2
	$315.83	$359.76	$362.85	$369.27
	2022		2023	
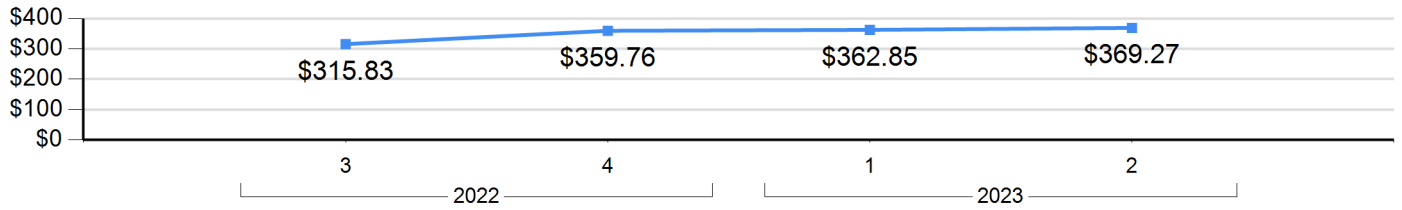
Distinct Clients Served by Service Group[12]

Year	2022		2023	
Quarter	3	4	1	2
Consumer Directed Care	174	187	203	229
Electronic Monitoring	2,033	1,992	1,926	1,916
Home Care Assistance	748	657	650	675
Home Delivered Meals	1,548	1,560	1,639	1,662
Home Medical Equipment	170	143	152	158
Laundry Service	0	0	1	2
Other Services	379	370	385	381
Transportation	296	283	280	281
All Services (Unduplicated)	**3,373**	**3,342**	**3,348**	**3,327**

Units Billed by Service Group[12]   *Please see the notes page for unit of measure descriptions by service.*

Year	2022		2023	
Quarter	3	4	1	2
Consumer Directed Care	11,974	11,098	16,679	15,486
Electronic Monitoring	6,900	6,732	5,663	7,634
Home Care Assistance	19,038	19,673	19,907	20,297
Home Delivered Meals	96,794	99,634	101,283	102,529
Home Medical Equipment	262	226	262	257
Laundry Service	0	0	5	16
Other Services	1,500	1,933	2,224	2,355
Transportation	2,696	2,681	2,462	2,781

Dollars Paid by Service Group (Purchased Services)[12]

Year	2022		2023	
Quarter	3	4	1	2
Consumer Directed Care	$199,511	$191,169	$279,580	$289,912
Electronic Monitoring	$120,352	$116,114	$95,648	$125,122
Home Care Assistance	$469,012	$526,922	$518,823	$530,284
Home Delivered Meals	$944,763	$1,168,143	$1,108,802	$1,116,038
Home Medical Equipment	$27,894	$27,504	$31,241	$34,013
Laundry Service		$0	$200	$714
Other Services	$206,048	$287,998	$250,943	$277,202
Transportation	$110,008	$107,703	$101,285	$113,252
All Services	**$2,077,587**	**$2,425,554**	**$2,386,523**	**$2,486,538**

Average Number of Days from Intake Call to the Enrollment Assessment
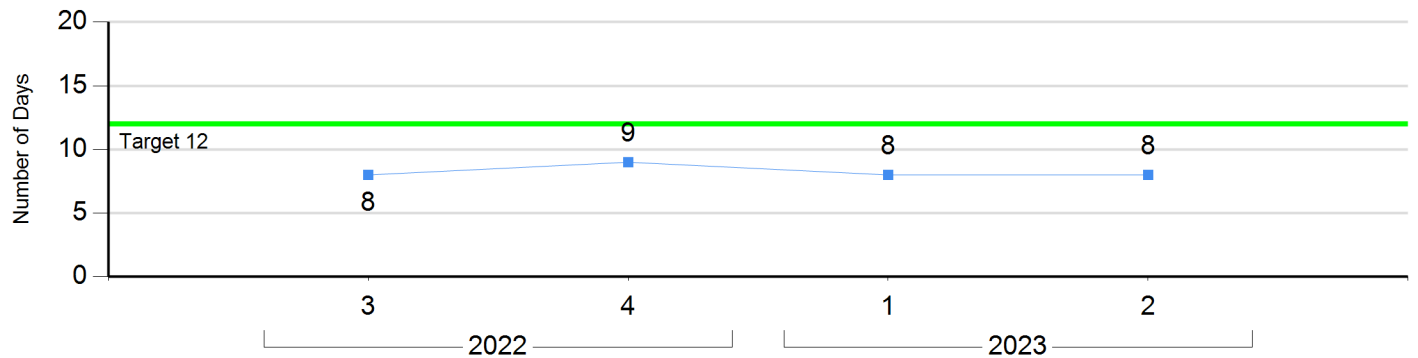
Home Care Provider Network Referrals and Capacity

Year	Quarter	#Clients in Need of HCA & CDC/ Add an Aide	# Clients Not Matched with a Provider	% of Clts Not Matched with a Provider	% of Clts Receiving Traditional HCA	% of Clts Receiving CDC
2022	3	1,408	520	37%	53%	10%
2022	4	1,327	548	41%	46%	12%
2023	1	1,311	458	35%	50%	15%
2023	2	1,376	472	34%	49%	17%

Home Delivered Meals - Client Satisfaction Survey Results

Year	2022		2023	
Quarter	3	4	1	2
Overall Satisfaction	97.44%	97.27%	97.59%	95.67%
Good Choice of Meals Available	95.07%	93.98%	94.60%	90.74%

Medical Transportation - Client Satisfaction Survey Results

Year	2022		2023	
Quarter	3	4	1	2
Overall Satisfaction	95.81%	97.11%	96.59%	98.96%
Service Returns Client Home Promptly	90.34%	92.66%	94.23%	97.01%

Home Care Assistance - Client Satisfaction Survey Results

Year	2022		2023	
Quarter	3	4	1	2
Overall Satisfaction	88.28%	91.77%	95.14%	94.03%
Aide is Dependable	87.76%	91.25%	94.14%	94.37%

ESP Cost Savings Analysis

Referrals

Year	2022	2022	2023	2023
Quarter	Q3	Q4	Q1	Q2
Number of Members Assisted	146	123	122	201
Over the Counter (OTC)			69	143

Services Awarded

Year	2022	2022	2023	2023
Quarter	Q3	Q4	Q1	Q2
Emergency Response Service	56	39	25	91
Medical Transportation	62	43	56	89
Total	118	82	81	180

Estimated Annual Cost Savings

Year	2022	2023
Est. Total Cost Savings	$324,168	$383,400

* Information for 2022 OTC is currently unavailable, going forward data will be available for 2023 reporting.

Butler County ESP

Quarter 2, 2023 (April - June 2023)

FINANCIALS: Based on Actual Revenue & Expenses as of June 30, 2023[1]

	Projected	Annual Budget	Budget Variance	% Budget Variance
Revenue				
Tax Levy Appropriations	$12,545,340	$12,998,253	($452,913)	-3.5%
Federal Funding				
Title III C2 - Home Delivered Meals	432,956	539,815	(106,859)	-19.8%
Title III E - Caregiver Support	69,584	14,910	54,674	366.7%
Nutrition Services Incentive Program (NSIP)	244,930	230,336	14,594	6.3%
State Funding(Senior Community Services, HDM, Alzheimer's)	15,377	14,527	850	5.9%
Other Federal (ARPA)	259,814	225,074	34,740	15.4%
Other Revenue Sources (Interest)	$57,116	$842	$56,274	6683.4%
Client Contributions				
Client Donations	9,352	18,617	(9,265)	-49.8%
Co-Pays Received	254,662	206,297	48,365	23.4%
Total Revenue	**$13,889,131**	**$14,248,671**	**($359,540)**	**-2.5%**
Expenses				
Operating Expenses				
COA Administrative	$905,647	$932,156	$26,509	2.8%
Intake & Assessment	311,562	345,945	34,383	9.9%
Fast Track Home - Pilot	45,673		(45,673)	
Case Management	2,628,459	2,841,997	213,538	7.5%
Total Operational Expenses	**$3,891,342**	**$4,120,098**	**$228,756**	**5.6%**
Purchased Services				
Home Care Assistance	$2,128,173	2,592,354	464,182	17.9%
Consumer Directed Care	1,141,965	880,630	(261,334)	-29.7%
Laundry Service	18,031	25,000	6,969	27.9%
Independent Living	258,652	273,666	15,015	5.5%
Home Medical Equipment	130,846	116,367	(14,479)	-12.4%
Electronic Monitoring	448,072	511,768	63,695	12.4%
Minor Home Modifications	461,509	291,915	(169,594)	-58.1%
Major Housecleaning	25,801	27,757	1,955	7.0%
Pest Control	42,871	45,287	2,416	5.3%
Home Delivered Meals	4,489,129	4,692,576	203,447	4.3%
Adult Day Service	189,176	30,191	(158,985)	-526.6%
Adult Day Transportation	47,493	7,602	(39,891)	-524.8%
Medical Transportation	433,251	461,034	27,783	6.0%
Non Medical Transportation	82,820	47,425	(35,395)	-74.6%
Behavior Health	100,000	125,000	25,000	20.0%
Gross Purchased Services	**$9,997,788**	**$10,128,573**	**$130,785**	**1.3%**
Gross Program Expenses	**$13,889,131**	**$14,248,671**	**$359,540**	**2.5%**
Client Census	**3,080**	**3,125**	**45**	**1.4%**
Cost of Services per Client	**$267.53**	**$250.44**	**($17.09)**	**-6.8%**

* Actual year end census.

1. Census Trends

    A. <u>Quarter-End Census by Program</u> is a client count based on a one-day snapshot of clients with a status of 'Enrolled' or 'Suspended' on the last day of the quarter. It is used as an approximation of how many clients are being served on any given day.

        1. The Service Trends section shows the client count based on billing data. This shows the number of clients whom services were delivered and invoiced. Given these differences, the quarter-end census and the client count for all services will not match.

    B. <u>New Enrollments</u> are calculated by taking the total number of clients who have an enrollment date during the quarter and an approved care plan.

    C. Disenrollment Outcomes

        1. <u>All Other Reasons Not Listed</u> includes: Dissatisfied with Service/Program, Refused Cost, Share/Verification, Eviction, Health/Safety, and Unable to Meet Client Need.

        2. <u>Client Non-Compliant</u> includes: Declined Call/Visit, Delinquent Balance, Refused, Transfer to Passport/Other Program and Unable to Contact.

        3. Adding the difference between *New Enrollments* and *Disenrollments* in a given quarter to the previous *Quarter-end Census* may result in a discrepency due to the timing of census reporting and back dating client enrollments and disenrollments.

2. Service Trends

    A. <u>Average Monthly Cost per Client</u> is based on the average monthly cost of Intake and Assessment, Administration, Care Management and Provider Services divided by the quarter-end census.

    B. <u>Clients Served by Service Group</u> is based on billing data. These numbers represent the unduplicated client counts within each service group and overall. The All Services client count will not equal the sum of the service group subtotals because many clients receive more than one service.

    C. <u>Home Care</u> includes homemaking, personal care, companion, and respite services.

    D. <u>Other Services</u> includes Environmental Services, Adult Day, Adult Day Transportation, Non-Medical Transportation, and Independent Living Assistance.

    E. <u>Dollars Paid by Service Group</u> represents the total from the financial system. Clients Served and Units Billed represent when service was provided, dollars paid represents when services were paid.

3. Unit of Measure Descriptions by Service

    A. Adult Day - Number of Days
    B. Consumer Directed Care - Number of Hours
    C. Electronic Monitoring - Number of Months
    D. Home Care - Number of Hours
    E. Home Delivered Meals - Number of Meals
    F. Medical Transportation - Number of Trips

4. N/A: This is displayed on a case-by-case basis, but is most frequently related to a rate or unit change. The metric should display data in subsequent quarters after the change has taken effect.

5. Benefit Cost Savings:
    OTC Medicare cards help cover the cost of over-the-counter drugs for seniors enrolled in certain Medicare Advantage plans. Not every Medicare Advantage plan offers this benefit, and limitations vary between the plans that do.

Contract Termination impacting ESP Home Delivered Meals, Independent Living Assistance, Transportation

Middletown Area Senior Citizens Inc. dba Central Connections was placed on hold for all new Home Delivered Meal (HDM) referrals on May 30th for ESP, PASSPORT, and MyCare Ohio programs. This was due to inadequate supplies to ensure safe delivery of nutritionally compliant meals.

On June 16th the hold for new referrals was expanded to include all services for ESP, PASSPORT, and MyCare Ohio Programs, which included Transportation, Independent Living Assistance (ILA), and HDM. This was due to inadequate staff to provide an acceptable level of service delivery.

A Quality Action Plan (QAP) was issued on June 19th as a result of inadequate supplies and inadequate staffing, with a request for evidence of sustainability to continue providing the contracted ESP and Title III services. COA developed and activated a plan to provide HDM service for the week of June 19-23rd using 3 contracted HDM providers. Onsite Monitoring began June 20th. Disciplinary Action was issued on June 28th to the Ohio Department of Aging (ODA) for non-compliance with service delivery requirements for the PASSPORT program.

Central Connections was contracted in Butler County to provide ESP HDM, ESP ILA, ESP Transportation, Title III Transportation, Title III Supportive Services, Title III Congregate meals, and Title III/ARPA Grocery Delivery Services. On July 25, 2023, COA terminated their contracts with Central Connections because of multiple contract breaches. The ESP clients being served by Central Connections have been assigned to other providers. Clients in the PASSPORT and MyCare Ohio programs were also reassigned to other providers. Partners in Prime, Warren County Community Services (WCCS) and MOW of SW OH stepped up to assist these individuals in Butler County. Those receiving Title III services were provided with resource information on who they could reach out to for needed services.

Laundry Delivery Service

Memorandums of Understanding (MOU) were sent to 3 laundry providers. Once the MOUs are executed, we will work with the providers to begin service.

Home Medical Equipment

We are looking to publish an RFP for this service in the upcoming months. We are also wanting to make minor changes to the HME Service Specification. Please see the attached copy showing the highlighted changes and a clean copy as well.

Environmental Services

We are experiencing a provider capacity issue in the area of major household cleaning, specifically bed bug preparation. Due to the shortage, COA will be bringing on additional environmental service providers. All Gone is currently contracted with COA under other funding sources and will be added to ESP.

Senior Farmers Market Nutrition Program for 2023

We have 7 Farmers Markets participating in the program in Butler County, our newest addition being Aimee's Produce in Middletown formerly known as Peggy's Produce.

We have had 510 participants sign up to receive coupons for the program. The last day to apply for the 2023 season is September 22, 2023. The final day to use the coupons is October 31, 2023.

Therapeutic Meal and Ohio Prescription Requirement Advocacy

COA (Council on Aging) and Meals on Wheels (MOW) of SW OH have been working with our government relations staff alongside the Commonsense Initiative to remove and/or loosen the therapeutic meal prescription requirement. From our work with the Commonsense initiative, we have been able to provide feedback on the proposed rule change. This rule change to the Older Americans Act Nutrition Program: Diet Orders, allowing the provider to provide a therapeutic meal to a consumer without a diet-order if it is the consumers preference to choose the therapeutic diet.

While we wait for this rule change to be accepted or rejected, the other way we have been looking to achieve the goal of client autonomy when it comes to their diet and choosing if they want to be on a therapeutic diet or not. Beginning October 1, 2023, the provider will no longer be responsible for collecting the client prescriptions, the client will be obtaining their own diet prescriptions.   We are currently working with Providers and Case Managers in developing a process that will go into effect on October 1, 2023.

Butler County ESP Screening Service Specification

COA will be posting a Request for Proposals (RFP) for a Butler County ESP Intake, Assessment, & Screening subcontractor by the end of Quarter Three (3). We would like to propose some changes to the Butler County ESP Screening Service Specification. Please see the attached redline version as well as a clean copy for review.

2023 BCESP Tentative Structural Compliance Review (SCR) Schedule

BUTLER COUNTY ESP STRUCTURAL COMPLIANCE REVIEW SCHEDULE – 2023		
(Please find below the list of Butler County Providers of ESP Services and the tentative dates for annual review for 2023).		
Butler County ESP Providers	**Review Type**	**Review Tentative Date**
A Best Home Care	Annual	Nov. 2023
A Miracle Home Care	Annual	Sept. 2023
Active Day of Cincinnati	Annual	Dec. 2023
All Gone Termite & Pest Control	Biennial	May. 2023
Always There Homecare	Annual	Aug. 2023
Bayley Adult Day Program	Annual	Sept. 2023
American Ramp Systems / AmRamp	Biennial	Nov. 2023
Bernens Medical	Biennial	Dec. 2023
Central Connections	Annual	Jan. 2023 *Due to issues leading to contract termination a review is currently in process.
Comfort and Care Home Health Agency	Annual	Sept. 2023
Custom Home Elevator & Lift Co.	Biennial	Aug. 2023
Home Care by Blackstone	Annual	April. 2023
Home First	Biennial	Dec. 2023
Interim HomeStyles Greater Cincinnati	Annual	Oct. 2023
LCD Agency Services	Annual	Aug. 2023
MedAdapt Ltd.	Biennial	June. 2023
Milts Termite & Pest Control	Biennial	Aug. 2023
Northwest Adult Services	Annual	Nov. 2023
Nova Home Care	Annual	Dec. 2023
Otterbein Lebanon Adult Day Service	Annual	Aug. 2023
Oxford Community Adult Day Services	Annual	April. 2023
Oxford Seniors	Annual	April. 2023
Partners in Prime	Annual	July. 2023
People Working Cooperatively	Biennial	May. 2023
Prime Home Care	Annual	Feb. 2023
Senior Helpers of Greater Cincinnati	Annual	Nov. 2023

UTS	Biennial	March. 2023
Warren County Community Services (WCCS)	Annual	March. 2023
Wesley/ MOW of Southwest OH & Northern KY	Annual	April. 2023

2023 Draft Request for Proposal (RFP) Schedule

COA has intent to issue the following RFPs during 2023:

- Title III – This RFP also contained Home Delivered Meals and Adult Day Services and was Published on April 17, 2023, and closed May 17, 2023. Submissions were reviewed, and awards were sent out August 18, 2024.
- Home Medical Equipment – tentatively proposed to be published in Quarter Three.
- Butler County ESP Intake and Assessment Subcontractor – tentatively proposed to be published at the end of Quarter Three
- In alignment with the goal of program modernization of our meal programs, COA has made the decision to forego a catering contract as of 10/1/2023.

We will continue to monitor client service needs as the year progresses to determine if any additional RFPs need to be published this upcoming year.
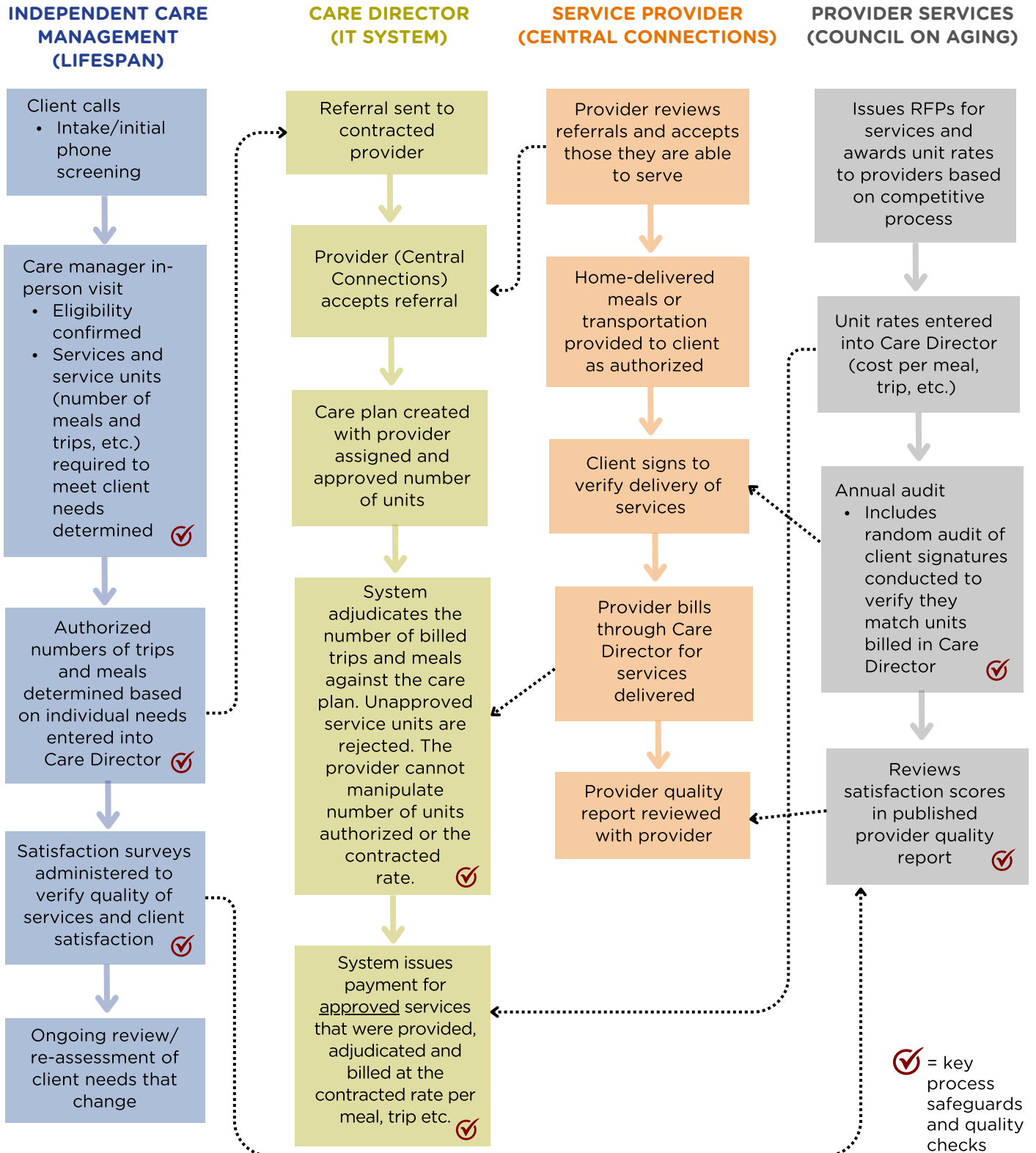
COA is pleased to announce a new process for Procurement (RFQs, RFIs and RFPs) in 2023. COA will use Bonfire, a competitive bidding platform for proposal information and submissions. Electronic Procurement ensures 100% compliance with submission requirements and leads to evaluation efficiencies.

The RFP evaluations will have 3 categories:

- **Financial Analysis and Stability:** Proposals will be scored on their agency's demonstration of financial stability.
- **The Organization and Capabilities Overview:** Focus will include- emergency preparedness, quality improvement and service delivery to meet the changing needs of older adults. Proposals demonstrating a county presence will receive additional scoring.
- **Pricing:** Does the Proposal demonstrate competitive pricing with respect to other proposals received?

BUTLER COUNTY ELDERLY SERVICES LEVY FUND SAFEGUARDS

COA Council on Aging

Council on Aging manages a provider network that delivers services to older adults in Butler County. COA has the monitoring checks and balances and controls in place to protect taxpayer dollars while ensuring older adults receive the right amount of services at the right time.

INDEPENDENT CARE MANAGEMENT (LIFESPAN)

Client calls
- Intake/initial phone screening

Care manager in-person visit
- Eligibility confirmed
- Services and service units (number of meals and trips, etc.) required to meet client needs determined ✅

Authorized numbers of trips and meals determined based on individual needs entered into Care Director ✅

Satisfaction surveys administered to verify quality of services and client satisfaction ✅

Ongoing review/re-assessment of client needs that change

CARE DIRECTOR (IT SYSTEM)

Referral sent to contracted provider

Provider (Central Connections) accepts referral

Care plan created with provider assigned and approved number of units

System adjudicates the number of billed trips and meals against the care plan. Unapproved service units are rejected. The provider cannot manipulate number of units authorized or the contracted rate. ✅

System issues payment for approved services that were provided, adjudicated and billed at the contracted rate per meal, trip etc. ✅

SERVICE PROVIDER (CENTRAL CONNECTIONS)

Provider reviews referrals and accepts those they are able to serve

Home-delivered meals or transportation provided to client as authorized

Client signs to verify delivery of services

Provider bills through Care Director for services delivered

Provider quality report reviewed with provider

PROVIDER SERVICES (COUNCIL ON AGING)

Issues RFPs for services and awards unit rates to providers based on competitive process

Unit rates entered into Care Director (cost per meal, trip, etc.)

Annual audit
- Includes random audit of client signatures conducted to verify they match units billed in Care Director ✅

Reviews satisfaction scores in published provider quality report ✅

✅ = key process safeguards and quality checks

Butler County ESP
Home Delivered Meals and Adult Day Service
RFP Update and Funding Awards FY 2024

9/12/23

Request for Proposals:

Home delivered meals (HDM), Adult Day, and Adult Day Transportation service request for proposal was issued by COA on April 17, 2023. The proposal responses were due on May 17, 2023, with a contract effective date of October 1, 2023.

Due to insufficient Adult Day Responses, an additional RFP was re-released on June 19th with proposals due on July 7th. Otterbein Adult Day had not originally responded but did so with the re-release of the RFP.

Award Decision Process:
1. An independent team reviewed and scored each proposal.
2. Provider score and history are reviewed.
3. Bid unit rates were evaluated to determine if a ceiling rate was necessary or not based on standard deviation. Bid responses were evaluated to determine their ability to meet current program capacity needs

Providers and Service:

1. Home Delivered Meals:
   a. Central Connections home delivered meal contract was terminated in July 2023.
   b. Mayerson is a new home delivered meal provider within Butler County.
   c. The cost of services increased from the prior RFP and the rate requested was honored for all home delivered meal providers.
2. Adult Day Service and Adult Day Transportation:
   a. Active Day of Cincinnati and 360 Total Care are new adult day providers to serve Butler County
   b. Adult Day Service providers were requested to consider serving all counties and Northwest ADS, Bayley ADS and Active Day of Cincinnati ADS were the only providers able to accept this charge. However, they are all limited to the counties for which they can provide transportation.
   c. Ceiling rates were applied specifically to adult day Enhanced, Intensive and for Adult Day Transportation service whose rates were more than 20% higher than the next highest rate. The ceiling rates were calculated based on a standard deviation:
      i. Intensive: A standard deviation of 1.5 with a max rate of $53.44 was applied and impacts Oxford Adult Day and 360 Total Care.
      ii. Enhanced: A standard deviation of 0.5 max of $66.77 was applied and impacts Oxford Adult Daya and 360 Total Care

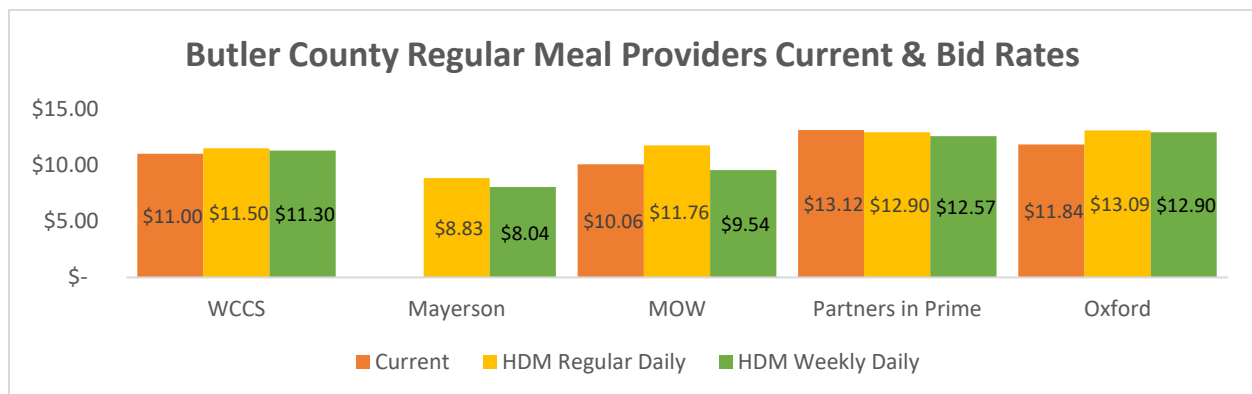iii. Transportation: A standard deviation of 0.5 was applied to all zones except for the West zone which had the standard deviation 0.5 minimum applied. This affected Oxford ADS and 360 Total Care.

3. Senior Buildings have been designated as a single provider building if there is a minimum of 15 clients and cost savings of at least 5% and $1,000 over offering the building to multiple providers. The single provider awarded the senior building must have capacity and the lowest cost per meal bid based on regular weekly meal rates. Awarding all the meal deliveries to one provider often results in cost savings. The following buildings have been awarded to Meals on Wheels of SW Oh. & N. Ky.
   a. Eden Park, Hamilton.
   b. Fairfield Village, Fairfield
   c. Trinity Mannor, Middletown
   d. Bell Tower, Hamilton

Home Delivered Meal Providers Average Rates:

Butler County Regular Meal Providers Current & Bid Rates

	Current	HDM Regular Daily	HDM Weekly Daily
WCCS	$11.00	$11.50	$11.30
Mayerson		$8.83	$8.04
MOW	$10.06	$11.76	$9.54
Partners in Prime	$13.12	$12.90	$12.57
Oxford	$11.84	$13.09	$12.90

Average Meal Rate with the Yearly Difference

Providers:	Daily HDM			Weekly HDM			Therapeutic HDM		
	2023	2024		2023	2024		2023	2024	
Warren County Community Services	11.00	11.50	4.5%	11.00	11.30	2.7%	11.00	11.65	5.9%
Mayerson		8.84		-	8.04	-		11.35	-
Meals on Wheels	10.08	11.76	16.7%	10.06	9.54	-5.2%	10.08	9.99	-0.1%
Partners in Prime	13.12	12.90	-1.68%	13.12	12.57	-4.2%	13.12	13.12	0.0%
Oxford	11.84	13.09	10.6%	11.84	12.90	8.9%	11.84	13.09	10.6%

Butler County ESP
Home Delivered Meals and Adult Day Service
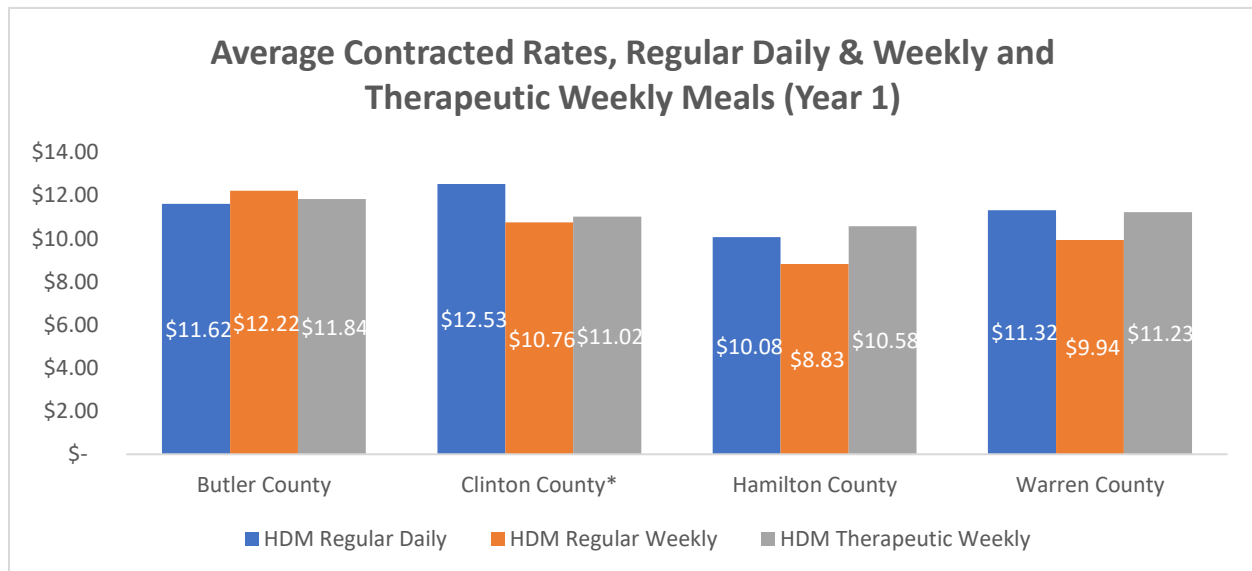# RFP Update and Funding Awards FY 2024

Overall Rates and Rate Increases for HDM - Current and Bid Prices

Current	$10.39	
Year 1	$10.64	2.4%
Year 2	$10.93	2.7%
Year 3	$11.22	2.7%
Year 4	$11.57	3.1%
Year 5	$11.93	3.1%

Current rates are averages of current contracted rates by provider and meal type.

Year 1through 5 rates are calculated using a weighted average of all bidders and all meal types provided, with weights based on current (2023) actual breakdown of provider, zone, and meal type.

All County Comparison:

Average Contracted Rates, Regular Daily & Weekly and Therapeutic Weekly Meals (Year 1)

	Butler County	Clinton County*	Hamilton County	Warren County
HDM Regular Daily	$11.62	$12.53	$10.08	$11.32
HDM Regular Weekly	$12.22	$10.76	$8.83	$9.94
HDM Therapeutic Weekly	$11.84	$11.02	$10.58	$11.23

■ HDM Regular Daily   ■ HDM Regular Weekly   ■ HDM Therapeutic Weekly

*Clinton County Average is excluding Mayerson, since we anticipate very few Kosher meals will be needed in the county, and the bid price was a significant outlier at $30/meal.

Average Rates calculated by taking the average price for each bidder (over all the zones they bid in any given county) for each meal type. Then all bidders in that county were averaged for the meal type.

Option #1: BCESP Levy Projections with Healthy Aging Grant

CURRENT COA PROJECTION: Aug 2023

	Year 1 2021 Actual	Year 2 2022 Actual*	Year 3 2023 Projected	Year 4 2024 Projected	Year 5 2025 Projected	5-Year Total
Revenue		*(remaining fund balance carries over year to year)*				
Beginning Fund Balance/Carryover	**9,835,999**	**10,074,237**	**9,628,575**	**7,129,302**	**5,021,222**	*9,835,999*
Levy Revenue (Cash Basis)	10,636,075	10,671,244	10,671,244	10,671,244	10,671,244	*53,321,051*
COA Levy Draw	*9,523,393*	*10,509,859*	*12,576,924*	*12,185,731*	*13,019,591*	*58,757,610*
Title III and State Funding (Accrual Basis)	846,861	992,865	762,847	636,713	548,257	*3,787,543*
Additional Covid Funding	483,192	241,856	182,554	-	-	*907,602*
Client Donations (Accrual Basis)	13,654	10,715	9,352	9,553	9,014	*52,288*
Client Co-Payments (Accrual Basis)	241,023	201,057	254,663	249,347	234,913	*1,181,002*
Interest and Other Income	233	2,879	57,117	66,669	64,969	*191,867*
Total Revenue to support ESP	11,108,356	11,959,231	13,843,456	13,148,013	13,876,743	*64,877,911*
Total Revenue (including balance carryover)	$ 22,057,038	$ 22,194,853	$ 21,566,351	$ 18,762,828	$ 16,549,618	*$ 69,277,352*
COA Operational Expenses						
Provider Services (Accrual Basis)	7,642,007	8,364,755	9,897,788	10,112,354	9,859,050	*45,875,954*
Healthy Aging Grant	-	-	-	(942,113)	-	*-*
Behavioral Health	56,356	39,300	100,000	100,000	100,000	*395,656*
Information & Assistance (Accrual Basis)	286,081	284,377	311,562	344,297	356,347	*1,582,664*
Care Management (Accrual Basis)	2,397,266	2,488,419	2,628,459	2,673,325	2,653,521	*12,840,991*
Program Management (Accrual Basis)	726,646	782,380	905,647	860,150	907,824	*4,182,647*
Total COA Operational Expenditures	**11,108,356**	**11,959,231**	**13,843,456**	**13,148,013**	**13,876,743**	*64,877,911*
Settlement Fees	99,836	105,260	105,000	105,000	105,000	*520,096*
Adult Protective Services	300,000	300,000	300,000	300,000	300,000	*1,500,000*
Prosecutor	178,089	188,593	188,593	188,593	188,593	*932,461*
Other County Expenses	296,520	13,194	-	-	-	*309,714*
Total Levy Expenditures	$ 11,686,281	$ 12,553,084	$ 14,437,049	$ 13,741,606	$ 14,470,336	*$ 67,830,468*
				$ -		
Actual & Estimated Median Fund Balance	$ 10,074,237	$ 9,628,575	$ 7,129,302	$ 5,021,222	$ 2,079,282	*$ 2,079,282*
				$ -		
Year Ending Client Census	3,174	3,070	3,080	2,981	2,745	
Annual Clients Served	4,307	4,178	4,170	4,223	3,881	

Assumptions:

Census: Census is estimated based on reduced market penetration - we used values that will maintain a positive balance through the following cycle (2026-2030)

Revenues:

Title III revenue in 2023 consists of additional COVID funding including ARPA funds through the end of 2023

Costs:

Provider services costs are estimated on a Cost per Client basis; **Home Care Assistance** is estimated for 25% of clients enrolled, with an average of 39 units per client per month, and cost increases in line with HCA RFP rate increases

Yearly amounts for APS/Prosecutor and Settlement fees are based on 2022 actual values; COA has also used reconciling items to tie back to county amounts

Option #2: BCESP Levy Projections without Healthy Aging Grant

CURRENT COA PROJECTION: Aug 2023

	Year 1 2021 Actual	Year 2 2022 Actual*	Year 3 2023 Projected	Year 4 2024 Projected	Year 5 2025 Projected	5-Year Total
Revenue		*(remaining fund balance carries over year to year)*				
Beginning Fund Balance/Carryover	**9,835,999**	**10,074,237**	**9,628,575**	**7,129,302**	**4,356,224**	*9,835,999*
Levy Revenue (Cash Basis)	10,636,075	10,671,244	10,671,244	10,671,244	10,671,244	*53,321,051*
COA Levy Draw	*9,523,393*	*10,509,859*	*12,576,924*	*12,850,729*	*12,355,852*	*57,816,756*
Title III and State Funding (Accrual Basis)	846,861	992,865	762,847	636,713	548,257	*3,787,543*
Additional Covid Funding	483,192	241,856	182,554	-	-	*907,602*
Client Donations (Accrual Basis)	13,654	10,715	9,352	9,308	8,554	*51,583*
Client Co-Payments (Accrual Basis)	241,023	201,057	254,663	242,958	222,920	*1,162,621*
Interest and Other Income	233	2,879	57,117	66,669	64,969	*191,867*
Total Revenue to support ESP	11,108,356	11,959,231	13,843,456	13,806,378	13,200,551	*63,917,971*
Total Revenue (including balance carryover)	**$ 22,057,038**	**$ 22,194,853**	**$ 21,566,351**	**$ 18,756,195**	**$ 15,872,167**	**$ 69,258,266**
COA Operational Expenses						
Provider Services (Accrual Basis)	7,642,007	8,364,755	9,897,788	9,852,748	9,357,427	*45,114,725*
Behavioral Health	56,356	39,300	100,000	100,000	100,000	*395,656*
Information & Assistance (Accrual Basis)	286,081	284,377	311,562	344,297	356,347	*1,582,664*
Care Management (Accrual Basis)	2,397,266	2,488,419	2,628,459	2,606,112	2,523,189	*12,643,446*
Program Management (Accrual Basis)	726,646	782,380	905,647	903,221	863,587	*4,181,480*
Total COA Operational Expenditures	**11,108,356**	**11,959,231**	**13,843,456**	**13,806,378**	**13,200,551**	*63,917,971*
Settlement Fees	99,836	105,260	105,000	105,000	105,000	*520,096*
Adult Protective Services	300,000	300,000	300,000	300,000	300,000	*1,500,000*
Prosecutor	178,089	188,593	188,593	188,593	188,593	*932,461*
Other County Expenses	296,520	13,194	-	-	-	*309,714*
Total Levy Expenditures	**$ 11,686,281**	**$ 12,553,084**	**$ 14,437,049**	**$ 14,399,971**	**$ 13,794,144**	**$ 66,870,529**
				$ -		
Actual & Estimated Median Fund Balance	$ 10,074,237	$ 9,628,575	$ 7,129,302	$ 4,356,224	$ 2,078,023	$ 2,078,023
				$ -		
Year Ending Client Census	**3,174**	**3,070**	**3,080**	**2,838**	**2,598**	
Annual Clients Served	**4,307**	**4,178**	**4,170**	**4,080**	**3,738**	

Assumptions:

Census: Census is estimated based on reduced market penetration - we used values that will maintain a positive balance through the following cycle (2026-2030)
Revenues:

Levy Tax Collections: 2023 - 2025 annual collection is based on 2022 collections reported from the auditor's office.

Title III revenue in 2023 consists of additional COVID funding including ARPA funds through the end of 2023

Costs:

Provider services costs are estimated on a Cost per Client basis; **Home Care Assistance** is estimated for 25% of clients enrolled, with an average of 39 units per client per month, and Yearly amounts for APS/Prosecutor and Settlement fees are based on 2022 actual values; COA has also used reconciling items to tie back to county amounts

Option #1 Budget Highlights
For the Butler County Elderly Services Program
For the Program Year January 1, 2024 – December 31, 2024

Client Census:
- Program year 2023 – is projected to end the program year with a census of 3,080 clients being served monthly. This represents a net increase growth of 10 clients (or 0.3%) for the year.
- Program year 2024 – managed enrollment will be needed to reduce client census to 2,838. A reduction is needed to keep the program within budget during this five-year plan.

Tax Levy Revenue:
- The amount of Tax levy money needed in 2024 is $12.5 million, which is a decrease of $43,938 or -0.3% when compared to the 2023 projected spending.

Client Co-payment:
- Are projected to be $242,958, which is lower from our current amount of $254,663 for 2023.

Client Donations:
- Donations are collected for home delivered meals. Donations are projected to be $9,308 for 2024 which is a slight change from $9,352 projected for 2023.

Interest Income:
- Is projected to be $66,669 which is higher than current projected amount of $57,117 for 2023.

Title III and State Funding:
- Traditional Title III and Alzheimer's funding are expected to remain at last year's award amounts. The one time Federal ARPA revenue is gone which is why there is a reduction of $331,523 from 2023.

Provider Services:
- We are projecting a growth of 4.5% in this category when compared to current spending projections. We are expecting an increase in Home Delivered Meals, Adult Day Services, and Adult Day Transportation from our most recent RFP awards. The increase will go into effect on 10/1/2023. This assumes the inclusion of Healthy Aging funding to the county in the amount of $942,113. This is a direct reduction in the cost of in-home services, without any administrative expense.

Intake & Assessment:
- Spending is projected to grow to $361,512 in 2024, which is an increase of $49,950 (or 16%) from 2023 projected spending. Budget amount is from the 2024 Budget submitted by LifeSpan.

Care Management:
- Budget amount is based on a per member per month rate (PMPM). The rate for 2024 will be $71.43. This is calculated by multiplying the rate times the client census times 1% for any half-month billing.

COA Administration:
- Is budgeted to be $882,434. This is a decrease of $49,722 (-5.3%) when compared to the 2023 budget. This is based on a 7% rate of the combined services of intake, care management, and provider services. The Healthy Aging grant offset reduces the administrative cost by $65,948.

Butler County Elderly Services Program
Option #1 Draft Budget including Healthy Aging Grant
January 1, 2024 - December 31, 2024

	2024 Proposed Budget	2023 Budget	2023 Projected	% Change 2024 Budget to 2023 Budget	% Change 2024 Budget to 2023 Projected
Revenue					
Butler County Levy					
Levy Appropriations	$ 12,532,988	$ 12,998,253	$ 12,576,927	-3.6%	-0.3%
Total County Levy Funding	12,532,988	12,998,253	12,576,927	-3.6%	-0.3%
Client Co-Payment	242,958	206,297	254,663	17.8%	-4.6%
Client Donations	9,308	18,617	9,352	-50.0%	-0.5%
Title III and State Funding	705,223	1,024,662	1,036,746	-31.2%	-32.0%
Interest Income	66,669	842	57,117	7817.9%	16.7%
Total Revenue	**$ 13,557,146**	**$ 14,248,671**	**$ 13,934,805**	**-4.9%**	**-2.7%**
Expenses					
Client Services					
Intake & Assessment	$ 361,512	$ 345,945	$ 311,562	4.5%	16.0%
Care Management	$ 2,736,418	$ 2,841,997	2,628,459	-3.7%	4.1%
Fast Track - Pilot	$ 68,510		91,347		-25.0%
Provider Services	$ 10,450,385	$ 10,128,573	9,997,788	3.2%	4.5%
Healthy Aging Grant	$ (942,113)				
Total Client Services	12,674,712	13,316,515	13,029,157	-4.8%	-2.7%
COA Administration	882,434	932,156	905,647	-5.3%	-2.6%
Total Expenses	**$ 13,557,146**	**$ 14,248,671**	**$ 13,934,805**	**-4.9%**	**-2.7%**

Average Daily Census for 2024 is projected to decrease by 7.9% from 2023 year end Projections
A 5% contingency is added to account for deviations in client enrollment and cost assumptions.
Budget includes the Fast Track program to be piloted with Federal dollars funding the program.
Heathly Aging Grant is money from the State with County approval will be available in 2024

Council on Aging of Southwestern Ohio
4601 Malsbary Road
Blue Ash, Ohio 45242
(513) 721-1025
(800) 252-0155
www.help4seniors.org

Option #2 Budget Highlights
For the Butler County Elderly Services Program
For the Program Year January 1, 2024 – December 31, 2024

Client Census:
- Program year 2023 – is projected to end the program year with a census of 3,080 clients being served monthly. This represents a net increase growth of 10 clients (or 0.3%) for the year.
- Program year 2024 – managed enrollment will be needed to reduce client census to 2,838. A reduction is needed to keep the program within budget during this five-year plan.

Tax Levy Revenue:
- The amount of Tax levy money needed in 2024 is $13.5 million, which is an increase of $964,122 or 4.2% when compared to the 2023 projected spending.

Client Co-payment:
- Are projected to be $242,958, which is lower from our current amount of $254,663 for 2023.

Client Donations:
- Donations are collected for home delivered meals. Donations are projected to be $9,308 for 2024 which is a slight change from $9,352 projected for 2023.

Interest Income:
- Is projected to be $66,669 which is higher than current projected amount of $57,117 for 2023.

Title III and State Funding:
- Traditional Title III and Alzheimer's funding are expected to remain at last year's award amounts. The one time Federal ARPA revenue is gone which is why there is a reduction of $331,523 from 2023.

Provider Services:
- We are projecting a growth of 4.5% in this category when compared to current spending projections. We are expecting an increase in Home Delivered Meals, Adult Day Services, and Adult Day Transportation from our most recent RFP awards. The increase will go into effect on 10/1/2023.

Intake & Assessment:
- Spending is projected to grow to $361,512 in 2024, which is an increase of $49,950 (or 16%) from 2023 projected spending. Budget amount is from the 2024 Budget submitted by LifeSpan.

Care Management:
- Budget amount is based on a per member per month rate (PMPM). The rate for 2024 will be $71.43. This is calculated by multiplying the rate times the client census times 1% for any half-month billing.

COA Administration:
- Budget amount is based on a 7% rate of the combined services of intake, care management, and provider services. COA's contract with Butler County was renewed with an expiration date of 9/30/2027.

Butler County Elderly Services Program
Option #2 Draft Budget
January 1, 2024 - December 31, 2024

	2024 Proposed Budget	2023 Budget	2023 Projected	% Change 2024 Budget to 2023 Budget	% Change 2024 Budget to 2023 Projected
Revenue					
Butler County Levy					
Levy Appropriations	$ 13,541,049	$ 12,998,253	$ 12,576,927	4.2%	7.7%
Total County Levy Funding	13,541,049	12,998,253	12,576,927	4.2%	7.7%
Client Co-Payment	242,958	206,297	254,663	17.8%	-4.6%
Client Donations	9,308	18,617	9,352	-50.0%	-0.5%
Title III and State Funding	705,223	1,024,662	1,036,746	-31.2%	-32.0%
Interest Income	66,669	842	57,117	7817.9%	16.7%
Total Revenue	$ 14,565,207	$ 14,248,671	$ 13,934,805	2.2%	4.5%
Expenses					
Client Services					
Intake & Assessment	$ 361,512	$ 345,945	$ 311,562	4.5%	16.0%
Care Management	$ 2,736,418	$ 2,841,997	2,628,459	-3.7%	4.1%
Fast Track - Pilot	$ 68,510		91,347		-25.0%
Provider Services	$ 10,450,385	$ 10,128,573	9,997,788	3.2%	4.5%
Total Client Services	13,616,825	13,316,515	13,029,157	2.3%	4.5%
COA Administration	948,382	932,156	905,647	1.7%	4.7%
Total Expenses	$ 14,565,207	$ 14,248,671	$ 13,934,805	2.2%	4.5%

Average Daily Census for 2024 is projected to decrease by 7.9% from 2023 year end Projections
A 5% contingency is added to account for deviations in client enrollment and cost assumptions.
Budget includes the Fast Track program to be piloted with Federal dollars funding the program.

BUTLER COUNTY
ELDERLY SERVICES PROGRAM (ESP^{SM})

SCREENING
SERVICE SPECIFICATIONS

2024~~2012~~

EFFECTIVE 20~~24~~12 (BCESP)

SCREENING SERVICES

SERVICE SPECIFICATION

TABLE OF CONTENTS

SCREENER SERVICE SPECIFICATION

1.0   OBJECTIVE

To provide telephonic ~~computerized~~ screening and assessment of callers to determine eligibility for appropriate long-term care options, as well as, provide information and resources for services, supports and community based referrals. ~~for long term care needs~~.

2.0   UNIT OF SERVICE

This service shall be cost reimbursed based on actual expenses up to a negotiated contract amount.

3.0   PROVIDER REQUIREMENTS:
The Provider must assure:

3.1   Screening is available 24 hours/day, 7 days/week. If Screening is not staffed 24 hours/day, 7 days/week, then a system shall be in place for taking calls outside of normal business hours. This may include a voice mail system. If a voice mail system is used, messages left outside of normal operating hours shall be returned the next business day.

3.2   Telephone numbers are approved by the Council on Aging of Southwestern Ohio (COA).

3.3   Multi-lingual capabilities based on the ethnic composition of Butler County.

3.4   Track monthly phone queue data with benchmarks to manage call center performance. This includes c~~C~~all abandonment rate, total calls, average time to answer and other pertinent data. ~~in Screening~~ ~~is less than 5% during normal business hours.~~

3.5   Screening staff conduct telephone assessments based on criteria provided by COA. These initial assessments will be documented into the software system required by COA. Screening staff shall evaluate the client's presenting problem, determine preliminary eligibility, make necessary referrals and provide program information.

3.6   Situations suggesting severe or imminent threat to the health or safety of the client must be documented and reported to Adult Protective Services (APS), ~~or the~~ police and COA immediately.

3.7   Screening assists callers in accessing COA programs by making referrals for PASSPORT and linking to Caregiver Support, Community Information and Resources, etc., as well as other community resources.

3.8   BCESP is the payor of last resort. All individuals who seek Levy services must first seek payment from other available sources of funding, such as PASSPORT,

private insurance, Medicaid, Medicare or other sources. Clients who become

eligible for other sources of funding after enrollment into BCESP must be disenrolled from BCESP.

3.9 Documentation shall be completed following the documentation standards set forth by COA..

3.10 Records shall be reviewed to ensure the congruence between the telephone screening and the face-to-face assessment.

4.0 SCREENER DUTIES AND RESPONSIBILITIES:

The Screener must:

4.1 Provide information about the aging network and services to callers and make referrals to community agencies.

4.2 Provide support to callers attempting to navigatenegotiate the aging network , or coping with difficult long-term care decisions or challenges issues related to aging.

4.3 Complete telephone assessments/screening and computerized screening to determine an individual's appropriateness for COA administered services.

4.4 Follow COA Policy and Procedure

4.4 Establish and maintain a positive working relationship with clients, or encouraging them to utlilizeutilize available services based upon eligibility for the program. more readily utilize planned services to their optimal benefit.

4.5

4.54.6 Educate clients on all areas related to program participation including rights and responsibilities.

4.64.7 Assist clients in selecting the best Medicare D prescription drug benefit options by providing information and education or referring out to other appropriate resources..

4.74.8 Maintain statistical tracking along with required reports, as requested by COA.

4.84.9 Monitor individual needs and program eligibility for individuals placed on program waiting lists.

Documentation

4.94.10 Maintain professional documentation of all contacts and activities with clients/caregivers in the appropriate COA computer software system.

4.104.11 Adhere to COA confidentiality policy and HIPAA protocol as related to all client information/interactions.

4.114.12 Complete incident reports as indicated.

4.12 Complete statistics and reports as necessary for individual, team and program maintenance. per COA policy.

4.13 Authorize Home Delivered Meal services as supported by the assessment and case note documentation.

4.14 Educate clients/caregivers about co-pay/liability process for programs.

5.0   SCREENER QUALIFICATIONS:
The Screener must:

5.1 Have a minimum of one year of experience with older adults, knowledge of aging services, and excellent customer service skills.

5.2 Possess a good working knowledge and understanding of issues related to the elderly population.

5.3 Be knowledgeable of individual, family, and social systems functioning in the aging process.

5.4 Be knowledgeable of community resources within Southwestern Ohio, particularly Butler County.

6.0   SCREENER SUPERVISOR RESPONSIBILITIES:
The Screener Supervisor shall:

6.1 Review 100% of all new screeners' documentation up to 30 days following employment.

6.2 Review an average of six to eight client records per screener per month.

6.3 Act as mentor, coach and counselor for ~~subordinate~~ staff.

7.0   SCREENER SUPERVISOR QUALIFICATIONS:
The Screener Supervisor(s) must:

7.1 Have a minimum of one year of experience with older adults, knowledge of aging services, excellent customer service skills and, as a minimum, a B. A. or B.S. degree in social work, ~~gerontologyor~~gerontology or a related field or is a Registered Nurse.

7.2 Possess a good working knowledge and understanding of issues related to the elderly population.

7.3 Be knowledgeable of the individual, family, and social systems functioning in the aging process.

7.4 Be knowledgeable of community resources within Southwestern Ohio, particularly Butler County.

8.0   SCREENER AND SCREENER SUPERVISOR TRAINING REQUIREMENTS:
The Screener and Screener Supervisor must:

8.1   ~~Attend standardized O~~orientation and initial training as approved by COA provided prior to providing service to clients.

~~8.2   Attend continuing education as required by COA.~~

~~8.3~~8.2   Attend continuing education as required by licensing agency.

ELDERLY SERVICES PROGRAM (ESP^{SM})

HOME MEDICAL EQUIPMENT

SERVICE SPECIFICATION

~~2019/2020~~

EFFECTIVE

~~APRIL 2019 (BCESP) (CCESP) (HCESP)~~

~~SEPTEMBER 2020 (WCESP)~~

September 2023

(BCESP) (CCESP) (HCESP) (WCESP)

Home Medical Equipment Service Specification

1.0 OBJECTIVE

Home Medical Equipment (HME) provides rented or purchased medical equipment or supplies to clients to promote independence and safety in their home. Home Medical Equipment under the Elderly Service Program (ESP)is limited to items not covered by third -party payors, Medicare, or the state Medicaid plan. ESP will attempt to bill insurance for covered items but may cover the cost of the item if it is determined insurance will not cover the item. ~~Home Medical Equipment under the Elderly Services Program (ESP) is limited to items not covered by third-party payers, Medicare, or the state Medicaid plan.~~

2.0 UNIT OF SERVICE

2.1 A unit of service is the item purchased or rented.

2.2 The unit rate is the ESP contracted purchase or rental price for the item. Rental amount, over time, is not to exceed the purchase price of the item or to exceed 13 months.~~.~~

3.0 PROVIDER REQUIREMENTS

3.1 The Provider must follow current ESP guidelines for items reimbursable by Medicare/Medicaid, MCO, or any third-party payer referred by the ESP staff member and ordered by the medical professional.

3.2 The Provider may only bill for the price established in the original price quote. The Provider shall purchase, deliver, ~~educate~~educate, and install, as applicable, the authorized items before submitting a bill to ESP. Any cost revisions to the original quote must have prior authorization.

3.3 The Provider must furnish professional ongoing assistance when needed to evaluate and adjust products delivered, or to instruct clients/caregivers in the use of HME products and assembly as applicable.

(a) The Provider must assume liability for equipment warranties and, therefore, install, maintain, and/or replace any defective parts or items, as specified in appropriate warranties.

(b) Replacement items or parts for rented equipment will not be reimbursed if damage is not related to normal wear and tear.

(c) The provider will notify the ESP staff member of ~~expected~~the expected date of repair or replacement.

4.0 DELIVERY, INSTALLATION, EDUCATION AND VERIFICATION

4.1 The Provider shall verify successful completion of delivery, installation, and education provided to the client. Client signature, or designee signature, will be obtained to verify service delivery. For those items that do not require installation and education, the Provider may use a common carrier to deliver the HME. The provider shall verify successful delivery by using the carrier's tracking statement or number in replacement of the client signature to verify the delivery.

4.2 The Provider must maintain individual client records documenting delivery and/or common carrier shipping record, installation of equipment, and education of equipment, when applicable.

4.3 The Provider may not bill until after delivery of the HME.

4.4 The Provider must inform the ESP staff member if an item is on backorder once they are aware. They must provide an estimated delivery date if known.

5.0 INSURANCE REQUIREMENTS

5.1 For HME items covered by Medicare, COA will seek to procure Providers identified through the Medicare Competitive Bid Process for applicable equipment in the affected areas.

5.2 A purchase price for items billable directly to ESP will be established during the Referral or RFP process.

5.3 The Provider must obtain prior approval from the COA staff member before billing ESP for any item deemed to be covered by another funding source.

5.4 COA may not pay for an item that is deemed to be covered by another payer source without supporting documentation. Supporting documentation will be reviewed prior to ESP reimbursing the provider for an item that may be covered by other insurance.