



## **2019 Year in Review**

As 2019 comes to an end, we are excited to share this Year in Review to highlight the astonishing accomplishments throughout the Company and behold the great things anticipated for next year.

Throughout this year, CareStar has continued to establish our key mission of “Improving Communities by Improving Lives” and the below report will demonstrate all the incredible ways each program or function of our business contributes to this goal. It also reiterates our key philosophy that it is through our five (5) Core Values of Fairness, Integrity, Innovation, Service and Respect (represented by the five (5) points of the CareStar Star) that these great accomplishments are possible.

CareStar hopes you read this with pride and confidence as the Company continues along a successful path to increasing and expanding the ways we can improve our communities! Join us in celebrating 2019 and looking forward to a great 2020!

# Clinical Operations

## TRANSITIONAL SERVICES

### **HOME Choice, Pre-Transitions and Community Living**

Throughout 2019, the Transitional Services Department Improved Communities by Improving Lives by assisting individuals in achieving greater independence and inclusion in their communities through continued service to the HOME Choice Program. HOME Choice, which was originally designed as Ohio's "Money Follows the Person" (MFP) Federal Grant Program, is an acronym for: "Helping Ohioans Move, Expanding Choice." Enrollment in the grant program ceased at the end of December 2018, after nearly 13,000 individuals transitioned to home and community-based settings, and CareStar has continued to provide HOME Choice Case Management Services participants of the grant program throughout calendar year 2019. Anticipating the end of the MFP, CareStar responded to the Ohio Department of Medicaid's Request for Grant Applications and is pleased to be one (1) of two (2) organizations awarded a statewide contract to provide HOME Choice Transition Coordination Services, beginning July 1, 2019. This award is a testament to the quality services CareStar provides and the hard work of the Transitional Services Team. Since the launch of the new Program on July 1, 2019 CareStar has performed assessments and began to assist with transitions for over 400 individuals.

In addition to HOME Choice Case Management and Transition Coordination Services, CareStar continues to meet with individuals residing in nursing facilities to provide information and community resources for residents to make informed decisions about their plans for discharge. CareStar also completes HOME Choice Needs Assessments to determine an individual's community living potential and eligibility for participation in HOME Choice. The Transitional Services Department has embraced CareStar's commitment to lifelong learning and service throughout 2019 and looks forward to a bright future for HOME Choice in the years to come.

### **Multiple Sclerosis Case Management**

CareStar's excellence in case management led to further expansion and collaboration with the National Multiple Sclerosis Society in 2019. CareStar has received our first referrals in Florida and Illinois this year, to add to our original States of Ohio, Indiana and Georgia. We look forward to launching further expansion in the regions of West Virginia, Pennsylvania and Michigan. As the growth in this program continues, CareStar is delighted by the impact this partnership makes on improving the quality of life of individuals affected by Multiple Sclerosis.

### **Hamilton County Senior Patient Navigation**

Hamilton County Senior Patient Navigation Services launched on July 1, 2019 with the goal of helping aging individuals navigate the complex medical care system, while addressing social and economic barriers having a significant impact on an individual's health and well-being. As a result of the Hamilton County Senior Services Levy, CareStar's Patient

Navigators assess the risks and barriers posed by the Social Determinants of Health to develop goals with participants that can be accomplished through support, advocacy, teamwork and education. CareStar has connected with our first participants in 2019 and partnered with St Vincent De Paul's Charitable Pharmacy, in Cincinnati, to reach more seniors in need of assistance and will benefit from our services. Looking forward, CareStar is eager to develop partnerships with local senior centers and other community organizations to increase outreach and awareness of the Program, with the goal of positively impacting the community.

### **Community to Home Program**

In the Fall of 2019, CareStar was awarded the Community to Home Program contracts in five (5) of six (6) regions in the State of Pennsylvania. Community to Home is a new Program that will provide community health services to Children and Youth with Special Healthcare Needs (CYSHCN) and their families, who live in rural regions of the State and have difficulty accessing resources where they live. Promotion of fiscal management, health management, access to transportation, self-advocacy, utilizing community services, social and employment skills preparation, community living and transitional skills, and independent living skills are some of the areas that will be the focus of the services provided. CareStar has begun the hiring process, as well as assessment creation, services plan creation and marketing plan creation for this new Program, which will be launching in March of 2020.

## **OHIO INTAKE AND ASSESSMENTS**

### **Ohio Home Care Waiver Intake**

In 2019, the Intake Department and Administrative Services Team received and managed over 4,000 Alerts for the Ohio Home Care Waiver Program (OHCP). The Intake Department currently has five (5) full-time Assessors, approximately 15 Flex staff, QI Supervisors, and several clinical staff, who have conducted over 2,400 assessments. These assessments resulted in approximately 1,250 new case management enrollees. The CareStar Intake Department and many other contributors have made level-of-care determinations statewide, allowing for over 1,000 Ohioans to remain in their homes safely and as independently as possible.

### **Single Entry Point (SEP) Program**

Through CareStar's partnership with the Ohio Benefits Long-Term Services and Supports Department, the Single-Entry Point (SEP) Program has continued to grow throughout 2019. The SEP work is telephonic and entails the completion of a long-term services and supports questionnaire (LTSSQ) and Support Navigation, where employees assist with navigating the complex healthcare and service network. The Team received and processed 3,877 referrals through November 2019 and were able to send referrals and community resources to support members of the community throughout the State of Ohio.

### **Buckeye Diabetic-HEDIS**

CareStar continues to partner with the Buckeye Community Health Plan to assist Buckeye members, diagnosed with Diabetes, to obtain maximum health. The goal of this partnership when working with the Buckeye members diagnosed, and admitted with, Diabetes is to assist in removing barriers to healthcare and decrease their HbA1c levels to below nine (9). By focusing on all conditions surrounding the member and providing interventions that address the social determinants of health, it can improve the individual's overall health. CareStar has been assigned approximately 900 members with which to connect this year. From these outreach efforts, CareStar has enrolled 38 members in ongoing case management and have worked to decrease barriers and HbA1c levels with each member.

One (1) of CareStar's initiatives in 2019 was to research and select a device to integrate into the CareStar service delivery. Recently, CareStar purchased four (4) A1CNow kits that will allow our Community Health Partners to obtain current HbA1c levels onsite when completing face-to-face appointments with the members. This replaces the need for self-reporting or obtaining other measurements to improve accuracy and timeliness.

### **Department of Developmental Disabilities (DODD) Community Options Counseling Program**

CareStar has continued work with the Ohio Department of Developmental Disabilities (DODD) throughout 2019. Community Options Specialists counseled over 219 residents and their families to discuss options for their long-term care services. In addition, CareStar was utilized as a subject matter expert and key consultant with the Department of Developmental Disabilities as they settled a lawsuit filed in 2016. As a result, discussions are currently progressing with DODD to receive additional Options Counseling referrals in 2020.

## **OHIO HOME CARE (OHC) WAIVER CASE MANAGEMENT**

CareStar Ohio Home Care (OHC) Waiver Case Management Improved Communities by Improving lives through our ongoing commitment to serving program individuals. Record high monthly new enrollments, which translated into census growth of 475 individuals, a 17% increase, required Case Managers, Clinical Supervisors and Clinical Managers to take on additional cases. Team-Based Case Managers provided extended coverage statewide. Dedication to ensuring the health and safety of our members was noticeable throughout the year. 13 Case Managers joined our Teams this year with close collaboration from our Human Resources and Education Departments.

In 2019, the Home Modification Department processed over 1,200 requests for the OHC Program. Home Modification staff for the Program, comprised of three (3) full-time Home Modification Specialists and one Home Modification Coordinator, work with Case Managers statewide to address Home and Vehicle modifications, and Adaptive Assistive Device needs.

In 2019, the Home Modification Department Improved Communities by Improving Lives by assuring that individuals on the OHC Waiver have safe access within their homes, as well as to and from the community, allowing them to have greater independence. Our Utilization Review Supervisor continues to share her expertise in Prior Authorizations and State Hearings by developing and presenting training programs for our clinical staff, while also processing prior authorization submissions.

New Ohio Administrative Code Rules and OHC Waiver services were launched during 2019 as a part of the Ohio Department of Medicaid, in collaboration with the Ohio Department of Aging's, waiver alignment initiatives. CareStar's clinical staff worked with both CareSource and CSIS to enhance CSCMSv2 to accommodate for these changes.

### **SPECIALIZED RECOVERY SERVICES PROGRAM (SRS)**

In 2019, the SRS Program expanded rapidly and now serves over 7,000 individuals, a 68% increase from the beginning of the year. We have added and continue to add highly qualified staff. Throughout this rapid expansion the SRS Department continues to Improve Communities by Improving Lives. Administrative Services, Assessors, and Recovery Managers go above and beyond to expedite the assessment process for individuals in dire need of Medicaid coverage, due to the Severe or Persistent Mental Illness or Diagnosed Chronic Condition. The willingness of our employees to do this makes it possible for individuals to obtain needed medical care and services, avoid acute exacerbations of chronic medical conditions, and successfully remain in the community.

Through our positive relationships with Managed Care Providers, Mental Health Providers, dialysis centers, physicians, and community organizations, SRS Recovery Managers assisted individuals daily with linkage, community resources, and health and safety concerns. As such, SRS Recovery Managers and Supervisors receive unsolicited comments of appreciation from the individuals we serve on a regular basis.

As an additional way to give back, SRS CareStars brought a carload of hats, gloves, household and hygiene items to our December Team Meeting to donate to Isabella's Closet in Akron, Ohio.

### **INTENSIVE SUPPORT COORDINATION/SUPPORT COORDINATION PROGRAM**

Georgia's Intensive Support Coordination Program serves individuals, who are living with an Intellectual Disability, Developmental Disability or have Behavioral Health issues. These individuals may currently reside in an institutional setting or, perhaps, did in the past. CareStar has the privilege of facilitating the transition of these individuals into the community and helping them acquire the support and services needed to live in the community like a "typical" person.

This year, we expanded our team of Intensive Support Coordinators (ISCs) to allow capacity to accept new referrals, where we currently serve over 220 individuals, and achieve our census goals. ISCs support our work with the Multiple Sclerosis Society by providing case management services, as well. The Georgia Team has averaged eight (8) ongoing MS cases this year.

A new Clinical Supervisor joined the team, as well. We are delighted to have this supervisor, who is a Registered Nurse, and can consult with team members on medical concerns. The leadership team is growing in its independence and confidence. ISCs are doing a fantastic job in the execution of their role. The camaraderie is impressive as the team works collaboratively.

DBHDD launched “IDD Connect,” a new client management software application. As with most new technology, there are wrinkles to be ironed out, but staff are remaining positive and embracing the new application. The provider-management application, “Provider Connects,” is not yet operational, but we expect it to launch very soon.

This year, CareStar became a case management provider for Georgia’s Independent Care Waiver Program (ICWP). This program serves individuals who have a Traumatic Brain Injury or other physical disability. CareStar will be a statewide provider for this Program. We look forward to onboarding the perfect candidate to help us launch this Program and getting us off to a great start. We expect to do wonderful things and provide a valuable service for those individuals who are enrolled.

## **INDIANA CLINICAL**

Throughout 2019, Indiana Operations continued to improve the communities in which we work by improving the lives of the individuals who choose CareStar as their case management provider. We continue to serve an increasing number of individuals in both our Aged and Disabled and Developmental Disability Waivers, with just shy of 3,000 individuals at the beginning of December 2019. There has been a 10% increase since the beginning of the year. We have been recommended by Facebook groups and Special Education Co-Ops, and hospital social workers reach out to us because of our solid reputation with all providers. The improvement to communities and lives is reflected in our 95.49% satisfaction rating. One of the many success stories in Indiana is pictured below, this one witnessed by Aaron Thomas, Case Manager. Garland and his mother Angela pose with the “fruits of their labors.” He and his mom learned how to build and care for a raised garden through YouTube. They started many plants from seed indoors in the winter months. He even learned how to pollinate the flowers for a more fruitful harvest.

Throughout 2019, CareStar Indiana also Improved Communities by Improving Lives by living the mission and not just in the paid work we do. Case Managers in Indiana give of their time and talents. Case Managers gave by participating in Autism Walks in three (3) different cities, and fundraising for Alzheimer's, Cancer, Salvation Army and March of Dimes. Case Managers teach women and teenage girls self-defense, give swim lessons to individuals with disabilities, coach cheerleading, softball, volleyball, basketball, and baseball. Case Managers visit nursing homes with their dogs, feed the hungry and support women in recovery, with mental health and youth issues. Case Managers teach Sunday school, serve on outreach committees, take mission trips, and act as mentors in the Confirmation teachings. Case Managers join our veterans on Honor Flights, maintain long-term Best Buddies relationships, support refugees, and lead Girl Scouts.



Finally, in 2019, the Department Improved Communities by Improving Lives in welcoming our first interns in the Indiana office. Relationships have been built with Indiana University School of Social Work and Indiana Wesleyan University to enhance the learning experiences of their students. Three (3) Social Work interns have been learning the “CareStar Way” of case management, of servant leadership, and of customer service. In turn, these Interns have taken the lead on research and reporting projects, as well as partnering with Case Managers to participate in client-specific work activities.

### **SUPPORTS OF COMMUNITY LIVING (SCL) AND MICHELLE P WAIVER ROGRAMS**

In 2019, CareStar Kentucky shared the CareStar way of case management, while reaching out to and educating targeted providers on a one-on-one basis. Dungarvin, Res-Care and Bridges have been open to learning about CareStar Kentucky services. CareStar attended the KY-APSE (Association of People Supporting Employment) conference, Morehead Wellness Workshop and KAPP quarterly meeting. CareStar continues to participate monthly and quarterly in the Human Rights Committee and Behavioral Intervention Committees in a way that CareStar gives back to individuals served by the waiver. In a closed Program, not accepting new enrollees, CareStar has been performing this outreach to effectively land our first cases and grow our case management presence in Kentucky.

## Personal Services

In 2019, CareStar made the strategic decision to expand our services along the Healthcare Provider continuum by acquiring, FamilyWatch, a Personal Services Agency located in Fort Wright, KY, started by retired Registered Nurse, Chis Heimbrock-Hiltz, after recognizing a need from her own experience with a family member. In continuing the great services that FamilyWatch began 31 years ago (roughly around the same time CareStar was founded), CareStar Personal Services provides friendship to those, who need it the most. Our Caregivers are called upon when families need a trustworthy individual, who will look out for the client's best interests, provide in-home services and, most importantly companionship. Each of our Caregivers take the time to get to know their clients on an individual level, making the relationship they have with each client unbreakable. A shining example, among many, Jane McBreen and a client of her's, decided to celebrate the Kentucky Derby during one of their visits this past spring. Jane brought her client a derby-hat, decorated for the race and prepared special derby-day treats. The client, who always praises Jane's dedication to her job, remembered it as one of the most memorable, fun days she had this year.

Currently, CareStar Personal Services provides care to 23 individuals, who continue to live in homes of their own because of the supports they receive from CareStar. By creating a "support community" for these people, they continue to live their best lives.

## Support Services

CareStar has developed the Support Services Department over the last year. The Team serves both our internal and external communities everyday within multiple facets of our organization. As mentioned in the Clinical Sections, Support Services is involved with the OHC Waiver, SRS, DDRS, and soon hope to be of assistance to Personal Services and the new Community-to-Home Program starting in Pennsylvania, in 2020.

The Support Services Team assists with over 85 tasks across the above-mentioned Programs. All the efforts help assist all staff members within CareStar, including, but not limited to, providing the best customer service and intake experience for those we serve, data entry for Program administration and billing, performing provider verifications, mailing service plans, and performing support navigation. Many members on the team have begun cross-training in areas they historically have not worked, which provides a dual benefit to them in skill-building and to the Company in efficiency. It provides better coverage across the many Departments and Programs across CareStar, so one (1) person is not the only person trained on a specific task, as well as provides broader experience and accuracy for jobs to be performed when people are absent or otherwise unavailable.

The Support Services Departments is a great mix of full-time employees and interns, or Rising Stars. CareStar's Rising Star Internship Program continues to expand as many new Rising Stars are welcomed to the Team. CareStar currently has 23 Rising Stars, which increased from 16 in 2018. The Rising Stars in Support Services assist with the SEP and Intake Programs, along with various project work for the Operations, Finance, IT and Human Resources Departments. In addition, CareStar continues to support DePaul Cristo Rey students at the Cincinnati location, who are an integral part of the CareStar administrative operations.

## Quality Improvement

At work, QI Department Team Members view their job responsibilities as another opportunity to support CareStar's mission of "Improving Communities by Improving Lives". During 2019, the QI Team has:

1. Conducted clinical record reviews to ensure quality in CareStar's assessment and case management processes and to evaluate the health and safety of individuals served.
2. Is on track to obtain over 1,700 Patient Satisfaction Survey responses across all Programs in the States of Ohio, Indiana and Georgia. Satisfaction with CareStar services remains high, with 9.5 out of 10 individuals expressing satisfaction for most survey questions.
3. In collaboration with leadership, helped CareStar achieve three (3)-year accreditation from the Commission on the Accreditation of Rehabilitative Facilities (CARF).
4. Conducted over 150 face-to-face initial assessments for applicants of the OHC Waiver.
5. Assisted in responding to the needs of thousands of after-hours callers by answering standard questions or making a referral to the clinical staff member on duty.
6. Participated in the development, coordination and narrative response for eight (8) Requests for Proposal (RFPs), or other business development proposals, submitted by CareStar during the calendar year.
7. Served as a resource for the fulfillment of records requests, as well as addressing and monitoring compliance with HIPAA regulations.

The upcoming calendar year promises to be one where the QI Team can continue to make an impact by: developing a Risk Management Program, collecting, analyzing and reporting quality outcome metrics data across Programs, States and in conjunction with the Buckeye HEDIS and the Hamilton County Senior Navigation Programs.

# Outreach Efforts

## Accreditations and Awards

1. Finalist for the Goring Center Award for Small and Private Business.
2. Clean HITRUST Audit for CSIS and CareStar.
3. Clean CARF Audit.
4. Clean Financial, 401k and ESOP Audit.
5. Clean Buckeye Health Plan Audit with Zero Deficiencies.

## CareStar Gives Back

**2019 Walk MS** - Thank you to Sally Johnston, Clinical Manager, and all the local Walk leaders for continuing CareStar's strong contribution to the Multiple Sclerosis Society.

**Josephine Walters Scholarship** - The Josephine Walters–CareStar Scholarship Fund has



been a long-standing philanthropic effort to ensure a supported education for future nurses and social workers that are the future of our



profession. This endowed scholarship provides tuition assistance to area colleges in the communities we serve. Scholarships are awarded to applicants who have academically excelled in their individual nursing programs and need additional funding to complete their courses of study. Since its inception in 1993, continuing through today, this fund has distributed more than \$500,000 to hundreds of students in need, largely through the donations of employees, friends, partners, and business associates of CareStar.

**Ms. Wheelchair USA** - We continued our great partnership and support of the Ms. Wheelchair USA Pageant. The weeklong pageant filled with activities is truly an inspiration for self-confidence, beauty and empowerment. CareStar contributed to the competition as a Friend Sponsor, as well as setup and tear-down of the venue. Thank you to Paul Howe, Director of Clinical Services, Sonia Pereira, HR Generalist, and Donna Keener, Education Manager, for helping the Dane Foundation make this event a success.

**Internship Programs** - CareStar provides a robust Internship Program through which students in various healthcare, social work, and business fields can build their resume and contribute to our ability to Improve Communities by Improving Lives. From high school students at DePaul Cristo Rey High School in Cincinnati, OH, to master's level Social Work and Health Services Administration students, Rising Stars complete valuable tasks that support all Departments within CareStar. There isn't an aspect of the Company they do not see or positively impact. The list of schools and universities increased in 2019 and are:

- DePaul Cristo Rey High School.
- LaSalle High School.
- Elder High School
- Indiana University.
- Indiana Wesleyan University.
- Cleveland State University.
- Xavier University.
- University of Cincinnati.
- The Ohio State University.
- Dayton University.

These strong partnerships also play a key role in CareStar's long-term recruiting strategy and will continue to expand in future years.

### **Community Service**

Each employee and each Department do a fantastic job embracing the call to service, beyond just the great work performed through CareStar. In 2019, employees performed a total of 10,381 community service hours.

The list of organizations served include:

- Disability rights.
- Schools of all ages.
- Food Banks/Food Pantries.
- Young Living Foundation.
- International Friendships, Inc.
- The Arthritis Foundation.
- Nursing Homes.
- Sorority.
- Army National Guard.
- March of Dimes.
- Churches.
- Hope Heritage Days.
- Coaching.
- Youth Football.
- PTO.
- Salvation Army.
- Self Defense for women/teenagers.
- Best Buddies Citizenship and Mentor.
- Disability Walks.
- Couponing and Donating.
- Women's Recovery.
- A Child's Hope International.
- Maya Health Alliance.
- True Word Tabernacle.
- Tri C Community College.
- Highland County Jail Ministry.
- Hamilton County Jail Ministry.
- St. Francis Seraph Ministries.
- Archdiocese Leadership Council.
- Isabella's Closet.

- Humane Society.
- County Extension.
- Gay Rights.
- Homemakers.
- Autism Awareness.
- School Robotics Team.
- Girl Scouts.
- Gymnastics Volunteer.
- Mozell Sanders Foundation.
- CASA/Youth Guardianship.
- Community Working Together.
- Foster Children.
- Domestic Violence.
- Child Abuse.
- Ovarian Cancer.
- Project Redwood.
- Special Olympics.
- Iglesia Luterana Cristo Rey.
- Catholic Community Foundation.
- Order of Malta.
- Ruah Woods.
- Xavier University Alternative Breaks.
- Mathew 25 Ministries.
- St. Joseph's Orphanage.
- Houston Food Banks.
- Ronald McDonald House.
- Oldenburg Academy.
- ACMPE.
- Xavier University (HUB, Mentor Advisory Committee, served as mentor, WOX, Alzheimer's Walk, Hoops and Hops, Taste of the Neighborhood, Breast Cancer Luncheon, presenter-BHSA class).
- Teaching at Local Universities.
- Mentoring.
- Public Service Organizations.
- Community Engagement.
- Josephine Walters CareStar Scholarship Fund.
- Operation Shoe Box.

## CareStar Learning

CareStar Learning continues to provide clinical practitioners in the market a centralized, easy-to-use portal to procure and track continuing education credits. CareStar accomplished its goal to increase agency sales by increasing the number of agencies to which it sold courses by 20%. CSL continues to service independent customers and agencies across the United States, with the majority residing in the Midwest. In 2018, CSL's independent customer base increased significantly, and in 2019, the agency customer base increased significantly. The focus of 2020 will be to update top selling courses that have not been updated in a couple of years, and, again, increase both customer bases to drive increased revenue.

The continues to be invaluable in eliminating the administrative burden for customers, agencies and the Company to deliver and track compliance to Federal, State and Certification requirements. It is a great example of how innovation and technology to can improve processes, so users and administrators can focus their time on positively impacting the lives of the individuals they serve.

## CareStar Information Systems (CSIS)

CSIS thru case management applications, provides data for multiple programs that helps Case Managers manage the needs of the individuals they serve.

In October 2018, CSIS started a new relationship with CareStar and CareSource and ended a contractual relationship with the Ohio Department of Medicaid (ODM). In 2019, CSIS continued this relationship by providing support to the user groups of each organization. In addition to weekly meetings with each organization, CSIS hosts a joint monthly meeting with both organizations to discuss the applications.

In 2019, CSIS began the process to develop applications for the Buckeye HEDIS Program, Hamilton County Senior Support Navigation, Single Entry Point (SEP) and the new Pennsylvania Community-to-Home Program. These applications will be different than the CSCMS2 or SRS Case Management applications used by CareStar and CareSource. The new applications are being developed to help CareStar Case Managers and Community Health Partners manage and report on the individuals in their caseload. These applications take information from a program-specific assessment and generate goals on a service plan. This information is structured in a way that is conducive in generating reports for CareStar customers and for storage in our Data Warehouse.

CSIS also continues to align its processes with the frequently changing HITRUST Certification requirements, which demonstrates CareStar's ongoing commitment to excellence in Data Privacy and Security to all current and future customers.

## Data Analytics

Data Analytics provides reporting of pertinent data for Case Managers and Managers, from a myriad of different systems related to the Programs served by CareStar, CareStar of Indiana, CareStar of Georgia and CareStar Personal Services. Data Analytics continues to eradicate manually maintained Excel spreadsheets, replacing them with Tableau reports from system generated data, which are delivered to the end user at the time and frequency needed.



CareStar is a special Company that has seized the opportunity to positively impact lives of the individuals we serve every day. It is only through each individual's unwavering commitment that this is possible. As CareStar continues to grow, adapt and more opportunities are presented, we must never waiver on our commitment to live and share the Vision, Mission and Values! Thank you for a great 2019 and we look forward to a better 2020!

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