

From: Kester, Tony
To: Pondy, Kevin <pondyk@aging.sc.gov>
Date: 4/22/2014 8:30:33 AM
Subject: FW: Aging budget questions

Tony Kester
Aging Director
South Carolina Lieutenant Governor's Office on Aging
1301 Gervais Street, Suite 350
Columbia, SC 29201
Phone 803-734-9910, Fax 803-734-9886
kester@aging.sc.gov

CONFIDENTIALITY NOTICE: This electronic email may contain information that is privileged, confidential, and/or otherwise protected from disclosure to anyone other than its intended recipient(s). Any dissemination or use of this electronic mail or its contents by persons other than the intended recipient(s) is strictly prohibited. If you have received this communication in error, please notify the sender immediately by reply email so that we may correct our internal records. Please then delete the original message.

From: Marvile Thompson [mailto:mthompson@lowcountrycog.org]
Sent: Tuesday, November 12, 2013 3:24 PM
To: Aging, PSA Help
Cc: Chris Bickley; Kester, Tony; Sherry Smith
Subject: FW: Aging budget questions

We are requesting a meeting with someone from the finance dept. to resolve the issues stated by the COG's Finance Director in an email to me. We are five months into the fiscal year and have not billed for service coordination for group dining, home delivered meals, home care and minor home repair. Staff is doing the work however we need technical assistance on how to set it up in AIMS and how to invoice for it. The Finance Director also has other concerns that need to be addressed.

Please respond as soon as possible. We are willing to come to Columbia.

Marvile J. Thompson, Director
Area Agency on Aging/ADRC



From: Sherry Smith
Sent: Thursday, October 24, 2013 4:14 PM
To: Marvile Thompson
Cc: Chris Bickley
Subject: Aging budget questions

Marvile,

I still have several unresolved issues with the Aging budget, Aging Area Plan and the Aging NGA. Since my direct communication with the State Aging Unit has been cut off, I need your help in getting these questions answered. I did attempt to address some of this via email, but answers are slow and the answer usually leads to another question.

What I would really like is to request a meeting with the finance staff at the State Aging Unit so that we could discuss how they would prefer to handle these issues before we get too far into the fiscal year.

Below are some of my concerns:

- The NGA doesn't match our area plan. Specifically we requested \$57,462 in III B federal funds for the IR&A position. We were granted \$28,600. This is same amount we had in FY11/12. Does this mean that the Area Plan budget for IR&A was denied or did the state just copy last year's amount? Or is it ok to move some IIIB funds from the HCBS section to the Internal Section?
- I don't understand the division of funds between Internal and Home and Community Based Services. In our region, there are programs that are run here at the AAA and the funding is listed under HCBS. Specifically, we proposed in the Area Plan to handle Assessments for the region here at the AAA with IIIB funds. Those funds are currently lumped with the other III B Supportive Services funds under HCBS section of the NGA. We are also running our Minor Home Repair program with State HCBS funds at the AAA. The new Alzheimer's and Respite funds are also listed under HCBS. It is possible that the State Aging Unit considers all of this Home and Community Based and that is why it is not in the Internal Operations section. I am fine with that, but I just want to be sure they understand what we are using those funds for and that they approve.
- We need guidance on how to draw the Service Coordinator's/Assessments funds. As of 9/30/13 I still haven't invoiced for reimbursement. Since these funds are lumped in with IIIB Supportive Services funds, I assume units must be entered in the AIM system. Without doing so, the new MUSRIII b-dm report will not reconcile with my Payment Request Form. If this service is a per unit reimbursement, we need a definition of a unit in order to compute a unit reimbursement rate.
- We also need guidance on the Minor Home Repair program. Since reimbursement is now tied to units of service in the AIM system, we need a process to convert staff time to units of service. Currently, we use \$10.00 as both a unit and a unit cost rate. So for each \$10.00 spent on direct supplies for the client we consider they received X amount of units. Our problem is converting staff time to units of service. I would like to discuss the best method to do this. I think we really need a definition of a unit in order to proceed.
- In an earlier email to psahelp@aging.sc.gov, I mentioned that our payments to our providers, do not match the MUSR reports because there is not a place in AIM for NSIP funds. The State Aging Unit answered and said that they were aware and that the problem was being addressed. Do you know if any changes have been made? After speaking with other AAA's in the state, I think we are all handling these funds differently. In this region, we don't enter those funds anywhere in the AIM system. NSIP is treated as another funding source for meals and is part of the provider unit reimbursement rate. I spoke to some areas who are also using it as part of the unit reimbursement rate and are combining it in AIM with the C-1 and C-2 rates. How does the State want us to do it?

These questions are very specific to our region and I think they would be best addressed in a face to face conversation with the finance staff at the State Aging Unit. Will you request a meeting with them? As I said earlier, the fiscal year is ticking away and I want to handle this situation as quickly as possible.

Thanks.

Sherry