

From: Kester, Tony
To: 'Steve Pelissier' <pelissier@scacog.org>
Theriot, Susan <stheriot@aging.sc.gov>
Carolyn Breeze <cbreeze@scacog.org>
CC: Pondy, Kevin <pondyk@aging.sc.gov>
Hightower, Paula <hightowr@aging.sc.gov>
Tim Womack <twomack@scacog.org>
Hoard, Betsy <bhoard@aging.sc.gov>
Date: 4/16/2013 7:41:42 AM
Subject: RE: One time Adjustment

Steve,

This is the very reason I say there should be slots budgeted for each funding source. You know how many clients should be on each source and can adjust during the year for maximum utilization.

Thanks.

Tony

From: Steve Pelissier [mailto:pelissier@scacog.org]
Sent: Monday, April 15, 2013 9:51 PM
To: Theriot, Susan; Carolyn Breeze
Cc: Pondy, Kevin; Hightower, Paula; Tim Womack; Hoard, Betsy; Kester, Tony
Subject: RE: One time Adjustment

Sue:

As I recall from our March 27th group phone conversation the message was that repeatedly moving people back and forth among programs is not allowed. Also, in general, this type of movement is discouraged; however, a one-time, or limited transfer, especially near the end of the year, can be appropriate for a good reason, such as to ensure effective fund utilization, or to ensure that high priority clients are served, etc.

Is my recollection correct?

Thanks,
Steve

From: Theriot, Susan [mailto:stheriot@aging.sc.gov]
Sent: Friday, April 12, 2013 7:54 AM
To: Carolyn Breeze
Cc: Pondy, Kevin; Hightower, Paula; Steve Pelissier; Tim Womack; Hoard, Betsy; Kester, Tony
Subject: RE: One time Adjustment

Hi Carolyn.

I know that the Appalachia team is working hard to address many service provider issues in your region. Have you consulted Tim and Steve on direction of this issue prior to submitting this request to our agency? Tim should be able to give you direction on this question.

Thanks
Sue

From: Hoard, Betsy
Sent: Thursday, April 11, 2013 12:45 PM

To: 'Carolyn Breeze'
Cc: Pondy, Kevin; Hightower, Paula; Theriot, Susan
Subject: RE: One time Adjustment

Carolyn, I am an IT staff person.

This is a question that should be directed more towards finance and programs. Therefore, I am referring this question to my supervisor Kevin and cc'ing Sue.

From: Carolyn Breeze [<mailto:cbreeze@scacog.org>]
Sent: Thursday, April 11, 2013 12:29 PM
To: Hoard, Betsy
Subject: One time Adjustment

Betsy,

In reviewing the request for funds for our region, I see that one agency has transportation funded in both Title III-B And in HCBS. They are under serving in transportation overall. Their reports show that they have served 100% of their

HCBS transportation units YTD but have more units to serve in Title III-B. Can we allow them to make a one-time adjustment

In re-distributing their clients so that Title III B can pick up some of the clients that can no longer be served through HCBS?

If necessary, I can ask them to first move those HCBS clients to the waiting list, then move them into Title III-B. We may have

To do a little bit more of this type of thing as we near the end of the year especially since the assignment of clients is always

A best estimate and never an exact science.

Please let me know what you think.

Thank you.
Carolyn