

**From:** Kester, Tony <kester@aging.sc.gov>  
**To:** Chris Bickleycbickley@lowcountrycog.org  
**Date:** 3/18/2014 8:00:30 AM  
**Subject:** Re: (Lowcountry) AAA Budget Changes  
**Attachments:** image001.jpg

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Chris

We are going to add an activity for assessment under III-B. You can then charge your assessment costs under there. If you have any questions let me know.

Tony

Sent from my iPad

On Mar 14, 2014, at 4:28 PM, "Chris Bickley" <cbickley@lowcountrycog.org> wrote:

Tony-

We need to decide how we are to be paid for doing assessments. We first broached the subject by email last May and multiple times since. We also discussed it face-to-face in November. We think it's time for a decision.

Please call me. We think the matter can be settled on the phone, but if not, we're prepared to come to your office.

I look forward to hearing from you.

Have a good weekend.

Chris Bickley

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**From:** Sherry Smith  
**Sent:** Thursday, March 13, 2014 4:32 PM  
**To:** Chris Bickley  
**Subject:** FW: (Lowcountry) AAA Budget Changes

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**From:** Marvile Thompson  
**Sent:** Thursday, March 13, 2014 1:17 PM  
**To:** Sherry Smith  
**Subject:** FW: (Lowcountry) AAA Budget Changes

This is the email I tried to send you yesterday.

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

<image001.jpg>

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**From:** Finance Help, Aging [<mailto:financehelp@aging.sc.gov>]  
**Sent:** Wednesday, March 12, 2014 8:50 AM  
**To:** Chris Bickley; Marvile Thompson  
**Cc:** Finance Help, Aging; Kester, Tony; Theriot, Susan  
**Subject:** FW: (Lowcountry) AAA Budget Changes

Dear Mr. Bickley and Ms. Thompson:

Thank you for your recent email regarding follow-up LGOA questions addressing budget changes for Lowcountry PSA. The LGOA appreciates the effort exhibited toward analyzing Lowcountry's unit assessment rate. Upon further review it is clear to the LGOA that AAA/ADRC is performing the assessment function. The LGOA took into consideration the request from the February 3<sup>rd</sup> email (item #2) requesting an additional .15 cents be added to each unit of service. At the present time, it is not feasible for the LGOA to increase the unit rate. However, there are a few existing options that may be considered:

- It may be easiest to renegotiate the provider contract during the procurement process, being a mere four months away from the start of the new fiscal year,
- Another effective option may involve collaborative dialogue with the provider to address the best way to recuperate any overpayments for services not rendered.

Thank you for your continued partnership in our mission to enhance the lives of South Carolina's seniors and adults with disabilities.

Single Point Of Contact  
South Carolina Lieutenant Governor's Office on Aging  
1301 Gervais Street, Suite 350  
Columbia, SC 29201

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**From:** Marvile Thompson [<mailto:mthompson@lowcountrycog.org>]  
**Sent:** Monday, March 03, 2014 5:20 PM  
**To:** Finance Help, Aging  
**Cc:** Sherry Smith; Chris Bickley  
**Subject:** RE: (Lowcountry) AAA Budget Changes

The Lowcountry Council of Governments AAA/ADRC is responsible for conducting assessments and reassessments. This has been in place since July 1, 2013. Please see attached document that was a part of our contract extensions for this program year.

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

<image001.jpg>

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**From:** Finance Help, Aging [<mailto:financehelp@aging.sc.gov>]  
**Sent:** Thursday, February 27, 2014 12:03 PM  
**To:** Chris Bickley; Marvile Thompson  
**Cc:** Finance Help, Aging; Kester, Tony; Theriot, Susan  
**Subject:** FW: (Lowcountry) AAA Budget Changes

Dear Mr. Bickley and Ms. Thompson:

Thank you for your recent email regarding follow-up LGOA questions addressing budget changes for the Lowcountry PSA. The LGOA has a follow-up question, which will help in addressing the funding request.

What party is responsible for the assessment based on the provider contract? Please provide insight as well as a copy of the contract to the LGOA.

As to the request to move Federal III B funds from III B Supportive Services (4B10) to III B I&R/A (4B09), your request has been approved. A hard copy will be mailed today.

Thank you for your continued partnership in our mission to enhance the lives of South Carolina's seniors and adults with disabilities.

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**From:** Sherry Smith [<mailto:ssmith@lowcountrycog.org>]  
**Sent:** Friday, February 07, 2014 2:00 PM  
**To:** Finance Help, Aging  
**Cc:** Marvile Thompson; Chris Bickley  
**Subject:** RE: (Lowcountry) AAA Budget Changes

Please see my answers to your questions below.

Thank you for your consideration.

Sherry Smith  
Finance Director

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**From:** Marvile Thompson  
**Sent:** Wednesday, February 05, 2014 4:21 PM  
**To:** Sherry Smith  
**Subject:** FW: (Lowcountry) AAA Budget Changes

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

<image001.jpg>

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**From:** Finance Help, Aging [<mailto:financehelp@aging.sc.gov>]  
**Sent:** Wednesday, February 05, 2014 3:54 PM  
**To:** Chris Bickley; Marvile Thompson  
**Cc:** Finance Help, Aging; Aging, PSA Help  
**Subject:** (Lowcountry) AAA Budget Changes

Dear Mr. Bickley and Ms. Thompson:

Thank you for your recent email concerning budget changes for the Lowcountry PSA. The LGOA has formulated a response, which addresses your funding request.

As to the request to move Federal III B funds from III B Supportive Services (4B10) to III B I&R/A (4B09), please provide further information on the number of I&R/A contacts made by the PSA. For FY12/13 the number of contacts were 3,679. Year to date for FY13/14 are 4,125.



With regards to the reimbursement process for assessments, if the provider/contractor is no longer conducting the assessment, was the unit rate decreased by .15 to reflect that change? We also discussed in the meeting with Tony Kester. I think Susan Theriot has notes from that meeting. We did not reduce any contracted rates to reflect the change in the assessment process. Per State Aging Unit instructions, we didn't allow any increases in unit costs for the last three fiscal years, except for the direct increases for catered meal rates. With that in mind, we decided not decrease any rates for FY13/14 because the providers had been so long without any increases. I also failed to mention that we aren't asking for additional funds to fund the assessments. I budgeted for the assessments on Form 4AP AAA Operating budget under the HCBS column. I needed clarification on the method we need to use to draw down the funds. I understand that my internal regional budget will have to be revised. I budgeted for the assessments to be a IIIB service. Now that reimbursement will come from all funding sources, I will need to review the current budget and adjust for that. I think I do that using HCBS state funds to fill the gap.

Please provide clarification by Monday, February 10, 2014, so that the LGOA can review this request.

Thank you for your continued partnership in our mission to enhance the lives of South Carolina's seniors and adults with disabilities.

#### Single Point Of Contact

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Columbia, SC 29201

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**From:** Sherry Smith [<mailto:ssmith@lowcountrycog.org>]  
**Sent:** Monday, February 03, 2014 3:04 PM  
**To:** Kester, Tony  
**Cc:** Aging, PSA Help; Chris Bickley; Marvile Thompson  
**Subject:** Lowcountry AAA budget changes

Tony,

This is a follow up to our November meeting. Marvile and I had several budget issues in the Lowcountry that we needed your advice on how to handle. You asked me to get back to you with the exact amounts and changes that we need.

Below are our requests:

1. We need to move \$28,862 in Federal III B funds from IIIB Supportive Services (4B10) to III B I&A (4B09). In the budget submitted with the Area Plan we asked to fund our I&A Counselor at 100%. We were able to do this and still remain within our IIIB allocation. We aren't asking for more III funds, only to reallocate them on the NGA.
2. We are providing Assessments for the entire region here at the AAA level this year. I needed help with the reimbursement process. You explained that the cost of assessment was included in the unit reimbursement rate per service. We discussed calculating a per unit assessment rate and adding that to the current reimbursement rates in the AIM system. I have determined that a rate of .15 should be added to each unit of service. I used two of the Area Plan budget pages to compute the .15. On Form 4AP AAA Operating budget, we estimated that cost of Assessments/Case Mgt for the year would be \$112,323. On Form 8AP Summary of Contracted Units, the total of all units for the region was 794,109. Dividing the budget by the estimated units gives us a rate of .15. Once I get your approval of this process, I will contact Kevin Pondy to help with getting the changes made in the AIM system so that we

can begin to collect the fees.

3. During our discussion about moving IIIB funds into I&A, you mentioned the additional State Support of \$50,000 to each AAA.

You asked me for an accounting of how we are using those funds. We are requesting to use those funds as match. Since we are providing the assessments here, we will need an additional \$11,232 to match the \$112,323 in #2 above. We will also need an additional \$3,395 for the I&A match in #1 above. The balance will be used to help with the 25% match on P&A funds. We also provide Homecare and a Minor Home Repair program through HCBS funds that have a 10% match this fiscal year. We are trying to document in-kind match for those services, but if we come up short then we will have to come up with cash match.

Please consider these changes and let me if you agree with moving forward.

Sherry Smith  
Finance Director