



# COASTAL HEALTH & WELLNESS

## GOVERNING BOARD

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

### AGENDA

Thursday, October 31, 2019 – 12:00 PM

**CONSENT AGENDA:** ALL ITEMS MARKED WITH A SINGLE ASTERICK (\*) ARE PART OF THE CONSENT AGENDA AND REQUIRE NO DELIBERATION BY THE GOVERNING BOARD. ANY BOARD MEMBER MAY REMOVE AN ITEM FROM THIS AGENDA TO BE CONSIDERED SEPARATELY.

#### *PROCEED TO BOTTOM OF THIS DOCUMENT FOR APPEARANCE & EXECUTIVE SESSION GUIDELINES*

In accordance with the provisions of the Americans with Disabilities Act (ADA), persons in need of a special accommodation in order to participate in this proceeding should, within two (2) days prior to the proceeding, request necessary accommodations by contacting CHW’s Executive Assistant at 409-949-3406, or via email at [trollins@gchd.org](mailto:trollins@gchd.org).

ANY MEMBERS NEEDING TO BE REACHED DURING THE MEETING MAY BE CONTACTED AT 409-938-2288  
**REGULARLY SCHEDULED MEETING**

#### Meeting Called to Order

- \*Item #1**ACTION**..... Agenda
- \*Item #2**ACTION**..... Excused Absence(s)
- \*Item #3**ACTION**..... Consider for Approval Minutes from September 26, 2019 Governing Board Meeting
- \*Item #4**ACTION**..... Consider for Approval Minutes from October 17, 2019 Governing Board Quality Assurance Committee Meeting
- \*Item #5**ACTION**..... Consider for Approval Quarterly Investment Report
- \*Item #6 ..... Informational Items  
Policies Approved by the United Board of Health as Authorized Under the Shared Services Agreement:
  - a) Mother Friendly Worksite Policy
- Item #7 ..... Executive Report
- Item #8**ACTION** ..... Consider for Approval Preliminary September 2019 Financial Report
- Item #9**ACTION** ..... Consider for Approval Quarterly Visit and Analysis Report Including Breakdown of New Patients by Payor Source
- Item #10**ACTION** ..... Consider for Approval Quarterly Access to Care Report
- Item #11**ACTION** ..... Consider for Approval Quarterly Patient Satisfaction Survey Report
- Item #12**ACTION**..... Consider for Approval Risk Management Plan
- Item #13**ACTION**..... Consider for Approval Quarterly Compliance and Risk Management Report

- Item #14**ACTION** ..... Consider for Approval Coastal Health & Wellness Budget Period Progress Report (BPR) Non-Competing Continuation (NCC) for Submittal to HRSA
- Item #15**ACTION**..... Consider for Approval Patient No Show Policy (*New Policy*)
- Item #16**ACTION**..... Consider for Approval Re-Privileging Rights for Emily Bailey, MSW, LCSW
- Item #17**ACTION**..... Consider for Approval Privileging Rights for the following UTMB Residents:
  - a) Zuleica Santiago Delgado, MD
- Item #18**ACTION** ..... Consider for Approval the Appointment of Flecia Charles to Complete The Unexpired Term of the Vacant Consumer Representative on the Coastal Health & Wellness Governing Board with a Term Expiring June 2020
- Item #19 ..... Update on Next Steps Regarding Refresh of the Galveston Clinic

**Adjournment**

*Tentative Next Meeting: November 14, 2019*

**Appearances before the Coastal Health & Wellness Governing Board**

The Coastal Health & Wellness Governing Board meetings are conducted under the provisions of the Texas Open Meetings Act, and members of the public that wish to address the Board about an item presented on the agenda shall be offered three minutes to do so. The Board cordially requests that individuals desiring to make a such a statement notify the Board of their intention by writing their name on the sign-in sheet located at the Boardroom’s main entrance.

A citizen desiring to make comment to the Board regarding an item not listed on the agenda shall submit a written request to the Executive Director by noon on the Thursday immediately preceding the Thursday of the Board meeting. A statement of the nature of the matter to be considered shall accompany the request. The Executive Director shall include the requested appearance on the agenda, and the person shall be heard if he or she appears.

**Executive Sessions**

When listed, an Executive Session may be held by the Governing Board in accordance with the Texas Open Meetings Act. An Executive Session is authorized under the Open Meetings Act pursuant to one or more the following exceptions: Tex. Gov’t Code §§ 551.071 (consultation with attorney), 551.072 (deliberation regarding real property), 551.073 (deliberation regarding a prospective gift or donation), 551.074 (personnel matters), 551.0745 (personnel matters affecting Coastal Health & Wellness advisory body), 551.076 (deliberation regarding security devices or security audits), and/or 551.087 (deliberations regarding economic development negotiations). The Presiding Officer of the Governing Board shall announce the basis for the Executive Session prior to recessing into Executive Session. The Governing Board may only enter into Executive Session if such action is specifically noted on the posted agenda.



# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board  
October 2019  
Item #2  
Excused Absence(s)**

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #3**

**Consider for Approval Minutes from September 26, 2019**

**Governing Board Meeting**

**Coastal Health & Wellness  
Governing Board  
September 26, 2019**

**Board Members**

**Present:**

David Delac  
Milton Howard, DDS  
Jay Holland  
Victoria Dougharty  
Virginia Valentino  
Aaron Akins  
Elizabeth Williams  
Dorothy Goodman  
Samantha Robinson  
Barbara Thompson, MD

**Staff:**

Kathy Barroso, Executive Director  
Hanna Lindskog, DDS  
Cheryl Golla  
Mary Orange  
Michelle Peacock  
Kristina Garcia  
Tiffany Carlson  
Ashley Tompkins  
Debra Howey

Cynthia Ripsin, MD  
Eileen Dawley  
Andrea Cortinas  
Richard Mosquera  
Amanda Wolff  
Kenna Pruitt  
Paula Compton  
Tyler Tipton  
Andy Mann  
Tikeshia Thompson Rollins

**Excused Absence:** Miroslava Bustamante

**Items 1-6 Consent Agenda**

A motion was made by Virginia Valentino to approve the consent agenda items one through six. Dr. Howard seconded the motion and the Board unanimously approved the consent agenda.

**Item #7 EXECUTIVE SESSION**

**Executive Session: Texas Government Code Section 551.071, Consultation with Attorney: The Governing Board will enter into an executive session as permitted under the Texas Open Meetings Act, Chapter 551 of the Texas Government Code, pursuant to Section 551.071 of the Government Code to seek the advice of its attorney about pending or contemplated litigation, a settlement offer, or on a matter in which the duty of the attorney to the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with the Open Meetings Act relating to each of the following items:**

- a) A pending EEOC matter.

**Item #8 Reconvene Regular Open Meeting**

The Open meeting was reconvened at 12:28p.m.

**Item #9 Possible Action from Executive Session**

No Action

**Item #10 Recognition of David Delac for his Dedicated Service to the Coastal Health & Wellness Governing Board from 2016-2019**

Dr. Howard presented David Delac with a plaque for his dedicated service to the Coastal Health & Wellness Governing Board from 2016-2019.

**Item #11 Executive Report**

Kathy Barroso, Executive Director, presented the September 2019 Executive Report to the Board.

**Item #12 Consider for Approval August 2019 Financial Report**

Mary Orange, Business Office Manager, presented the August 2019 financial report to the Board. A motion to accept the financial report as presented was made by Jay Holland. Virginia Valentino seconded the motion and the Board unanimously approved.

**Item #13 Consider for Approval Budget for Additional Funding Received from HRSA in the Amount of \$110,000 to Continue the Substance Use Disorder-Mental Health (SUD-MH) Program**

Mary Orange, Business Office Manager, asked the Board to consider for approval the budget for additional funding received from HRSA in the amount of 110,000 to continue the SUD-MH program. A motion to accept the budget as presented was made by Virginia Valentino and seconded by Victoria Dougharty. The Board unanimously approved the motion.

**Item #14 Consider for Approval Budget for Additional Funding Received through the Direct Relief Recovery and Resiliency Community Health Fund in the Amount of \$146,140**

Mary Orange, Business Office Manager, asked the Board to consider for approval the budget for additional funding received through the Direct Relief recovery and resiliency community health fund in the amount on \$146,140. A motion to accept the budget as presented was made by Aaron Akins and seconded by Victoria Dougharty. The Board unanimously approved the motion.

**Item #15 Consider for Approval Purchase of M11 Sterilizer for the Texas City Dental Clinic in the Amount of \$5,655**

Mary Orange, Business Office Manager, asked the Board to consider for approval the purchase of a M11 Sterilizer for the Texas City Dental Clinic in the amount of \$5,655. Dr. Howard requested that the Governing Board revisit the maximum amount the CEO can approve without having to have the approval of the Board. Kathy informed the Board that the \$5,000 limit is stated in the Governing Board Bylaws which will need to be revised and brought to the Board for approval. A motion to accept the budget as presented was made by Aaron Akins and seconded by Victoria Dougharty. The Board unanimously approved the motion.

**Item #16 Consider for Approval the Coastal Health & Wellness After Hours Coverage Policy**

Kathy Barroso, Executive Director, asked the Board to consider for approval the Coastal Health & Wellness After Hours Coverage Policy. A motion to accept the policy as presented was made by Victoria Dougharty and seconded by Virginia Valentino. The Board unanimously approved the motion.

**Item #17 Consider for Approval the Coastal Health & Wellness Medication Management Policy**

Tiffany Carlson, Nursing Director, asked the Board to Consider for approval the Coastal Health & Wellness Medication Management Policy. Samantha Robinson requested that Tiffany remove the reference to sample medications if in fact Coastal Health and Wellness does not issue sample medications. A motion to accept the policy with the change of removing sample medications was made by Virginia Valentino and seconded by Dorothy Goodman. The Board unanimously approved the motion.

**Item #18 Consider for Approval Privileging Rights for Tokunbo Ibidapo-Obe, MD, UTMB Contractor**

Dr. Ripsin, Medical Director, asked the Board to consider for approval privileging rights for Tokunbo Ibidapo-Obe, MD. A motion to accept privileging rights for UTMB Contractor Dr. Tokunbo Ibidapo-Obe was made by Dr. Howard and seconded by Aaron Akins. The Board unanimously approved the motion

**Item #19 Consider for Approval Privileging Rights for the following UTMB Residents:**

Dr. Ripsin, Medical Director, asked the Board to consider for approval privileging rights for UTMB resident Daniela Rojas, MD.

A motion to accept privileging rights for Dr. Rojas was made by Victoria Dougharty and seconded by Aaron Akins. The board unanimously approval the motion.

**Item #18 Consider for Approval the Election of Governing Board Representatives to Serve in the Following Positions through September 30, 2020:**

Due to notice of the recent Board Chair vacancy, David Delac asked the Board to consider for approval the election of Governing Board representatives to serve in the following positions.

- a. Governing Board Chair
- b. Governing Board Vice Chair
- c. Governing Board Secretary/Treasurer

David Delac requested a motion for Board Chair. Dr. Howard made a motion to nominate Samantha Robinson, BSN, as Board Chair by acclamation. Jay Holland seconded the motion and the Board unanimously approved.

David Delac requested a motion for Vice Chair. Dorothy Goodman made a motion to nominate Dr. Howard as Vice Chair. Virginia Valentino seconded the motion and the Board unanimously approved.

David Delac requested a motion for Board Secretary/Treasurer. Dr. Howard made a motion to nominate Virginia Valentino as Secretary/Treasurer. Dorothy Goodman seconded the motion and the Board unanimously approved.

#### Adjournment

A motion to adjourn was made by Dr. Howard and seconded by Victoria Dougharty. The Board adjourned at 12:06 p.m.

\_\_\_\_\_

Chair

\_\_\_\_\_

Secretary/Treasurer

\_\_\_\_\_

Date

\_\_\_\_\_

Date

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #4**

**Consider for Approval Minutes from October 17, 2019 Governing  
Board Quality Assurance Committee Meeting**



**Coastal Health & Wellness  
Governing Board  
Quality Assurance Committee  
Meeting  
October 17, 2019**

**BOARD QA COMMITTEE MEMBERS PRESENT:**

Milton Howard, DDS – Vice Chair

**BOARD QA COMMITTEE MEMBERS ABSENT:**

Samantha Robinson, BSN – Chair

**EMPLOYEES PRESENT:**

Kathy Barroso (Executive Director), Eileen Dawley (Chief Nursing Officer), Cynthia Ripsin (Medical Director), Hanna Lindskog (Dental Director), Richard Mosquera (Chief Compliance Officer), Jason Borillo (Lead Midlevel), Debra Howey (Infection Control Nurse), Tiffany Carlson (Nursing Director), Virginia Lyle (Lab & X-Ray Supervisor), Andrea Cortinas (Chief Financial Officer), Pisa Ring (Patient Information Manager) & Anthony Hernandez (Executive Assistant II)

(Minutes recorded by Anthony Hernandez)

<b>ITEM</b>	<b>ACTION</b>
<p><b>Patient Access / Satisfaction Reports</b></p> <p>a) Quarterly Access to Care Report</p> <p>b) Quarterly Patient Satisfaction Report</p>	<p><b><u>Quarterly Access to Care Report</u></b></p> <ul style="list-style-type: none"> <li>• Quarterly Access to Care report was reviewed. No show rates were improved in comparison to last quarter except for counseling visits in Texas City and medical and dental hygienist visits in Galveston. Utilization rates were higher in all areas except for dental hygienist visits in Galveston.</li> </ul> <p><b><u>Quarterly Patient Satisfaction Report</u></b></p> <ul style="list-style-type: none"> <li>• The results of the July to September Patient Satisfaction Survey were presented and discussed. In comparison to last quarter, the overall weighted average score increased from 4.54 to 4.75.</li> </ul>
<p><b>Clinical Measures</b></p> <p>a) Quarterly Report on UDS Medical Measures in Comparison to Goals</p> <p>b) Update on UDS Dental Sealant Measure</p> <p>c) Update on Medical Quality Review Measures</p>	<p><b><u>Quarterly Report on UDS Medical Measures in Comparison to Goals</u></b></p> <ul style="list-style-type: none"> <li>• Kathy Barroso reviewed the quarterly progress report of UDS measures in comparison to 2020 goals.</li> <li>• Will continue to monitor and provide updates to the Committee quarterly.</li> </ul> <p><b><u>Update on UDS Dental Sealant Measure</u></b></p> <ul style="list-style-type: none"> <li>• Dr. Lindskog informed the QA Board Committee that the UDS Sealant measure improved from 22.22% to 55.55%</li> </ul> <p><b><u>Update on Medical Quality Review Measures</u></b></p> <ul style="list-style-type: none"> <li>• Dr. Ripsin reviewed the Medical Quality review Measures and Peer to Peer education plan.</li> </ul>

<p><b>Quality Assurance/Risk Management/ Emergency Management Reports</b></p> <p>a) Quarterly Risk Management Report (July to September)</p> <p>b) Infection Control / Environment Safety Audit Report</p>	<p><b><u>Quarterly Risk Management Report (July to September)</u></b></p> <ul style="list-style-type: none"> <li>Quarterly Risk Management report was presented and reviewed in comparison to current goals.</li> </ul> <p><b><u>Infection Control / Environment Safety Audit Report</u></b></p> <ul style="list-style-type: none"> <li>A summary of the Infection Control/Environment Safety Audit report was reviewed.</li> </ul>
<p>c) Draft Risk Management Assessment</p> <p>d) Culture of Safety/Leadership Feedback</p> <p>e) Dental Water Quality Reports and Assessment</p> <p>f) Emergency Management Report</p>	<p><b><u>Draft Risk Management Assessment</u></b></p> <ul style="list-style-type: none"> <li>Risk Management Assessment was reviewed; Goals will be presented to the Governing Board after receiving feedback from management staff.</li> </ul> <p><b><u>Culture of Safety/Leadership Feedback</u></b></p> <ul style="list-style-type: none"> <li>Eileen Dawley reviewed the responses from the Leadership team related to Culture of Safety. Another culture of safety survey will be repeated and distributed to the entire staff in early 2020 in order to gauge progress.</li> </ul> <p><b><u>Dental Water Quality Reports and Assessment</u></b></p> <ul style="list-style-type: none"> <li>Dr. Lindskog informed the QA Board Committee that the Dental chair #3 in Galveston was taken out of services due to water results. Will continue to test water and use Adec ICX tablets for daily water maintenance.</li> </ul> <p><b><u>Emergency Management Report</u></b></p> <ul style="list-style-type: none"> <li>Rocky reviewed the Emergency Management Report and gave an update on trainings and drills that had occurred during the quarter.</li> </ul>
<p><b>Plans and Policies</b></p> <p>a) Risk Management Plan</p> <p>b) Draft No-Show Policy</p>	<p><b><u>Risk Management Plan</u></b></p> <ul style="list-style-type: none"> <li>Risk Management Plan was reviewed.</li> <li>Plan will be presented at the October Governing Board meeting for approval.</li> </ul> <p><b><u>Draft No-Show Policy</u></b></p> <ul style="list-style-type: none"> <li>No-Show Policy was reviewed and discussed.</li> <li>Policy will be presented at the Governing Board meeting for approval.</li> </ul>
<p><b>Other Updates</b></p> <p>a) Process Improvement Changes Related to the Lab</p> <p>b) Next Steps Regarding Refresh of the Galveston Clinic</p>	<p><b><u>Process Improvement Changes Related to the Lab</u></b></p> <ul style="list-style-type: none"> <li>Virginia Lyle, Lab &amp; X-Ray Supervisor gave an overview of recent lab process improvements.</li> </ul> <p><b><u>Next Steps Regarding Refresh of the Galveston Clinic</u></b></p> <ul style="list-style-type: none"> <li>Fleet and Facilities Coordinator will be meeting with the Housing Authority to complete action plan and gather more information</li> </ul>
<p>Open Discussion</p>	<ul style="list-style-type: none"> <li>No additional comments</li> </ul>

Next Meeting: January 16, 2020

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# **COASTAL HEALTH & WELLNESS**

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #5**

**Consider for Approval Quarterly Investment Report**

**Coastal Health & Wellness  
Investment Report  
For the period ending September 30, 2019**

Coastal Health & Wellness	Money Market Account		
	July	August	September
Beginning Balance	\$1,349,254	\$1,172,544	\$1,555,871
Deposits	347,000	647,000	75,000
Withdrawals	(525,000)	(265,000)	(535,000)
Interest Earned	1,291	1,327	1,468
Ending Balance	\$1,172,544	\$1,555,871	\$1,097,339
Current Annual Yield	1.41%	1.41%	1.41%
Previous Quarter Yield (4/2019 - 6/2019)	1.41%	1.41%	1.41%

Tex Pool Investments			
	July	August	September
	\$3,598,395	\$3,605,692	\$3,612,342
	0	0	0
	0	0	0
	7,297	6,650	6,424
	\$3,605,692	\$3,612,342	\$3,618,765
	2.39%	2.17%	2.16%
	2.43%	2.40%	2.38%

FY19 Summary	Interest Earned	Avg Balance	Yield
October 1, 2018 to December 31, 2018	\$22,372	\$4,793,734	0.43%
January 1, 2019 to March 31, 2019	\$23,901	\$4,730,067	0.47%
April 1, 2019 to June 30, 2019	\$25,207	\$4,784,295	0.47%
July 1, 2019 to September 30, 2019	\$24,456	\$4,764,862	0.46%
YTD Totals	\$95,936	\$4,768,239	1.84%

Coastal Health & Wellness	Q1	Q2	Q3	Q4	YTD Comparison
Interest Yield Year to Year Comparison	Oct 1-Dec 31	Jan 1-Mar 31	Apr 1-June 30	Jul 1-Sept 30	Total as of 9/30
FY2016	0.13%	0.12%	0.12%	0.13%	0.50%
FY2017	0.13%	0.12%	0.12%	0.13%	0.50%
FY2018	0.14%	0.20%	0.30%	0.38%	1.02%
<b>FY2019 (Current year)</b>	0.43%	0.47%	0.47%	0.46%	1.84%

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# **COASTAL HEALTH & WELLNESS**

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #6**

**Policies Approved by the United Board of Health as Authorized Under  
the Shared Services Agreement:**

a) Mother Friendly Worksite Policy

# Mother Friendly Worksite Policy

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-Approved  
UBOH 09/25/2019  
-Effective 09/27/2012

## Audience

This policy applies to all actively breastfeeding Galveston County Health District, Galveston Area Ambulance Authority, Coastal Health & Wellness (collectively “the District”) employees.

## Policy

The District recognizes that breast milk is the recommended and normal food for healthy growth and development of infants and young children. The District promotes and supports breastfeeding and the expression of breast milk by employees who are breastfeeding when they return to work.

Management staff of the District shall work with breastfeeding employees to determine mutually agreeable hours or work, assignments and breaks which support breastfeeding practices for one year after the child’s birth.

The District has a designated Mother Friendly Worksite area that is in accordance to the Texas Statutes-Section. 165.003. Business Designation as “Mother-Friendly”.

Employees that utilize the Mother Friendly Worksite area should contact Human Resources.

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board  
October 2019  
Item #7  
Executive Report**



A monthly newsletter about Galveston County's Community Health Center, Coastal Health & Wellness.

# 2020 Marketplace enrollment begins Nov. 1

## *CHW offers free application assistance*

Open enrollment in the 2020 Health Insurance Marketplace begins Nov. 1 and runs through Dec. 15. Those who don't enroll by Dec. 15 cannot get 2020 coverage unless they qualify for a special enrollment period.

Coastal Health & Wellness (CHW) is here to help and offers free open enrollment application assistance.

Depending on an applicant's income, they may qualify for assistance paying monthly health care premiums.

Plans sold during open enrollment start Jan. 1, 2020.

There are three plan categories: Bronze; Silver; and Gold. The categories show how you and your plan share costs. The categories have nothing to do with quality of care.

"All plans cover essential health benefits, pre-existing conditions and preventative services," said Michelle Peacock, CHW patient care nurse case manager. "That includes maternity care, mammograms and other preventative care services."

Applicants cannot be denied health coverage for having pre-existing conditions such as diabetes, hypertension and

cancer.

Different plan types are designed to meet different needs.

Some plans restrict provider choices or encourage clients to get care from the plan's network of doctors, hospitals, pharmacies and other medical service providers.

Other plans pay a greater share of costs when clients use providers outside of the plan's network.

"It can be confusing. That's why we're here," Peacock said. "Our staff can help you figure out what all this means for you

and your family. What you pay for insurance depends on your income."

Depending on income, applicants may also qualify for an insurance plan with tax credits or for Medicaid/ Children's Health Insurance Program (CHIP). There is no open enrollment for individuals to apply for Medicaid, CHIP or the Texas Women's Health Program.

Health Insurance Marketplace is for those who do not have health coverage through a job, Medicare, Medicaid, CHIP or another source that provides qualifying health cov-



### 2020 COVERAGE IN THE

## HEALTH INSURANCE MARKETPLACE

NOVEMBER 1 - DECEMBER 15

WE CAN HELP YOU!  
(409) 978 - 4225





# 34M U.S. adults smoke cigarettes

## Great American Smokeout aims to encourage tobacco users to stop

Twenty minutes after quitting smoking, a person's heart rate and blood pressure drop. Two weeks to three months af-

ter, their circulation improves and lung function increases. After one year, their risk of coronary heart disease is half that of someone who still smokes.

And, after 15 years, their risk for coronary heart disease is that of a non-smoker's.

Quitting smoking isn't easy. It takes hard work, time and a plan. But it can be done and the American Cancer Society (ACS) is here to help with access to resources and support needed.

Nov. 21 marks the Great American Smokeout, an annual effort to encourage the nearly 34 million adults in the United States who smoke cigarettes to stop.

"You can join the thousands of people across the country who smoke in taking this step toward a healthier life and reducing your cancer risk," said Eileen Dawley, RN, Galveston County Health District (GCHD) chief nursing officer.

Smoking remains the single largest preventable cause of death in the world. The habit causes an estimated 480,000 deaths each year – that accounts for about one in five deaths. More than 16 million Americans currently live with a smoking-related disease, according to the ACS.

"If you're a smoker or tobacco user, setting a date to quit is an incredibly important step," Dawley said. "You don't have to stop smoking all in one day. Small steps are still steps moving in the right direction. Choosing a quit date is the first step

in making a positive change to quitting tobacco for good."

Even though e-cigarettes do not contain tobacco, the Food and Drug Administration (FDA) classifies them as tobacco products, according to the ACS.

E-cigarette vapor can contain nicotine and other substances that are addictive and can cause lung disease, heart disease and cancer. It's especially important to know that all JUULs and most e-cigarettes contains nicotine, the same addictive drug that is in regular cigarettes, cigars, hookah, and other tobacco products.

E-cigarettes are still fairly new, and more research is needed over a longer

period of time to know what the long-term effects may be.

It's time to make a plan.

### Set a date

Choose the Great American Smokeout or another quit day within the next two weeks.


### Tell your family and friends about your quit plan

Share your quit date with the important people in your life and ask for support. A daily phone call, e-mail or text message can help you stay on course and provide moral support.

### Be prepared for challenges

The urge to smoke is short – usually only three-five minutes – but those moments can feel intense. Even one puff can feed a craving and make it stronger. Before your quit day, write down healthy ways to cope. Drink water, exercise,

Smokeout page 9



You don't have to stop smoking in one day.

Start with **DAY 1**

Quitting smoking isn't easy. It takes commitment and a plan. Let the **Great American Smokeout** event on **Nov. 15** be your start to living a smoke-free life.

NOVEMBER 15  
GREAT AMERICAN SMOKEOUT

# Patients can access Patient Portal from anywhere

Have you registered for the Coastal Health & Wellness (CHW) Patient Portal?

It would be so much more convenient if patients could simply send CHW an electronic message, right? Well, register for the Patient Portal and do just that!

The Patient Portal is an easy-to-use secure internet application that allows patients to:

- Send a message to their medical provider, nurse or the billing department;
- Request and view appointments;
- Request a prescription refill;
- View a summary of health record and lab results;
- Look up information about health topics; and
- View and pay statements online.

Be sure to ask about the Patient Portal on your next visit and we'll walk you through registration.

## Patient Portal FAQs

- How can I get a Patient Portal account?

*All you need is an email address. At your next appointment, ask a check-out team member to enroll you in the Patient Portal. Please call the IT Help Desk at (409) 938-2210 for assistance.*

- What kind of questions can I ask on the Patient Portal?

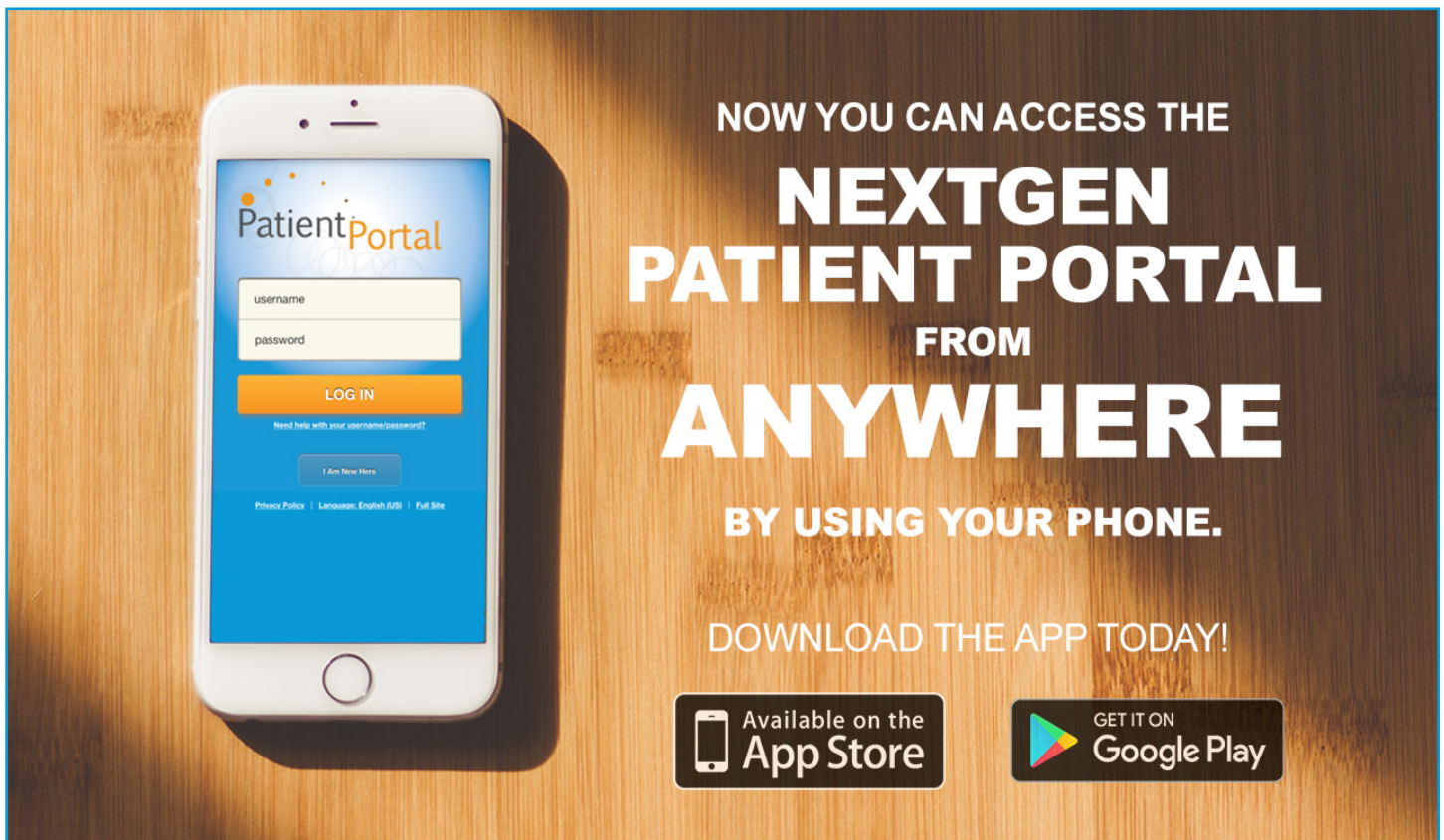
*You can ask your medical provider or nurse any non-urgent medical questions about lab results, your medicines or your health. You can ask billing questions as well.*

- How do I know my health information is secure?

*Coastal Health & Wellness has made significant investments to ensure your information is secure. We meet all regulatory requirements for security.*

- Can I request or view my upcoming appointments on the Patient Portal?

*Yes, patients can see and request appointments.*



NOW YOU CAN ACCESS THE  
**NEXTGEN  
PATIENT PORTAL**  
FROM  
**ANYWHERE**  
BY USING YOUR PHONE.  
DOWNLOAD THE APP TODAY!

Available on the  
**App Store**

GET IT ON  
**Google Play**

# Thank you to our CHW physician assistants, medical assistants

## National Physician Assistant Week, Oct. 6-12



Thank you to our wonderful physician assistants who work tirelessly to improve our community's health. Did you know, nationwide, physician assistants have more than 400 million patient interactions each year?

We're proud to celebrate our fantastic PAs and their contribution to keeping you and our community healthy. Pictured left to right are Yaa Cheremateng, Jacklyn Morgan, Jason Borillo and Haley McCabe.

Thank you for all you do!

## National Medical Assistant Week, Oct. 21-25



Our MA's play a vital role in helping perform administrative and clinical duties to make sure our patients have a comfortable visit.

A big THANK YOU goes out to MA's. Pictured above, left to right, are Cecilia Saucedo, Ashley Gardner, Cheryl Rowe, Brenda Orta Gonzalez, Abilene Coss and Lilia Saenz. Pictured at left, left to right, are Cecilia Saucedo, Esmeralda Martinez, Brenda Fernandez and Jasmine Tello. Not pictured are Guadalupe Resendiz, LaTonya Jones and Tabatha Breaux.



# E-CIGARETTE 101



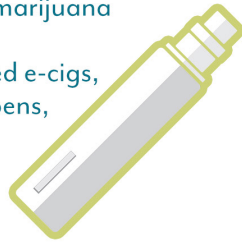
GCHD.ORG

## WHAT ARE E-CIGARETTES?

E-cigarettes are devices that deliver an aerosol to the user by heating a liquid that usually contains nicotine, flavorings and other chemicals.

Devices can also deliver marijuana and other drugs.

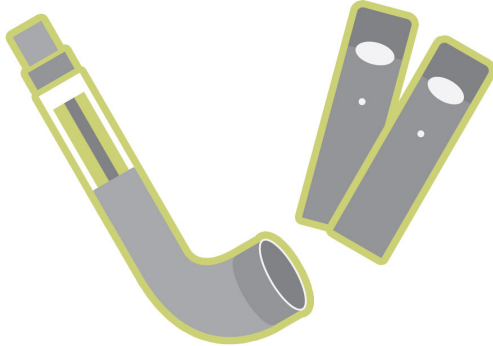
They are sometimes called e-cigs, e-hookahs, mods, vape pens, vapes, tank systems and electronic nicotine delivery systems.



## WHAT DO E-CIGARETTES LOOK LIKE?

Some e-cigarettes are made to look like regular cigarettes, cigars or pipes.

Others look like pens, USB sticks and other everyday items.



## WHAT'S THE BOTTOM LINE?

E-cigarettes have the potential to harm some people and are not safe for youth and young adults. If you've never smoked or used other tobacco products or e-cigarettes, **don't start**.

There is currently a multi-state outbreak of severe pulmonary disease associated with e-cigarette products.

## WHAT IS IN E-CIGARETTE AEROSOL?

The e-cigarette aerosol that users breathe from the device and exhale can contain harmful and potentially harmful substances:

- Volatile organic compounds
- Nicotine
- Ultrafine particles
- Cancer-causing chemicals
- Heavy metals such as nickel, tin and lead
- Flavorings such as diacetyl, a chemical linked to a serious lung disease.



## WHO USES E-CIGARETTES?

E-cigarettes are the most commonly used tobacco product among youth.

In 2018, more than **3.6 million U.S.**

middle and high school students used e-cigarettes in the past

30 days including 4.9% middle school students and 20.8% high school students.

Among current e-cigarette users ages 18-24 years, 40% had never been regular smokers.



## WHAT SHOULD I LOOK FOR?

Patients in this investigation have reported symptoms including **cough, shortness of breath or diarrhea, fatigue, fever or weight loss**. Some patients have reported their symptoms developed over a few days while others have reported their symptoms developed over several weeks.

A pulmonary infection does not appear to be causing the symptoms, which have generally not improved with antibiotic treatment alone.

## “Tell me something good...”

Below are comments from Coastal Health & Wellness patients following their visit at our clinics.

“Very friendly atmosphere. The receptionist at checkout was very nice.” (Medical services)

“Great people and doctors.” (Medical services)

“Suma Shetty, DDS is very good at her job.” (Dental services)

“Everything went very good. Thank you.” (Dental services)

“Great customer service, always with a smile. Great staff that greets us as we walk in the front door.”

“(Lisa Tigrett, LBSW, E Ed, LPC) is great.” (Counseling services)

# CHW offers extended counseling hours to help

Life can be stressful and sometimes, that stress can be overwhelming. That’s where the licensed professional counselors at Coastal Health & Wellness (CHW) can help.

One-on-one talk therapy sessions for adults and children are available at CHW clinics. CHW is extending its counseling service hours offering evening sessions on Mondays and Thursdays in Texas City and Galveston. These sessions can help patients deal with depression, anxiety and other life stressors.

Counselors can teach coping skills and other tools to help manage stressful life situations. CHW’s professional and caring team is dedicated to helping patients improve their overall health and well-being.

As with all CHW services, many major insurance plans are accepted and discounts are offered for eligible patients. To learn more about talk therapy and to make an appointment, call (409) 938-2330 or (409) 978-4216. Patient confidentiality will be protected.

## HOURS OF OPERATION

### Same Day

Appointments Available.

Call (409) 938-2234 for more information.

## TEXAS CITY

**Monday**  
8 AM - 8 PM

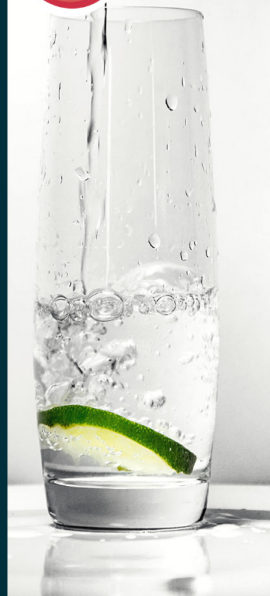
**Tuesday - Friday**  
8 AM - 5 PM

**Saturday**  
8 AM - Noon

## GALVESTON

**Monday, Tuesday, Wednesday and Friday**  
8 AM - 5 PM

**Thursday**  
8 AM - 8 PM



## HEALTHY WATER ADDITIVES

Try out this water additives to add extra flavor and benefits to your water.

### Nuun:

These tablets have all the electrolytes and none of the sugar. And, they dissolve in water!

### MiO:

You can add this liquid to water for flavor. There are also versions with caffeine.

### Crystal Lite:

These single serving packets carry only 5 calories.

# Out and about: Community outreach



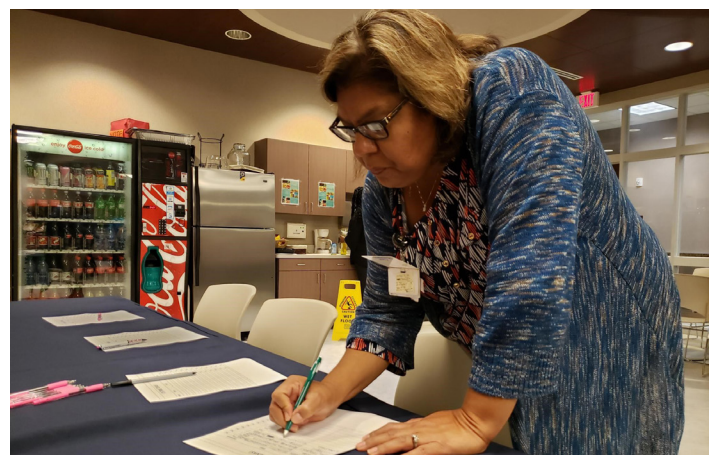
Galveston County Animal Resource Center brought some furry friends to the Galveston County Health District (GCHD) for lunch break Oct. 23. Health district and Coastal Health & Wellness (CHW) enjoyed taking a break from work to play with the adorable, adoptable dogs!



Health district and CHW employees enjoyed volunteering at the Galveston County Food Bank earlier this month packing boxes for food bank clients.



Public Health Nurse Ashley Sciba, RN, spent some time at Walmart in La Marque offering information and resources in honor of National Breast Cancer Awareness Month.



Take advantage of early registration for the IT'S TIME TEXAS Community Challenge and earn 700 points for your community. Just head over to [www.itcommunitychallenge.com](http://www.itcommunitychallenge.com), register and let's get healthy together!

One in 10 adults have diabetes

# Healthy lifestyle can reduce risk, impact of diabetes

Uncontrolled, diabetes can cause blindness, nerve damage, kidney disease and other health problems and affects many. One in 10 Americans have the disease and another 84 million are at high risk for developing type 2 diabetes.

Diabetes is a leading cause of disability and death in the United States. However, there is good news. Those at risk for type 2 diabetes can lower their chances if they make lifestyle changes including adopting a healthy diet, being physically active and losing weight.

November marks National Diabetes Awareness Month, a time to raise awareness about diabetes risk factors and to encourage healthy living.

"There is not a cure for diabetes, but a lifestyle with healthy eating and regular activity can reduce the impact on your life and help you stay on track," said Dr. Philip Keiser, Galveston County local health authority.

There are three main types of diabetes – type 1, type 2 and gestational. Type 1 accounts for roughly 5 percent of all diagnosed cases in adults and can develop at any age. There is no known way to prevent type 1 diabetes.

Roughly 95 percent of adults who have diabetes have type 2, which can often be delayed or prevented with lifestyle changes. Type 2 affects a body's ability to use insulin well and makes it unable to regulate blood sugar levels.

Early detection and treatment of diabetes can decrease the risk of developing complications from the disease. Diabetes can be managed by working with a health professional.

"Making small changes can have a big impact. Park farther away from the building when shopping, take the stairs instead

**ARE YOU AT RISK?**

**84.1 MILLION PEOPLE**  
**THAT'S 1 IN 3 ADULTS**  
**have prediabetes.**

Losing weight can cut your risk of getting type 2 diabetes **in half!**

Risk factors include being overweight, family history, being physically inactive and being 45 and older.

DIABETES 101 |

of the elevator, replace your soda with water," Keiser said. "Losing weight can cut the risk of developing type 2 diabetes in half. It is good to work to get your type 2 diabetes under control as it can lead to a host of other health problems down the road."

Risk factors for developing type 2 diabetes include:

- Being overweight;
- Being 45 years old or older;
- Having a parent, brother or sister with type 2 diabetes;
- Being physically ac-

tive less than three times a week; and

- Ever having gestational diabetes or giving birth to a baby who weighed more than nine pounds.

Those who show any risk signs should contact their health care provider to see if they should be tested for type 2 diabetes. Race and ethnicity also matter. African Americans, Hispanic/ Latino Americans, American Indians, Pacific Islanders and some Asian Americans are at higher risk for type 2 diabetes.

Symptoms of type 2 diabetes include:

- Urinating often;
  - Feeling very thirsty;
  - Feeling very hungry – even though you are eating;
  - Extreme fatigue;
  - Blurry vision;
  - Cuts/ bruises that are slow to heal;
  - Weight loss – even though you are eating more (type 1);
- and
- Tingling, pain or numbness in the hands/ feet (type 2).

"The sooner you find out if you have diabetes, the sooner you can start making changes that will benefit you now and in the future," Keiser said.

listen to music or call a friend.

**Remove cigarettes and other tobacco**

Remove these items from your home, car and workplace. Throw away cigarettes, matches, lighters and ashtrays.

Clean and freshen your car, home and workplace. Old cigarette odors can cause cravings.

**Know your options**

Talk to your pharmacist or doctor about quit options.

Nicotine patches, gum or other approved quit medication can help with cravings.

Benefits of quitting smoking includes better tasting food, normal sense of smell, teeth and fingernails stop yellowing, not being out of breath from

ordinary activities and better smelling breath, hair and clothes.

Quitting smoking, at any age, improves health immediately and over the long term.

It's hard, but chances of success can be improved with help.

Getting help through counseling and medications doubles or even triples chances of quitting successfully.



**MYTH**

**DRIVERS CAN MULTITASK.**

**SPEAKING HANDS-FREE IS SAFE TO USE WHILE DRIVING.**

**I ONLY USE MY PHONE AT STOP LIGHTS SO IT'S OK.**

**VOICE-TO-TEXT IS SAFE TO DO WHILE DRIVING.**

**FACT**

The human brain cannot do two things – like drive and hold a phone conversation – at the same time without reaction time slowing down.

Drivers talking on cell phones can miss seeing up to 50% of their driving environments, including pedestrians and red lights.

It's important to stay alert at red lights. A recent American Automobile Association (AAA) study shows that people continue to be distracted up to 27 seconds after they finish sending a voice text.

It's very distracting. Not only are you mentally distracted, but you're visually distracted due to common auto-correct errors.

**Marketplace**

erage.

Those who have job-based insurance may buy a plan through Health Insurance Marketplace but will pay full price unless their employer's insurance doesn't meet certain standards.

Most job-based plans do meet the required standards.

Those who have Medicare cannot switch to Health Insurance Marketplace, supplement their coverage with a plan or buy a dental plan.

"The time frame to enroll for coverage is short so don't let this pass you by. Remember you must enroll by Dec. 15," Peacock said. "We have certified application counselors at Coastal Health & Wellness to help you along the way if you have questions."

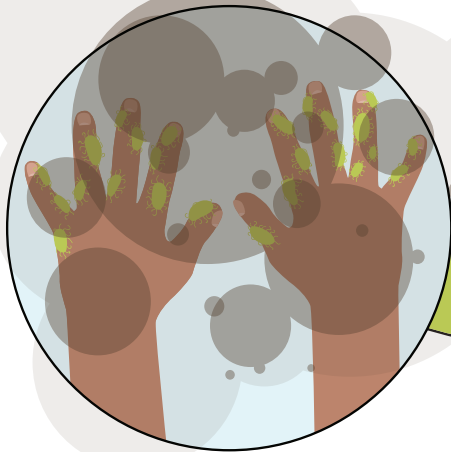
Galveston County residents with questions about the Health Insurance Marketplace can call CHW at 409-978-4225 or visit the clinic at 9850-C Emmett F. Lowry Expressway in Texas City.



**#JUSTDRIVE**  
Learn more at [www.nsc.org](http://www.nsc.org)



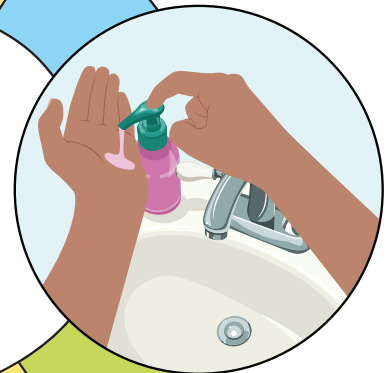
# Wash Your Hands!



Dirty!



Wet



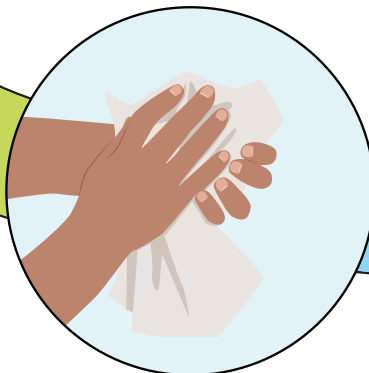
Get Soap



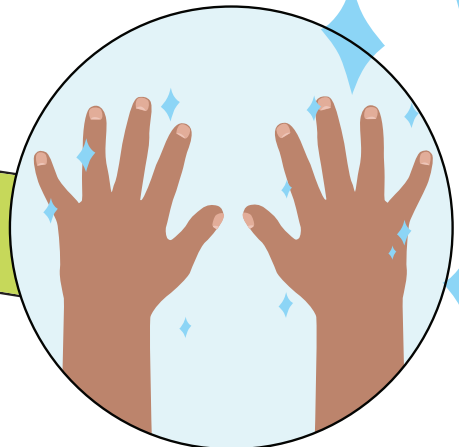
Scrub



Rinse



Dry



Clean!



Centers for Disease Control and Prevention  
National Center for Emerging and Zoonotic Infectious Diseases

[www.cdc.gov/handwashing](http://www.cdc.gov/handwashing)

CS267057-A

## **Coastal Health & Wellness Updates**

### **Insurance Contract Updates –**

#### **Dental**

- MCNA-Currently Dr. Shetty in network; Pending-Lindskog, Keiser, Nguyen, Foreman
- Dr. Foreman Pending (Currently working to get provider added to all accepted insurance plans)

#### **Behavioral Health**

- Texas Children's Health Plan- Pending- Application submitted waiting approval (Tigrett & Bailey)

#### **Medical**

- Dr. Obe, Juliet Wiseman, NP, Yaa Cheremateng, PA-C, Opeyemi Ojo, NP, Haley McCabe, PA-C- Pending (Currently working to get providers added to all accepted insurance plans)

### **Pending New/Evaluating Contracts:**

- Memorial Hermann Health Plan- CHW has been approved to participate as of 10/21/19. Contract under review
- Patient /Physician and Cooperatives (PPC)- Contract currently under review
- HealthSmart Preferred Care- Pending response from HealthSmart
- Superior Health Plan (Dental Services)-Pending response to contract request

### **Other Insurance Updates:**

- In an effort to streamline dental insurance verification processes, new procedures have been developed on how treatment plans will be handled and how insurance verifications will be obtained. The goal of this process is to assure that we can obtain information in a timely manner so that we can notify the patient of their payment responsibility promptly.

### **Committees –**

- **Quality Assurance/Risk Management Committee** – The monthly meeting of this committee was held on October 2, 2019. Appointment utilization and no-show rates for September were reviewed. Appointment utilization rates for the month of September for medical and dental appointments were within the goal of 90%. Counseling utilization rate continued to

- remain below the goal in both Texas City and Galveston, reporting 68% and 31% respectively. Overall, no-show rates for the month continued to be higher than the 20% goal, except for dental hygienist visits, which reported 17% and 12% no-show rates in Texas City and Galveston respectively. On average, medical visits reported a 26% no-show rate for the month while dental visits reported 28%. The average counseling no-show rate was 34%. A new no-show policy has been drafted and will be presented to the Board today for approval.
- Patient satisfaction survey data was also reviewed, and participation rates improved from the prior period due to changes made in handing patients a paper survey and requesting that they fill out the survey before they leave the clinic. Updates were also provided on recent process improvement changes in the lab.
  - On October 17, 2019, the quarterly meeting of the Governing Board QA Committee was held. CHW staff members provided reports to the committee on patient access/satisfaction, clinical measures, quality assurance, emergency management and risk management. The Risk Management plan and new No-Show policy were also discussed.
  - **Infection Control / Environment of Care /Joint Commission Committee (IEJ)**– The monthly meeting of the Joint Commission/Infection Control/Environment of Care Committee was held on October 16, 2019. Culture of safety leadership survey results were reviewed another full survey of staff will be conducted after the first of the year and National Patient Safety Goals for 2020 were reviewed with the committee. Clinical guidelines continue to be updated and centralized on the extranet. Data for the Infection Control Risk Assessment is currently being collected and will be presented at a future meeting. Other topics discussed included review of infection control audit reports and safety and compliance reports. The Leadership Team continues to participate in The Joint Commission’s 12-part Ambulatory Breakfast Briefing series. This series, which runs from August 28th to November 13th is designed to provide an overview of new and revised 2020 standards and assist in preparation for the next Joint Commission site survey.
  - **Patient Centered Medical Home (PCMH) Committee** – The Coastal PCMH Team continues to meet to evaluate and develop processes related to this initiative. Recent activities include development of a welcome packet to be distributed to patients that will include useful information related to clinic services; a review of provider panel sizes to determine an appropriate panel size for each provider; and a review of appointment time allotments to maximize access to care. Good progress is being made on the PCMH elements included in the self-assessment. Next steps will be to develop a timeline for completion so that a mock survey can be conducted.

#### **HRSA Deliverables / Updates –**

- Substance Use Disorder-Mental Health (SUD-MH) grant – The SUD-MH program is going well and currently a total of 15 patients are enrolled in the program. Initial grant projections for program enrollment were based on a maximum of 50 patients.

- We continue to acquire equipment and supplies budgeted through the Capital Assistance for Hurricane Response and Recovery Efforts (CARE) grant. We have currently spent \$305,398 of the \$337,012 initially awarded. All grant funds must be spent by August 31, 2020.
- We were recently notified by HRSA that we were not awarded the Oral Health Infrastructure funding that was submitted in May. The application included \$300,000 in one-time requests for dental equipment and supplies which would have been used to enhance and expand dental services currently being provided. HRSA will keep our application in an active status for up to one year for consideration for future funding.
- On 10/16/19, we received notification from HRSA that coverage under the Federal Tort Claim Act (FTCA) has been approved for the 2020 calendar year.
- The quarterly progress report was submitted to our HRSA Project Officer on 10/17/19.
- A request for carryover of HRSA grant funding in the amount of \$183,697 related to the SUD-MH program was approved on 10/29/19.
- We received notification on 10/2/19 that HRSA is planning an operational site visit in August 2020. Once the exact date has been confirmed, we will notify the Board.
- The Non-competing Continuation (NCC) Progress Report for the 2020-2021 period is due to HRSA by November 8, 2019.

#### **Miscellaneous Updates –**

- We are continuing to monitor the number of patients enrolled in the patient portal and have scheduled weekly events to assist patients with enrolling, alternating between Texas City and Galveston. We are actively monitoring numbers and educating patients about the benefits of enrolling in the portal.
- In order to better clarify appointment confirmations and cancellations, text messages requesting appointment confirmation have been changed to YES to confirm or NO to cancel. Previously, patients were asked to enter C to confirm and X to cancel.
- On 10/15/19, medical and dental checkups on four children with the Texas City Headstart program were conducted.
- Dr. Lindskog and her team have begun participation in the National Network for Oral Health Access (NNOHA) Sealants Improvement Collaborative. As previously reported, Coastal Health and Wellness was one of 40 health centers nationwide selected to participate in this collaborative, which will be ongoing from October 2019 to June 2020.
- The 2019 Employee Appreciation Luncheon is scheduled for Wednesday, November 13<sup>th</sup> from 11:00 am to 1:00 pm at the College of the Mainland Conference Center. This event is fully funded by BeWell Committee activities conducted throughout the year

#### **Communications –**

- **News Releases/ Website News Posts**
  - GCHD confirms serious lung illness
  - National Childhood Obesity Awareness Month
  - National Food Safety Education Month

- **Social Media**
  - Labor Day closure
  - Diabetes awareness and education
  - Childhood obesity awareness
  - #WorkWednesday
  - World Alzheimer's Day
  - Handwashing importance and education
  - National Preparedness Month – extreme heat
  - National Preparedness Month – vaccines
  - Cholesterol awareness and education
  - Food safety – poisoning
  - Food safety – handling food
  - Food safety – dining out
  - Food safety – GCHD inspection
  - Food safety – Gold Ribbon Awards
  - Prostate Cancer Awareness Week
  - Same day appointments available
  - Dental Director Dr. Hanna Lindskog fellowship
  - CHW Galveston clinic closed due to storms
  - Healthy aging awareness and education
  - Patient Portal registration
  - Medical services offered
  - Dental services offered
  - Counseling services offered

## **Coastal Health & Wellness Updates**

### **Communications –**

- **News Releases/ Website News Posts**
  - National Dental Hygiene Month
  - GCHD confirms new cases of lung illness
  - Flu season begins
  - National Breast Cancer Awareness Month
  - World Mental Day
- **Social Media**
  - Halloween and oral health tips
  - National Dental Hygiene Month
  - National Breast Cancer Awareness Month
  - Diabetes awareness and education
  - Childhood obesity awareness
  - #WorkWednesday
  - Handwashing importance and education
  - Patient Portal registration
  - Medical services offered
  - Dental services offered

- Counseling services offered
- Talk therapy services
- E-cigarette awareness and education
- Flu season vaccine, education
- Child Health Day
- HEAL and Clean 15, Dirty 12
- Pregnancy and Infant Loss Remembrance Day
- HEAL #Take10
- HEAL – obesity awareness
- HEAL healthy recipes – October
- Take Back Day
- CHW – breast cancer awareness educational materials at clinic
- Flu and heart disease
- Physician Assistant Week recognition
- Medical Assistant Week recognition
- Flu and handwashing importance

#### **CHW Career Opportunities:**

Sept. 17-Oct. 22, 2019

#### **CHW Career Opportunities:**

- **Employee Onboarding** – Human Resources conducted new employee orientation for the following employee(s):
  - Steffin John - Dental Hygienist (part-time)
  - Mildred Ortiz – LVN-Bilingual (full-time)
  - LaTonya Jones – Medical Aide I (full-time)
- **Job Offers** – The following candidate(s) were extended job offers and have future start dates:
  - Gabriella Lopez – Dental Assistant (full-time)
- **Current Vacancies:**
  - CHW Nursing
    - LVN (1)
    - Medical Aide (1)
    - Medical Aide (Bilingual) (1)
    - Registered Nurse – Charge Nurse (1)
  - Providers
    - Physician (1)
  - Patient Services
    - Patient Services Specialist (1)
  - Electronic Records
    - Unit Receptionist-Medical (Bilingual) (1)

#### **CHW Executive Contract Report: October 2019**

1. A 340B Contract Pharmacy Set-Up Fee Policy was signed with Cardinal Health and became effective on July 1, 2019 to establish Walgreens Specialty Pharmacy as a “ship to” account for Cardinal.

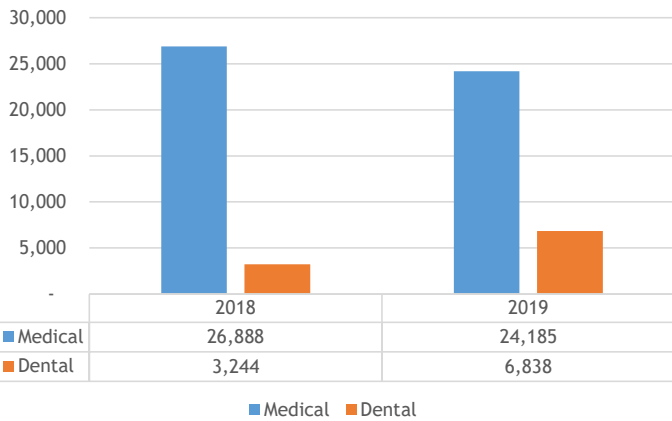
2. Coastal Health & Wellness (“CHW”) renewed an Agreement with UTMB for the provision of a family medicine and prenatal services physician. CHW will pay UTMB \$140 per hour with a minimum of four-hour blocks when such services are scheduled and provided.
3. A Direct Relief Grant was awarded to Coastal Health & Wellness to provide continued financial support to organizations recovering from recent natural disasters in the United States in the amount of \$146,140, effective from September 15, 2019 through September 15, 2020.
4. Coastal Health & Wellness entered into a Memorandum of Understanding with Texas City Independent School District to provide Well-Child examinations and immunizations, if needed, based on Medicaid and Head Start requirements. The Well-Child examinations include developmental assessments, physical examinations and dental examinations for children in the Head Start program at TCISD.

**October 2019**  
**YTD Comparison Report (January to September)**

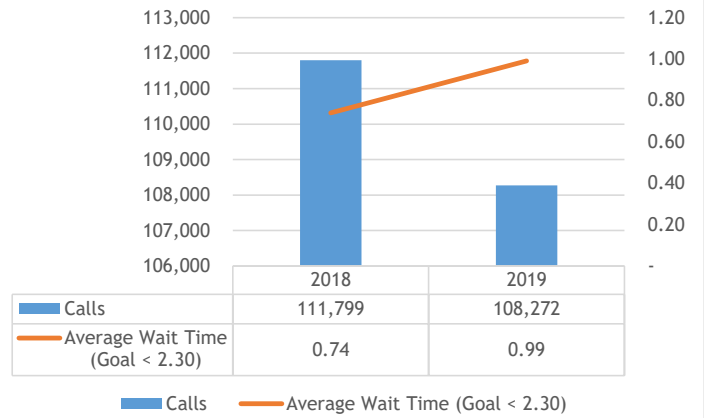
<b>Patient Services - Patients Checked-In</b>	<b>2018</b>	<b>2019</b>	<b>% Change</b>
Medical	26,888	24,185	-10%
Dental	3,244	6,838	111%
<b>Contact Center</b>	<b>2018</b>	<b>2019</b>	<b>% Change</b>
Calls	111,799	108,272	-3.2%
Average Wait Time (Goal < 2.30)	0.74	0.99	34%
<b>Electronic Records</b>	<b>2018</b>	<b>2019</b>	<b>% Change</b>
Record Requests	8,457	8,313	-1.7%
<b>County Indigent Program</b>	<b>2018</b>	<b>2019</b>	<b>% Change</b>
Applied	1110	1211	9%
Referrals	3391	1669	-51%
Avg Total Patients on Program	249	256	3%
<b>Case Management</b>	<b>2018</b>	<b>2019</b>	<b>% Change</b>
Referrals	8,759	7,282	-17%



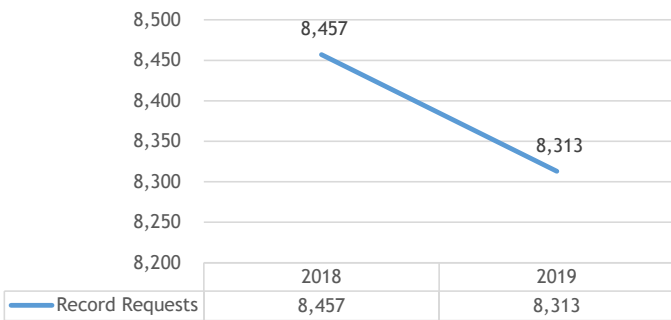
### Patient Services-Total Patients Checked-In



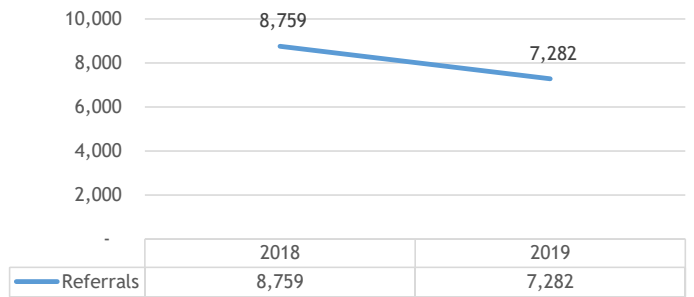
### Contact Center - Calls and Wait Time



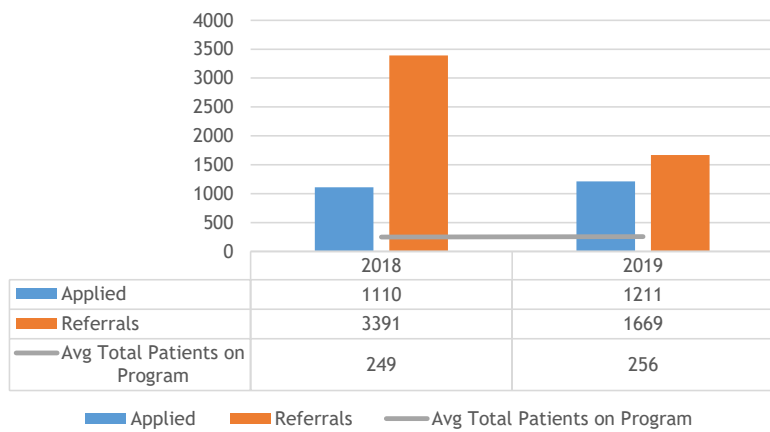
### Electronic Record Requests



### Case Management Referrals



### County Indigent Program



[Back to Agenda](#)



# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #8**

**Consider for Approval Preliminary September 2019**

**Financial Report**

# COASTAL HEALTH & WELLNESS

Governing Board



## FINANCIAL SUMMARY

For the Period Ending September 30, 2019

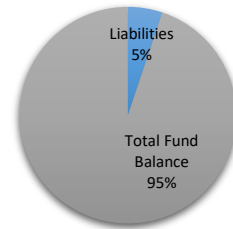
October 31, 2019

GCHD Board Room | 9850-A Emmett F. Lowry Expy. | Texas City, TX 77591

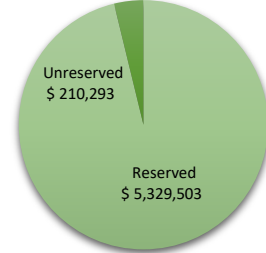
**CHW - BALANCE SHEET** as of September 30, 2019

	Current Month Sep-19	Prior Month Aug-19	Increase (Decrease)
<b>ASSETS</b>			
Cash & Cash Equivalents	\$4,885,634	\$5,263,592	(\$377,958)
Accounts Receivable	1,696,737	1,813,880	(117,143)
Allowance For Bad Debt	(914,866)	(1,300,244)	385,378
Pre-Paid Expenses	88,976	98,498	(9,522)
Due To / From	332,184	(39,867)	372,050
<b>Total Assets</b>	<b>\$6,088,664</b>	<b>\$5,835,860</b>	<b>\$252,805</b>
<b>LIABILITIES</b>			
Accounts Payable	\$61,902	\$62,497	(\$596)
Accrued Salaries	244,023	224,112	19,911
Deferred Revenues	7,409	9,455	(2,045)
<b>Total Liabilities</b>	<b>\$313,334</b>	<b>\$296,064</b>	<b>\$17,270</b>
<b>FUND BALANCE</b>			
Fund Balance	\$5,813,682	\$5,813,682	\$0
Current Change	(38,352)	(273,887)	235,535
<b>Total Fund Balance</b>	<b>\$5,775,330</b>	<b>\$5,539,796</b>	<b>\$235,535</b>
<b>TOTAL LIABILITIES &amp; FUND BALANCE</b>	<b>\$6,088,664</b>	<b>\$5,835,860</b>	<b>\$252,805</b>

Current Period Assets



Total Fund Balance



**CHW - REVENUE & EXPENSES** as of September 30, 2019

	Actual Sep-19	Budgeted Sep-19	PTD Budget Variance	YTD Budget Variance
<b>REVENUE</b>				
County Revenue	\$324,071	\$324,070	\$1	\$5
DSRIP Revenue	0	79,167	(79,167)	(475,000)
HHS Grant Revenue	310,668	260,617	50,051	183,216
Patient Revenue	418,573	368,553	50,020	(575,168)
Other Revenue	15,101	23,635	(8,534)	(57,708)
<b>Total Revenue</b>	<b>\$1,068,413</b>	<b>\$1,056,042</b>	<b>\$12,371</b>	<b>(\$924,657)</b>
<b>EXPENSES</b>				
Personnel	\$567,052	\$680,896	\$113,844	\$485,156
Contractual	61,072	85,808	24,735	151,892
IGT Reimbursement	0	37,500	37,500	225,000
Supplies	76,877	121,986	45,109	125,530
Travel	3,882	2,519	(1,363)	(4,913)
Bad Debt Expense	40,304	35,045	(5,259)	(42,983)
Other	83,690	92,289	8,599	(120,382)
<b>Total Expenses</b>	<b>\$832,878</b>	<b>\$1,056,042</b>	<b>\$223,164</b>	<b>\$819,300</b>
<b>CHANGE IN NET ASSETS</b>	<b>\$235,535</b>	<b>\$0</b>	<b>\$235,535</b>	<b>(\$105,357)</b>

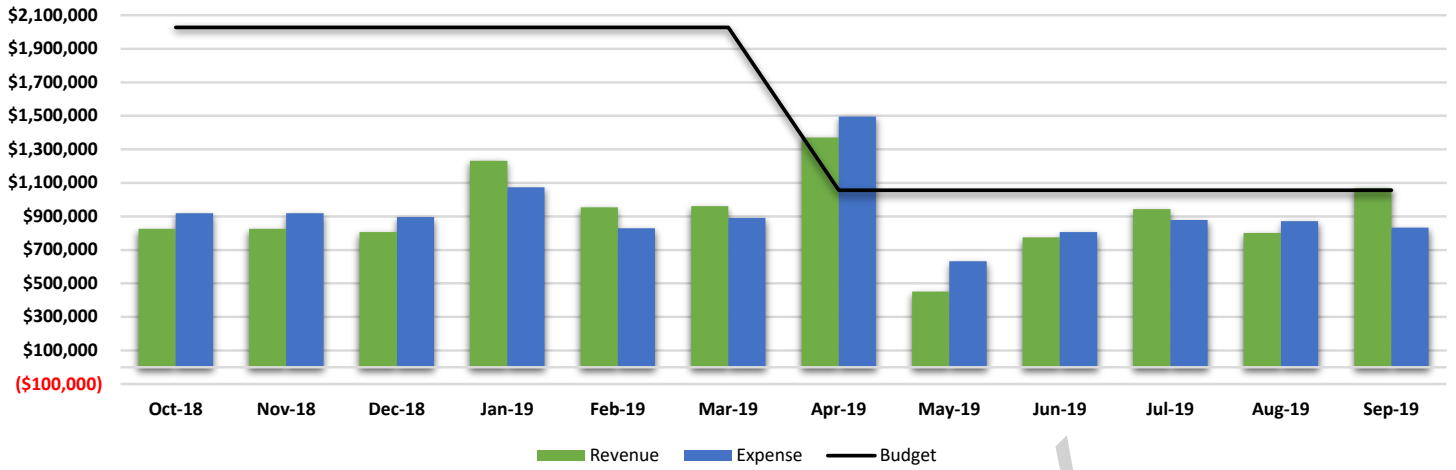
Current Month Revenue & Expenses Actual



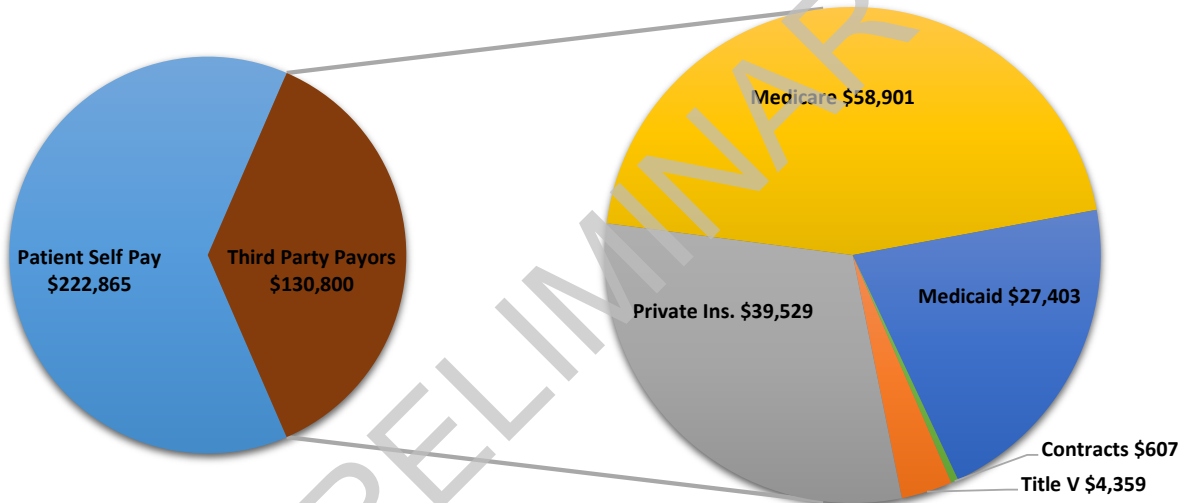
**HIGHLIGHTS**

- MTD increase in Fund Balance of \$235,535 and YTD decrease of (\$38,352).
- MTD revenues were overbudget by \$12,371. Patient revenues are higher due to year end recording of anticipated AR for all payor classes.
- MTD expenses were \$223,164 underbudget. Travel was slightly overbudget, but was offset by savings in Personnel, Contractual, Supplies and Other. Bad debt expense is overbudget for the month. Accrual is based on % of Self-Pay Charges less Adjustments.
- Total Fund balance is \$5,775,330 as of 9/30/19.

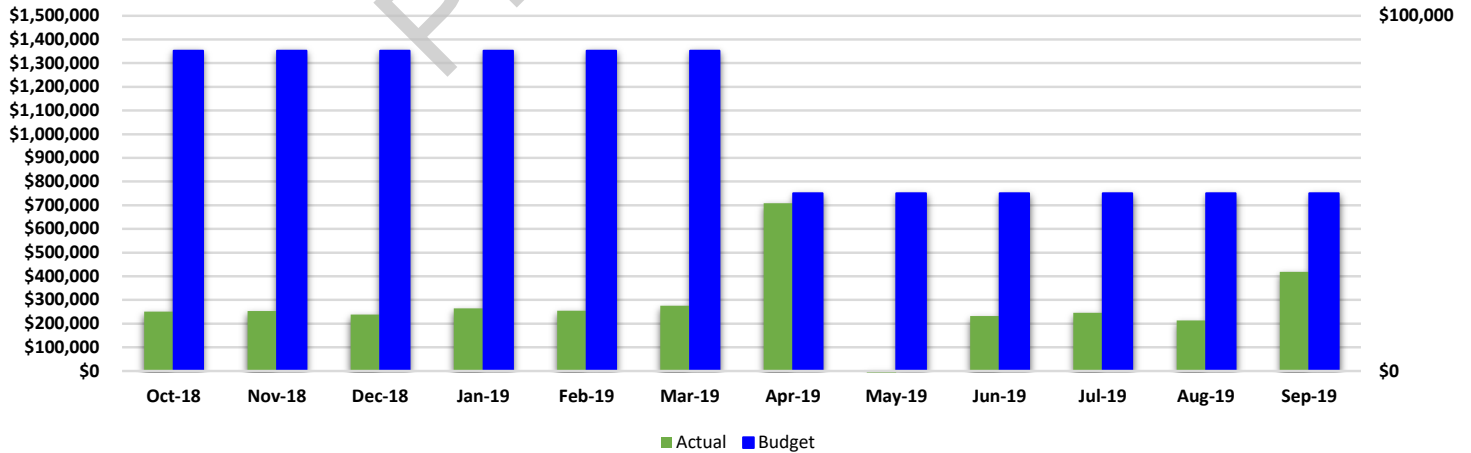
Actual Revenue & Expenses in Comparison to Budget

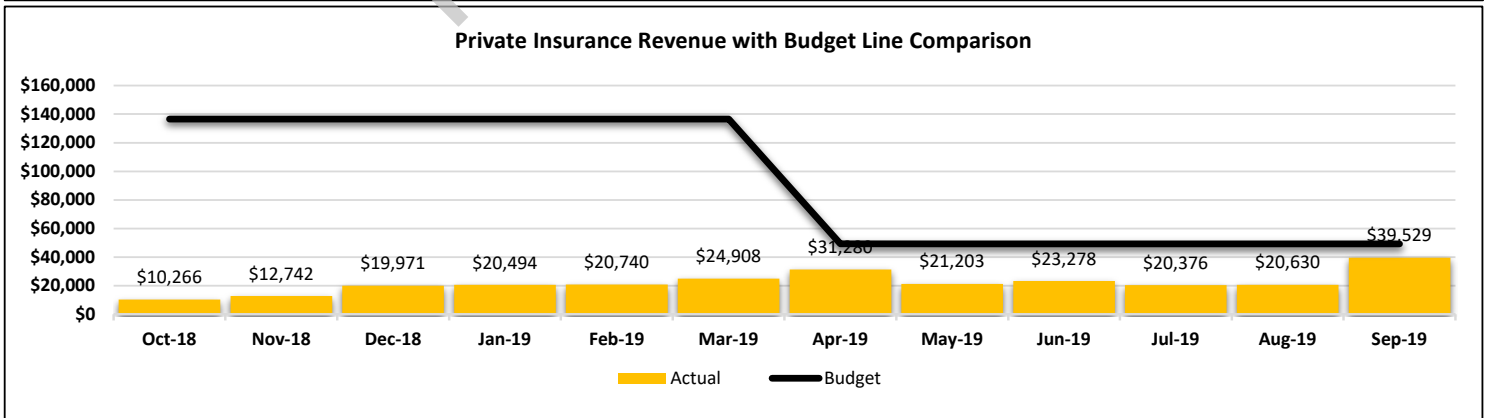
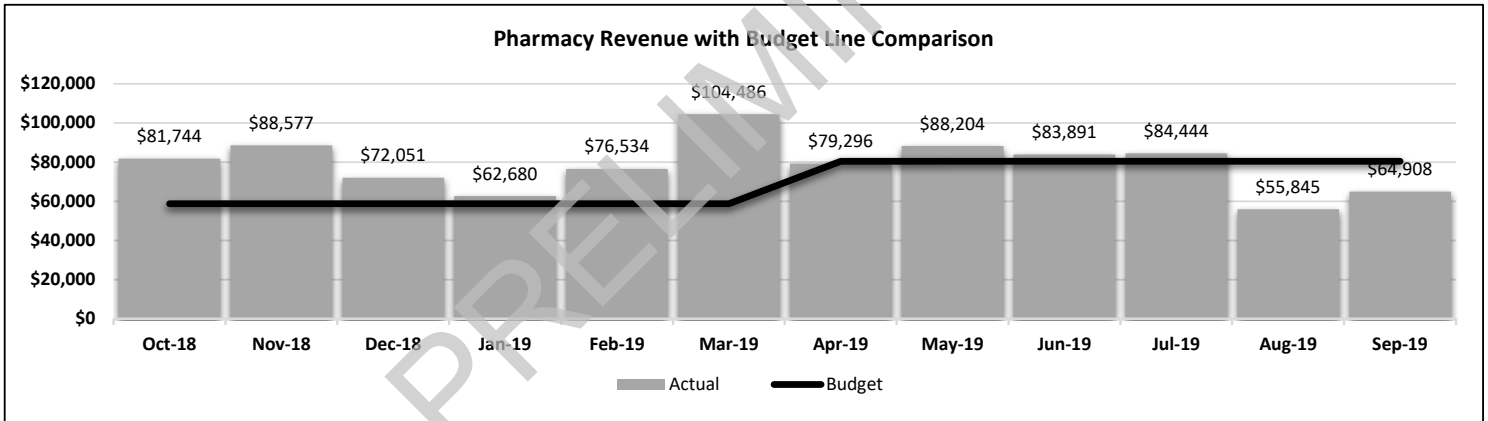
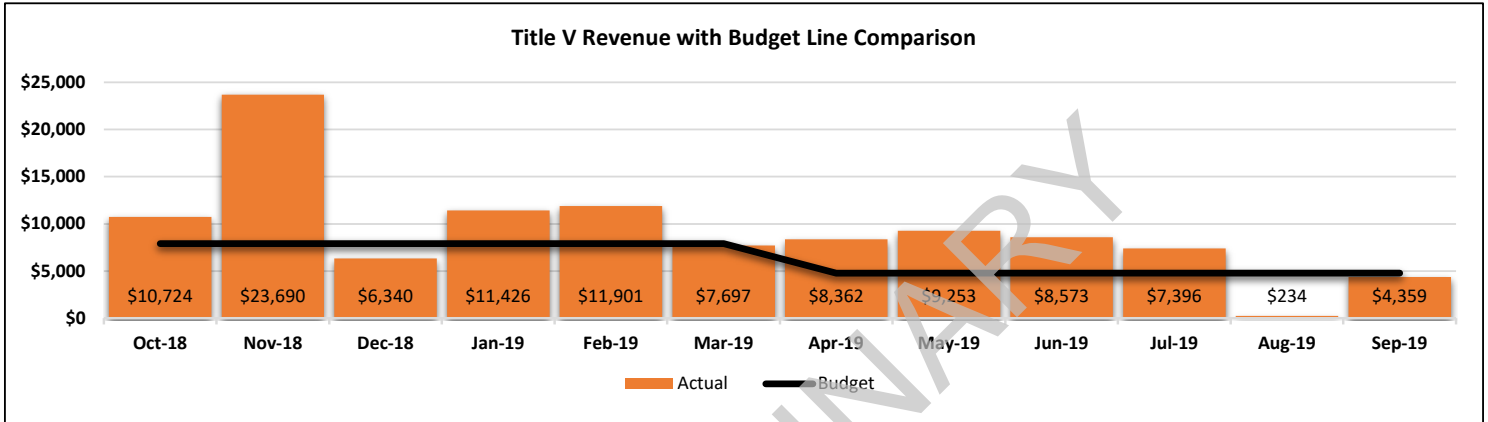
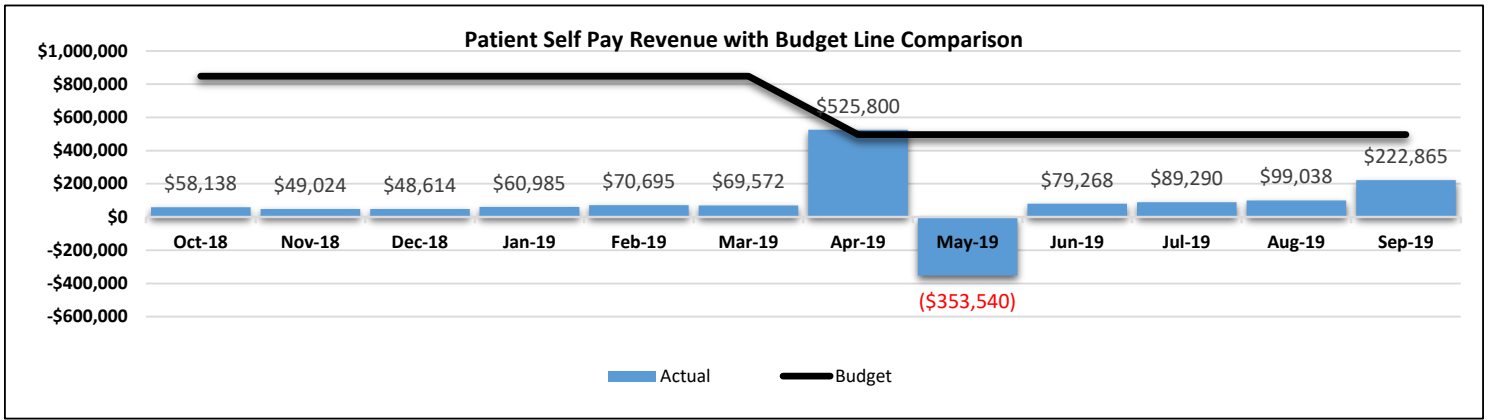


Current Period Patient Revenue with Third Party Payor Contributions Identified

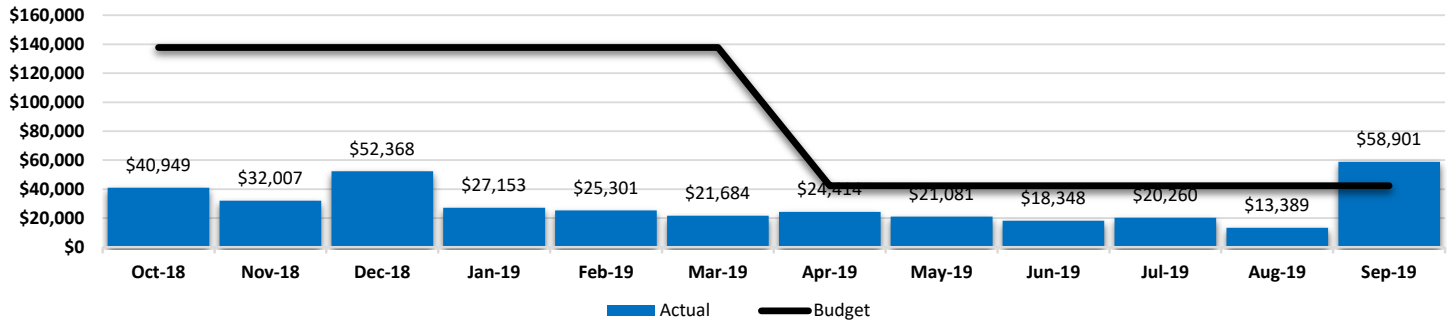


Actual Patient Revenue Rec'd vs Budget

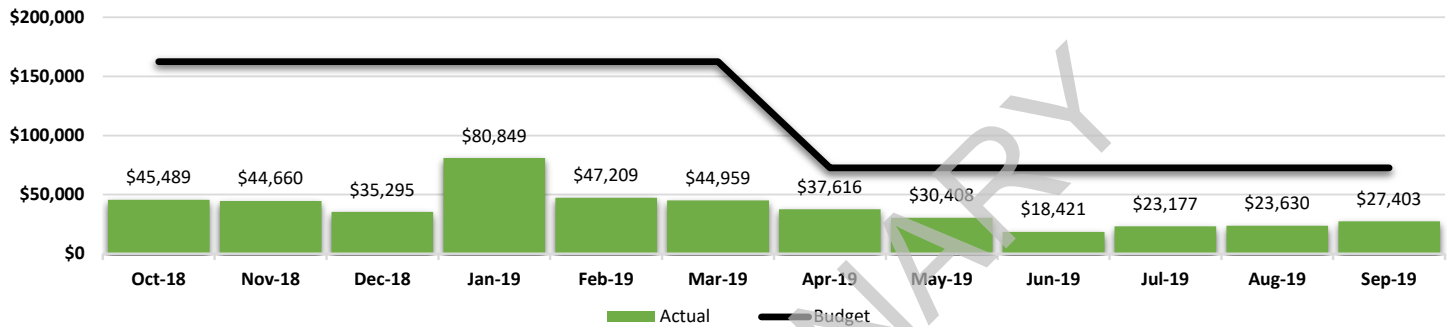




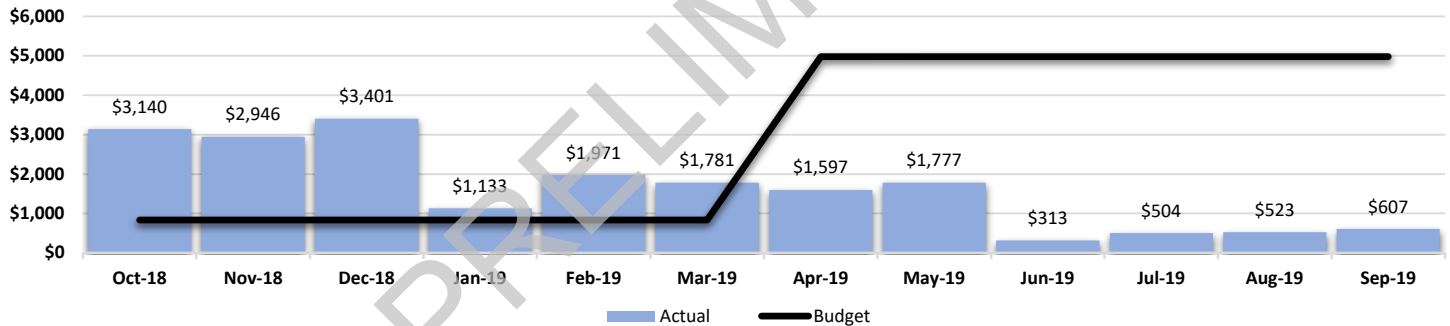
**Medicare Revenue with Budget Line Comparison**



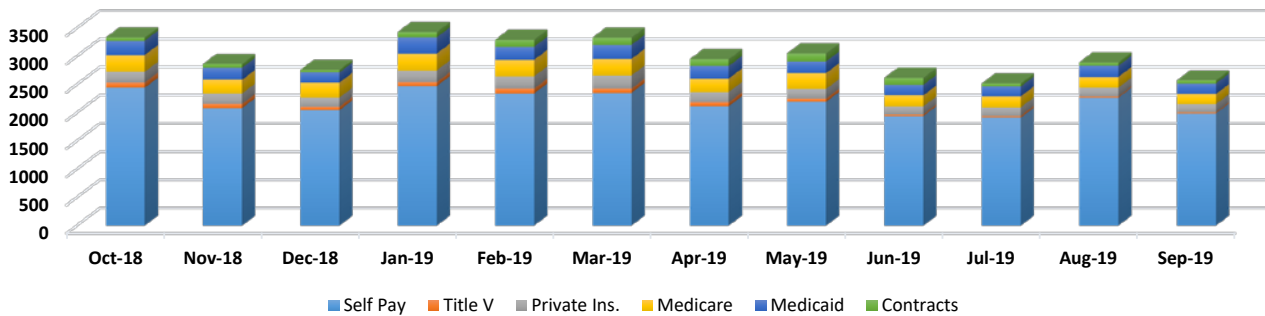
**Medicaid Revenue with Budget Line Comparison**



**Contract Revenue with Budget Line Comparison**



**Total Number of Patient Visits**



Coastal Health & Wellness								
Statement of Revenue and Expenses for the Period ending Sep 30, 2019								
		Period Ending	MTD	MTD Budget	YTD	YTD	YTD Budget	Annual
	Description	9/30/2019	Budget	Variance	Actual	Budget	Variance	Budget
<b>Grouping</b>	<b>REVENUE</b>							
HRSA	HHS GRANT REVENUE - Federal	\$310,668	\$260,617	\$50,051	\$1,746,916	\$1,563,700	\$183,216	\$3,127,400
Patient Rev	GRANT REVENUE - Title V	\$4,359	\$4,780	(\$420)	\$38,177	\$28,678	\$9,500	\$57,355
Patient Rev	PATIENT FEES	\$222,865	\$114,102	\$108,763	\$662,720	\$684,613	(\$21,892)	\$1,369,225
Patient Rev	PRIVATE INSURANCE	\$39,529	\$49,289	(\$9,760)	\$156,297	\$295,736	(\$139,439)	\$591,472
Patient Rev	PHARMACY REVENUE - 340b	\$64,908	\$80,417	(\$15,509)	\$456,588	\$482,500	(\$25,912)	\$965,000
Patient Rev	MEDICARE	\$58,901	\$42,380	\$16,521	\$156,393	\$254,279	(\$97,886)	\$508,558
Patient Rev	MEDICAID	\$27,403	\$72,608	(\$45,205)	\$160,654	\$435,648	(\$274,994)	\$871,296
Other Rev	LOCAL GRANTS & FOUNDATIONS	\$2,045	\$1,351	\$695	\$8,799	\$8,104	\$695	\$16,208
Other Rev	MEDICAL RECORD REVENUE	\$1,286	\$1,354	(\$69)	\$10,170	\$8,125	\$2,045	\$16,250
Other Rev	MEDICAID INCENTIVE PAYMENTS	\$0	\$0	\$0	\$3,070	\$0	\$3,070	\$0
County	COUNTY REVENUE	\$324,071	\$324,070	\$1	\$1,944,427	\$1,944,423	\$5	\$3,888,845
DSRIP	DSRIP REVENUE	\$0	\$79,167	(\$79,167)	\$0	\$475,000	(\$475,000)	\$950,000
Other Rev	MISCELLANEOUS REVENUE	\$234	\$0	\$234	\$3,059	\$0	\$3,059	\$0
Other Rev	OTHER REVENUE - SALE OF FIXED ASSET	\$2,107	\$0	\$2,107	\$3,875	\$0	\$3,875	\$0
Other Rev	INTEREST INCOME	\$8,159	\$5,750	\$2,409	\$51,615	\$34,500	\$17,115	\$69,000
Patient Rev	CONTRACT REVENUE	\$607	\$4,978	(\$4,371)	\$5,321	\$29,867	(\$24,545)	\$59,733
Other Rev	LOCAL FUNDS / OTHER REVENUE	\$1,270	\$0	\$1,270	\$3,513	\$0	\$3,513	\$0
Other Rev	CONVENIENCE FEE	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Rev	Fund Balance	\$0	\$0	\$0	\$84,562	\$84,562	\$0	\$182,160
	<b>Total Revenue</b>	<b>\$1,068,413</b>	<b>\$1,040,862</b>	<b>\$27,551</b>	<b>\$5,496,156</b>	<b>\$6,329,733</b>	<b>(\$833,577)</b>	<b>\$12,672,502</b>
	<b>EXPENSES</b>							
Personnel	SALARIES	\$472,131	\$526,677	\$54,546	\$2,930,731	\$3,160,062	\$229,331	\$6,320,124
Personnel	SALARIES, Merit Compensation	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Personnel	SALARIES, PROVIDER INCENTIVES	\$0	\$4,400	\$4,400	\$3,652	\$26,400	\$22,748	\$52,800
Personnel	SALARIES, supplemental	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Personnel	SALARIES, O/T	\$3,436	\$5,000	\$1,564	\$15,788	\$30,000	\$14,212	\$60,000
Personnel	SALARIES, PART-TIME	\$9,683	\$36,141	\$26,458	\$68,410	\$216,847	\$148,437	\$433,694
Personnel	Comp Pay	\$0	\$0	\$0	\$189	\$0	(\$189)	\$0
Personnel	FICA EXPENSE	\$33,427	\$43,775	\$10,348	\$219,723	\$262,648	\$42,925	\$525,296
Personnel	TEXAS UNEMPLOYMENT TAX	\$19	\$1,215	\$1,196	(\$446)	\$7,292	\$7,738	\$14,584
Personnel	LIFE INSURANCE	\$1,463	\$1,380	(\$83)	\$8,666	\$8,279	(\$387)	\$16,558
Personnel	LONG TERM DISABILITY INSURANCE	\$1,065	\$1,284	\$219	\$6,282	\$7,706	\$1,424	\$15,411
Personnel	GROUP HOSPITALIZATION INSURANC	\$33,056	\$46,032	\$12,976	\$33,056	\$276,192	\$243,136	\$552,383
Personnel	WORKER'S COMP INSURANCE	(\$3,835)	\$2,861	\$6,697	\$2,294	\$17,167	\$14,873	\$34,333
Personnel	EMPLOYER SPONSORED HEALTHCARE	\$6,892	\$0	(\$6,892)	\$207,671	\$0	(\$207,671)	\$0
Personnel	HRA EXPENSE	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Personnel	PENSION / RETIREMENT	\$10,235	\$12,131	\$1,846	\$64,001	\$72,786	\$8,785	\$145,572
Contractua	OUTSIDE LAB CONTRACT	\$14,800	\$30,475	\$15,675	\$106,125	\$182,850	\$76,725	\$365,700
Contractua	OUTSIDE X-RAY CONTRACT	\$1,884	\$4,428	\$2,544	\$12,048	\$26,565	\$14,517	\$53,130
Contractua	MISCELLANEOUS CONTRACT SERVICES	\$22,864	\$23,990	\$1,126	\$107,775	\$143,937	\$36,162	\$287,874
Personnel	TEMPORARY STAFFING	(\$570)	\$0	\$570	\$40,206	\$0	(\$40,206)	\$0
Contractua	CHW CONTRACT BILLING SERVICE	\$7,297	\$9,000	\$1,703	\$39,591	\$54,000	\$14,409	\$108,000
IGT	IGT REIMBURSEMENT	\$0	\$37,500	\$37,500	\$0	\$225,000	\$225,000	\$450,000
Contractua	JANITORIAL CONTRACT	\$13,682	\$13,926	\$244	\$82,331	\$83,555	\$1,223	\$167,109
Contractua	PEST CONTROL	\$80	\$80	(\$0)	\$481	\$480	(\$1)	\$960
Contractua	SECURITY	\$465	\$3,910	\$3,445	\$14,603	\$23,460	\$8,857	\$46,920
Supplies	OFFICE SUPPLIES	\$4,136	\$5,115	\$978	\$155,832	\$30,688	(\$125,144)	\$61,376
Supplies	OPERATING SUPPLIES	\$34,492	\$24,032	(\$10,461)	\$196,665	\$144,191	(\$52,474)	\$288,382
Supplies	OUTSIDE DENTAL SUPPLIES	\$2,815	\$2,000	(\$815)	\$19,860	\$12,000	(\$7,860)	\$24,000
Supplies	PHARMACEUTICAL SUPPLIES	\$35,413	\$89,889	\$54,476	\$230,464	\$539,334	\$308,870	\$1,078,668
Supplies	JANITORIAL SUPPLIES	\$0	\$333	\$333	\$0	\$2,000	\$2,000	\$4,000
Supplies	PRINTING SUPPLIES	\$20	\$200	\$180	\$2,366	\$1,200	(\$1,166)	\$2,400
Supplies	UNIFORMS	\$0	\$417	\$417	\$1,198	\$2,500	\$1,303	\$5,000
Other	POSTAGE	\$1,575	\$667	(\$908)	\$5,328	\$4,000	(\$1,328)	\$9,480
Other	TELEPHONE	\$2,690	\$4,066	\$1,375	\$19,401	\$24,395	\$4,994	\$48,790
Other	WATER	\$31	\$31	\$1	\$183	\$188	\$5	\$375
Other	ELECTRICITY	\$1,464	\$2,083	\$619	\$8,745	\$12,500	\$3,755	\$25,000
Travel	TRAVEL, LOCAL	\$369	\$383	\$14	\$2,351	\$2,300	(\$51)	\$4,600
Travel	TRAVEL, OUT OF TOWN	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Travel	LOCAL TRAINING	\$967	\$417	(\$550)	\$5,590	\$2,500	(\$3,090)	\$5,000
Travel	TRAINING, OUT OF TOWN	\$2,546	\$1,719	(\$827)	\$12,083	\$10,312	(\$1,771)	\$20,624
Other	RENTALS	\$3,253	\$3,290	\$37	\$19,007	\$19,740	\$733	\$39,480
Other	LEASES	\$43,121	\$43,702	\$581	\$258,724	\$262,212	\$3,488	\$524,424
Other	MAINTENANCE / REPAIR, EQUIP.	\$9,378	\$6,977	(\$2,401)	\$42,967	\$41,860	(\$1,107)	\$83,720
Other	MAINTENANCE / REPAIR, AUTO	\$0	\$42	\$42	\$0	\$250	\$250	\$500
Other	FUEL	\$0	\$42	\$42	\$0	\$250	\$250	\$500
Other	MAINTENANCE / REPAIR, BLDG.	\$325	\$417	\$92	\$2,575	\$2,500	(\$75)	\$5,000
Other	MAINT/REPAIR, IT Equip.	\$0	\$1,273	\$1,273	\$3,168	\$7,638	\$4,469	\$15,275
Other	MAINTENANCE / Preventative, AUTO	\$0	\$42	\$42	\$0	\$250	\$250	\$500
Other	INSURANCE, AUTO/Truck	\$200	\$208	\$8	\$1,199	\$1,250	\$51	\$2,500
Other	INSURANCE, GENERAL LIABILITY	\$1,026	\$1,029	\$3	\$6,158	\$6,175	\$17	\$12,350
Other	INSURANCE, BLDG. CONTENTS	\$1,451	\$1,633	\$181	\$8,708	\$9,798	\$1,089	\$19,595
Other	Settlements	\$0	\$0	\$0	\$87,500	\$0	(\$87,500)	\$0



**Coastal Health & Wellness**

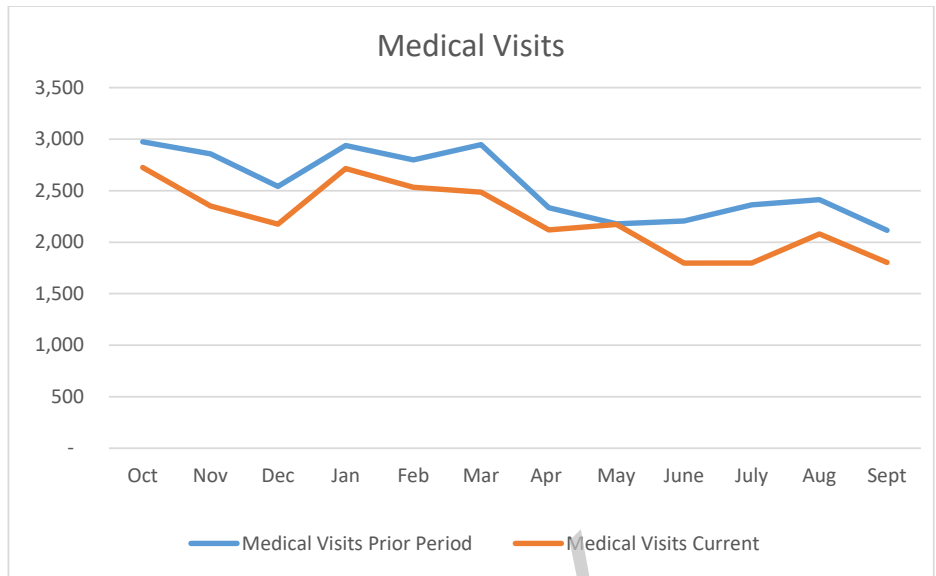
**Statement of Revenue and Expenses for the Period ending Sep 30, 2019**

		<b>Period Ending</b>	<b>MTD</b>	<b>MTD Budget</b>	<b>YTD</b>	<b>YTD</b>	<b>YTD Budget</b>	<b>Annual</b>
	<b>Description</b>	<b>9/30/2019</b>	<b>Budget</b>	<b>Variance</b>	<b>Actual</b>	<b>Budget</b>	<b>Variance</b>	<b>Budget</b>
Other	COMPUTER EQUIPMENT	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	OPERATING EQUIPMENT	\$0	\$0	\$0	\$18,500	\$0	(\$18,500)	\$0
Other	BUILDING IMPROVEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	NEWSPAPER ADS	\$458	\$1,500	\$1,042	\$5,795	\$9,000	\$3,205	\$18,000
Other	SUBSCRIPTIONS, BOOKS, ETC	\$484	\$125	(\$359)	\$634	\$750	\$116	\$1,500
Other	ASSOCIATION DUES	\$2,667	\$2,883	\$216	\$16,000	\$17,296	\$1,296	\$34,592
Other	IT SOFTWARE, LICENSES, INTANGIBLES	\$12,350	\$18,355	\$6,005	\$137,269	\$110,133	(\$27,137)	\$220,265
Other	PROF FEES/LICENSE/INSPECTIONS	\$25	\$203	\$178	\$717	\$1,215	\$498	\$2,430
Other	PROFESSIONAL SERVICES	\$1,242	\$1,875	\$633	\$17,157	\$11,250	(\$5,907)	\$22,500
Other	MED/HAZARD WASTE DISPOSAL	\$569	\$483	(\$85)	\$3,270	\$2,900	(\$370)	\$5,800
Other	TRANSPORTATION CONTRACT	\$546	\$650	\$104	\$2,743	\$3,900	\$1,157	\$7,800
Other	BOARD MEETING OPERATIONS	\$85	\$29	(\$56)	\$2,057	\$175	(\$1,882)	\$350
Other	SERVICE CHG - CREDIT CARDS	\$751	\$685	(\$66)	\$4,358	\$4,110	(\$248)	\$8,220
Other	CASHIER OVER / SHORT	\$0	\$0	\$0	\$5	\$0	(\$5)	\$0
Other	LATE CHARGES	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	BAD DEBT EXPENSE	\$40,304	\$35,045	(\$5,259)	\$253,251	\$210,269	(\$42,983)	\$420,537
Other	MISCELLANEOUS EXPENSE	\$0	\$0	\$0	\$1,946	\$0	(\$1,946)	\$0
	<b>Total Expenses</b>	<b>\$832,878</b>	<b>\$1,056,042</b>	<b>\$223,164</b>	<b>\$5,516,951</b>	<b>\$6,336,251</b>	<b>\$819,300</b>	<b>\$12,672,502</b>
	<b>Net Change in Fund Balance</b>	<b>\$235,535</b>	<b>(\$15,180)</b>	<b>\$250,715</b>	<b>(\$20,795)</b>	<b>(\$6,518)</b>	<b>(\$14,277)</b>	<b>(\$0)</b>
					Expenses Fund Bal. Reserve	(\$84,562)		
						(\$105,357)		

PRELIMINARY

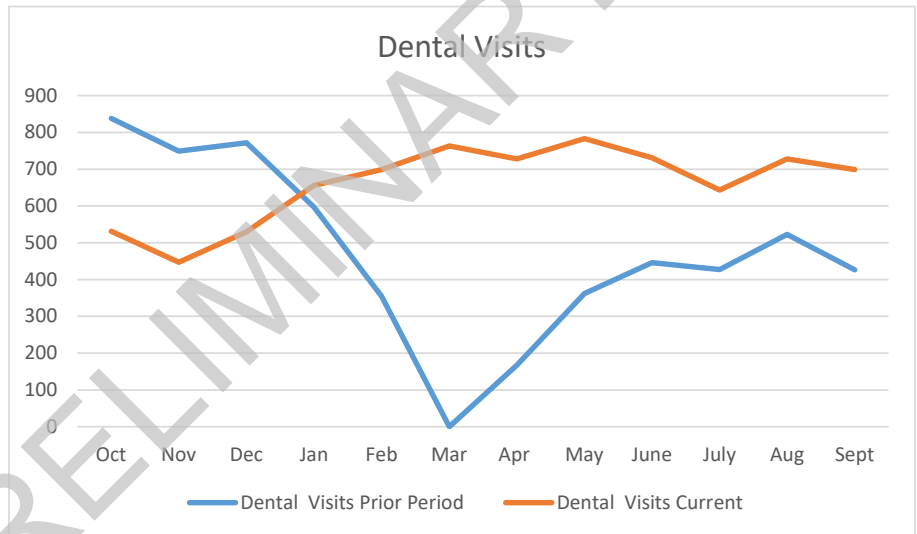
### Medical Visits

	<u>Prior Period</u>	<u>Current</u>
Oct	2,974	2,725
Nov	2,857	2,351
Dec	2,542	2,175
Jan	2,939	2,714
Feb	2,798	2,534
Mar	2,946	2,484
Apr	2,334	2,119
May	2,177	2,171
June	2,205	1,797
July	2,363	1,798
Aug	2,413	2,081
Sept	2,115	1,804
	<u>28,548</u>	<u>26,753</u>



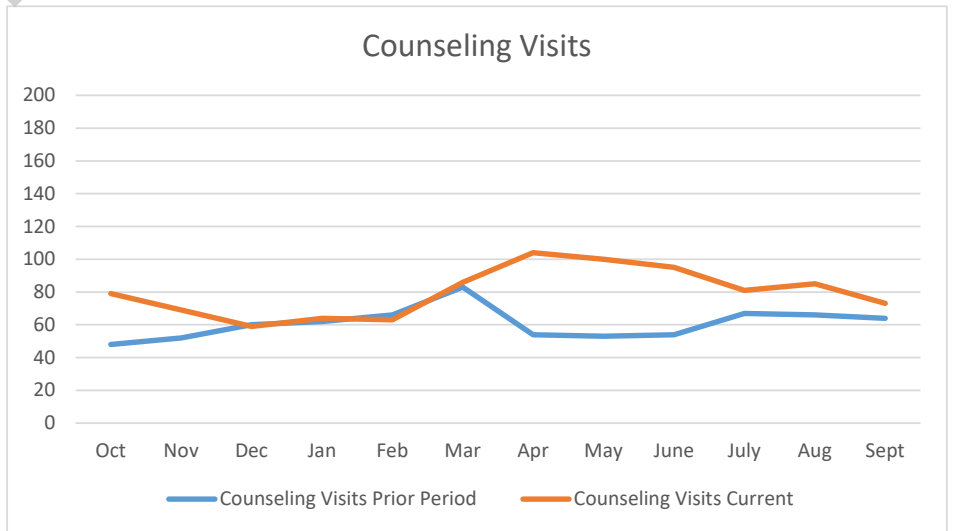
### Dental Visits

	<u>Prior Period</u>	<u>Current</u>
Oct	838	531
Nov	749	447
Dec	772	530
Jan	597	656
Feb	354	699
Mar	0	763
Apr	167	728
May	362	783
June	446	731
July	427	643
Aug	523	728
Sept	426	699
	<u>5,235</u>	<u>7,938</u>



### Counseling Visits

	<u>Prior Period</u>	<u>Current</u>
Oct	48	79
Nov	52	69
Dec	60	59
Jan	62	64
Feb	66	63
Mar	83	86
Apr	54	104
May	53	100
June	54	95
July	67	81
Aug	66	85
Sept	64	73
	<u>665</u>	<u>958</u>



**Vists by Financial Class - Actual vs. Budget**  
**As of September 30, 2019 (Grant Year 4/1/19-3/31/20)**

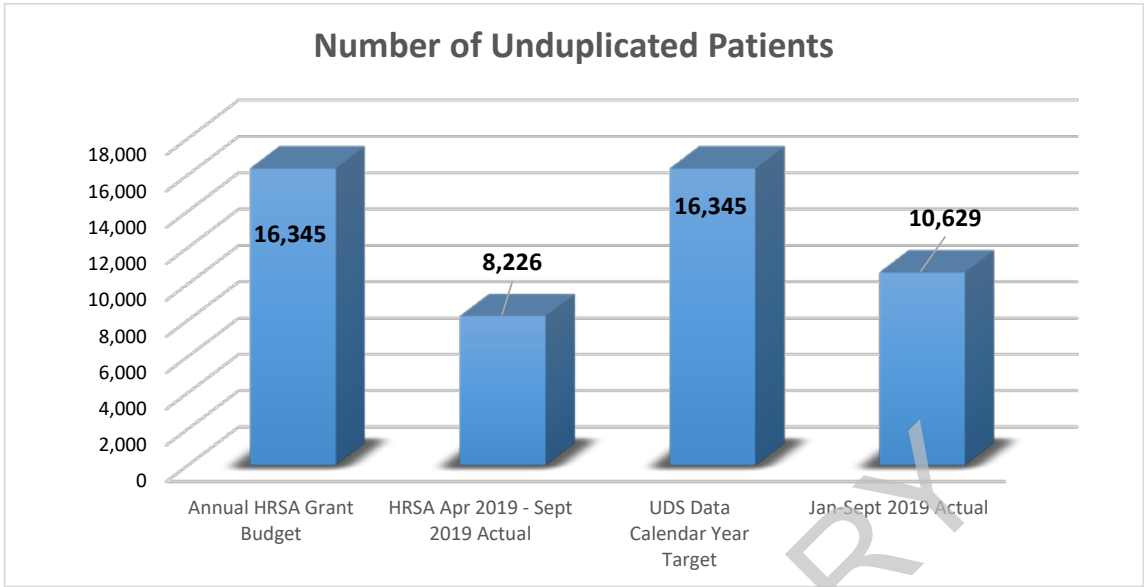
	Annual HRSA		Over/(Under)		YTD Actual	YTD Budget	Over/(Under) YTD Budget	% Over/ (Under) YTD Budget
	Grant Budget	MTD Actual	MTD Budget	MTD Budget				
Medicaid	5,442	188	454	(266)	1,193	2,721	(1,528)	-56%
Medicare	3,640	178	303	(125)	1,289	1,820	(531)	-29%
Other Public (Title V, Contract)	1,728	75	144	(69)	530	864	(334)	-39%
Private Insurance	4,718	146	393	(247)	962	2,359	(1,397)	-59%
Self Pay	31,361	1,989	2,613	(624)	12,699	15,681	(2,982)	-19%
	<b>46,889</b>	<b>2,576</b>	<b>3,907</b>	<b>(1,331)</b>	<b>16,673</b>	<b>23,445</b>	<b>(6,772)</b>	<b>-29%</b>

**Unduplicated Patients - Current vs. Prior Year**  
**UDS Data Calendar Year**  
**January through December**

	Current Year Annual Target	Jan-Sept 2018 Actual	Jan-Sept 2019 Actual	Increase/ (Decrease) Prior Year	% of Annual Target

**Unduplicated Patients - Current vs. Prior Year**  
**HRSA Grant Year**  
**April through March**

	Annual HRSA Grant Budget	Apr 2018 - Sept 2018 Actual	Apr 2019 - Sept 2019 Actual	Increase/ (Decrease) Prior Year	% of Annual Target



[Back to Agenda](#)

PRELIMINARY



# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #9**

**Consider for Approval Quarterly Visit and Analysis Report Including  
Breakdown of New Patients by Payor Source**

**Coastal Health & Wellness - Quarterly Visit & Analysis Report  
for the period ending September 30, 2019**

*\*based on UDS Reporting period (January 1 to December 31)*

Total Visits by Financial Class	September 2019	September 2018	% Change	* YTD Average		% Change	* YTD Payor Mix		% Change
				2019	2018		2019	2018	
Self Pay	1,989	1,940	3%	2,231	2,061	8%	75.1%	70.8%	4%
Medicare	178	255	-30%	242	296	-18%	8.1%	10.2%	-2%
Medicaid	188	178	6%	221	241	-8%	7.4%	8.3%	-1%
Contract	56	41	37%	72	58	26%	2.4%	2.0%	0%
Private Insurance	146	130	12%	181	196	-8%	6.1%	6.7%	-1%
Title V	19	64	-70%	24	60	-60%	0.8%	2.1%	-1%
<b>Total</b>	<b>2,576</b>	<b>2,608</b>	<b>-1%</b>	<b>2,970</b>	<b>2,911</b>	<b>2%</b>	<b>100%</b>	<b>100%</b>	<b>0%</b>

Department	* YTD Total Visits		% Change
	2019	2018	
Medical	19,555	22,325	-12%
Dental	6,431	3,304	95%
Counseling	748	569	31%
<b>Total</b>	<b>26,734</b>	<b>26,198</b>	<b>2%</b>

Unduplicated Visits	* YTD Total Users		% Change
	2019	2018	
Medical	8,337	9,444	-12%
Dental	2,159	1,281	69%
Counseling	133	100	33%
<b>Total</b>	<b>10,629</b>	<b>10,825</b>	<b>-2%</b>

NextGen / Crystal Reports - Summary Aging by Financial Class for the period ending September 30, 2019 (based on encounter date)										Goal is 45-75 days	
										Days in A/R	
	0-30	31-60	61-90	91-120	121-150	151-180	181-up	Total	%	Current Period	Last Qtr
Self Pay	\$19,947	\$56,719	\$59,137	\$51,927	\$54,999	\$54,958	\$570,428	\$868,115	78%	287	295
Medicare	15,890	16,638	4,615	3,863	2,329	3,410	21,748	\$68,493	6%	57	61
Medicaid	12,088	18,203	7,884	7,831	5,387	4,199	(15,891)	\$39,700	4%	34	23
Contract	1,599	7,178	8,226	4,619	2,760	6,437	112,958	\$143,776	13%	336	265
Private Insurance	10,234	22,878	7,145	6,958	3,985	1,608	8,513	\$61,322	6%	68	64
Title V	919	1,846	3,529	2,381	-	(7)	795	\$9,462	1%	113	179
Unapplied	(78,842)							(78,842)	-7%	-----	-----
<b>Totals</b>	<b>(78,842)</b>	<b>\$123,462</b>	<b>\$90,535</b>	<b>\$77,578</b>	<b>\$69,461</b>	<b>\$70,606</b>	<b>\$698,551</b>	<b>\$1,112,027</b>	<b>100%</b>	<b>149</b>	<b>148</b>

Previous Quarter Balances	(78,842)	\$123,462	\$90,535	\$77,578	\$69,461	\$70,606	\$698,551	\$1,112,027	100%	149	148
% Change	-46%	11%	-12%	-14%	-28%	-30%	3%	-3%			

Charges & Collections	September 2019	September 2018	% Change	* YTD 2019	YTD 2018	% Change
Billed	\$737,737	\$649,699	14%	\$7,369,332	\$6,430,945	14.59%
Adjusted	(540,934)	(461,855)	17%	(5,533,695)	(4,621,482)	19.74%
Net Billed	\$196,803	\$187,844	5%	\$1,835,637	\$1,809,463	1.45%
Collected	\$139,003	\$115,479	20%	\$1,515,360	\$1,227,450	23%
% Net Charges collected	71%	61%	15%	83%	68%	22%

Payor	YTD Current Period				YTD Prior Year			
	Visits	Payor Mix	Net Revenue per Visit	(Net Billed) Net Revenue	Visits	Payor Mix	Net Revenue per Visit	(Net Billed) Net Revenue
Self Pay	23,211	73.5%	\$35.20	\$817,006	21,701	70.9%	\$31.23	\$677,671
Medicare	2,491	7.9%	\$129.90	323,589	3,001	9.8%	\$145.90	437,855
Medicaid	2,314	7.3%	\$135.40	313,322	2,432	8.0%	\$136.77	332,632
Contract	1,400	4.4%	\$82.60	115,636	734	2.4%	\$96.38	70,741
Private Insurance	1,953	6.2%	\$124.70	243,547	2,103	6.9%	\$115.93	243,792
Title V	222	0.7%	\$101.52	22,536	620	2.0%	\$75.44	46,772
<b>Total</b>	<b>31,591</b>	<b>100%</b>	<b>\$58.11</b>	<b>\$1,835,637</b>	<b>30,591</b>	<b>100%</b>	<b>\$59.15</b>	<b>\$1,809,463</b>

Item	2019	2018
Self Pay - Gross Charges	\$5,095,322	\$4,185,901
Self Pay - Collections	\$725,073	\$485,158
% Gross Self Pay Charges Collected	14.2%	11.6%
% Net Self Pay Charges Collected	88.7%	71.6%

**Coastal Health & Wellness**  
**New Patients By Financial Class**  
**From 1/1/2019 to 9/30/19**

<b>Summary</b>	<b>Current Period</b>		<b>Prior Period 2018</b>	
	<b>New Patients</b>	<b>Current %</b>	<b>New Patients</b>	<b>%</b>
Self Pay	2,123	<b>78.7%</b>	1,904	<b>77.1%</b>
Medicaid	193	<b>7.2%</b>	137	<b>5.5%</b>
Medicare	80	<b>3.0%</b>	108	<b>4.4%</b>
Private Insurance	186	<b>6.9%</b>	223	<b>9.0%</b>
Title V	62	<b>2.3%</b>	42	<b>1.7%</b>
Contracts	52	<b>1.9%</b>	57	<b>2.3%</b>
<b>Total</b>	<b>2,696</b>	<b>100.0%</b>	<b>2,471</b>	<b>100.0%</b>

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #10**

**Consider for Approval Quarterly Access to  
Care Report**

**Coastal Health & Wellness – Access to Care Report  
July, August, September 2019 (3<sup>rd</sup> Quarter)**

**Goals: Utilization % = 90% (minus Counseling); No Show % = 20%**

	Available Appts	# Appts Scheduled	% Utilization	# Appts Kept	% Appts Kept	# No Shows	% No Shows
Medical	4,458	4,478	100.5%	3,468	77%	1,010	23%
Dental	2,099	2023	96%	1,501	74%	522	26%
Dental Hygienist	370	350	95%	291	83%	59	17%
Counseling	826	388(534)	65%*	256	66%	132	34%
Galveston	Available Appts	# Appts Scheduled	% Utilization	# Appts Kept	% Appts Kept	# No Shows	% No Shows
Medical	1,864	1,822	98%	1,331	73%	491	27%
Dental	591	550(561)	95%*	400	73%	150	28%
Dental Hygienist	84	76	90%	65	86%	11	14%
Counseling	416	109(161)	39%*	78	72%	31	28%

\*Appointment slots / Available Appointments

**April, May, June 2019 (2<sup>nd</sup> Quarter)**

	Available Appts	# Appts Scheduled	% Utilization	# Appts Kept	% Appts Kept	# No Shows	% No Shows
Medical	6,165	5,874	95%	4,415	75%	1,459	25%
Dental	2,617	2,432	93%	1,781	73%	651	27%
Dental Hygienist	350	327	93%	273	83%	54	17%
Counseling	901	415	46%	302	73%	113	27%
Galveston	Available Appts	# Appts Scheduled	% Utilization	# Appts Kept	% Appts Kept	# No Shows	% No Shows
Medical	2,486	2,251	91%	1,685	75%	565	25%
Dental	430	400	93%	290	73%	110	28%
Dental Hygienist	96	92	96%	81	88%	11	12%
Counseling	430	114	27%	71	62%	43	38%

### Change in Comparison to Prior Quarter

	Available Appointments		Utilization Rate		No Show Rate	
	Texas City	Galveston	Texas City	Galveston	Texas City	Galveston
Medical	(1,707)	(622)	5%	7%	-2%	2%
Dental	(518)	161	3%	2%	-1%	0%
Dental Hygienist	20	(12)	2%	-6%	0%	2%
Counseling	(75)	(14)	19%	12%	7%	-10%

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #11**

**Consider for Approval Quarterly Patient  
Satisfaction Survey Report**

**Patient Satisfaction Survey Responses**  
**July 1 - September 30, 2019**

<b>Total Responses</b>	<b>605</b>	
Galveston	272	45%
Texas City	333	55%

<b>Type of Visit</b>		
Medical	465	77%
Dental	112	19%
Counseling	28	5%

<b>Appointment Time Based on Need</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>	<b>Weighted Avg</b>
Medical	0.9%	1.2%	5.5%	17.2%	75.2%	4.65
Dental	1.0%	1.0%	4.8%	15.4%	77.9%	4.68
Counseling	0.0%	0.0%	7.7%	15.4%	76.9%	4.69

<b>The Appointment Check-in Process</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>	<b>Weighted Avg</b>
Medical	0.0%	0.5%	3.7%	16.6%	79.3%	4.75
Dental	0.0%	1.0%	1.0%	15.4%	82.7%	4.8
Counseling	0.0%	3.9%	3.9%	15.4%	76.9%	4.65

<b>The Staff on Being Friendly &amp; Helpful</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>	<b>Weighted Avg</b>
Medical	0.7%	0.7%	3.0%	10.6%	85.1%	4.79
Dental	0.0%	1.9%	2.9%	9.6%	85.6%	4.79
Counseling	0.0%	0.0%	3.9%	15.4%	80.8%	4.77

<b>How Well Did Staff Explain Things to You So You Could Understand</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>	<b>Weighted Avg</b>
Medical	1.4%	0.2%	3.5%	12.6%	82.3%	4.74
Dental	0.0%	1.0%	5.8%	9.6%	83.7%	4.76
Counseling	0.0%	0.0%	0.0%	19.2%	80.8%	4.81

<b>The Quality of Care you Received Today</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>	<b>Weighted Avg</b>
Medical	1.8%	2.1%	2.1%	13.1%	80.9%	4.69
Dental	1.0%	2.9%	3.9%	8.7%	83.7%	4.71
Counseling	0.0%	0.0%	0.0%	11.5%	88.5%	4.88

<b>The Clinic on Being Clean &amp; Sanitary</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>	<b>Weighted Avg</b>
Medical	0.2%	0.5%	3.7%	14.0%	81.6%	4.76
Dental	0.0%	0.0%	1.0%	10.6%	88.5%	4.88
Counseling	0.0%	0.0%	0.0%	15.4%	84.6%	4.85

<b>What is the Likelihood that you Would Recommend Coastal Health &amp; Wellness to a Friend or Family Member</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>	<b>Weighted Avg</b>
Medical	1.4%	1.2%	3.2%	12.4%	81.8%	4.72
Dental	1.0%	0.0%	4.8%	9.6%	84.6%	4.77
Counseling	0.0%	0.0%	7.7%	15.4%	76.9%	4.69

Average All Categories - Current Quarter	0%	1%	3%	13%	82%	4.75
Average All Categories - Previous Quarter	3.0%	1.0%	4.0%	20.0%	71%	4.54

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #12**

**Consider for Approval Risk Management Plan**



Effective: XX/XX/XXXX

Last Approved: XX/XX/XXXX

Expires: XX/XX/XXXX

## **Risk Management Plan**

### **1. PURPOSE**

The purpose of the Coastal Health & Wellness Risk Management Plan (the “Plan”) is to address visitor, third party, volunteer, and employee safety as well as potential business, operational, and property risks. The Risk Management Plan is the primary tool for outlining Coastal Health & Wellness’ (“CHW”) overall risk management procedures.

The focus of the Risk Management Plan is to provide an ongoing, comprehensive, and systematic approach to reducing exposure to risk. Risk management activities include identifying, investigating, analyzing, and evaluating risks, followed by selecting and implementing the most appropriate methods for correcting, reducing and/or eliminating them.

### **2. GUIDING PRINCIPLES**

This Risk Management Plan supports the Coastal Health & Wellness philosophy that patient safety and risk management are everyone’s responsibility. Teamwork and participation among management, providers, volunteers, and staff are essential for an efficient and effective patient safety and risk management plan. The Plan will be implemented through the coordination of multiple organizational functions and the activities of multiple staff members.

Coastal Health & Wellness supports the establishment of a just culture that emphasizes implementing evidence-based best practices, learning from error analysis, and providing constructive feedback rather than blame and punishment. In a just culture, unsafe conditions and hazards are readily and proactively identified, medical or patient care errors are reported and analyzed, mistakes are openly discussed, and suggestions for systemic improvements are welcomed. Individuals are still held accountable for compliance with patient safety and risk management practices. As such, if evaluation and investigation of an error or event reveal reckless behavior or willful violation of policies, disciplinary actions can be taken.

Principles of this Plan provide the foundation for developing key policies and procedures for risk management activities, including but not limited the following:

- Claims and insurance management;
- Complaint resolution;
- Confidentiality and release of information;
- Compliance efforts;

- Safe and secure use of technology;
- Event investigation, root-cause analysis, and follow-up;
- Provider and staff education, competency validation, credentialing and privileging requirements, and background checks;
- Systems for monitoring and tracking referrals (specialty care, hospital and or emergency department admissions) and diagnostic laboratory values and other tests;
- Reporting and management of adverse events and near misses;
- Trend analysis of events, near misses, and claims; and
- Implementing performance improvement strategies to mitigate risk.

## **2.1 Leadership**

The success of the Coastal Health & Wellness Risk Management Plan requires top-level commitment and support. The Governing Board by majority vote authorizes adoption of this Plan.

The Governing Board and CHW executives, including but not limited to the Executive Director, Medical Director, Dental Director, Chief Nursing Officer and Chief Compliance Officer are committed to promoting the safety of all patients, visitors, employees, volunteers, and other individuals involved in operations of the organization. The Risk Management Plan is designed to serve as an umbrella policy, in conjunction with the Risk Management Training Plan, aimed at reducing system-related errors and potentially unsafe conditions by implementing continuous improvement strategies to support an organizational culture of safety.

## **3. PLAN GOALS AND OBJECTIVES**

The Risk Management Plan sets forth goals and objectives, which include the following:

- Continuously improving patient safety and minimizing or preventing the occurrence of errors, events, and system breakdowns leading to harm of patients, staff, volunteers, visitors, and others through proactive risk management and patient safety and emergency operations activities.
- Minimizing adverse effects of errors, events, and system breakdowns when they do occur.
- Minimizing losses to the organization by proactively identifying, analyzing, preventing, and controlling potential clinical, business, financial, and operational risks.
- Achieving requirements required by accrediting organizations.
- Protecting human and intangible resources (e.g. reputation).

## **4. SCOPE AND FUNCTIONS OF THE PLAN**

The Coastal Health & Wellness Risk Management Plan interfaces with all operational departments and services offered through the clinic, as well as HRSA.

### **4.1 Functional Interfaces**

Functional interfaces with the Risk Management Plan include areas covered under the Coastal Health & Wellness Environment of Care plans, as well as credentialing and privileging, information technology,



event reporting and investigation, performance assessment and improvement, volunteers, infection control, and administration. All areas work together on risk reduction strategies and methods as defined in this Plan.

## 4.2 Specific Components

- a) The Risk Management Plan will include the following components: Developing systems for overseeing the reporting of adverse events, near misses, and potentially unsafe conditions.
  - i. Reporting responsibilities may include internal reporting as well as external reporting to regulatory, governmental, or voluntary agencies.
- b) Ensuring the collection and analysis of data to monitor the performance of processes that involve risk or that may result in serious adverse events, near misses, and potentially unsafe conditions; providing feedback to providers and staff; and using this data to facilitate systems improvements to reduce the probability of occurrence of future related events.
- c) Ensuring compliance with data collection and reporting requirements of governmental, regulatory, and accrediting agencies.
- d) Facilitating and ensuring the implementation of patient safety initiatives that include tracking systems for preventive screenings and diagnostic tests, medication safety systems, and emergency management programs.
- e) Facilitating and ensuring provider and staff participation in educational programs on patient safety and risk management.
- f) Facilitating a culture of safety in the organization that embodies an atmosphere of mutual trust in which all providers and staff members can talk freely about safety problems and potential solutions without fear of retribution. This ordinarily involves performing safety culture surveys and assessments.
- g) Proactively advising the organization on strategies to reduce unsafe situations and improve the overall environmental safety of patients, visitors, staff, and volunteers.
- h) Preventing and minimizing the risk of liability to the health center, and protecting the financial, human, and other tangible and intangible assets of the health center.
- i) Decreasing the likelihood of claims and lawsuits by educating patients and their families about proper health practices. This includes communicating and disclosing errors and events that occur in the course of patient care with a plan to manage any adverse effects or complications.
- j) Investigating and assisting in claim resolution to minimize financial exposure.
- k) Reporting claims and potentially compensable events to the appropriate entity, including the U.S. Department of Health and Human Services Federal Tort Claims Act (“FTCA”) claims (as appropriate) and other insurers in accordance with the requirements of the insurance policy/contract and FTCA requirements.
- l) Supporting quality assessment and improvement programs throughout the organization.
- m) Implementing programs that fulfill regulatory, legal, and accreditation requirements.
- n) Establishing an ongoing Quality Assurance and Risk Management Committee composed of representatives from key clinical and administrative departments and services.
- o) Monitoring the effectiveness and performance of risk management actions. Performance monitoring data may include the following:

- i. Claims and claim trends;
  - ii. Culture of safety surveys;
  - iii. Event trending data;
  - iv. Ongoing risk assessment information;
  - v. Patient's or family's perceptions of how well the organization meets their needs and expectations (i.e. patient satisfaction survey data); and
  - vi. Quality performance data.
- p) Completing insurance and deeming applications.
- q) Developing and monitoring effective handoff processes for continuity of patient care.

## **5. ADMINISTRATIVE AND COMMITTEE STRUCTURE AND MECHANISMS FOR COORDINATION**

The Risk Management Plan is administered through the Quality Assurance and Risk Management Committee, which is led by the Executive Director and the Chief Nursing Officer, and by the Chief Compliance Officer who acts as the Risk Manager. The Risk Manager reports to the Executive Director and interacts with administration, staff, medical providers, and other professionals in order to meet program goals and objectives.

The Risk Manager is responsible for overseeing day-to-day monitoring of risk management activities and for investigating and reporting to the applicable insurance carrier actual or potential clinical, operational, or business claims or lawsuits arising out of the organization, according to requirements specified in the insurance policy or contract. The Risk Manager serves as the primary contact between the organization and other external parties on all matters relative to risk identification, prevention, and control, as well as risk retention and risk transfer. The Risk Manager oversees the reporting of events to external organizations, per regulations and contracts, and communicates analysis and feedback of reported Risk Management information to the organization for action.

## **6. REPORTING REQUIREMENTS, MONITORING, AND CONTINUOUS IMPROVEMENT**

The Quality Assurance and Risk Management Committee reviews risk management activities monthly. The Risk Manager reports activities and outcomes (e.g., claims activity, risk and safety assessment results, event report summaries, and trends) to the Governing Board and the Governing Board Quality Assurance Committee on a quarterly basis. These reports inform members of the Governing Board of efforts made to identify and reduce risks, reports on the success of these activities, and communicates outstanding issues that require input or support from the Governing Board for action or resolution. Data reporting may include event trends, claims analysis, frequency and severity data, credentialing activity, relevant provider and staff education, and risk management, emergency operation and patient safety activities. In accordance with the organization's bylaws, recommendations from the Quality Assurance

and Risk Management Committee that rise to the level of requiring Board approval are submitted as needed. Goals are developed to remain consistent with established risk management goals and Environment of Care measures as determined by the Quality Assurance and Risk Management Committee and/or the Governing Board.

Documentation is retained in the form of meeting minutes for the applicable body.

## 7. CONFIDENTIALITY

Any and all documents and records associated with the Risk Management Plan and subjected to legally permissible withholdings shall be privileged and confidential to the extent provided by state and federal law. Confidentiality protections may include attorney/client privilege, attorney work product, Joint Commission survey reports, and peer review protections.

The signatures below represent acceptance of the Risk Management Plan.

Risk Manager Approval: \_\_\_\_\_

Date: \_\_\_\_\_

Executive Director Approval: \_\_\_\_\_

Date: \_\_\_\_\_

Medical Director Approval: \_\_\_\_\_ - \_\_\_\_\_

Date: \_\_\_\_\_

Governing Board Approval: \_\_\_\_\_

Date: \_\_\_\_\_

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# **COASTAL HEALTH & WELLNESS**

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #13**

**Consider for Approval Quarterly Compliance and  
Risk Management Report**

**Coastal Health & Wellness Governing Board**  
**Quarter 2, FY20 – Compliance Report & Risk Management Goal Tracking**

<b>Internal Audits</b>		
<i>DEPARTMENT- DATE CONDUCTED</i>	<i>TYPE OF AUDIT &amp; FINDINGS</i>	<i>ACTION TAKEN</i>
<b>Patient Services Director - July 1, 2019 – September 30, 2019</b>	<b>Financial Screening Audit:</b> <ul style="list-style-type: none"> <li>• Financial screening audits were performed by randomly pulling ten applications monthly to establish the accuracy and completeness of said applications.</li> <li>• An inclusive application requires the CHW Patient Service Specialists to ensure the accurate completion of nine different fields within each application, all of which are reviewed during the audit.</li> <li>• Amongst the 30 applications reviewed, which collectively encompass 270 individual fields, there was one cited error – yielding a 99% rate of accuracy.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue operating under current protocol.</li> </ul>
<b>Patient Services Director - July 1, 2019 – September 30, 2019</b>	<b>Title V Audit:</b> <ul style="list-style-type: none"> <li>• Due to funding restrictions, the Title V program wasn't accessible to patients in July and August of 2019. Title V funds again became available in September.</li> <li>• 35 Title V applications were audited for the month of September, which collectively included 350 individual fields.</li> <li>• Among the 350 fields, there were 7 erroneous findings, yielding a 98% rate of accuracy.</li> </ul>	<ul style="list-style-type: none"> <li>• All seven errors were attributable to NextGen inputting mistakes.</li> <li>• Staff was reminded to remain cautious during data entry processes as it pertains to Title V applications (and other important patient criteria).</li> </ul>

**Coastal Health & Wellness Governing Board**  
**Quarter 2, FY20 – Compliance Report & Risk Management Goal Tracking**

<p><b>Nursing Director/ Business Office Manager -</b> July 1, 2019 – September 30, 2019</p>	<p><b>340B Medication Audit:</b></p> <ul style="list-style-type: none"> <li>• The Nursing Director and Business Office Manager jointly performed a 340B medication audit to determine the comprehensiveness of charting 340B ordered meds, which requires documentation reflecting consistency in medication logs, NextGen and billing activities.</li> <li>• Of the 20 charts analyzed (ten at each of the two sites), no errors were identified, yielding a 100% compliance rate.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue operating under current protocol.</li> </ul>
<p><b>HIPAA Breach Reports</b></p>		
<p><b><i>DEPARTMENT – DATE OCCURRED</i></b></p>	<p><b><i>SUMMARY</i></b></p>	<p><b><i>FOLLOW-UP</i></b></p>
<p><b>Patient Services</b> October 4, 2019</p>	<ul style="list-style-type: none"> <li>• A patient services representative inadvertently provided an appointment reminder printout to the incorrect patient. The incorrect patient presented to the clinic at the time and date indicated on the reminder, at which time it was discovered the reminder had been intended for another patient.</li> </ul>	<ul style="list-style-type: none"> <li>• The staff member was issued a formal verbal warning and counseled about the matter by the Patient Services Director, and all members of the Patient Services staff were reminded to always double-check documentation containing PHI before handing it to patients.</li> <li>• Per 45 C.F.R. § 164.408, a breach notification detailing the disclosure was submitted to the Secretary of Health &amp; Human Services.</li> </ul>

**Coastal Health & Wellness Governing Board**  
**Quarter 2, FY20 – Compliance Report & Risk Management Goal Tracking**

<b>No External Audits Performed</b>		
<b>Incident Reports</b>		
<i>DEPARTMENT – DATE OCCURRED</i>	<i>SUMMARY</i>	<i>FOLLOW-UP</i>
<b>Dental (ICC)– July 18, 2019</b>	<p>A provider notified a patient that, due to a prescription the patient was currently taking, the patient’s tooth could not be extracted until the patient first received a medical evaluation. The patient’s mother become extremely upset and started cursing and taking pictures of staff with her phone. Staff did not have the CHW emergency phone protocol at the front desk and thus couldn’t call a code, and ICC security failed to respond despite being radioed. Fortunately, the patient and his mother departed the clinic shortly thereafter.</p> <ul style="list-style-type: none"> <li>• <b>Preventable Incident</b></li> </ul>	<ul style="list-style-type: none"> <li>• The emergency protocol is now being kept at the front desk.</li> <li>• The lieutenant charged with oversight of the officers stationed at the Island Community Center was notified of the on-duty officer’s failure to respond to the call, and the lieutenant issued a memo to all officers stationed at that post to ensure they keep the Coastal provided radio on and tuned into the designated frequency.</li> </ul>
<b>Dental (ICC) - August 26, 2019</b>	<p>The air conditioning in the dental area malfunctioned overnight, causing the humidity in the storage area and sterilization room to eclipse maximum permissible temperatures. Additionally, the refrigerator was found to have exceeded the allowable temperature. Per the Infection Control Nurse, all instruments were resterilized, new spore tests were performed, and the flowable composite stored in the refrigerator was discarded.</p> <ul style="list-style-type: none"> <li>• <b>Non-Preventable Incident</b></li> </ul>	<ul style="list-style-type: none"> <li>• Dental drafted contingency plans to specify how to address such matters should they occur in the future, and these plans were approved by the Quality Assurance and Risk Management Committee on Wednesday, October 2, 2019.</li> </ul>

**Coastal Health & Wellness Governing Board**  
**Quarter 2, FY20 – Compliance Report & Risk Management Goal Tracking**

<p><b>Dental (MCA) –</b> September 5, 2019</p>	<p>During Dental’s monthly inspection, it was discovered that three ammonia ampules were missing. Although the box’s security tag was still intact, it was loose enough for the box to have been slightly opened and medications to be removed. The ampules were replaced, and a new security tag was tightly affixed to the box.</p> <ul style="list-style-type: none"> <li>• <b>Preventable Incident</b></li> </ul>	<ul style="list-style-type: none"> <li>• After each month’s inspection, the dental assistant performing the medication box audit must now fasten the security tag tight enough so the box cannot be opened without first breaking the tag.</li> <li>• At the end of each business day, the medication box will be stored in a cabinet in the medication room instead of remaining on the countertop, where it previously was always kept.</li> </ul>
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<b>Warning and Termination Letters</b>	
<b><i>REASON</i></b>	<b><i>TYPE OF LETTER</i></b>
Debt Collection Policy	Suspensions: 220; Reinstatements: 164
Behavioral Letters Issued	Terminations: 0; Warnings: 2

**NOTE: Various issues were discussed in peer review.**

*Incidents involving quality of care issues, In accordance with Section 161 et seq., Health and Safety Code, are reviewed such that proceedings and records of the quality program and committee reviews are privileged and confidential.*



**Annual Risk Management Report: July - September 2019**

July 2019- June 2020

Objective	Goal	2018-2019 Total	2019-2020 Goal	Q1 (07/19-09/19)	Q2 (10/19-12/19)	Q3 (01/20-03/20)	Q4 (04/20-06/20)	Total
<b>Customer Service and Patient Satisfaction</b>								
Promote positive patient service experience with all staff with a particular emphasis on treating patients in a courteous manner	Reduce grievances by 20% from the previous year	25	20	10 Total 7 Medical 1 Dental 1 Security 1 Billing				
Offer optimal care for all patients throughout the entirety of their visit	Increase weighted results of patient satisfaction survey to 4.8	4.6	4.8	4.75				
Promote patient appointment confirmations	Reduce the cumulative patient no-show rate to 20%	28.60%	20%	24.60%				
Ensure staff always wears their Coastal Health & Wellness issued identification cards in a readily visible manner	Biennial audits should yield at least 95% of identification cards being worn appropriately	100%	95%	Audit to Occur Q2 and Q4				
Minimize preventable maintenance related injuries for all staff, patients and visitors	Incur zero preventable injuries at all CHW locations	5	0	0				

**KEY**

**COLOR KEY**

Off Targeted Measures; Needs Improvement	Trending in Proper Direction; Still Needs Focus	Compliant with Goals
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**Annual Risk Management Report: July - September 2019**

July 2019- June 2020

Objective	Goal	2018-2019 Total	2019-2020 Goal	Q1 (07/19-09/19)	Q2 (10/19-12/19)	Q3 (01/20-03/20)	Q4 (04/20-06/20)	Total
<b>Staff Trainings</b>								
Train staff on appropriate responses for different emergency scenarios	Facilitate at least three non-required emergency preparedness drills during the year	NA	3	No drills facilitated				
Ensure all staff is trained on SDS material pertinent to his/her work area and responsibilities	Ensure documented training rate of 100% within 30 days from hire	NA	100%	100%				
Guarantee all staff is trained on equipment critical to his/her job performance	Ensure documented training rate of 100% within 30 days from hire	NA	100%	100%				
All staff is trained on how to respond to hazards	Documentation exhibiting 100% of staff received Hazardous Response Training exists	NA	100%	Training Occurred October 2019				
Train staff regarding detection of and follow-up actions for suspected human trafficking victims	Provide training to 100% of employees about how to report suspected human trafficking	100%	100%	Scheduled for June 2020				
Staff receives safety and incident report training	Documentation exhibiting 95% of staff received Risk Management and Safety Training	NA	95%	100%				
Continue to promote staff knowledge of hand-hygiene practices and policies	Increase cumulative hand-hygiene audit score to 90%	76%	90%	97%				

**Annual Risk Management Report: July - September 2019**

July 2019- June 2020

Objective	Goal	2018-2019 Total	2019-2020 Goal	Q1 (07/19-09/19)	Q2 (10/19-12/19)	Q3 (01/20-03/20)	Q4 (04/20-06/20)	Total
<b>Maintenance and Reporting</b>								
Protect patients and staff by ensuring incidents and adverse events are promptly reported	95% of incident reports should be made within two business days of the incident's occurrence	NA	95%	100%				
Protect staff and patients by promptly reporting issues requiring landlord attention	Report 100% of building and/or maintenance related issues to applicable landlord within 24 business hours of discovery	100%	100%	100%				
Maintain staff and patient safety by keeping equipment properly tested and maintained	95% of equipment (100% of critical equipment) documented in Equipment Inventory Log be inspected and calibrated in accordance with manufacturer's recommendations	100%	95%	100%				
Minimize obstruction to fire exit doors	Achieve a cumulative score for non-obstructed doors of at least 95%	NA	95%	100%				
Maintain at least 18" between storage and top of sprinkler heads	Achieve a cumulative score of at least 90% when auditing sprinkler head ceiling clearance	NA	90%	100%				
Access to fire extinguishers shall remain clear and unobstructed	Achieve a cumulative score for non-obstructed pathways to fire extinguishers of at least 95%	NA	95%	100%				
Maintain SDS binders with all applicable material	Biennial audits should yield at least a 90% percentage of accuracy	NA	90%	95%				

Annual Risk Management Report: July - September 2019 July 2019- June 2020								
Objective	Goal	2018-2019 Total	2019-2020 Goal	Q1 (07/19-09/19)	Q2 (10/19-12/19)	Q3 (01/20-03/20)	Q4 (04/20-06/20)	Total
<b>Suits, Claims and Potentially Compensable Incidents</b>								
Take all necessary precautions to ensure an environment optimally conducive to patient safety	Incur no malpractice or risk management related suits or claims	117	0	0				
Retain open communication and promote timely reporting of adverse events	Ensure potentially compensable incidents are reported and deliberated upon by executive management within 72 business hours following their occurrence	NA	NA	0 incidents				
<b>Notes</b>								

**EOC Projects Commenced During Q1 (07/19 - 09/19)**

1. The Risk and Safety Coordinator worked with departmental managers to ensure annual calibrations were carried out, as specified in the Equipment Management Plan.
  - a. All equipment requiring inspection was labeled.
    - i. The Fleet and Facilities Coordinator inspected all electric equipment for wire integrity.
    - ii. Cal-Tech, a certified third-party vendor, inspected all equipment requiring calibration verification.
  - b. The Equipment Inventory Log was updated to include:
    - i. Most recent inspection dates;
    - ii. Equipment no longer in-use that remained on the list; and
    - iii. Equipment recently added.
  - c. Per the Equipment Assessment Plan, all new equipment was scored and logged.

[Back to Agenda](#)



# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #14**

**Consider for Approval Coastal Health & Wellness  
Budget Period Progress Report (BPR) Non-Competing Continuation  
(NCC) for Submittal to HRSA**



# Coastal Health & Wellness

FY21 Budget Proposal for  
HRSA Submission

PRELIMINARY

October 31, 2019

## COASTAL HEALTH & WELLNESS

### Proposed Budget for the fiscal year ending March 31, 2021

#### Budget Highlights

#### SUMMARY

- Budget decreased by (\$903,014) from FY20.
- Decrease of (\$154,178) in county contribution.

#### REVENUES

- Overall budgeted revenue decreased by (\$903,014), not including fund balance.
- Decrease in Patient Revenue based on payor mix and average income per visit amounts.
- DSRIP revenue anticipated to be earned in 2020-2021 is included with offset by IGT payment expense.
- Grant revenue includes Title V grant award.

#### EXPENDITURES

##### Personnel

- Net decrease of (\$532,949) in personnel (\$473,173 wages and \$59,776 benefits).
  - 2.0% cost of living increase for all positions effective in October 2020 with GCHD approved budget.
- Net decrease of 11.6 FTE's (additional details included in within packet).
  - Added one new Part-time Dental Hygienist
  - Included allocation increases for changes in shared positions, i.e. Executive Director, CNO, etc.
  - Eliminated 12 vacant positions (2 Medical, 6 Nursing, 3 Lab & X-Ray, 1 Case Management)
- Health insurance decreased approximately 3% due to CareHere locations changing from 3 sites to 2 sites.
- Includes a 5% salary/benefits lapse to account for position vacancies.

##### Contractual

- Outside Lab and X-Ray decreased based on seeing a reduction in average cost per test.
- Reduced budgeted expense with Primary Care Services from UTMB previously overstated.
- Reduction in IGT reimbursement associated with anticipated DSRIP revenue.

##### Supplies/Other

- Increase in office supplies to account for rise in new supply bid prices.
- Decrease of (\$214,742) for pharmaceutical expenses based on anticipated 2020-2021 projections.
- Increase of \$89,632 in IT Software due primarily for removing Microsoft licensing as a fund balance purchase.

#### FUND BALANCE

- \$240,577 one-time expenses proposed to come out of fund balance (details page included within packet).

Budget Breakdown:	FY20	FY21	Change	%
Personnel	8,119,480	7,586,531	(532,949)	-7%
Supplies	1,428,070	1,255,086	(172,984)	-12%
Contract Services	1,010,793	856,176	(154,617)	-15%
Equipment/Capital	-	-	-	-
Other Costs	1,511,462	1,486,277	(25,185)	-2%
Bad Debt	420,537	403,258	(17,279)	-4%
<b>Budgeted Expense Total</b>	<b>\$ 12,490,342</b>	<b>\$ 11,587,328</b>	<b>\$ (903,014)</b>	<b>-7.2%</b>

**COASTAL HEALTH & WELLNESS**

**Proposed Budget for the fiscal year ending March 31, 2021**

**Operating Budget**

	FY20 Budget	FY21 Budget
<b>REVENUE:</b>		
<i>Patient Service Income</i>	4,422,639	3,026,853
<i>Local Funding</i>	3,888,845	3,734,667
<i>Other Local Funding</i>	16,208	16,208
<i>Federal BPHC 330 Grant</i>	3,127,400	3,127,400
<i>Other Revenues (Pharmacy, DSRIP, Medical Record Fees, Interest):</i>	1,035,250	1,682,200
<b>TOTAL REVENUE</b>	<b>\$ 12,490,342</b>	<b>\$ 11,587,328</b>

	FY20 Budget	FY21 Budget
<b>EXPENSES:</b>		
<b>Personnel:</b>		
<i>Administration</i>	1,869,736	1,990,062
<i>Medical Staff</i>	2,872,650	2,209,776
<i>Dental Staff</i>	982,744	1,025,412
<i>Mental Health Staff</i>	117,132	117,475
<i>Enabling Staff (Case Management, Outreach &amp; Education)</i>	911,557	881,220
<i>Salaries, Overtime</i>	60,000	45,000
<i>Salaries, Provider Incentives</i>	1,524	78,000
<b>Fringe Benefits:</b>		
<i>FICA Expense</i>	525,296	485,525
<i>Texas Unemployment Tax</i>	14,584	13,357
<i>Life Insurance</i>	16,558	15,418
<i>Long Term Disability Insurance</i>	15,411	14,477
<i>Group Medical Insurance</i>	552,383	551,511
<i>Worker's Comp Insurance</i>	34,333	19,034
<i>Pension / Retirement</i>	145,572	140,264
<b>Total Personnel and Fringe Benefits</b>	<b>8,119,480</b>	<b>7,586,531</b>
<b>Travel:</b>		
<i>Non-Local Travel</i>	20,624	14,600
<i>Local Travel - Staff travel b/t clinic sites, meetings, etc.</i>	4,600	4,600
<b>Total Travel</b>	<b>25,224</b>	<b>19,200</b>
<b>Supplies:</b>		
<i>Clinical Medical</i>	116,266	108,000
<i>Lab / X-ray</i>	68,400	60,000
<i>Pharmaceuticals</i>	1,078,668	863,906
<i>Dental</i>	72,960	90,000
<i>Outside Dental (Restorative)</i>	24,000	40,200
<i>Office, Administrative, &amp; Printing Supplies</i>	63,776	92,980
<i>Janitorial</i>	4,000	-
<b>Total Supplies</b>	<b>1,428,070</b>	<b>1,255,086</b>
<b>Contractual:</b>		
<b>Patient Care Contracts:</b>		
<i>Outside Lab Contract (LabCorp services for 2 sites)</i>	365,700	301,500
<i>Outside X-Ray Contract (Xray reading services for 2 sites)</i>	53,130	36,000
<i>Patient Transportation Contract (transport provided to TC location)</i>	7,800	7,500
<i>Contract Ob/Gyn &amp; Primary Care Services</i>	129,930	84,132
<i>Contract CIHCP</i>	6,700	3,600
<i>Translation &amp; Interpretation Services</i>	8,400	6,720
<b>Subtotal Patient Care Contracts</b>	<b>571,660</b>	<b>439,452</b>



**COASTAL HEALTH & WELLNESS**

**Proposed Budget for the fiscal year ending March 31, 2021**

**Operating Budget**

	FY20 Budget	FY21 Budget
<b>Non-Patient Contracts:</b>		
Janitorial Contract (Contract for services at 2 site)	167,109	168,000
Security (Security services at 2 sites)	46,920	47,700
Pest Control (pest control services @ 1 site)	960	960
Claim Processing	15,180	1,920
Statement Processing / Appointment Reminders	60,000	67,200
Contract & Communications Management (MediTract, Meltwater)	8,400	11,220
Compliance Testing Services (HPC, Penetration)	-	9,600
IT Consulting (Creager, IT Works, Meriplex)	27,200	6,600
Interface EAP, Prehire Screenings, & Medicare Exclusions	5,364	7,524
Billing Contract Service	108,000	96,000
<b>Subtotal Non-Patient Contracts</b>	<b>439,133</b>	<b>416,724</b>
<b>Total Contractual</b>	<b>1,010,793</b>	<b>856,176</b>
<b>Equipment:</b>		
None	-	-
<b>Total Equipment</b>	<b>-</b>	<b>-</b>
<b>Other:</b>		
Training	5,000	35,200
Uniforms	5,000	2,820
Postage	8,000	10,000
Telecommunications	48,790	52,860
Utilities (Water & Electricity)	25,375	24,372
Rentals	39,480	38,400
Leases - Facility	524,424	517,464
<b>Maint &amp; Repair:</b>		
Equipment	83,720	85,444
Mobile Clinic	1,500	-
Computer	-	-
Building	5,000	5,000
<b>Insurance:</b>		
General Liability	12,350	13,500
Building Contents	19,595	18,420
Mobile Clinic	2,500	144
IGT Reimbursement	450,000	308,969
Newspaper Ads	18,000	21,600
Subscriptions, Books, etc.	1,500	2,970
Organizational Memberships	34,592	34,186
IT Software, Licensing & Usage Fees	162,112	251,744
Professional Fees/License/Inspections	2,430	1,854
Professional Services - Accounting Services	22,500	26,420
Med/Hazard Waste Disposal	5,800	6,600
Board Meeting Operations	350	350
Service Charge - Credit Cards	8,220	8,760
Bad Debt	420,537	403,258
<b>Total Other</b>	<b>1,906,775</b>	<b>1,870,335</b>
<b>TOTAL EXPENSES</b>	<b>\$ 12,490,342</b>	<b>\$ 11,587,328</b>

**COASTAL HEALTH & WELLNESS**

Proposed Budget for the fiscal year ending March 31, 2021

**Operating Budget**

	FY20 Budget	FY21 Budget
<b>CHW BUDGETED POSITIONS:</b>		
<i>Admin Support</i>	50.5	51.4
<i>Medical Director</i>	1.0	0.9
<i>Family Physicians</i>	2.0	1.0
<i>Physician Assistant / Nurse Practitioner</i>	7.8	6.0
<i>Pediatrician</i>	1.0	1.0
<i>Nurses</i>	10.0	9.0
<i>Clinical Support</i>	20.5	15.5
<i>Lab</i>	8.0	5.0
<i>Dentists</i>	4.4	4.5
<i>Dental Hygienists</i>	1.0	1.5
<i>Dental Assistants</i>	9.0	9.0
<i>Behavioral Health Specialists</i>	1.5	1.5
<i>Case Management</i>	7.0	5.9
<i>Outreach &amp; Education</i>	2.0	2.0
<b>TOTAL FTE's</b>	<b>125.7</b>	<b>114.1</b>

**COASTAL HEALTH & WELLNESS**

**Proposed Budget for the fiscal year ending March 31, 2021**

**Budget Details**

	<i>FY19 Actual</i>	<i>FY20 Adopted Budget</i>	<i>FY20 Actual thru 9/30/19</i>	<i>FY20 Projected thru 3/31/20</i>	<b>FY21 Proposed Budget</b>	<i>Increase / (Decrease)</i>
<b>VISITS:</b>	35,342	46,889	16,642	33,284	<b>48,354</b>	1,465
<b>REVENUES</b>						
HHS Grant Revenue	3,242,428	3,127,400	1,746,916	3,493,831	<b>3,127,400</b>	-
Grant Revenue	116,250	57,355	38,177	76,355	<b>70,000</b>	12,645
Patient Fees	660,110	1,369,225	662,720	1,325,441	<b>1,152,165</b>	(217,060)
Private Insurance	194,444	591,472	156,297	312,593	<b>489,000</b>	(102,472)
Pharmacy Revenue	963,869	965,000	456,588	913,175	<b>780,000</b>	(185,000)
Medicare	355,497	508,558	156,393	312,787	<b>585,910</b>	77,352
Medicaid	442,670	871,296	160,654	321,309	<b>609,930</b>	(261,366)
Local Grants & Foundations	81,416	16,208	8,799	17,597	<b>16,208</b>	-
Medical Record Revenue	24,016	16,250	10,170	20,341	<b>18,000</b>	1,750
Medicaid Incentive Payments	3,025	-	3,070	6,140	-	-
County Revenue	3,888,849	3,888,845	1,944,427	3,888,854	<b>3,734,667</b>	(154,178)
DSRIP Revenue	558,125	950,000	-	-	<b>790,000</b>	(160,000)
Miscellaneous Revenue	541	-	3,059	6,118	-	-
Gain on Fixed Asset Disposals	-	-	3,875	7,750	-	-
Interest Income	84,092	69,000	51,352	102,703	<b>90,000</b>	21,000
CHW Contract Revenue	27,805	59,733	5,321	10,642	<b>119,848</b>	60,115
Local Funds / Other Revenue	5,952	-	3,513	7,026	<b>4,200</b>	4,200
Fund Balance	-	-	-	-	-	-
<b>TOTAL REVENUE</b>	<b>\$ 10,649,090</b>	<b>\$ 12,490,342</b>	<b>\$ 5,411,331</b>	<b>\$ 10,822,662</b>	<b>\$ 11,587,328</b>	<b>\$ (903,014)</b>
<b>EXPENSES</b>						
Salaries	5,769,764	6,273,624	2,930,731	5,861,462	<b>6,034,494</b>	(239,130)
Salaries, Provider Incentives	3,000	52,800	3,652	7,304	<b>78,000</b>	25,200
Salaries, O/T	36,282	60,000	15,788	31,577	<b>45,000</b>	(15,000)
Salaries, Part-Time	102,851	433,694	68,410	136,820	<b>189,451</b>	(244,243)
Comp Pay Premium	800	-	189	378	-	-
FICA Expense	422,626	521,739	219,723	439,447	<b>485,525</b>	(36,214)
Texas Unemployment Tax	11,455	14,584	(446)	(892)	<b>13,357</b>	(1,227)
Employee Life Insurance	17,028	16,558	8,665	17,331	<b>15,418</b>	(1,140)
Employee LT Disability Ins.	12,401	15,411	6,282	12,563	<b>14,477</b>	(934)
Employer Paid Health Ins.	378,642	552,383	197,418	394,837	<b>481,290</b>	(71,093)
Worker's Compensation Ins.	6,936	34,100	2,294	4,587	<b>19,034</b>	(15,066)
Employer Sponsor Hlthcare	86,940	-	43,308	86,617	<b>70,221</b>	70,221
Pension / Retirement	139,327	144,587	64,001	128,002	<b>140,264</b>	(4,323)
Outside Lab Contract	253,820	365,700	106,125	212,250	<b>301,500</b>	(64,200)
Outside X-Ray Contract	31,020	53,130	12,048	24,096	<b>36,000</b>	(17,130)
Misc Contract Services	214,925	268,674	107,775	215,550	<b>198,516</b>	(70,158)
Temporary Staffing	192,435	-	40,206	80,412	-	-
CHW Billing Contract Svc	82,615	108,000	39,591	79,183	<b>96,000</b>	(12,000)
IGT Reimbursement	237,391	450,000	-	-	<b>308,969</b>	(141,031)
Janitorial Contract	121,120	167,109	82,331	164,662	<b>168,000</b>	891
Pest Control	961	960	481	961	<b>960</b>	-
Security	43,835	46,920	14,603	29,207	<b>47,700</b>	780
Office Supplies	90,480	31,220	131,410	262,819	<b>82,600</b>	51,380
Operating Supplies	360,515	280,282	196,665	393,330	<b>262,800</b>	(17,482)
Outside Dental Supplies	9,294	24,000	19,860	39,720	<b>40,200</b>	16,200
Pharmaceutical Supplies	844,993	1,078,668	230,464	460,927	<b>863,906</b>	(214,762)

**COASTAL HEALTH & WELLNESS**

**Proposed Budget for the fiscal year ending March 31, 2021**

**Budget Details**

	<i>FY19 Actual</i>	<i>FY20 Adopted Budget</i>	<i>FY20 Actual thru 9/30/19</i>	<i>FY20 Projected thru 3/31/20</i>	<b>FY21 Proposed Budget</b>	<i>Increase / (Decrease)</i>
Janitorial Supplies	1,754	4,000	-	-	-	(4,000)
Printing Supplies	598	2,400	2,366	4,731	5,580	3,180
Uniform	2,695	5,000	1,198	2,395	2,820	(2,180)
Postage	8,337	8,000	5,328	10,656	10,000	2,000
Telecommunications	47,386	48,790	19,401	38,802	52,860	4,070
Water	366	375	183	366	372	(3)
Electricity	20,339	25,000	8,745	17,490	24,000	(1,000)
Travel, Local	4,137	4,600	2,351	4,703	4,600	-
Travel, Out Of Town	-	-	-	-	-	-
Training, Local	7,532	5,000	5,590	11,180	35,200	30,200
Training, Out Of Town	18,489	20,624	12,083	24,166	14,600	(6,024)
Rentals	36,773	39,480	19,007	38,013	38,400	(1,080)
Leases	520,935	524,424	258,724	517,448	517,464	(6,960)
Maint/Repair, Equip.	91,812	83,720	42,967	85,935	85,444	1,724
Maint/Repair, Auto	3,023	500	-	-	-	(500)
Fuel	-	500	-	-	-	(500)
Maint/Repair, Bldg.	14,100	5,000	2,575	5,150	5,000	-
Maint/Repair, IT Equip.	186	-	3,168	6,336	-	-
Maint/Repair, Prev Auto	-	500	-	-	-	(500)
Insurance, Auto/Truck	2,293	2,500	1,199	2,398	144	(2,356)
Insurance, General Liability	10,502	12,350	6,158	12,315	13,500	1,150
Insurance, Bldg. Contents	17,778	19,595	8,708	17,417	18,420	(1,175)
IT Equipment	23,421	-	-	-	-	-
Operating Equipment	17,989	-	-	-	-	-
Newspaper Ads/Advertising	20,591	18,000	5,795	11,590	21,600	3,600
Subscriptions, Books, Etc.	2,085	1,500	634	1,268	2,970	1,470
Association Dues	35,927	34,592	16,000	32,000	34,186	(406)
IT Software, Licenses, Intangibles	242,308	162,112	87,175	176,523	251,744	89,632
Prof Fees/Licenses/Inspections	11,628	2,430	717	1,434	1,854	(576)
Professional Services	24,406	22,500	17,157	34,315	26,420	3,920
Med / Hazard Waste Disposal	5,370	5,800	3,270	6,540	6,600	800
Transportation	7,242	7,800	2,743	5,486	7,500	(300)
Board Meeting Operations	174	350	2,057	515	350	-
Service Charge - Credit Cards	8,153	8,220	4,358	8,716	8,760	540
Cashier Over/Short	(5)	-	5	10	-	-
Bad Debt Expense	236	420,537	253,251	506,503	403,258	(17,279)
Miscellaneous Expense	3,578	-	89,446	3,891	-	-
<b>TOTAL EXPENSES</b>	<b>\$ 10,683,594</b>	<b>\$ 12,490,342</b>	<b>\$ 5,423,935</b>	<b>\$ 10,671,443</b>	<b>\$ 11,587,328</b>	<b>\$ (903,014)</b>
Revenue Over / (Under) Expenses	(34,505)	-	(12,604)	151,220	-	-

**COASTAL HEALTH & WELLNESS**

**Proposed Budget for the fiscal year ending March 31, 2021**

**Funding Details**

	<i>Federal</i>	<i>Non-Federal</i>	<b>FY21 Operating Budget</b>
<b>REVENUES</b>			
HHS Grant Revenue	3,127,400	-	3,127,400
Grant Revenue	-	70,000	70,000
Patient Fees	-	1,152,165	1,152,165
Private Insurance	-	489,000	489,000
Pharmacy Revenue	-	780,000	780,000
Medicare	-	585,910	585,910
Medicaid	-	609,930	609,930
Local Grants & Foundations	-	16,208	16,208
Medical Record Revenue	-	18,000	18,000
Medicaid Incentive Payments	-	-	-
County Revenue	-	3,734,667	3,734,667
DSRIP Revenue	-	790,000	790,000
Miscellaneous Revenue	-	-	-
Gain on Fixed Asset Disposals	-	-	-
Interest Income	-	90,000	90,000
CHW Contract Revenue	-	119,848	119,848
Local Funds / Other Revenue	-	4,200	4,200
<b>TOTAL REVENUE</b>	<b>\$ 3,127,400</b>	<b>\$ 8,459,928</b>	<b>\$ 11,587,328</b>
<b>EXPENSES</b>			
Salaries	2,184,632	3,849,862	6,034,494
Salaries, Provider Incentives	-	78,000	78,000
Salaries, O/T	-	45,000	45,000
Salaries, Part-Time	35,025	154,426	189,451
Comp Pay Premium	-	-	-
FICA Expense	169,795	315,730	485,525
Texas Unemployment Tax	4,505	8,852	13,357
Employee Life Insurance Exp.	5,528	9,890	15,418
Employee LT Disability Ins. Exp.	5,242	9,235	14,477
Employer Paid Health Ins.	163,324	317,966	481,290
Worker's Compensation Ins.	6,656	12,378	19,034
Employer Sponsor Hlthcare	23,826	46,395	70,221
Pension / Retirement	49,052	91,212	140,264
Outside Lab Contract	301,500	-	301,500
Outside X-Ray Contract	-	36,000	36,000
Misc Contract Services	-	198,516	198,516
Temporary Staffing	-	-	-
CHW Billing Contract Svc	60,871	35,129	96,000
IGT Reimbursement	-	308,969	308,969
Janitorial Contract	-	168,000	168,000
Pest Control	-	960	960
Security	28,800	18,900	47,700
Office Supplies	-	82,600	82,600
Operating Supplies	-	262,800	262,800
Outside Dental Supplies	-	40,200	40,200
Pharmaceutical Supplies	-	863,906	863,906
Janitorial Supplies	-	-	-
Printing Supplies	-	5,580	5,580
Uniform	-	2,820	2,820
Postage	-	10,000	10,000
Telecommunications	2,400	50,460	52,860

**COASTAL HEALTH & WELLNESS**

**Proposed Budget for the fiscal year ending March 31, 2021**

**Funding Details**

	<i>Federal</i>	<i>Non-Federal</i>	<b>FY21 Operating Budget</b>
Water	-	372	372
Electricity	-	24,000	24,000
Travel, Local	-	4,600	4,600
Travel, Out Of Town	-	-	-
Training, Local	-	35,200	35,200
Training, Out Of Town	-	14,600	14,600
Rentals	15,600	22,800	38,400
Leases	-	517,464	517,464
Maint/Repair, Equip.	70,644	14,800	85,444
Maint/Repair, Auto	-	-	-
Fuel	-	-	-
Maint/Repair, Bldg.	-	5,000	5,000
Maint/Repair, IT Equip.	-	-	-
Maint/Repair, Prev Auto	-	-	-
Insurance, Auto/Truck	-	144	144
Insurance, General Liability	-	13,500	13,500
Insurance, Bldg. Contents	-	18,420	18,420
IT Equipment	-	-	-
Operating Equipment	-	-	-
Newspaper Ads/Advertising	-	21,600	21,600
Subscriptions, Books, Etc.	-	2,970	2,970
Association Dues	-	34,186	34,186
IT Software, Licenses, Intangibles	-	251,744	251,744
Prof Fees/Licenses/Inspections	-	1,854	1,854
Professional Services	-	26,420	26,420
Med / Hazard Waste Disposal	-	6,600	6,600
Transportation	-	7,500	7,500
Board Meeting Operations	-	350	350
Service Charge - Credit Cards	-	8,760	8,760
Cashier Over/Short	-	-	-
Bad Debt Expense	-	403,258	403,258
Miscellaneous Expense	-	-	-
<b>TOTAL EXPENSES</b>	<b>\$ 3,127,400</b>	<b>\$ 8,459,928</b>	<b>\$ 11,587,328</b>
<i>Revenue Over / (Under) Expenses</i>	-	-	-

<b>CATEGORICAL</b>	<i>Federal</i>	<i>Non-Federal</i>	<b>FY21 Operating Budget</b>
Wages	2,219,657	4,127,288	6,346,945
Benefits	427,928	811,658	1,239,586
Travel	-	19,200	19,200
Equipment	-	-	-
Supplies	-	1,255,086	1,255,086
Contractual	391,171	465,005	856,176
Other	88,644	1,781,691	1,870,335
<b>Total Expenses</b>	<b>\$ 3,127,400</b>	<b>\$ 8,459,928</b>	<b>\$ 11,587,328</b>

**COASTAL HEALTH & WELLNESS***Proposed Budget for the fiscal year ending March 31, 2021***Fund Balance**

<b>Personnel (6xxx)</b>	<b>Total Cost</b>	<b>CHW %</b>	<b>CHW Cost</b>
One-Time payout of \$500 (full-time) and \$250 (part-time) staff employed 6+ months	52,051	100%	<u>52,051</u>
			<b>52,051</b>
<b>Misc Contract Services (7020)</b>	<b>Total Cost</b>	<b>CHW %</b>	<b>CHW Cost</b>
*IT Security Penetration Testing Services	15,000	50%	<u>7,500</u>
			<b>7,500</b>
<b>Office Supplies (8011)</b>	<b>Total Cost</b>	<b>CHW %</b>	<b>CHW Cost</b>
Desktop Computer Refresh Replacements, 79 computers (40 CHW, 39 GF)	99,115	49.8%	49,400
*Board Laptop Replacements (18 x \$400)	7,200	50%	<u>3,600</u>
			<b>53,000</b>
<b>Operating Supplies (8012)</b>	<b>Total Cost</b>	<b>CHW %</b>	<b>CHW Cost</b>
*ID Security Badge Programming updates and printer replacement	3,600	50%	1,800
Oral Cancer Screening Early Detection (3 x \$1,995)	5,985	100%	5,985
Endo Motor & Handpiece Device for Root Canals (1 x \$2,000)	2,000	100%	2,000
Apex Locator for Root Canals (1 x \$1,060)	1,060	100%	1,060
GuttaCore Oven for Root Canals (1 x \$2,000)	2,000	100%	<u>2,000</u>
			<b>12,845</b>
<b>Maint/Repair, IT Equip (8185)</b>	<b>Total Cost</b>	<b>CHW %</b>	<b>CHW Cost</b>
*Maintenance Hardware for Infrastructure Components (Server/Network)	10,000	50%	<u>5,000</u>
			<b>5,000</b>
<b>Operating Equipment (8214)</b>	<b>Total Cost</b>	<b>CHW %</b>	<b>CHW Cost</b>
Dental Chair Replacements (3 x \$27,495)	82,485	100%	82,485
Adult Digital X-Ray Sensors (4 x \$5,419)	21,676	100%	21,676
Pharmacy Grade Freezer Replacement (1 x \$6,000)	6,000	100%	<u>6,000</u>
			<b>110,161</b>
			<b>240,557</b>

NOTE - List does not replace prior fund balance requested items, only items included in FY21 budgeted totals

\*Purchases could be initiated/completed prior to start of 4/1/20 budget term (shared services)

**COASTAL HEALTH & WELLNESS**

**Proposed Budget for the fiscal year ending March 31, 2021**

**Funding Details, including fund balance purchases**

	<i>Federal</i>	<i>Non-Federal</i>	<b>FY21 Operating Budget</b>	<i>Fund Balance</i>	<b>FY21 Total Budget</b>
<b>REVENUES</b>					
HHS Grant Revenue	3,127,400	-	<b>3,127,400</b>	-	<b>3,127,400</b>
Grant Revenue	-	70,000	<b>70,000</b>	-	<b>70,000</b>
Patient Fees	-	1,152,165	<b>1,152,165</b>	-	<b>1,152,165</b>
Private Insurance	-	489,000	<b>489,000</b>	-	<b>489,000</b>
Pharmacy Revenue	-	780,000	<b>780,000</b>	-	<b>780,000</b>
Medicare	-	585,910	<b>585,910</b>	-	<b>585,910</b>
Medicaid	-	609,930	<b>609,930</b>	-	<b>609,930</b>
Local Grants & Foundations	-	16,208	<b>16,208</b>	-	<b>16,208</b>
Medical Record Revenue	-	18,000	<b>18,000</b>	-	<b>18,000</b>
Medicaid Incentive Payments	-	-	-	-	-
County Revenue	-	3,734,667	<b>3,734,667</b>	-	<b>3,734,667</b>
DSRIP Revenue	-	790,000	<b>790,000</b>	-	<b>790,000</b>
Miscellaneous Revenue	-	-	-	-	-
Gain on Fixed Asset Disposals	-	-	-	-	-
Interest Income	-	90,000	<b>90,000</b>	-	<b>90,000</b>
CHW Contract Revenue	-	119,848	<b>119,848</b>	-	<b>119,848</b>
Local Funds / Other Revenue	-	4,200	<b>4,200</b>	-	<b>4,200</b>
Fund Balance	-	-	-	240,557	<b>240,557</b>
<b>TOTAL REVENUE</b>	<b>\$ 3,127,400</b>	<b>\$ 8,459,928</b>	<b>\$ 11,587,328</b>	<b>\$ 240,557</b>	<b>\$ 11,827,885</b>
<b>EXPENSES</b>					
Salaries	2,184,632	3,849,862	<b>6,034,494</b>	47,250	<b>6,081,744</b>
Salaries, Provider Incentives	-	78,000	<b>78,000</b>	-	<b>78,000</b>
Salaries, O/T	-	45,000	<b>45,000</b>	-	<b>45,000</b>
Salaries, Part-Time	35,025	154,426	<b>189,451</b>	-	<b>189,451</b>
Comp Pay Premium	-	-	-	-	-
FICA Expense	169,795	315,730	<b>485,525</b>	3,615	<b>489,140</b>
Texas Unemployment Tax	4,505	8,852	<b>13,357</b>	-	<b>13,357</b>
Employee Life Insurance Exp.	5,528	9,890	<b>15,418</b>	-	<b>15,418</b>
Employee LT Disability Ins. Exp.	5,242	9,235	<b>14,477</b>	-	<b>14,477</b>
Employer Paid Health Ins.	163,324	317,966	<b>481,290</b>	-	<b>481,290</b>
Worker's Compensation Ins.	6,656	12,378	<b>19,034</b>	142	<b>19,176</b>
Employer Sponsor Hlthcare	23,826	46,395	<b>70,221</b>	-	<b>70,221</b>
Pension / Retirement	49,052	91,212	<b>140,264</b>	1,044	<b>141,308</b>
Outside Lab Contract	301,500	-	<b>301,500</b>	-	<b>301,500</b>
Outside X-Ray Contract	-	36,000	<b>36,000</b>	-	<b>36,000</b>
Misc Contract Services	-	198,516	<b>198,516</b>	7,500	<b>206,016</b>
Temporary Staffing	-	-	-	-	-
CHW Billing Contract Svc	60,871	35,129	<b>96,000</b>	-	<b>96,000</b>
IGT Reimbursement	-	308,969	<b>308,969</b>	-	<b>308,969</b>
Janitorial Contract	-	168,000	<b>168,000</b>	-	<b>168,000</b>
Pest Control	-	960	<b>960</b>	-	<b>960</b>
Security	28,800	18,900	<b>47,700</b>	-	<b>47,700</b>
Office Supplies	-	82,600	<b>82,600</b>	53,000	<b>135,600</b>
Operating Supplies	-	262,800	<b>262,800</b>	12,845	<b>275,645</b>
Outside Dental Supplies	-	40,200	<b>40,200</b>	-	<b>40,200</b>
Pharmaceutical Supplies	-	863,906	<b>863,906</b>	-	<b>863,906</b>
Janitorial Supplies	-	-	-	-	-
Printing Supplies	-	5,580	<b>5,580</b>	-	<b>5,580</b>
Uniform	-	2,820	<b>2,820</b>	-	<b>2,820</b>
Postage	-	10,000	<b>10,000</b>	-	<b>10,000</b>



**COASTAL HEALTH & WELLNESS**

**Proposed Budget for the fiscal year ending March 31, 2021**

**Funding Details, including fund balance purchases**

	<i>Federal</i>	<i>Non-Federal</i>	<b>FY21 Operating Budget</b>	<i>Fund Balance</i>	<b>FY21 Total Budget</b>
Telecommunications	2,400	50,460	52,860	-	52,860
Water	-	372	372	-	372
Electricity	-	24,000	24,000	-	24,000
Travel, Local	-	4,600	4,600	-	4,600
Travel, Out Of Town	-	-	-	-	-
Training, Local	-	35,200	35,200	-	35,200
Training, Out Of Town	-	14,600	14,600	-	14,600
Rentals	15,600	22,800	38,400	-	38,400
Leases	-	517,464	517,464	-	517,464
Maint/Repair, Equip.	70,644	14,800	85,444	-	85,444
Maint/Repair, Auto	-	-	-	-	-
Fuel	-	-	-	-	-
Maint/Repair, Bldg.	-	5,000	5,000	-	5,000
Maint/Repair, IT Equip.	-	-	-	5,000	5,000
Maint/Repair, Prev Auto	-	-	-	-	-
Insurance, Auto/Truck	-	144	144	-	144
Insurance, General Liability	-	13,500	13,500	-	13,500
Insurance, Bldg. Contents	-	18,420	18,420	-	18,420
IT Equipment	-	-	-	-	-
Operating Equipment	-	-	-	110,161	110,161
Newspaper Ads/Advertising	-	21,600	21,600	-	21,600
Subscriptions, Books, Etc.	-	2,970	2,970	-	2,970
Association Dues	-	34,186	34,186	-	34,186
IT Software, Licenses, Intangibles	-	251,744	251,744	-	251,744
Prof Fees/Licenses/Inspections	-	1,854	1,854	-	1,854
Professional Services	-	26,420	26,420	-	26,420
Med / Hazard Waste Disposal	-	6,600	6,600	-	6,600
Transportation	-	7,500	7,500	-	7,500
Board Meeting Operations	-	350	350	-	350
Service Charge - Credit Cards	-	8,760	8,760	-	8,760
Cashier Over/Short	-	-	-	-	-
Bad Debt Expense	-	403,258	403,258	-	403,258
Miscellaneous Expense	-	-	-	-	-
<b>TOTAL EXPENSES</b>	<b>\$ 3,127,400</b>	<b>\$ 8,459,928</b>	<b>\$ 11,587,328</b>	<b>\$ 240,557</b>	<b>\$ 11,827,885</b>
<i>Revenue Over / (Under) Expenses</i>	-	-	-	-	-

<b>CATEGORICAL</b>	<i>Federal</i>	<i>Non-Federal</i>	<b>FY21 Operating Budget</b>	<i>Fund Balance</i>	<b>FY21 Total Budget</b>
Wages	2,219,657	4,127,288	6,346,945	47,250	6,394,195
Benefits	427,928	811,658	1,239,586	4,801	1,244,387
Travel	-	19,200	19,200	-	19,200
Equipment	-	-	-	110,161	110,161
Supplies	-	1,255,086	1,255,086	65,845	1,320,931
Contractual	391,171	465,005	856,176	7,500	863,676
Other	88,644	1,781,691	1,870,335	5,000	1,875,335
<b>Total Expenses</b>	<b>\$ 3,127,400</b>	<b>\$ 8,459,928</b>	<b>\$ 11,587,328</b>	<b>\$ 240,557</b>	<b>\$ 11,827,885</b>

Department of Health and Human Services Health Services and Resources Administration		For HRSA Use Only					
Form 3: Income Analysis Support Year 19		Applicant Name:		COASTAL HEALTH & WELLNESS			
		Grant Number:		H80CS00344			
		Application Tracking Number:		169037			
<b>Part 1: Patient Service Revenue - Program Income</b>							Prior FY Income Mo/Yr: March 2019
Line #	Payer Category	Patients	Billable Visits	Income Per Visit	Projected Income		
		(a)	(b)	(c)	(d)	(e)	
1	Medicaid	1,637	4,518	135.00	609,930.00	442,670.03	
2	Medicare	1,473	4,507	130.00	585,910.00	355,496.82	
3	Other Public	539	2,498	76.00	189,848.00	144,055.85	
4	Private	1,637	3,912	125.00	489,000.00	194,444.36	
5	Self Pay	11,084	32,919	35.00	1,152,165.00	660,109.60	
6	Total (lines 1-6)	16,370	48,354	62.60	3,026,853.00	1,796,776.66	
<b>Part 2: Other Income - Other Federal, State, Local and Other Income</b>							
7	Other Federal				-	-	
8	State Government				790,000.00	558,124.99	
9	Local Government				3,734,667.00	3,888,849.00	
10	Private Grants/Contracts				16,208.00	81,416.00	
11	Contributions				-	-	
12	Other				892,200.00	1,081,494.94	
13	Applicant (Retained Earnings)				-	-	
14	Total Other (lines 7-14)				5,433,075.00	5,609,884.93	
<b>Total Non-Federal (Non-section 330) Income (Program Income Plus Other)</b>							
15	Total Non-Federal (lines 6 + 14)				8,459,928.00	7,406,661.59	
<b>Comments/Explanatory Notes (if applicable)</b>							
Pharmacy Revenue is included in Line 12 Other. Projected Income for current Support year is \$780,000. Prior FY Pharmacy Income was \$963,868.81							

Public Burden Statement: An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. The OMB control number for this project is 0915-0285. Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to HRSA Reports Clearance Officer, 5600 Fishers Lane, Room 10-33, Rockville, Maryland, 20857.

## Coastal Health & Wellness - Budget Justification

Federal and Non-Federal Expenditures

Funding Period: April 1, 2020 to March 31, 2021

Budget Justification	FY 2021 Budget Period	
	Federal Grant Request	Non-Federal Resources
<b>REVENUE</b> – Should be consistent with information presented in Budget Information: Budget Details form and Form 3: Income Analysis.		
PROGRAM INCOME (fees, third party reimbursements, and payments generated from the projected delivery of services)	-	3,806,853.00
STATE FUNDS (Projected revenue from 1115 Waiver Project)	-	790,000.00
LOCAL FUNDS	-	3,734,667.00
FEDERAL 330 GRANT	3,127,400.00	-
OTHER SUPPORT	-	128,408.00
<b>TOTAL REVENUE</b>	<b>\$ 3,127,400.00</b>	<b>\$ 8,459,928.00</b>
<b>EXPENSES:</b> Object class totals should be consistent with those presented in Section B of the Budget Information: Budget Details form.		
<b>PERSONNEL</b> – Salary Total from Form 2: Staffing Profile may not match the total below due to some salaries being charged as indirect costs. Include budget details for each staff position as seen in the Personnel Justification sample below.		
ADMINISTRATION	372,338.00	1,617,724.00
MEDICAL STAFF	1,130,609.00	1,079,167.00
DENTAL STAFF	535,876.00	489,536.00
BEHAVIORAL HEALTH STAFF (Mental Health/Substance Abuse)	-	117,475.00
ENABLING STAFF (Case Managers/Outreach & Education Staff)	180,834.00	700,386.00
OTHER STAFF	-	-
SALARIES, OVERTIME	-	45,000.00
SALARIES, PROVIDER INCENTIVES	-	78,000.00
<b>TOTAL PERSONNEL</b>	<b>\$ 2,219,657.00</b>	<b>\$ 4,127,288.00</b>
<b>FRINGE BENEFITS</b>		
FICA @ 7.65%	169,795.00	315,730.00
State Unemployment Tax @ 1.30%	4,505.00	8,852.00
Life ADD @ 0.22%	4,806.00	8,466.00
Dependent Life @ \$1.71/month (per eligible employee)	722.00	1,424.00
Long Term Disability Insurance @ 0.24%	5,242.00	9,235.00
Medical Insurance @ \$432.02/month (per eligible employee)	187,150.00	364,361.00
Workers Compensation @ 0.30%	6,656.00	12,378.00
Retirement @ 2.41%	49,052.00	91,212.00
<b>TOTAL FRINGE @ 19.5%</b>	<b>\$ 427,928.00</b>	<b>\$ 811,658.00</b>

## Coastal Health & Wellness - Budget Justification

Federal and Non-Federal Expenditures

Funding Period: April 1, 2020 to March 31, 2021

Budget Justification	FY 2021 Budget Period	
	Federal Grant Request	Non-Federal Resources
<b>TRAVEL</b>		
Non-Local Travel – related to staff trainings/CME, etc. <i>(25,172 miles x 58 cents per mile)</i>	-	14,600.00
Local Travel – staff travel b/t clinic sites, meetings, etc. <i>(7,931 miles x 58 cents per mile)</i>	-	4,600.00
<b>TOTAL TRAVEL</b>	<b>\$ -</b>	<b>\$ 19,200.00</b>
<b>EQUIPMENT – Include items of moveable equipment that cost \$5,000 or more and with a useful life of one year or more.</b>		
None	-	-
<b>TOTAL EQUIPMENT</b>	<b>\$ -</b>	<b>\$ -</b>
<b>SUPPLIES</b>		
Office, Administrative & Printing Supplies <i>(\$7,748/month x 12 months)</i>	-	92,980.00
Lab / X-ray <i>(\$5,000/month x 12 months)</i>	-	60,000.00
Medical Supplies <i>(Based on 76% of total visits - \$2.94/visit x 36,749 visits)</i>	-	108,000.00
Pharmaceuticals <i>(\$71,992/month x 12 months)</i>	-	863,906.00
Dental <i>(Based on 24% of total visits - \$7.76/visit x 11,605 visits)</i>	-	90,000.00
Outside Dental (Restorative) <i>(\$3,350/month x 12 months)</i>	-	40,200.00
<b>TOTAL SUPPLIES</b>	<b>\$ -</b>	<b>\$ 1,255,086.00</b>
<b>CONTRACTUAL – Include sufficient detail to justify costs.</b>		
Outside Lab Contract <i>(\$6.70/test x 45,000 tests)</i>	301,500.00	-
Outside X-Ray Contract <i>(\$12.00/reading x 3,000 readings)</i>	-	36,000.00
Ob/Gyn Contract Services <i>(\$140/hr x 16 hrs x 12 months)</i>	-	26,880.00
Primary Care Contract Services <i>(\$4,771/month x 12 months)</i>	-	57,252.00
CIHCP Contract Services <i>(\$300/month x 12 months)</i>	-	3,600.00
Patient Transportation Contract with Gulf Coast Center <i>(\$30.00/average per trip x 250 estimated trips)</i>	-	7,500.00
Translation & Interpretation Services <i>(\$560/month x 12 months)</i>	-	6,720.00
Janitorial Contract (two sites) <i>(\$14,000/month x 12 months)</i> <i>(Galveston site - \$4,000/month &amp; Texas City site - \$10,000/month)</i>	-	168,000.00
Security Services (two sites) <i>(\$3,975/month x 12 months)</i> <i>(Galveston site - \$1,575/month &amp; Texas City site - \$2,400/month)</i>	28,800.00	18,900.00
Pest Control Services (one site) <i>(\$80/month x 12 months)</i>	-	960.00
Claim Processing <i>(\$160/month x 12 months)</i>	-	1,920.00

## Coastal Health & Wellness - Budget Justification

Federal and Non-Federal Expenditures

Funding Period: April 1, 2020 to March 31, 2021

Budget Justification	FY 2021 Budget Period	
	Federal Grant Request	Non-Federal Resources
Statement Processing and Appointment Reminders <i>(\$5,600/month x 12 months)</i>	-	67,200.00
Contract and Communications Mgmt System <i>(\$935/month x 12 months)</i> <i>(Contracts - \$650/month &amp; Communications \$285/month)</i>	-	11,220.00
HPC Compliance Testing Services <i>(\$800/month x 12 months)</i>	-	9,600.00
IT Consulting (Creager & IT Works) <i>(\$550/month x 12 months)</i>	-	6,600.00
Interface EAP, Prehire Screenings & Medicare Exclusions <i>(\$627/month x 12 months)</i>	-	7,524.00
Billing Contract Service <i>(5% of gross collections)</i> <i>(\$8,000/month x 12 months)</i>	60,871.00	35,129.00
<b>TOTAL CONTRACTUAL</b>	<b>\$ 391,171.00</b>	<b>\$ 465,005.00</b>
<b>OTHER – Include detailed justification. Note: Federal funding CANNOT support construction, fundraising, or lobbying costs.</b>		
Training – CME and other types of continuing education/trainings <i>(\$2,933/month x 12 months)</i>	-	35,200.00
Uniforms (lab coats or scrubs for providers, nurses, dentists, etc.) <i>(\$235/month x 12 months)</i>	-	2,820.00
Postage <i>(\$833/month x 12 months)</i>	-	10,000.00
Telecommunication Services (phone, data, radio, internet) <i>(\$4,405/month x 12 months)</i>	2,400.00	50,460.00
Utilities (Water & Electricity) <i>(\$2,031/month x 12 months)</i>	-	24,372.00
Rentals (Copiers and Records Storage) <i>(\$3,200/month x 12 months)</i>	15,600.00	22,800.00
Leases – Facilities (Galveston and Texas City clinic sites) <i>(\$43,122/month x 12 months)</i>	-	517,464.00
Equipment Maintenance (inspections, calibrations, and repairs) <i>(\$7,120/month x 12 months)</i>	70,644.00	14,800.00
Building Maintenance <i>(\$417/month x 12 months)</i>	-	5,000.00
General Liability Insurance <i>(\$1,125/month x 12 months)</i>	-	13,500.00
Building Contents Insurance <i>(\$1,535/month x 12 months)</i>	-	18,420.00
Auto Insurance (hired/non-owned liability) <i>(\$12/month x 12 months)</i>	-	144.00
IGT Reimbursement	-	308,969.00
Advertising (staff recruitment and advertising costs for outreach and education program during open enrollment)	-	21,600.00
Subscriptions, Books, etc. <i>(\$248/month x 12 months)</i>	-	2,970.00

## Coastal Health & Wellness - Budget Justification

Federal and Non-Federal Expenditures

Funding Period: April 1, 2020 to March 31, 2021

Budget Justification	FY 2021 Budget Period	
	Federal Grant Request	Non-Federal Resources
Organizational Memberships ( <i>TACHC, NACHC, TDA, AMA, and AAFP</i> )	-	34,186.00
Computer Software, Licensing, Updates, & Usage Fees ( <i>\$20,979/month x 12 months</i> )	-	251,744.00
Professional Fees/License/Inspections ( <i>radiation, laboratory, notary</i> )	-	1,854.00
Professional Services (Year-end annual audit and HR verifications)	-	26,420.00
Medical/Hazard Waste Disposal ( <i>\$550/month x 12 months</i> )	-	6,600.00
Board Meeting Operations	-	350.00
Service Charge – Credit Cards (processing fees for patients who pay with credit cards) and patient portal ( <i>\$730/month x 12 months</i> )	-	8,760.00
Bad Debt - Uncollectible AR	-	403,258.00
<b>TOTAL OTHER</b>	<b>\$ 88,644.00</b>	<b>\$ 1,781,691.00</b>
<b>TOTAL DIRECT CHARGES</b> (Sum of TOTAL Expenses)	<b>\$ 3,127,400.00</b>	<b>\$ 8,459,928.00</b>
<b>INDIRECT CHARGES – Include approved indirect cost rate.</b>		
0% indirect cost rate (includes utilities and accounting services)	-	-
<b>TOTALS</b> (Total of TOTAL DIRECT CHARGES and INDIRECT CHARGES)	<b>\$ 3,127,400.00</b>	<b>\$ 8,459,928.00</b>



# Coastal Health & Wellness

HRSA Budget Submission

April 1, 2020 to March 31, 2021

October 31, 2019

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
Health Resources and Services Administration  
PERFORMANCE PROGRESS REPORT - SF-PPR

NCC Progress Report Tracking (#) : 00169037

## Grantee Organization Information

<b>Federal Agency and Organization Element to Which Report is Submitted</b>	Health Resources and Services Administration (HRSA)	<b>Federal Grant or Other Identifying Number Assigned by Federal Agency</b>	H80CS00344
<b>DUNS Number</b>	135951940	<b>Employer Identification Number (EIN)</b>	741665318
<b>Recipient Organization</b> (Name and complete address including zip code)	COASTAL HEALTH & WELLNESS, P.O. BOX 939, LA MARQUE Texas 77568 - 5925	<b>Recipient Identifying Number or Account Number</b>	169037
<b>Project / Grant Period</b>	Start Date : 04/01/2002    End Date : 03/31/2022	<b>Reporting Period End Date</b>	04/01/2021
<b>Report Frequency</b>	<input checked="" type="checkbox"/> annual <input type="checkbox"/> semi-annual <input type="checkbox"/> quarterly <input type="checkbox"/> other		

**Certification: I certify to the best of my knowledge and belief that this report is correct and complete for performance of activities for the purposes set forth in the award documents.**

<b>Typed or Printed Name and Title of Authorized Certifying Official</b>	Kathy Barroso, Authorizing Official	<b>Telephone</b> (area code, number and extension)	(409) 938-2257
<b>Email Address</b>	kbarroso@gchd.org	<b>Date Report Submitted</b> (Month, Day, Year)	



SF-PPR-2 (Cover Page Continuation)

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
 Health Resources and Services Administration  
 PERFORMANCE PROGRESS REPORT - SF-PPR-2 (Cover Page Continuation)

NCC Progress Report Tracking (#) : 00169037

Supplemental Continuation of SF-PPR Cover Page

Department Name	Health Resources and Service Administration		
Division Name	Health Resources and Service Administration		
Name of Federal Agency	Health Resources and Service Administration	Funding Opportunity Number	5-H80-20-004
Funding Opportunity Title	Health Center Program		

Lobbying Activities

Have you paid any funds for any lobbying activities related to this grant application (progress report)? Reminder, no Federal appropriated funds may be used for lobbying.

Yes

No

OMB SF-LLL Disclosure of Lobbying Activities Form

No documents attached

Areas Affected by Project (Cities, County, State, etc.)

Area Type	Affected Area(s)
X-14	Other
X-14	Other

Point of Contact (POC) Information

Title of Position	Name	Phone	Email
Point of Contact	Ms. Kathy Barroso	(409) 938-2257	kbarroso@gchd.org

**Health Center Program**

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
 Health Resources and Services Administration  
 PERFORMANCE PROGRESS REPORT - Health Center Program

NCC Progress Report Tracking (#) : 00169037

**Section A - Budget Summary**

Grant Program Function or Activity	New or Revised Budget		
	Federal	Non Federal	Total
Community Health Centers	\$3,127,400.00	\$8,459,928.00	\$11,587,328.00
<b>Total :</b>	<b>\$3,127,400.00</b>	<b>\$8,459,928.00</b>	<b>\$11,587,328.00</b>

**Section B - Budget Categories**

Object Class Categories	Grant Program Function or Activity		Total
	Federal	Non-Federal	
Personnel	\$2,219,657.00	\$4,127,288.00	\$6,346,945.00
Fringe Benefits	\$427,928.00	\$811,658.00	\$1,239,586.00
Travel	\$0.00	\$19,200.00	\$19,200.00
Equipment	\$0.00	\$0.00	\$0.00
Supplies	\$0.00	\$1,255,086.00	\$1,255,086.00
Contractual	\$391,171.00	\$465,005.00	\$856,176.00
Construction	\$0.00	\$0.00	\$0.00
Other	\$88,644.00	\$1,781,691.00	\$1,870,335.00
<b>Total Direct Charges</b>	<b>\$3,127,400.00</b>	<b>\$8,459,928.00</b>	<b>\$11,587,328.00</b>
Indirect Charges	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$3,127,400.00</b>	<b>\$8,459,928.00</b>	<b>\$11,587,328.00</b>

**Program Income**

Grant Program Function or Activity	Total
Community Health Centers	\$3,806,853.00
<b>Total :</b>	<b>\$3,806,853.00</b>

**Section C - Non Federal Resources**

Grant Program Function or Activity	Applicant	State	Local	Other	Total
Community Health Centers	\$0.00	\$790,000.00	\$3,734,667.00	\$3,935,261.00	\$8,459,928.00
<b>Total :</b>	<b>\$0.00</b>	<b>\$790,000.00</b>	<b>\$3,734,667.00</b>	<b>\$3,935,261.00</b>	<b>\$8,459,928.00</b>

**Community Health Centers**

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
 Health Resources and Services Administration  
 PERFORMANCE PROGRESS REPORT - Community Health Centers

NCC Progress Report Tracking (#) : 00169037

**Section A - Budget Summary**

Grant Program Function or Activity	New or Revised Budget		
	Federal	Non Federal	Total
Community Health Centers	\$3,127,400.00	\$8,459,928.00	\$11,587,328.00
<b>Total :</b>	<b>\$3,127,400.00</b>	<b>\$8,459,928.00</b>	<b>\$11,587,328.00</b>

**Program Income**

Grant Program Function or Activity	Total
Community Health Centers	\$3,806,853.00
<b>Total :</b>	<b>\$3,806,853.00</b>

**Section C - Non Federal Resources**

Grant Program Function or Activity	Applicant	State	Local	Other	Total
Community Health Centers	\$0.00	\$790,000.00	\$3,734,667.00	\$3,935,261.00	\$8,459,928.00
<b>Total :</b>	<b>\$0.00</b>	<b>\$790,000.00</b>	<b>\$3,734,667.00</b>	<b>\$3,935,261.00</b>	<b>\$8,459,928.00</b>

## Coastal Health & Wellness - Budget Justification

Federal and Non-Federal Expenditures

Funding Period: April 1, 2020 to March 31, 2021

Budget Justification	FY 2021 Budget Period	
	Federal Grant Request	Non-Federal Resources
<b>REVENUE</b> – Should be consistent with information presented in Budget Information: Budget Details form and Form 3: Income Analysis.		
PROGRAM INCOME (fees, third party reimbursements, and payments generated from the projected delivery of services)	-	3,806,853.00
STATE FUNDS (Projected revenue from 1115 Waiver Project)	-	790,000.00
LOCAL FUNDS	-	3,734,667.00
FEDERAL 330 GRANT	3,127,400.00	-
OTHER SUPPORT	-	128,408.00
<b>TOTAL REVENUE</b>	<b>\$ 3,127,400.00</b>	<b>\$ 8,459,928.00</b>
<b>EXPENSES:</b> Object class totals should be consistent with those presented in Section B of the Budget Information: Budget Details form.		
<b>PERSONNEL</b> – Salary Total from Form 2: Staffing Profile may not match the total below due to some salaries being charged as indirect costs. Include budget details for each staff position as seen in the Personnel Justification sample below.		
ADMINISTRATION	372,338.00	1,617,724.00
MEDICAL STAFF	1,130,609.00	1,079,167.00
DENTAL STAFF	535,876.00	489,536.00
BEHAVIORAL HEALTH STAFF (Mental Health/Substance Abuse)	-	117,475.00
ENABLING STAFF (Case Managers/Outreach & Education Staff)	180,834.00	700,386.00
OTHER STAFF	-	-
SALARIES, OVERTIME	-	45,000.00
SALARIES, PROVIDER INCENTIVES	-	78,000.00
<b>TOTAL PERSONNEL</b>	<b>\$ 2,219,657.00</b>	<b>\$ 4,127,288.00</b>
<b>FRINGE BENEFITS</b>		
FICA @ 7.65%	169,795.00	315,730.00
State Unemployment Tax @ 1.30%	4,505.00	8,852.00
Life ADD @ 0.22%	4,806.00	8,466.00
Dependent Life @ \$1.71/month (per eligible employee)	722.00	1,424.00
Long Term Disability Insurance @ 0.24%	5,242.00	9,235.00
Medical Insurance @ \$432.02/month (per eligible employee)	187,150.00	364,361.00
Workers Compensation @ 0.30%	6,656.00	12,378.00
Retirement @ 2.41%	49,052.00	91,212.00
<b>TOTAL FRINGE @ 19.5%</b>	<b>\$ 427,928.00</b>	<b>\$ 811,658.00</b>

## Coastal Health & Wellness - Budget Justification

Federal and Non-Federal Expenditures

Funding Period: April 1, 2020 to March 31, 2021

Budget Justification	FY 2021 Budget Period	
	Federal Grant Request	Non-Federal Resources
<b>TRAVEL</b>		
Non-Local Travel – related to staff trainings/CME, etc. (25,172 miles x 58 cents per mile)	-	14,600.00
Local Travel – staff travel b/t clinic sites, meetings, etc. (7,931 miles x 58 cents per mile)	-	4,600.00
<b>TOTAL TRAVEL</b>	<b>\$ -</b>	<b>\$ 19,200.00</b>
<b>EQUIPMENT – Include items of moveable equipment that cost \$5,000 or more and with a useful life of one year or more.</b>		
None	-	-
<b>TOTAL EQUIPMENT</b>	<b>\$ -</b>	<b>\$ -</b>
<b>SUPPLIES</b>		
Office, Administrative & Printing Supplies (\$7,748/month x 12 months)	-	92,980.00
Lab / X-ray (\$5,000/month x 12 months)	-	60,000.00
Medical Supplies (Based on 76% of total visits - \$2.94/visit x 36,749 visits)	-	108,000.00
Pharmaceuticals (\$71,992/month x 12 months)	-	863,906.00
Dental (Based on 24% of total visits - \$7.76/visit x 11,605 visits)	-	90,000.00
Outside Dental (Restorative) (\$3,350/month x 12 months)	-	40,200.00
<b>TOTAL SUPPLIES</b>	<b>\$ -</b>	<b>\$ 1,255,086.00</b>
<b>CONTRACTUAL – Include sufficient detail to justify costs.</b>		
Outside Lab Contract (\$6.70/test x 45,000 tests)	301,500.00	-
Outside X-Ray Contract (\$12.00/reading x 3,000 readings)	-	36,000.00
Ob/Gyn Contract Services (\$140/hr x 16 hrs x 12 months)	-	26,880.00
Primary Care Contract Services (\$4,771/month x 12 months)	-	57,252.00
CIHCP Contract Services (\$300/month x 12 months)	-	3,600.00
Patient Transportation Contract with Gulf Coast Center (\$30.00/average per trip x 250 estimated trips)	-	7,500.00
Translation & Interpretation Services (\$560/month x 12 months)	-	6,720.00
Janitorial Contract (two sites) (\$14,000/month x 12 months) (Galveston site - \$4,000/month & Texas City site - \$10,000/month)	-	168,000.00
Security Services (two sites) (\$3,975/month x 12 months) (Galveston site - \$1,575/month & Texas City site - \$2,400/month)	28,800.00	18,900.00
Pest Control Services (one site) (\$80/month x 12 months)	-	960.00
Claim Processing (\$160/month x 12 months)	-	1,920.00

## Coastal Health & Wellness - Budget Justification

Federal and Non-Federal Expenditures

Funding Period: April 1, 2020 to March 31, 2021

Budget Justification	FY 2021 Budget Period	
	Federal Grant Request	Non-Federal Resources
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HPC Compliance Testing Services <i>(\$800/month x 12 months)</i>	-	9,600.00
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Interface EAP, Prehire Screenings & Medicare Exclusions <i>(\$627/month x 12 months)</i>	-	7,524.00
Billing Contract Service <i>(5% of gross collections)</i> <i>(\$8,000/month x 12 months)</i>	60,871.00	35,129.00
<b>TOTAL CONTRACTUAL</b>	<b>\$ 391,171.00</b>	<b>\$ 465,005.00</b>
<b>OTHER – Include detailed justification. Note: Federal funding CANNOT support construction, fundraising, or lobbying costs.</b>		
Training – CME and other types of continuing education/trainings <i>(\$2,933/month x 12 months)</i>	-	35,200.00
Uniforms (lab coats or scrubs for providers, nurses, dentists, etc.) <i>(\$235/month x 12 months)</i>	-	2,820.00
Postage <i>(\$833/month x 12 months)</i>	-	10,000.00
Telecommunication Services (phone, data, radio, internet) <i>(\$4,405/month x 12 months)</i>	2,400.00	50,460.00
Utilities (Water & Electricity) <i>(\$2,031/month x 12 months)</i>	-	24,372.00
Rentals (Copiers and Records Storage) <i>(\$3,200/month x 12 months)</i>	15,600.00	22,800.00
Leases – Facilities (Galveston and Texas City clinic sites) <i>(\$43,122/month x 12 months)</i>	-	517,464.00
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Building Maintenance <i>(\$417/month x 12 months)</i>	-	5,000.00
General Liability Insurance <i>(\$1,125/month x 12 months)</i>	-	13,500.00
Building Contents Insurance <i>(\$1,535/month x 12 months)</i>	-	18,420.00
Auto Insurance (hired/non-owned liability) <i>(\$12/month x 12 months)</i>	-	144.00
IGT Reimbursement	-	308,969.00
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Subscriptions, Books, etc. <i>(\$248/month x 12 months)</i>	-	2,970.00

**Coastal Health & Wellness - Budget Justification**

Federal and Non-Federal Expenditures

Funding Period: April 1, 2020 to March 31, 2021

Budget Justification	FY 2021 Budget Period	
	Federal Grant Request	Non-Federal Resources
Organizational Memberships ( <i>TACHC, NACHC, TDA, AMA, and AAFP</i> )	-	34,186.00
Computer Software, Licensing, Updates, & Usage Fees ( <i>\$20,979/month x 12 months</i> )	-	251,744.00
Professional Fees/License/Inspections ( <i>radiation, laboratory, notary</i> )	-	1,854.00
Professional Services (Year-end annual audit and HR verifications)	-	26,420.00
Medical/Hazard Waste Disposal ( <i>\$550/month x 12 months</i> )	-	6,600.00
Board Meeting Operations	-	350.00
Service Charge – Credit Cards (processing fees for patients who pay with credit cards) and patient portal ( <i>\$730/month x 12 months</i> )	-	8,760.00
Bad Debt - Uncollectible AR	-	403,258.00
<b>TOTAL OTHER</b>	<b>\$ 88,644.00</b>	<b>\$ 1,781,691.00</b>
<b>TOTAL DIRECT CHARGES</b> (Sum of TOTAL Expenses)	<b>\$ 3,127,400.00</b>	<b>\$ 8,459,928.00</b>
<b>INDIRECT CHARGES</b> – <i>Include approved indirect cost rate.</i>		
0% indirect cost rate (includes utilities and accounting services)	-	-
<b>TOTALS</b> (Total of TOTAL DIRECT CHARGES and INDIRECT CHARGES)	<b>\$ 3,127,400.00</b>	<b>\$ 8,459,928.00</b>

## **Coastal Health & Wellness – Budget Narrative**

Grant # H8OCS00344

Funding Period: April 1, 2020 to March 31, 2021

### **REVENUES**

Revenues shown in the operating budget request consist of program income from patients, third party reimbursement from Medicare, Medicaid, and Private Insurance. Revenue also includes grant revenue for services provided under Title V and other revenues from contracted pharmacy services, medical record requests and interest income. Revenue in the form of cost reimbursements from local contracts and funding from Galveston County are used to defray costs. A detailed review of revenues is found in the INCOME ANALYSIS FORM - FORM 3.

The program revenue assumptions and estimates for the FY20/FY21 operating budget were expected to be higher in comparison to the previous year due to changes in the payer mix and increased collection efforts related to self pay payers. Over the last year, the percent of patients covered by a third-party payer source has decreased. Coastal Health & Wellness will develop plans to target patients with some form of payor source within the service area to increase these numbers. In addition, collections from self pay payers has increased over the last year due to an increase in the nominal fee. Efforts continue to increase collections from Self-pay patients, and new policies will be put in place to limit no-shows. Self-pay patients with outstanding balances are sent letters requesting payment and are offered the opportunity to set up a payment plan on past due balances in an ongoing effort to reduce bad debt and increase self pay collections. Plans to increase the percentage of funded patients resulted in an increase in the estimated number of insured patients. Medicare, Medicaid and Private insurance service revenues were estimated to increase in comparison to last year based on current visit projections and reimbursement rates, and an increase in the percentage of patients. Revenues are based on the current third quarter reimbursement rates for all payor categories. Other revenues include pharmacy revenues based on a contract with Walgreens to provide medication dispensing services to patients whereas a monthly reimbursement is received for fees collected less any contracted dispensing or administrative fees. This budget also assumes that other revenue generated from local contracts, Case Management, and various other social service programs will remain at the same level as prior years. The County of Galveston is projected to provide local support to Coastal Health & Wellness in the amount of \$3,734,667.

The revenue figures are reasonable estimates based on data from recent billing and collection activity. The clinic management system is used to electronically bill Medicare/Medicaid and Private Insurance, and billing services are outsourced. The fee schedule is reviewed and/or updated annually and is determined based on the annual Medicare cost report and relative value units (RVU's). Recent data indicates that Coastal Health & Wellness has 12,672 unduplicated total clinic visits for 2018, with most of the patient population being self-pay. This trend follows population and poverty trends within Galveston County.

### **EXPENDITURES**

Coastal Health & Wellness operates clinic sites in Texas City and Galveston, Texas. Both are combined outpatient medical and dental clinics with adjacent WIC and Immunization sites.

Costs between clinical departments are allocated as follows: salaries and benefits according to biweekly timesheets; office/clinical space, facility insurance, janitorial, and utility charges by periodic review of space usage and percentage (%) allocations; telephone costs by allocation reports; postage by a report generated from the postage meter; and a portion of office and cleaning supplies by staff and/or space allocation.

**PERSONNEL:** Funding for staff is paid through a mix of Section 330 Grant, Program Income and local contributions. See



## Coastal Health & Wellness – Budget Narrative

Grant # H80CS00344

Funding Period: April 1, 2020 to March 31, 2021

CHW FY21 HRSA Budget Justification – Personnel Object Details for details. The current staffing pattern provides an appropriate mix of provider and sufficient support staff for the activities detailed on FORM 5 and described in the health care plan. Personnel costs were budgeted to include a 2.0% cost of living salary adjustment beginning 10.1.19.

**FRINGE BENEFITS:** The staff roster, CHW FY21 HRSA Budget Justification – Personnel Object Details, lists separately the full-time and part-time project positions paid for by program revenues and local funding. Paid benefits include: FICA (7.65%), SUTA (1.30%), Workers' Compensation (0.30%), retirement plan contributions of 2.21% of gross salary, employees' health (\$427.02 per month per employee), CAREHERE as part of the health insurance plan (\$5.00 per month per employee), life insurance (0.22% of gross wages), dependent life (\$1.71 per month per employee) and disability insurance (0.24% of gross wages). With the exception of health insurance, benefit costs remained relatively level in comparison to prior years.

**TRAVEL:** Funds for local travel are used for travel between clinics and outreach activities. Funds for non-local and local travel includes reimbursement of mileage at \$0.58 per mile when applicable, reasonable hotel accommodations, per diem, parking, conference fees and other reasonable and necessary expenses. Funds for non-local travel are used primarily for travel associated with Coastal Health and Wellness administrative activities. This includes travel for "Key Personnel" to attend meetings such as NACHC Policy Seminars and Texas Association of Community Health Center (TACHC) meetings. Funds for CME and other training activities are found in "Training - Local" under the Other category.

**SUPPLIES:** Funds for supplies are detailed in the operating budget by type (medical, lab, pharmaceutical, dental, outside dental (restorative), office and janitorial supplies) and are based on recent cost experience and estimated usage derived from projected visits. Costs saving methods include contract purchasing of lab and pharmacy supplies through the State of Texas PCA, the Texas Association of Community Health Centers (TACHC), along with the use of various State and in-house bulk purchasing contracts. Dental contract services, which now include prosthetics, crowns and root canals, are paid for in full by patients and/or third party payers, while other supply costs are partially/fully covered by patient payments or local funding.

**CONTRACTUAL:** Patient care contracts include laboratory services that are provided through an outside lab under a TACHC group purchasing contract. Reading of x-rays is provided through a contract with a local radiologist, and a contract with Gulf Coast Center (GCC) to provide patient transportation, if requested. In addition, interpreter services are also available to patients as needed through a contract that provides either phone or onsite translation services. In all cases, charges to the clinic are discounted and equal services are not available elsewhere in the community at lower costs. Non-patient contracts include janitorial/pest control, security service for an onsite security officer at the Texas City and Galveston site clinics, the annual cost for contract management software services, clearinghouse fees for claim processing, and contract services to provide monthly statement processing and appointment voice mail reminder services through our EPM provider. Due to the recent outsourcing of medical and dental billing functions, contract services also includes fees related to the outside billing agency. United Solutions MSO (USMSO) provides billing services, which is calculated based on 5% of gross collections. Contracts are awarded based on a competitive bidding process and established procedures.

**OTHER:** Includes: - Training: includes provider CME costs for 6 mid-levels, 3 physicians, 4.5 dentists and 1 dental hygienist, registration fees for seminars and webinars, as well as materials for on-site training of staff; uniforms for dental staff; postage, and utilities such as telephone, water and electric for our Galveston facility; rental costs – includes monthly rental cost for copiers and computers, high speed internet service, and rental of storage area for storing medical records and other records; leases - includes facility lease of clinical space in Texas City and Galveston; maintenance/repair for equipment, facilities and computers – includes normal maintenance and repair costs for medical / dental equipment, building facilities and IT operations. Also includes annual maintenance fees for the clinical EPM/EHR/EDR systems and the clinic portion of the annual maintenance of the Accounting software system; insurance - costs are for general liability / building contents

## **Coastal Health & Wellness – Budget Narrative**

Grant # H80CS00344

Funding Period: April 1, 2020 to March 31, 2021

for the Galveston clinic; newspaper ads – for advertising and recruiting; subscriptions/books – pays for reference manual, newsletters and books used for reference and training; organizational membership – NACHC and TACHC Association dues; Professional fees/license/inspections – include license for pharmacy, CLIA, Medical/Dental Directors professional license, and any outside legal fees; Professional services - accounting - funds are for payment of the clinics portion of the annual single agency audit; med/hazard waste/trash removal and service charges (credit cards and bank fees); Employee Betterment and Board Meeting Operations – for costs associated with employee events and Board meetings. Totals for all are based on current expenditures with projected inflationary increases, as appropriate.

**CURRENT SERVICES ADJUSTMENT:** This budget does not include a request for additional 330 funding outside of the current amount provided of \$3,127,400.

**PROJECT PERIOD JUSTIFICATION:** This justification represents the second year of a three year project period renewal.

**Program Specific Form(s) - Review**

**00169037: COASTAL HEALTH & WELLNESS**

**Due Date: 11/08/2019 (Due In: 9 Days)**

**Announcement Number:** 5-H80-20-004

**Announcement Name:** Health Center Program

**Progress Report Type:** Noncompeting Continuation

**Grant Number:** H80CS00344

**Target Population:** Community Health Centers

**Current Project Period:** 4/1/2019 - 3/31/2022

**Resources**

**View**

FY20 BPR User Guide | Funding Opportunity Announcement

**Form 1C - Documents On File**

As of 10/30/2019 02:04:40 PM

OMB Number: 0915-0285 OMB Expiration Date: 1/31/2020

Management and Finance	Date of Last Review/Revision (maximum 100 characters)	Not Applicable (N/A)
Personnel policies, including selection and dismissal procedures, salary and benefit scales, employee grievance procedures, and equal opportunity practices.	7/31/19	
Procurement procedures.	7/31/19	
Standards of Conduct/Conflict of Interest policies/procedures.	3/27/19	
Financial Management/Accounting and Internal Control policies and/or procedures to ensure awarded Health Center Program federal funds are not expended for restricted activities.	8/28/19	
Financial Management/Accounting and Internal Control policies/procedures related to restrictions on the use of federal funds for the purchase of sterile needles or syringes for the hypodermic injection of any illegal drug. <sup>1</sup> (Only applicable if your organization provides syringe exchange services or is otherwise engaged in syringe service programs; otherwise, indicate as N/A).		[ X ]
Financial Management/Accounting and Internal Control policies/procedures related to restrictions on the use of federal funds to provide abortion services, except in cases of rape or incest or where there is a threat to the life of the mother. <sup>2</sup> (Only applicable if your organization provides abortion services; otherwise, indicate as N/A).		[ X ]
Billing and Collections policies/procedures, including those regarding waivers or fee reductions and refusal to pay.	3/28/19	
Services	Date of Last Review/Revision (maximum 100 characters)	Not Applicable (N/A)
Credentialing/Privileging operating procedures.	9/12/19	
Coverage for Medical Emergencies During and After Hours operating procedures.	9/26/19	
Continuity of Care/Hospital Admitting operating procedures.	5/30/19	
Sliding Fee Discount Program policies, operating procedures, and sliding fee schedule.	8/29/19	
Quality Improvement/Assurance Program policies and operating procedures that address clinical services and management, patient safety, and confidentiality of patient records.	8/1/19	
Governance	Date of Last Review/Revision (maximum 100 characters)	Not Applicable (N/A)
Governing Board Bylaws.	1/26/17	

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**Form 3 - Income Analysis**

As of 10/30/2019 02:04:40 PM  
 OMB Number: 0915-0285 OMB Expiration Date: 9/30/2016

Payer Category	Patients By Primary Medical Insurance (a)	Billable Visits (b)	Income Per Visit (c)	Projected Income (d)	Prior FY Income
<b>Part 1: Patient Service Revenue - Program Income</b>					
1. Medicaid	1637.00	4518.00	\$135.00	\$609,930.00	\$442,670.00
2. Medicare	1473.00	4507.00	\$130.00	\$585,910.00	\$355,497.00
3. Other Public	539.00	2498.00	\$76.00	\$189,848.00	\$144,056.00
4. Private	1637.00	3912.00	\$125.00	\$489,000.00	\$194,444.00
5. Self Pay	11084.00	32919.00	\$35.00	\$1,152,165.00	\$660,110.00
6. Total (Lines 1 to 5)	16370	48354	N/A	\$3,026,853.00	\$1,796,777.00
<b>Part 2: Other Income - Other Federal, State, Local and Other Income</b>					
7. Other Federal	N/A	N/A	N/A	\$0.00	\$0.00
8. State Government	N/A	N/A	N/A	\$790,000.00	\$558,125.00
9. Local Government	N/A	N/A	N/A	\$3,734,667.00	\$3,888,849.00
10. Private Grants/Contracts	N/A	N/A	N/A	\$16,208.00	\$81,416.00
11. Contributions	N/A	N/A	N/A	\$0.00	\$0.00
12. Other	N/A	N/A	N/A	\$892,200.00	\$1,081,495.00
13. Applicant (Retained Earnings)	N/A	N/A	N/A	\$0.00	\$0.00
14. Total Other (Lines 7 to 13)	N/A	N/A	N/A	\$5,433,075.00	\$5,609,885.00
<b>Total Non-Federal (Non-section 330) Income (Program Income Plus Other)</b>					
15. Total Non-Federal Income (Lines 6+14)	N/A	N/A	N/A	\$8,459,928.00	\$7,406,662.00

**Comments/Explanatory Notes (if applicable)**

Pharmacy Revenue is included in Line 12 Other. Projected Income for current Support year is \$780,000. Prior FY Pharmacy Income was \$963,868.81.

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 OMB Number: 0915-0285 OMB Expiration Date: 9/30/2016

**Form 5A - Required Services**

Service Type	Column I - Direct (Health Center Pays)	Column II - Formal Written Contract/Agreement (Health Center Pays)	Column III - Formal Written Referral Arrangement (Health Center DOES NOT Pay)
General Primary Medical Care	[ X ]	[ X ]	[ _ ]
Diagnostic Laboratory	[ X ]	[ X ]	[ _ ]
Diagnostic Radiology	[ X ]	[ X ]	[ _ ]
Screenings	[ X ]	[ _ ]	[ X ]
Coverage for Emergencies During and After Hours	[ X ]	[ _ ]	[ _ ]
Voluntary Family Planning	[ X ]	[ X ]	[ _ ]
Immunizations	[ X ]	[ _ ]	[ _ ]
Well Child Services	[ X ]	[ _ ]	[ _ ]
Gynecological Care	[ X ]	[ X ]	[ _ ]
Obstetrical Care			
Prenatal Care	[ X ]	[ X ]	[ X ]

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Service Type	Column I - Direct (Health Center Pays)	Column II - Formal Written Contract/Agreement (Health Center Pays)	Column III - Formal Written Referral Arrangement (Health Center DOES NOT Pay)
Intrapartum Care (Labor & Delivery)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Postpartum Care	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Preventive Dental	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pharmaceutical Services	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HCH Required Substance Use Disorder Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eligibility Assistance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Education	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outreach	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Translation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

As of 10/30/2019 02:04:40 PM

OMB Number: 0915-0285 OMB Expiration Date: 9/30/2016

**Form 5A - Additional Services**

Service Type	Column I - Direct (Health Center Pays)	Column II - Formal Written Contract/Agreement (Health Center Pays)	Column III - Formal Written Referral Arrangement (Health Center DOES NOT Pay)
Additional Dental Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Behavioral Health Services			
Mental Health Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Substance Use Disorder Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Optometry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recuperative Care Program Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Health Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupational Therapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Therapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speech-Language Pathology/Therapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nutrition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complementary and Alternative Medicine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Enabling/Supportive Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

As of 10/30/2019 02:04:40 PM

OMB Number: 0915-0285 OMB Expiration Date: 9/30/2016

**Form 5A - Specialty Services**

Service Type	Column I - Direct (Health Center Pays)	Column II - Formal Written Contract/Agreement (Health Center Pays)	Column III - Formal Written Referral Arrangement (Health Center DOES NOT Pay)
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Service Type	Column I - Direct (Health Center Pays)	Column II - Formal Written Contract/Agreement (Health Center Pays)	Column III - Formal Written Referral Arrangement (Health Center DOES NOT Pay)
Psychiatry	[_]	[X]	[_]
Endocrinology	[_]	[_]	[_]
Ophthalmology	[_]	[_]	[_]
Cardiology	[_]	[_]	[_]
Pulmonology	[_]	[_]	[_]
Dermatology	[_]	[_]	[_]
Infectious Disease	[_]	[_]	[_]
Gastroenterology	[_]	[_]	[_]
Advanced Diagnostic Radiology	[_]	[_]	[_]

**Form 5B - Service Sites**

As of 10/30/2019 02:04:40 PM

OMB Number: 0915-0285 OMB Expiration Date: 9/30/2016

Coastal Health & Wellness (BPS-H80-012179) Action Status: Picked from Scope

<b>Site Name</b>	Coastal Health & Wellness	<b>Physical Site Address</b>	9850 Emmett F Lowry Expy, Texas City, TX 77591-2122
<b>Site Type</b>	Administrative	<b>Site Phone Number</b>	(409) 938-2401
<b>Web URL</b>	www.coastalhw.org		
<b>Location Type</b>	Permanent	<b>Site Setting</b>	All Other Clinic Types
<b>Date Site was Added to Scope</b>	12/5/2012	<b>Site Operational By</b>	12/5/2012
<b>FQHC Site Medicare Billing Number Status</b>	Health center does not/will not bill under the FQHC Medicare system at this site	<b>FQHC Site Medicare Billing Number</b>	
<b>FQHC Site National Provider Identification (NPI) Number</b>		<b>Total Hours of Operation</b>	0
<b>Months of Operation</b>	January, February, March, April, May, June, July, August, September, October, November, December		
<b>Number of Contract Service Delivery Locations</b>		<b>Number of Intermittent Sites</b>	0
<b>Site Operated by</b>	Grantee		

**Organization Information**

No Organization Added

**Service Area Zip Codes**

Coastal Health & Wellness - Texas City (BPS-H80-011462) Action Status: Picked from Scope

<b>Site Name</b>	Coastal Health & Wellness - Texas City	<b>Physical Site Address</b>	9850-C Emmett F. Lowry Expressway STE C103, Texas City, TX 77591
<b>Site Type</b>	Service Delivery Site	<b>Site Phone Number</b>	(409) 938-2401
<b>Web URL</b>	www.coastalhw.org		
<b>Location Type</b>	Permanent	<b>Site Setting</b>	All Other Clinic Types
<b>Date Site was Added to Scope</b>	5/22/2012	<b>Site Operational By</b>	5/25/2012

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<b>FQHC Site National Provider Identification (NPI) Number</b>	1578588406	<b>Total Hours of Operation</b>	50
<b>Months of Operation</b>	May, June, July, August, January, February, March, April, November, September, October, December		
<b>Number of Contract Service Delivery Locations</b>		<b>Number of Intermittent Sites</b>	0
<b>Site Operated by</b>	Grantee		

**Organization Information**  
No Organization Added

**Service Area Zip Codes**  
77511, 77554, 77573, 77650, 77568, 77550, 77518, 77574, 77592, 77563, 77591, 77549, 77565, 77590, 77551, 77623, 77553, 77555, 77617, 77552, 77510, 77546, 77517, 77539

**Coastal Health & Wellness - Galveston (BPS-H80-001376)** **Action Status: Picked from Scope**

<b>Site Name</b>	Coastal Health & Wellness - Galveston	<b>Physical Site Address</b>	4700 BROADWAY STREET STE 100, GALVESTON, TX 77551-4241
<b>Site Type</b>	Service Delivery Site	<b>Site Phone Number</b>	(409) 938-2401
<b>Web URL</b>	www.coastalhw.org		
<b>Location Type</b>	Permanent	<b>Site Setting</b>	All Other Clinic Types
<b>Date Site was Added to Scope</b>	8/1/1996	<b>Site Operational By</b>	8/1/1996
<b>FQHC Site Medicare Billing Number Status</b>	This site has a Medicare billing number	<b>FQHC Site Medicare Billing Number</b>	451905
<b>FQHC Site National Provider Identification (NPI) Number</b>	1871766584	<b>Total Hours of Operation</b>	43
<b>Months of Operation</b>	May, June, July, August, January, February, March, April, November, September, October, December		
<b>Number of Contract Service Delivery Locations</b>		<b>Number of Intermittent Sites</b>	0
<b>Site Operated by</b>	Grantee		

**Organization Information**  
No Organization Added

**Service Area Zip Codes**  
77550, 77553, 77546, 77539, 77552, 77592, 77590, 77518, 77573, 77617, 77568, 77623, 77551, 77510, 77554, 77574, 77565, 77549, 77555, 77591, 77650, 77511, 77563, 77517

**Mobile Van #1 (BPS-H80-013539)** **Action Status: Picked from Scope**

<b>Site Name</b>	Mobile Van #1	<b>Physical Site Address</b>	9850-C Emmett F. Lowry Expressway STE C103, Texas City, TX 77591
<b>Site Type</b>	Service Delivery Site	<b>Site Phone Number</b>	(409) 949-3406
<b>Web URL</b>			
<b>Location Type</b>	Mobile Van	<b>Site Setting</b>	All Other Clinic Types
<b>Date Site was Added to Scope</b>	1/13/2014	<b>Site Operational By</b>	4/9/2014
<b>FQHC Site Medicare Billing Number Status</b>	This site is neither permanent nor seasonal per CMS	<b>FQHC Site Medicare Billing Number</b>	
<b>FQHC Site National Provider Identification (NPI) Number</b>		<b>Total Hours of Operation</b>	2
<b>Months of Operation</b>	May, June, July, August, January, February, March, April, September, October, December, November		

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**Locations**

**Site Operated by** Grantee

**Organization Information**

No Organization Added

**Service Area Zip Codes**

77554, 77539, 77510, 77592, 77517, 77552, 77550, 77565, 77574, 77591, 77568, 77549, 77617, 77546, 77553, 77563, 77551, 77590, 77511, 77650, 77555, 77623, 77518, 77573

**Form 5C - Other Activities/Locations**

As of 10/30/2019 02:04:40 PM

OMB Number: 0915-0285 OMB Expiration Date: 9/30/2016

**Activity/Location Information**

No other activities/locations added.

**Scope Certification**

As of 10/30/2019 02:04:40 PM

OMB Number: 0915-0285 OMB Expiration Date: 9/30/2016

**1. Scope of Project Certification - Services – Select only one below**

- By checking this option, I certify that I have reviewed my Form 5A: Services Provided and it accurately reflects all services and service delivery methods included in my current approved scope of project.
- By checking this option, I certify that I have reviewed my Form 5A: Services Provided and it requires changes that I have submitted through the change in scope process.

**2. Scope of Project Certification - Sites – Select only one below**

- By checking this option, I certify that I have reviewed my Form 5B: Service Sites and it accurately reflects all sites included in my current approved scope of project.
- By checking this option, I certify that I have reviewed my Form 5B: Service Sites and it requires changes that I have submitted through the change in scope process.

As of 10/30/2019 02:04:40 PM

OMB Number: 0915-0285 OMB Expiration Date: 9/30/2016

**Program Narrative Update - Environment and Organizational Capacity**

**Environment**

Discuss current major community, state, and/or regional changes, since the last budget period, that have directly impacted and/or have the potential to impact the progress of the funded project, including changes in:

- Service area demographics and shifting patient population needs;
- Major health care providers in the service area;
- Key community partnerships and collaborations; and
- Changes in insurance coverage, including Medicaid, Medicare, and the Children's Health Insurance Program (CHIP).

As the population in Galveston County continues to grow, so does the need for primary healthcare services. Although several private healthcare providers have continued to expand services to the mainland, there remain relatively few options for those that are uninsured or under-insured. Over the past year, Coastal Health & Wellness (CHW) has seen an increase in self-pay patients in comparison to those with insurance. Approximately 75% of the patients currently seen at CHW are uninsured. As growth within Galveston County continues to move northward, healthcare options, particularly for those that are uninsured and live in less populated areas of the County, continue to be a challenge. Galveston County has a population of around 330,000 and an estimated poverty rate of approximately 13.9%. The needs of the population range in large part to management of chronic conditions to mental health services. Texas is one of 14 states that has not expanded Medicaid under the Affordable Care Act, resulting in a large uninsured population. Collaborations with community partners, such as MD Anderson and the American Cancer Society have allowed us to provide colorectal cancer screenings and mammograms to uninsured or underinsured patients who would otherwise not be able to afford these services.

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hospitals, UTMB and HCA-Mainland, and our case management staff play an important role in coordinating patient referrals for tertiary care. CHW has also seen a significant increase in the number of patients seeking dental services. Although there are several dental providers located within our area, affordable quality dental services are limited. In order to meet this demand, CHW recently expanded dental services and worked to decrease the no-show rate to improve access. A part-time dental hygienist was also recently added to the staff to continue to promote the importance of good oral hygiene.

**Organizational Capacity**

Discuss current major changes, since the last budget period, in the organization's capacity that have impacted or may impact the progress of the funded project, including changes in:

- Staffing, including key vacancies;
- Board membership changes;
- Operations, including changes in policies and procedures since the last operational site visit;
- Systems, including financial, clinical, and/or practice management systems; and
- Financial status, including the most current audit findings, as applicable.

Coastal Health & Wellness hired a new Dental Director in November 2018 and a new Medical Director in December 2018. CHW is now fully staffed for dental providers and is adding a part-time dental hygienist. There is currently one provider vacancy for a licensed MD and CHW is fully staffed for midlevel providers. All of the midlevel providers began in July/August and have been working a reduced patient per hour schedule until completion of their orientation. There was a reorganization at the executive level with the Executive Director position, as well as shared services positions for the Chief Nursing Officer, Chief Financial Officer, and Chief Compliance Officer taking on expanded rolls in the operations of the clinic. Coastal Health & Wellness is also seeking accreditation as a Patient Centered Medical Home, and there has been some reorganization in the medical staff to accommodate this accreditation process. The financial status of the clinic remains strong with a designated reserve in place in the event of any emergencies or unexpected changes.

**Program Narrative Update - Telehealth**

**Telehealth**

Describe how you use telehealth<sup>1</sup> to:

- Communicate with patients at other clinical locations;
- Communicate with providers and staff at other clinical locations;
- Receive or perform clinical consultations;
- Send and receive health care information from mobile devices to remotely monitor patients (i.e., mobile health, mHealth<sup>2</sup>); and
- Provide virtual health care services (list all services that are provided via telehealth).

**Note:**

<sup>1</sup> Telehealth is defined as the use of electronic information and telecommunication technologies to support and promote long-distance clinical health care, patient and professional health-related education, public health, and health administration. Technologies include video conferencing, the internet, store-and-forward imaging, streaming media, and terrestrial and wireless communications.

<sup>2</sup> For more information, see <http://www.telehealthtechnology.org/toolkits/mhealth>.

Coastal Health & Wellness uses telehealth for our SUD-MH program services. Patients are counseled by psychiatrists for issues related to substance use disorder, along with mental health services. Our telepsychiatrists are double board certified in general psychiatry and addiction medicine, which enables us to manage patients with a dual diagnosis very well.

**Program Narrative Update - Patient Capacity and Supplemental Awards**

**Patient Capacity**

Referencing the % Change 2016-2018 Trend, % Change 2017-2018, and % Progress Toward Goal columns:

Discuss trends in unduplicated patients served and report progress in reaching the projected number of patients. In the Patient Capacity Narrative column, explain any negative trends or limited progress toward the projected patient goals.

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Notes:

- 2016-2018 Patient Number data are pre-populated from Table 3a in the UDS Report.
- The Projected Number of Patients value is pre-populated from the Patient Target noted in the Patient Target Management Module in HRSA EHBs. If you have questions related to your Patient Target, contact the Patient Target Response Team at [BPHPatientTargets@hrsa.gov](mailto:BPHPatientTargets@hrsa.gov). To formally request a change in your Patient Target, you must submit a request via the Patient Target Management Module in HRSA EHBs.

Project Period: 4/1/2002 - 3/31/2022

Unduplicated Patients	2016 Patient Number ⓘ	2017 Patient Number ⓘ	2018 Patient Number ⓘ	% Change 2016-2018 Trend ⓘ	% Change 2017-2018 Trend ⓘ	% Progress Toward Goal ⓘ	Projected Number of Patients	Patient Capacity Narrative
Total Unduplicated Patients	13324	13816	12672	-4.89%	-8.28%	77.41%	16370	Unduplicated patients are at 10,629 as of 9.30.19 which is 1.8% less compared to the same time last year. However with the midlevel provider positions being fully staffed and dental providers being fully staffed, we are anticipating being above the total of 12,672 in 2019.

Notes:

- 2016-2018 Patient Number data are pre-populated from Table 4 in the UDS Report.
- The Projected Number of Patients values is pre-populated from the patient projections in the submission that initiated your current project period (Service Area Competition (SAC)) plus the patient projections from selected supplemental funding awarded after the start of the current project period. See the frequently asked questions on the BPR TA webpage for details on the selected supplemental funding patient projections included.
- The Projected Number of Patients values cannot be edited during the BPR submission. If these values are not accurate, provide adjusted projections and an explanation in the Patient Capacity Narrative section.

Project Period: 4/1/2002 - 3/31/2022

Special Populations	2016 Patient Number ⓘ	2017 Patient Number ⓘ	2018 Patient Number ⓘ	% Change 2016-2018 Trend ⓘ	% Change 2017-2018 Trend ⓘ	% Progress Toward Goal ⓘ	Projected Number of Patients	Patient Capacity Narrative
Total Migratory and Seasonal Agricultural Worker Patients	0	0	0	Data not available	Data not available	Data not available	0 (This number has been calculated by adding the following patient projections: FY 2019 SAC = 0)	Total Migratory and Seasonal Agricultural Worker Patients is 0 as of 9.30.19.
Total People Experiencing Homelessness Patients	368	405	355	-3.53%	-12.35%	Data not available	0 (This number has been calculated by adding the following patient projections: FY 2019 SAC = 0)	Total People Experiencing Homelessness Patients is currently at 332 as of 9.30.19.
Total Public Housing Resident Patients	0	0	0	Data not available	Data not available	Data not available	0 (This number has been calculated by adding the following patient projections: FY 2019 SAC = 0)	Total Public Housing Resident Patients is at 0 as of 9.30.19.

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Notes:

- 2016-2018 Patient Number data are pre-populated from Table 5 in the UDS Report.
- The Projected Number of Patients column is pre-populated from the patient projections in the submission that initiated your current project period (SAC) plus the patient projections from selected supplemental funding awarded after the start of the current project period. See the frequently asked questions on the BPR TA webpage for details on the selected supplemental funding patient projections included.
- The Projected Number of Patients values cannot be edited during the BPR submission. If these values are not accurate, provide adjusted projections and an explanation in the Patient Capacity Narrative section.

Project Period: 4/1/2002 - 3/31/2022

Patients and Visits by Service Type	2016 Patient Number (i)	2017 Patient Number (i)	2018 Patient Number (i)	% Change 2016-2018 Trend (i)	% Change 2017-2018 Trend (i)	% Progress Toward Goal (i)	Projected Number of Patients	Patient Capacity Narrative
<b>Total Medical Services Patients</b>	11279	11936	11653	3.32%	-2.37%	80.97%	14391 (This number has been calculated by adding the following patient projections: FY 2019 SAC = 14391)	Total Medical Services Patients is 9,510 as of 9.30.19. CHW anticipates this number to be higher at year-end.
<b>Total Dental Services Patients</b>	3081	2877	3134	1.72%	8.93%	85.98%	3645 (This number has been calculated by adding the following patient projections: FY 2019 SAC = 3645)	Total Dental Services Patients is 3,893 as of 9.30.19 which is higher than 2018 numbers. CHW anticipates this number to increase as of 12.31.19.
<b>Total Mental Health Services Patients</b>	340	294	324	-4.71%	10.20%	117.82%	275 (This number has been calculated by adding the following patient projections: FY 2019 SAC = 275)	Total Mental Health Services Patients is 317 as of 9.30.19. CHW anticipates this number to increase as of 12.31.19.
<b>Total Substance Use Disorder Services Patients</b>	0	0	0	Data not available	Data not available	Data not available	0 (This number has been calculated by adding the following patient projections: FY 2019 SAC = 0)	For the reporting period 9.1.18 thru 8.31.19, CHW has 15 unduplicated patients who are receiving SUD services. CHW anticipates this number will increase as of 12.31.19.
<b>Total Enabling Services Patients</b>	11178	9941	9390	-16.00%	-5.54%	94.46%	9941 (This number has been calculated by adding the following patient projections: FY 2019 SAC = 9941)	Total Enabling Services as of 9.30.19 is 9,098. CHW anticipates this number will increase as of 12.31.19.

Supplemental Awards

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In the Supplemental Award Narrative column, describe the following:

- Implementation status and progress toward achieving goals;
- Key factors impacting progress toward achieving goals; and
- Plans for sustaining progress and/or overcoming barriers to ensure goal achievement.

Notes:

- If you did not receive a Supplemental Award, the system will not require narrative in the Supplemental Award Narrative column.
- Supplemental awards released late in FY 2019 or early in FY 2020 will be included in the FY 2021 BPR.
- SUD-MH recipients should report on the number of patients accessing SUD and/or mental health services, and, if you requested additional MAT funding, the number of patients receiving MAT for opioid use disorder (OUD).

Type of Supplemental Award	Programmatic Goal	Supplemental Award Narrative
FY 2017 Access Increases in Mental Health and Substance Abuse Services (AIMS)	Increase the number of patients with access to mental health services, and substance use disorder services focusing on the treatment, prevention, and awareness of opioid abuse by December 31, 2018	N/A
FY 2017 New Access Points (NAP) Satellite	Achieve operational status and increase the number of patients by December 31, 2018	N/A
FY 2018 Expanding Access to Quality Substance Use Disorder and Mental Health Services (SUD-MH)	Increase patients receiving substance use disorder and/or mental health services by December 31, 2019	CHW implemented this program in late June 2019. Currently 15 patients are active in the program as of 8.31.19 and this number will increase by 12.31.19. Due to the resources CHW has committed to this program, we have been able to safely manage two patients with alcohol use disorder thru ambulatory detoxification, and both are now alcohol free, and have continued seeing both behavioral health and telepsychiatry. Our telepsychiatrists are double board certified in general psychiatry and addiction medicine, and we can manage patients with a dual diagnosis very well. Approximately 30% of our patients have significant mental health history and active addiction. The current issue still facing Coastal Health & Wellness is identifying Recovery Coaches in the local area who can be implemented into the program. Resources are scarce and it has been difficult to find individuals who can help with the implementation. The other issue Coastal Health & Wellness is dealing with is wanting to expand services and provide more appointments for patients/clients. CHW recently filled several provider vacancies in the past two months and is still getting these providers oriented to general primary care processes and procedures. Once that is accomplished, CHW can focus on getting other providers trained to assist with this program. CHW is also limited in the number of patients that can be treated with MAT services because of the waiver. This barrier will be removed after the first year.

**Program Narrative Update - One Time Funding**

▼ One-Time Funding Awards

In the Activities column, discuss activities for which one-time funds were used and the impact on your organization.

Notes:

- If you did not receive a One-Time Funding Award, the system will not require narrative in the Activities column.
- One-time awards released late in FY 2019 or early in FY 2020 will be included in the FY 2021 BPR.

Type of One-Time Funding Award	Allowable Activities	Activities

In the Activities column, discuss activities for which one-time funds were used and the impact on your organization.

Notes:

- If you did not receive a One-Time Funding Award, the system will not require narrative in the Activities column.
- One-time awards released late in FY 2019 or early in FY 2020 will be included in the FY 2021 BPR.

Type of One-Time Funding Award	Allowable Activities	Activities
FY 2017 Access Increases in Mental Health and Substance Abuse Services (AIMS)	<p>Implementing health information technology (health IT) and/or training investments to:</p> <ul style="list-style-type: none"> <li>• Expand mental health services, and substance use disorder services focusing on the treatment, prevention, and awareness of opioid abuse</li> <li>• Integrate expanded services into primary care</li> </ul> <p>Funding must be used for health IT and/or training investments in one or more of the following Activity Categories:</p> <ul style="list-style-type: none"> <li>• Medication Assisted Treatment</li> <li>• Telehealth</li> <li>• Prescription Drug Monitoring Program</li> <li>• Clinical Decision Support</li> <li>• EHR Interoperability</li> <li>• Quality Improvement</li> <li>• Cybersecurity</li> <li>• Other Training</li> <li>• Other IT</li> </ul>	
FY 2017 Quality Improvement Assistance (August 2017)	<p>Developing and improving health center quality improvement (QI) systems and infrastructure:</p> <ul style="list-style-type: none"> <li>• Training staff</li> <li>• Purchasing medically accessible clinical equipment</li> <li>• Enhancing health information technology, certified electronic health record, and data systems</li> <li>• Data analysis</li> <li>• Implementing targeted QI activities (including hiring consultants)</li> </ul> <p>Developing and improving care delivery systems:</p> <ul style="list-style-type: none"> <li>• Purchasing supplies to support care coordination, case management, and medication management</li> <li>• Laboratory reporting and tracking</li> <li>• Training and workflow redesign to support team-based care</li> <li>• Clinical integration of behavioral health, oral health, HIV care, and other services</li> </ul>	<p>QI funding in the amount of \$26,612 was awarded in August 2017. Those funds were used for staff development and training (\$6,497), purchase of a Migali G-25 Refrigerator (\$8,920) for clinic medications and vaccines, three small refrigerators (\$637) for sample medications and controls, EHR software and service (\$8,150) to integrate into a regional database for meaningful use data, and EHR upgrades (\$2,408) for patient libraries to allow patient information to be printed out in various languages.</p>

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In the Activities column, discuss activities for which one-time funds were used and the impact on your organization.

Notes:

- If you did not receive a One-Time Funding Award, the system will not require narrative in the Activities column.
- One-time awards released late in FY 2019 or early in FY 2020 will be included in the FY 2021 BPR.

Type of One-Time Funding Award	Allowable Activities	Activities
<p><b>FY 2018 Quality Improvement Assistance (August 2018)</b></p>	<p>Developing and improving health center quality improvement (QI) systems and infrastructure:</p> <ul style="list-style-type: none"> <li>• Training staff</li> <li>• Purchasing medically accessible clinical equipment</li> <li>• Enhancing health information technology, certified electronic health record, and data systems</li> <li>• Data analysis</li> <li>• Implementing targeted QI activities (including hiring consultants)</li> </ul>	<p>QI funding in the amount of \$28,316 was awarded in August 2018. Those funds were used for staff development and training (\$8,759), replacing the TV's in the medical and dental waiting areas to allow for patient focused programming (\$1,568), and purchase of a colposcopy machine (\$17,989) to allow for the provision of these services to patients.</p>
<p><b>FY 2018 Enhancing Behavioral Health Workforce</b></p>	<p>Developing and improving care delivery systems:</p> <ul style="list-style-type: none"> <li>• Purchasing supplies to support care coordination, case management, and medication management</li> <li>• Laboratory reporting and tracking</li> <li>• Training and workflow redesign to support team-based care</li> <li>• Clinical integration of behavioral health, oral health, HIV care, and other services</li> </ul> <p>Increase access to quality opioid use disorder (OUD) and other substance use disorder (SUD) treatment by increasing the number of professionals and paraprofessionals trained to deliver behavioral health and primary care services as part of integrated, interprofessional team. Funds must be used to fulfill the following requirements throughout the 2 year funding period:</p> <ul style="list-style-type: none"> <li>• Provide mental health and SUD services either directly or through formal or written agreement for which the health center pays.</li> <li>• Have physicians, certified nurse practitioners, and/or physician assistants, on-site or with whom the health center has contracts, who have obtained a Drug Addiction Treatment Act (DATA) of 2000 waiver to treat OUD with medications specifically approved by the U.S. Food and Drug Administration (FDA) for that indication.</li> <li>• Have patients who receive medication-assisted treatment (MAT) for OUD from a physician, certified nurse practitioner, or physician assistant with a DATA 2000 waiver working on behalf of the health center.</li> <li>• Develop, host in academic years 2018-2019 and 2019-2020, and evaluate at least annually, experiential rotations for individuals preparing to become social workers, psychologists, counselors, addiction counselors, paraprofessionals, community workers, or other approved professionals that will teach integrated behavioral health and primary care services, and OUD and other SUD treatment, including MAT.</li> </ul>	

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In the Activities column, discuss activities for which one-time funds were used and the impact on your organization.

**Notes:**

- If you did not receive a One-Time Funding Award, the system will not require narrative in the Activities column.
- One-time awards released late in FY 2019 or early in FY 2020 will be included in the FY 2021 BPR.

Type of One-Time Funding Award	Allowable Activities	Activities
<b>FY 2018 Expanding Access to Quality Substance Use Disorder and Mental Health Services (SUD-MH)</b>	<p>Implementation of evidence-based SUD-MH integration and expansion strategies to:</p> <ul style="list-style-type: none"> <li>• Expand access to quality integrated SUD prevention and treatment services, including those addressing OUD and other emerging SUD issues.</li> <li>• Expand access to quality integrated mental health services, with a focus on conditions that increase risk for, or co-occur with SUD, including OUD.</li> </ul> <p>Funding may be used for infrastructure enhancements that support the expansion of SUD and/or mental health services, which may include:</p> <ul style="list-style-type: none"> <li>• equipment,</li> <li>• minor alternation and renovations (A/R), and</li> <li>• other one-time costs.</li> </ul>	<p>The SUD-MH funding was awarded in September 2018 in the amount of \$185,000. At that time, Coastal Health &amp; Wellness was actively recruiting a new Medical Director, who began in December 2018. Since implementation of the program, SUD-MH funding has been used to provide for a full-time LVN as well as provide partial funding for a physician, nurse case manager and medical aide who provide services under this program. This funding also was used to purchase computer equipment necessary for telepsychiatry services and refreshing the treatment room with new seating and decor. A contract psychiatrist who provide services 4 hours per week is also funded through this award, as well as any lab testing and pharmaceuticals that are provided. Additional dollars have also been allocated for travel and training for staff, IT programming related to EHR changes, a Recovery Coach, printing and advertising for outreach activities, and patient education materials. In addition, funds have been designated to assist patients with any transportation needs to and from their appointments.</p>

**Program Narrative Update - Clinical/Financial Performance Measures**

**Clinical/Financial Performance Measures**

Referencing the % Change 2016-2018 Trend, % Change 2017-2018 Trend, and % Progress Toward Goal columns, discuss the trends for:

- HRSA Priority Clinical and Financial Performance Measures:
  - Diabetes: Hemoglobin A1c Poor Control
  - Health Center Program Grant Cost Per Patient (Grant Costs)
- The measures for which you have experienced a negative trend of 5 percent or greater.

In the Clinical/Financial Performance Measures Narrative column provide an explanation of measures for which you have experienced a negative trend of 5 percent or greater, including:

- a. Key contributing and restricting factors affecting progress toward achieving goals; and
- b. Plans for improving progress and/or overcoming barriers to ensure goal achievement.

If you have no measures for which you have experienced a negative trend of 5 percent or greater, state this in the Measure Narrative field for the relevant measure(s).

**Notes:**

- 2016 – 2018 Measure fields will prepopulate from UDS, if available.
- Performance measure goals cannot be edited during the BPR submission. If pre-populated performance measure goals are not accurate, provide an adjusted goal and explanation in the appropriate Measure Narrative field (e.g., goal for the low birth weight measure has decreased based on improved patient tracking via a new EHR).
- If you were previously a look-alike, your look-alike UDS data will not pre-populate.
- (\*) If there are measures, within this section, that have not experienced a negative trend of 5 percent or greater, state this in the appropriate Measure Narrative field.
- (\*\*) Due to the fact that Cervical Cancer and IVD goals were set and reported in UDS based on different measure definitions, data will not display for some fields.
- (\*\*\*) If you receive funds to serve special populations (i.e., migratory and seasonal agricultural workers, people experiencing homelessness, and/or residents of public housing), you must ensure that at least one additional clinical performance measure that addresses the health care needs of each funded special population is included, as established in your most recent SAC application.

**HRSA Priority Clinical and Financial Performance Measures**

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**Clinical Measures**

Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Measure Narrative
Diabetes: Hemoglobin A1c Poor Control	Numerator: 595.0000 Denominator : 1418.0000 Calculated Value: 41.9600	Numerator: 577.0000 Denominator : 1632.0000 Calculated Value: 35.3600	Numerator: 726.0000 Denominator : 1992.0000 Calculated Value: 36.4500	-13.13%	3.08%	125.69%	29.00%	

**Financial Measures**

Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Measure Narrative
Health Center Program Grant Cost Per Patient (Grant Costs)	Numerator: 3514901.0000 Denominator : 13324.0000 Calculated Value: 263.8022	Numerator: 2999237.0000 Denominator : 13816.0000 Calculated Value: 217.0843	Numerator: 3333854.0000 Denominator : 12672.0000 Calculated Value: 263.0882	-0.27%	21.19%	111.01%	237.00 : 1 Ratio	

**Perinatal Health\***

Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Measure Narrative
Early Entry into Prenatal Care	Numerator: 13.0000 Denominator : 14.0000 Calculated Value: 92.8600	Numerator: 36.0000 Denominator : 42.0000 Calculated Value: 85.7100	Numerator: 39.0000 Denominator : 49.0000 Calculated Value: 79.5900	-14.29%	-7.14%	88.43%	90.00%	2019 3rd quarter measure is 81.8%, which is above 2018 measure, yet below the measure goal of 90%. This is a current focus area for our medical providers.
Low Birth Weight	Numerator: 2.0000 Denominator : 11.0000 Calculated Value: 18.1800	Numerator: 0.0000 Denominator : 4.0000 Calculated Value: 0.0000	Numerator: 4.0000 Denominator : 31.0000 Calculated Value: 12.9000	-29.04%	Data not available	129.00%	10.00%	

**Preventive Health Screenings and Services\***

Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Measure Narrative
Dental Sealants for Children between 6 – 9 Years	Numerator: 1.0000 Denominator : 17.0000 Calculated Value: 5.8800	Numerator: 9.0000 Denominator : 28.0000 Calculated Value: 32.1400	Numerator: 3.0000 Denominator : 10.0000 Calculated Value: 30.0000	410.20%	-6.66%	85.71%	35.00%	2019 3rd quarter measure is 42.85%, which is above 2018 measure and above measure goal of 35%.



Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Measure Narrative
Body Mass Index (BMI) Screening and Follow-Up Plan	Numerator: 3032.0000 Denominator : 10038.0000 Calculated Value: 30.2100	Numerator: 5876.0000 Denominator : 10682.0000 Calculated Value: 55.0100	Numerator: 8773.0000 Denominator : 10533.0000 Calculated Value: 83.2900	175.70%	51.41%	124.31%	67.00%	
Weight Assessment and Counseling for Nutrition and Physical Activity for Children and Adolescents	Numerator: 337.0000 Denominator : 1022.0000 Calculated Value: 32.9700	Numerator: 28.0000 Denominator : 961.0000 Calculated Value: 2.9100	Numerator: 82.0000 Denominator : 766.0000 Calculated Value: 10.7000	-67.55%	267.70%	30.57%	35.00%	
Tobacco Use: Screening and Cessation Intervention	Numerator: 4509.0000 Denominator : 6505.0000 Calculated Value: 69.3200	Numerator: 5999.0000 Denominator : 7566.0000 Calculated Value: 79.2900	Numerator: 6379.0000 Denominator : 6574.0000 Calculated Value: 97.0300	39.97%	22.37%	118.33%	82.00%	
Colorectal Cancer Screening	Numerator: 245.0000 Denominator : 3696.0000 Calculated Value: 6.6300	Numerator: 615.0000 Denominator : 4035.0000 Calculated Value: 15.2400	Numerator: 632.0000 Denominator : 4100.0000 Calculated Value: 15.4100	132.43%	1.12%	85.61%	18.00%	
Cervical Cancer Screening**	Data not available	Numerator: 1638.0000 Denominator : 5580.0000 Calculated Value: 29.3500	Numerator: 1842.0000 Denominator : 5464.0000 Calculated Value: 33.7100	Data not available	14.86%	93.64%	36.00%	
Childhood Immunization Status (CIS)	Numerator: 2.0000 Denominator : 42.0000 Calculated Value: 4.7600	Numerator: 2.0000 Denominator : 51.0000 Calculated Value: 3.9200	Numerator: 4.0000 Denominator : 45.0000 Calculated Value: 8.8900	86.76%	126.79%	44.45%	20.00%	

**Chronic Disease Management\***

Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Measure Narrative
Use of Appropriate Medications for Asthma	Numerator: 86.0000 Denominator : 97.0000 Calculated Value: 88.6600	Numerator: 113.0000 Denominator : 149.0000 Calculated Value: 75.8400	Numerator: 153.0000 Denominator : 171.0000 Calculated Value: 89.4700	0.91%	17.97%	105.26%	85.00%	
Coronary Artery Disease (CAD): Lipid Therapy	Numerator: 285.0000 Denominator : 368.0000 Calculated Value: 77.4500	Numerator: 180.0000 Denominator : 208.0000 Calculated Value: 86.5400	Numerator: 164.0000 Denominator : 188.0000 Calculated Value: 87.2300	12.63%	0.80%	99.13%	88.00%	

Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Measure Narrative
Ischemic Vascular Disease (IVD): Use of Aspirin or Another Antiplatelet**	Data not available	Numerator: 335.0000 Denominator : 421.0000 Calculated Value: 79.5700	Numerator: 266.0000 Denominator : 311.0000 Calculated Value: 85.5300	Data not available	7.49%	104.30%	82.00%	
Controlling High Blood Pressure	Numerator: 1756.0000 Denominator : 2772.0000 Calculated Value: 63.3500	Numerator: 2174.0000 Denominator : 3698.0000 Calculated Value: 58.7900	Numerator: 2123.0000 Denominator : 3653.0000 Calculated Value: 58.1200	-8.26%	-1.14%	90.81%	64.00%	
HIV Linkage to Care	Numerator: 3.0000 Denominator : 3.0000 Calculated Value: 100.0000	Numerator: 2.0000 Denominator : 2.0000 Calculated Value: 100.0000	Numerator: 0.0000 Denominator : 1.0000 Calculated Value: 0.0000	-100.00%	-100.00%	0.00%	85.00%	2019 3rd quarter measure is 100%, which is above 2018 measure and above measure goal of 85%.
Screening for Depression and Follow-Up Plan	Numerator: 3495.0000 Denominator : 8737.0000 Calculated Value: 40.0000	Numerator: 8104.0000 Denominator : 9353.0000 Calculated Value: 86.6500	Numerator: 8275.0000 Denominator : 8854.0000 Calculated Value: 93.4600	133.65%	7.86%	105.01%	89.00%	

**Financial Measures\***

Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Measure Narrative
Total Cost Per Patient (Costs)	Numerator: 9488870.00 Denominator : 13324.0000 Calculated Value: 712.1638	Numerator: 9627242.00 Denominator : 13816.0000 Calculated Value: 696.8183	Numerator: 10953475.00 Denominator : 12672.0000 Calculated Value: 864.3841	21.37%	24.05%	113.52%	761.43 : 1 Ratio	
Medical Cost Per Medical Visit (Costs)	Numerator: 4292553.00 Denominator : 29396.0000 Calculated Value: 146.0251	Numerator: 4555897.00 Denominator : 32014.0000 Calculated Value: 142.3095	Numerator: 4780656.00 Denominator : 29512.0000 Calculated Value: 161.9902	10.93%	13.83%	104.51%	155.00 : 1 Ratio	

**Additional Measures\*\*\***

Performance Measure	2016 Measures	2017 Measures	2018 Measures	% Change 2016-2018 Trend	% Change 2017-2018 Trend	% Progress toward Goal	Measure Goals	Is This Performance Measure Applicable	Measure Narrative

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #15**

**Consider for Approval Patient**

**No Show Policy (*New Policy*)**

**TO: CHW Nextgen Users**

**FROM:**

**DATE:**

**SUBJECT: No Show Process**

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The purpose of this process is to maximize open access to care for patients by reducing No-Shows, arriving to late appointments, and late cancellations.

It is the policy of Coastal Health & Wellness to inform patients the importance of keeping their scheduled appointments and the expectation of notifying the center of any cancellation or rescheduling within the allotted timeframe. Failure to comply with this policy may result in appointment limitations and/or restrictions.

**PATIENT SERVICES:**

It is the responsibility of Patient Services staff:

- To review the No Show Policy with each patient at either check-in or during financial screening
- Obtain signatures on the No Show Agreement from patients and save to the patient chart

**SCHEDULERS:**

It is the responsibility of the scheduling staff:

- Explain to the patient the automated appointment system and the expectations of the patient as explained on the No Show patient flyer
- Explain the expectations of patients to arrive 20 minutes prior to the appointment time or 1-hour, if the patient must be financially screened
- If a patient is found to have 2 consecutive No Shows:
  - Schedulers must explain the consequences of 3 consecutive No Shows
    - The patient will only be allowed to schedule appointments on the same day, if and only if, a cancellation is available.
  - A letter, "No Show Patient Letter", is completed by the scheduler and sent to the patient by mail.



## NO SHOW POLICY

### PURPOSE:

To maximize open access to care for patients by reducing No-Shows, arriving late to appointments, and late cancellations.

### POLICY:

It is the policy of Coastal Health & Wellness (CHW) to inform patients the importance of keeping their scheduled appointments and the expectation of notifying the center of any cancellation or rescheduling within the allotted timeframe. Failure to comply with this policy may result in appointment limitations and/or restrictions.

### PROCEDURE:

1. Each patient will receive and sign the *No Show Agreement?* at the time of registration or Checking In
2. CHW's automated system will send a reminder **48** business hours prior, to remind patients of their scheduled appointments. Patients will be required to confirm their appointments by using the automated system protocol. Appointments **NOT** confirmed within **24** hours may be canceled and replaced with another patient in need of the appointment.
3. The patient must notify CHW **24** hours in advance if they are unable to attend their scheduled appointment and notify CHW of any changes in the preferred contact method.
4. Patients will be required to arrive 20 minutes prior to the appointment time or 1-hour prior, if the patient must be financially screened. If a patient is late to their appointment, they may be asked to reschedule.
5. A notice will be sent to the patient if a patient fails to keep **2** consecutive scheduled appointments. Failure to keep **3** consecutive scheduled appointments, the patient will only be allowed to schedule appointments on the same day, if and only if, a cancellation is available.
6. This policy will be enforced uniformly and consistently by all staff and administration of Coastal Health & Wellness.



## No-Show Policy Agreement

At Coastal Health & Wellness (CHW) we highly value our patients and the importance of providing quality accessible care. For that reason, it is important that you keep scheduled appointments and/or inform CHW of any changes in a timely manner. Please understand that a No-Show appointment or late cancellation prevents CHW from providing care to additional patients who may need an appointment. Please understand that our policy states patients that fail to keep **3 consecutive scheduled appointments** will not be able to pre-schedule future appointments

Our Policy Requires:

- Appointments must be rescheduled within **24** hours prior to scheduled appointment.

**Initials**

- Appointments must be canceled within **24** hours prior to the scheduled appointment.

**Initials**

Coastal Health & Wellness thanks you for your understanding and cooperation to continue to provide quality care to all our patients.

*I understand and agree to abide by this No-Show Policy.*

\_\_\_\_\_  
Patient or Parent/Guardian Signature

\_\_\_\_\_  
Date



## **Notice**

# **No-Show Policy**

Coastal Health & Wellness (CHW) has an official No-Show Policy that will go into effect **January 1, 2020**. CHW will provide all patients with a copy of the No-Show Policy which will be outlined in the *Patient and Centers Rights and Responsibilities*.

CHW will implement the following changes.

- 1. The automated system will send a reminder (via your preferred method of contact), 48 business hours prior to your appointment. It is important for you to confirm your appointment using the automated system protocol.**
  - a. Please notify CHW of any changes in the preferred method of contact.**
    - **Via-Voice – you must press “1”**
    - **Via-Text – you can confirm by texting “C”**
    - **Via -Email – you can select “confirm”**
    - **Opt-out (patient responsible to call and confirm appointment)**
- 2. Please notify CHW 24 hours in advance if you will be unable to attend your scheduled appointment.**
- 3. Patients are required to arrive 20 minutes prior to the appointment time or 1-hour prior, if the patient must be financially screened. If a patient is late to their appointment, they may be asked to reschedule**

If you have any questions feel free to ask any CHW staff or via email:  
[coastalcontact@gchd.org](mailto:coastalcontact@gchd.org)





Date:

Dear:

We value you as a patient and thank you for choosing Coastal Health & Wellness as your healthcare provider. You recently No-Showed for your appointment on,\_\_\_\_\_. Our records indicate that you have failed to keep 2 consecutive scheduled appointments. Please understand that our policy states patients that fail to keep (3) consecutive scheduled appointments will only be allowed to schedule appointments on the same day, if and only if, a cancellation is available. Under special circumstances or urgent matters, the patient will have to speak with the Patient Information Manager. If you have any questions, please contact our office at 409-938-2234.

Coastal Health & Wellness Staff,

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #16**

**Consider for Approval Re-Privileging Rights for  
Emily Bailey, MSW, LCSW**



Date: October 31, 2019  
To: CHW Governing Board  
Thru: Kathy Barroso, CPA  
Executive Director  
From: Cynthia Ripsin, MS, MPH, MD  
Medical Director  
Re: Privileging

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After preparation of the credentialing file, the Coastal Health & Wellness Medical Director Cynthia Ripsin, MD has reviewed the completed file and recommends that the Governing Board approve re-privileging as follow:

- Emily Bailey, MSW, LCSW is a licensed Clinical Social Worker who will practice part-time at both clinic sites. Emily Bailey graduated from University of Houston. Emily Bailey is requesting Counseling re-privileging.

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**



**October 2019**

**Item #17**

**Consider for Approval Privileging Rights for  
the following UTMB Residents:**

- a) Zuleica Santiago Delgado, MD



Date: October 31, 2019  
To: CHW Governing Board  
Thru: Kathy Barroso, CPA   
Executive Director  
From: Cynthia Ripsin, MS, MPH, MD   
Medical Director  
Re: Privileging

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Upon the review of the completed credentialing file of Zuleica Santiago Delgado, MD, by Judie Olivares, Human Resources Generalist, and myself (Cynthia Ripsin, MD), we would like to recommend that the Coastal Health & Wellness Governing Board approve privileging for Zuleica Santiago Delgado, MD, based on the following information:

- Zuleica Santiago Delgado, MD, is a licensed Physician IN TRAINING who will practice and train part-time at the Texas City Coastal Health & Wellness Medical Clinic. Dr. Zuleica Santiago Delgado graduated from Ponce Health Science University School of Medicine in 2017 with a Doctor of Medicine Degree. Dr. Zuleica Santiago Delgado requests medical privileges on a part-time basis at the Texas City site.

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #18**

**Consider for Approval the Appointment of Flecia Charles to Complete  
The Unexpired Term of the Vacant Consumer Representative on the  
Coastal Health & Wellness Governing Board with a Term Expiring  
June 2020**

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# COASTAL HEALTH & WELLNESS

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**GOVERNING BOARD**

9850-A.106 Boardroom Emmett F. Lowry Expressway, Texas City

**Governing Board**

**October 2019**

**Item #19**

**Update on Next Steps Regarding Refresh of  
the Galveston Clinic**

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