

Healthy San Francisco Quarterly Refresher Trainings

March 6th and 7th, 2012

San Francisco General Hospital: Carr Auditorium

Today's Agenda Items



1. To get an update on:

- HSF Enrollment Numbers
- SF PATH

Agenda Items



2. To Review:

- New Assistor Tools
- HSF Application Assistor Inquiries

Agenda Items



3. To learn about:

- HSF Evaluation Results
- Workshop: Profit and Loss Statements

HSF PROGRAM UPDATES

HSF Enrollment Numbers



As of February 19th , there are 46,197 participants enrolled in Healthy San Francisco!

Thank You



SF PATH PROGRAM UPDATES

SF PATH – Eligibility & Enrollment



Eligibility

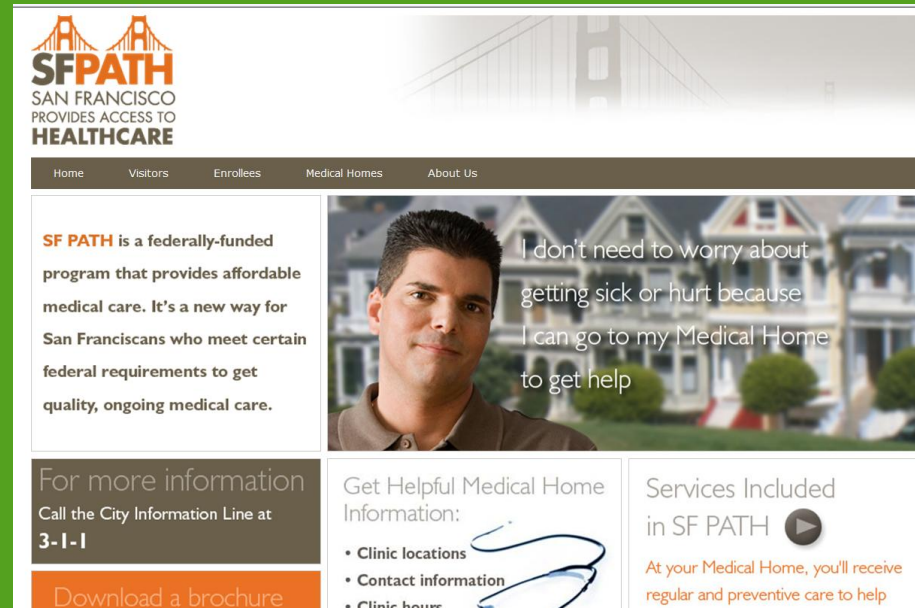
- Income is 0-25% FPL (for new applicants after November 14, 2011)
 - First enrolled September 1, 2007 – June 30, 2011: 0 – 200% FPL
 - First enrolled July 1, 2011 – November 9, 2011: 0 – 133% FPL
- San Francisco resident
- 19 – 64 years old
- Documented citizenship or permanent legal resident (at least 5 years)
- U.S. government issued photo identification
- Ineligible for Medi-Cal, but can be insured by other sources (e.g., Medicare)

Enrollment (local system)

- SF PATH enrollment can only be done by Department of Public Health employees
 - Eligibility and Enrollment Unit at 25th Street and Potrero Avenue
- Department uses One-e-App to determine eligibility for SF PATH

Questions

- If applicants have questions regarding SF PATH, where can I direct them?
 - SF PATH Customer Service 415-615-4510 or 3-1-1
 - www.sfp PATH.org



The screenshot shows the SF PATH website. At the top left is the SF PATH logo with the text "SAN FRANCISCO PROVIDES ACCESS TO HEALTHCARE". Below the logo is a navigation menu with links for Home, Visitors, Enrollees, Medical Homes, and About Us. The main content area features a large image of a man in a brown shirt with a quote: "I don't need to worry about getting sick or hurt because I can go to my Medical Home to get help". To the left of the image is a text block: "SF PATH is a federally-funded program that provides affordable medical care. It's a new way for San Franciscans who meet certain federal requirements to get quality, ongoing medical care." Below this is a section for "For more information" with the text "Call the City Information Line at 3-1-1" and a "Download a brochure" button. To the right of the man's image is a section titled "Get Helpful Medical Home Information:" with a list of links: "Clinic locations", "Contact information", and "Clinic hours". Further right is a section titled "Services Included in SF PATH" with a play button icon and the text "At your Medical Home, you'll receive regular and preventive care to help".

NEW APPLICATION ASSISTOR TOOLS

SF PATH Enrollment Site Flyer

Non-DPH Assistor should use this flyer to re-direct participants interested in SF PATH to the Enrollment and Eligibility Unit (EEU)



EEU Enrollment Site

Call the San Francisco Department of Public Health's Eligibility Enrollment Unit to set up an appointment and see if you qualify.

(415) 206-7800



**San Francisco Department of Public Health
Eligibility Enrollment Unit**
2789 25th Street, Rm 2004
M – F: 8:00am to 5:00pm
Walk in hours are 8:00am to 10:00am

Eligibility Enrollment Unit is accessible by MUNI.
To find MUNI bus routes and schedules at 511.org or at sfmta.com.

**San Francisco Department of Public Health
Eligibility Enrollment Unit**
2789 25th Street, Rm 2004
M – F: 8:00am to 5:00pm
Walk in hours are 8:00am to 10:00am

5036 SFPATH 0911

to confirm your eligibility for

4. Proof of Income and Assets

Assets are not factored into your SF PATH eligibility. However, this documentation is needed to determine your eligibility and fees for Healthy San Francisco, the City and County's health access program, if you are found ineligible for SF PATH:

- Current Pay Stub
- Current Tax Return
- Signed Statement From Employer
- Bank Statement
- Rental Income Receipts or 1040 tax return
- Bank Book / Annuity Statement
- Unemployment Benefits Statement
- Veteran's Statement
- Workers' Compensation Statement
- Copy of Award Letter
- Certification from the issuing institution of any non-retirement stocks, bonds, or certificates of deposit.
- Account statements for retirement accounts, such as 401(k), 403(b) accounts (value of retirement holdings are not counted toward household assets)

When you sign to vouch for your residency, they will need to provide one of the above items in their name.

SFHP Enrollment Site Flyer

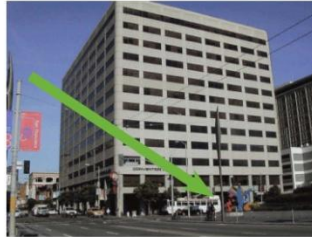
Use this flyer to redirect applicants who are interested in:

- Kaiser Permanente
- Brown and Toland-CPMC
- City Option



Enrollment Site

To Healthy San Francisco

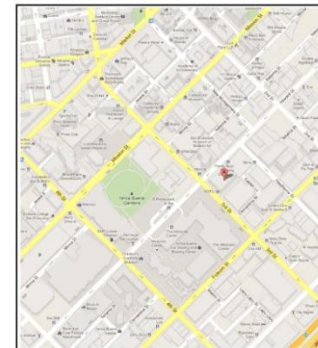


Call *Healthy San Francisco* to set up your appointment and see if you qualify.

(415) 615-4588

Primary enrollment site for:

- Kaiser Permanente
- Brown & Toland Physicians-CPMC
- City Option



Primary enrollment site information:

San Francisco Health Plan Enrollment Site
201 Third Street, 7th Floor (at Howard St.)
San Francisco, CA 94103
(415) 615-4588

Phone Hours:
Monday-Friday 8:30am-5:30pm

Lobby Hours:
Monday-Friday 8:00am-5:00pm
BY APPOINTMENT ONLY

San Francisco Health Plan is accessible by MUNI and BART. To find MUNI bus routes and schedules at 511.org or at sfmta.com.

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of Francisco Agency

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HSF APPLICATION ASSISTOR INQUIRIES

HSF Application Assistor Inquiries



1. What is the difference between SSI/SSP and SSA?
 - Which is countable?
2. Is someone with Worker's Compensation insurance eligible for Healthy San Francisco?
3. Where can ESR participants renew their HSF applications?

HEALTHY SAN FRANCISCO EVALUATION RESULTS

Evaluation Background

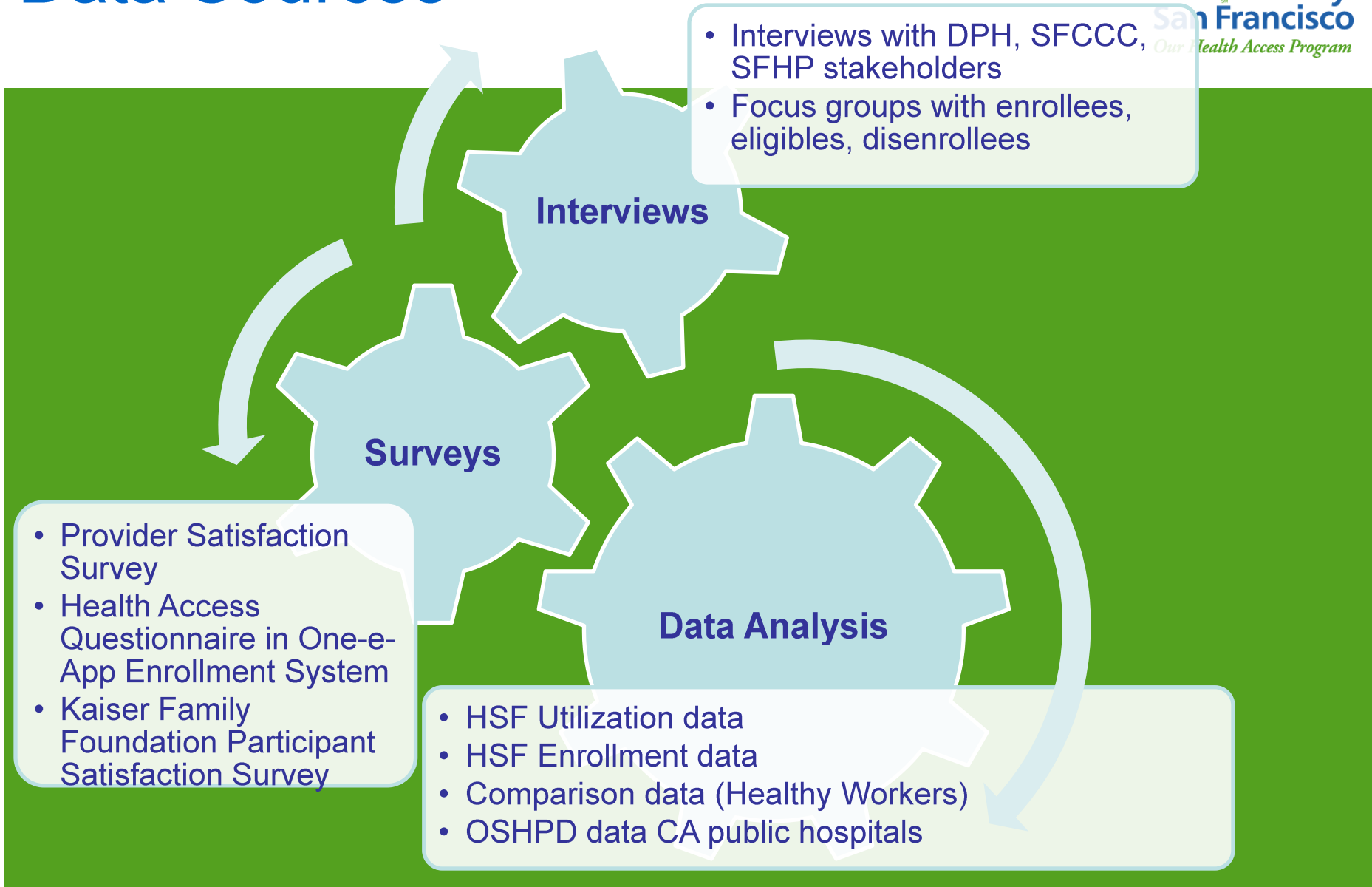
What: Mathematica Policy Research, Inc. conducted a two-year independent evaluation of Healthy San Francisco (2009-2011)

Why: Purpose was to determine if Healthy San Francisco was achieving its goal to expand access to care for the uninsured

Report Deliverables:

- Understanding the Healthy San Francisco Medical Home and How It Functions for Different Patient Populations
- Participation in Healthy San Francisco: Trends in Enrollment and Retention
- Healthy San Francisco: Changes in Access to and Utilization of Health Care Services
- Evaluation of Healthy San Francisco

Data Sources



Significant Contributions From HSF Providers and Enrollment Sites



HSF medical homes and hospital partners provided HSF patient utilization data for analysis

Clinic administrators met with evaluators to provide perspective on program operations and impact

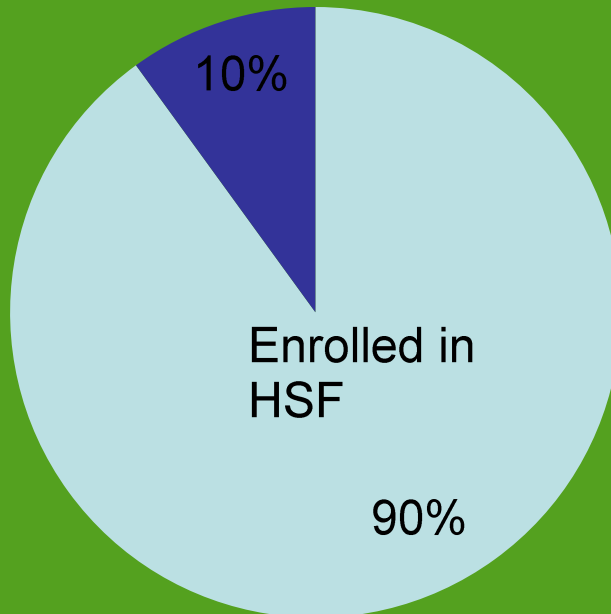
Application Assistors administered Health Access Questionnaire in One-e-App system to applicants to gauge their pre and post enrollment experience

Evaluation Committee with representatives from all provider organizations reviewed reports



HSF Enrollment Findings

Uninsured S.F. Eligibles Ages 40-64



-HSF has enrolled the majority of working-age uninsured adults in San Francisco- **54,000** uninsured participants as of March 2011

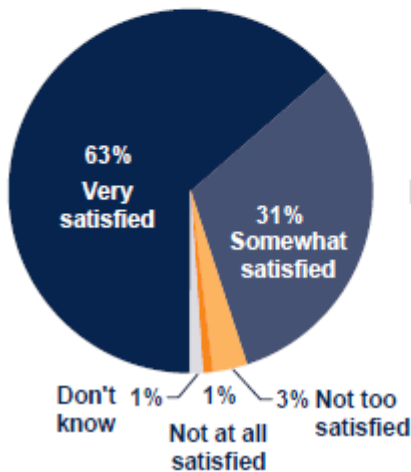
-Program has enrolled almost **100K** unique participants since 2007

92% of Participants Would Recommend HSF to a Friend

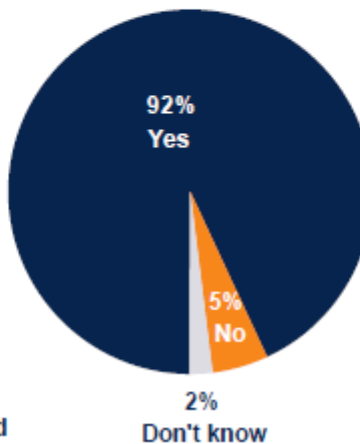


High satisfaction and resounding endorsement of HSF

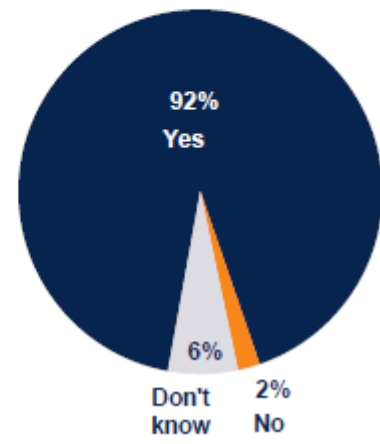
Overall, are you very satisfied, somewhat satisfied, not too satisfied, not at all satisfied with the *Healthy San Francisco* program?



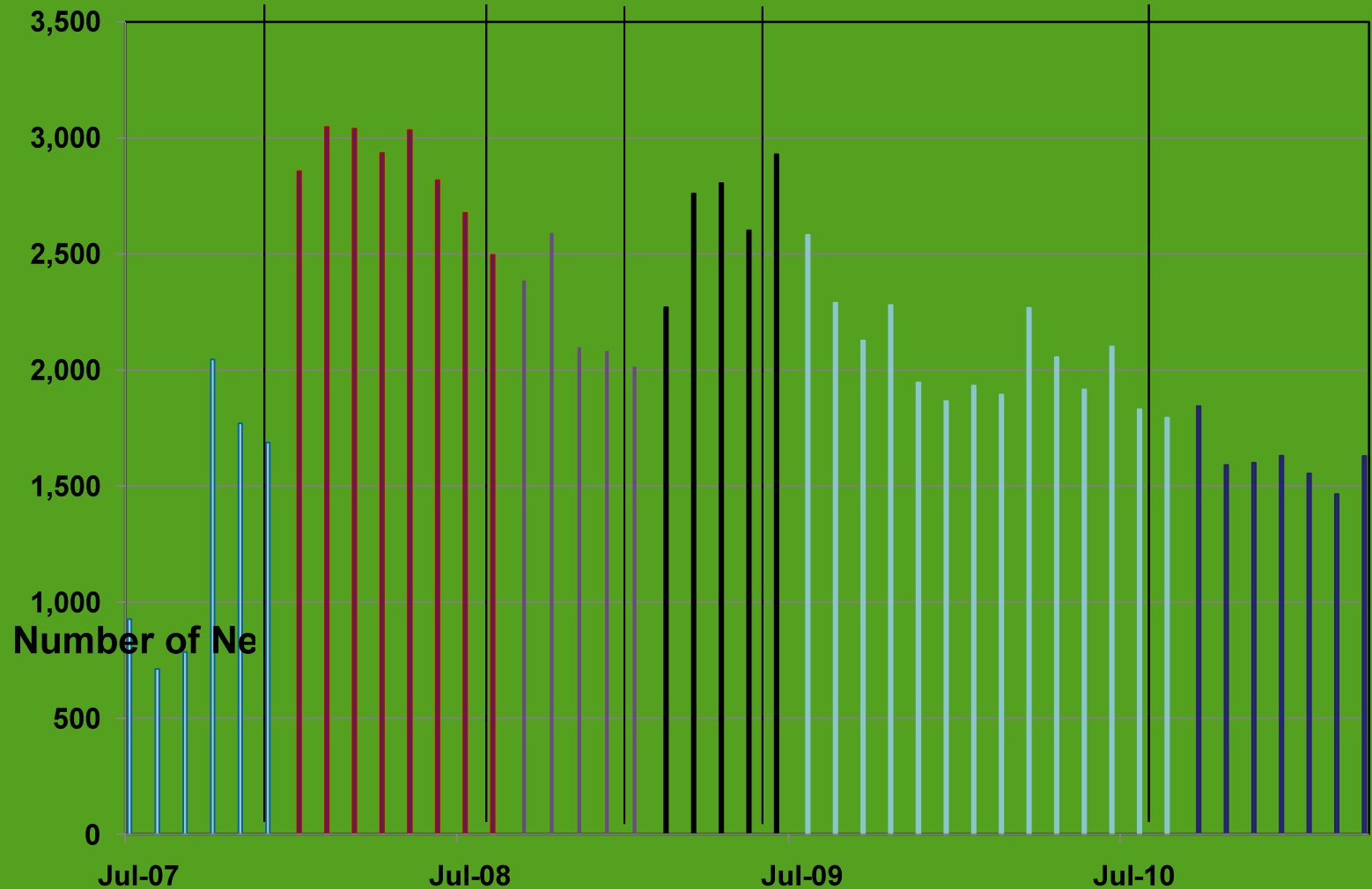
Would you recommend joining *Healthy San Francisco* to a friend, or not?



Do you think other cities should create programs like *Healthy San Francisco*, or not?

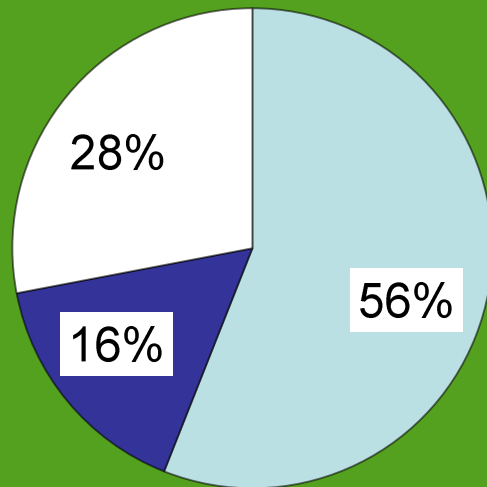


HSF Continues to Attract New Participants (avg 2,100 new participants/month July 2007-March 2011)



Majority of Participants Elect to Remain in or Return to Program

HSF Participant Decisions



- Renewed
- Reenrolled
- Exited

-56% of participants renew at term end

-Older participants, those with chronic conditions, and participants with physician visits are more likely to renew

-Participants fail to renew for variety of reasons

-More than 85% of participants remain in program for at least 12 months

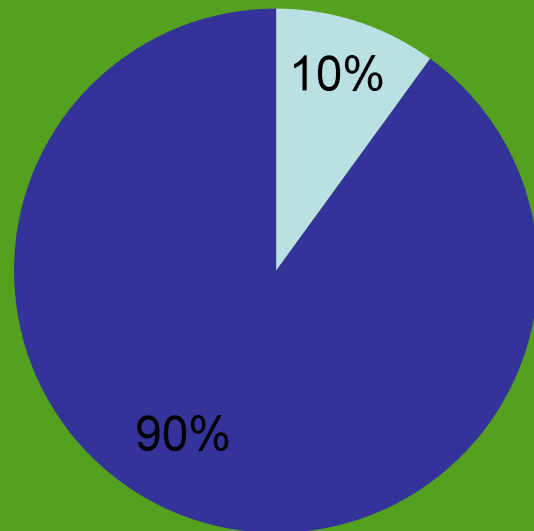
In Our Participants' Own Words: Impact of Your Contributions:

“(The renewal is) faster, yes, because they already have it in the computer. Well, I thought (the renewal) was helpful, thoughtful. And I got a sense that they cared and that they weren't trying to kick me off.”

HSF Participants Are Satisfied with Access to Care



% of Renewing Participants Who Delayed Seeking Care or Filling a Prescription in Past 12 Months



- Delay
- No Delay
-

-Participants report being more likely to have a usual source of care over time

-Participants report fewer delays accessing care over time

-Some focus group participants referenced wait times for specialty care

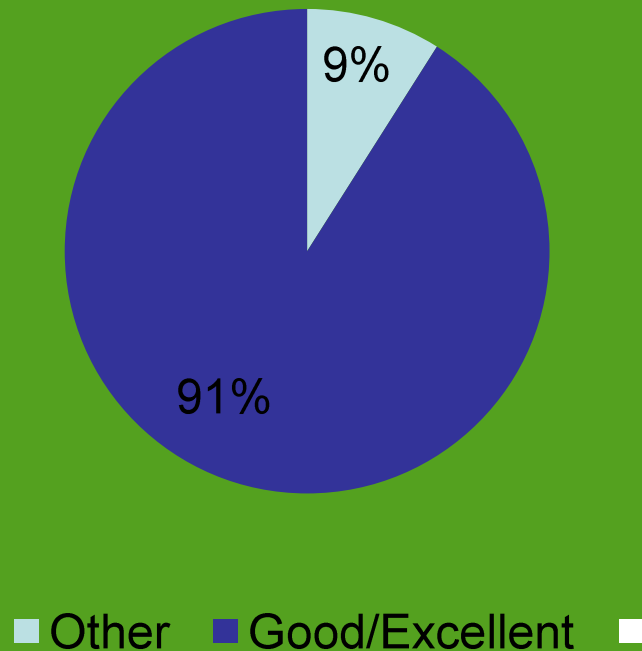
-40% of renewing participants reported improved access under HSF

In Our Participants' Own Words: Impact of Your Contributions:

“For most of us, before we had this program, you feel afraid to go to a hospital or a clinic because the first thing you think about is how much money you would have to pay. And that they might not take care of you because you don’t have insurance. When you have a medical home or clinic, you feel more protected.”

HSF Participants Are Utilizing Primary and Preventive Care

% of Participants Who Rated Care as Good or Excellent



-For those enrolled for at least 12 continuous months, 80% received at least one service

-Significant percentage of HSF participants (63%) have one or more chronic condition

-Almost all participants who had a visit during the first week of enrollment had repeat visits during the year

-Levels of primary care use, including preventive care, are high (71%)

Evidence of Decreasing ED Use and Potentially Avoidable Hospitalizations

-HSF participants show declining emergency department use over time

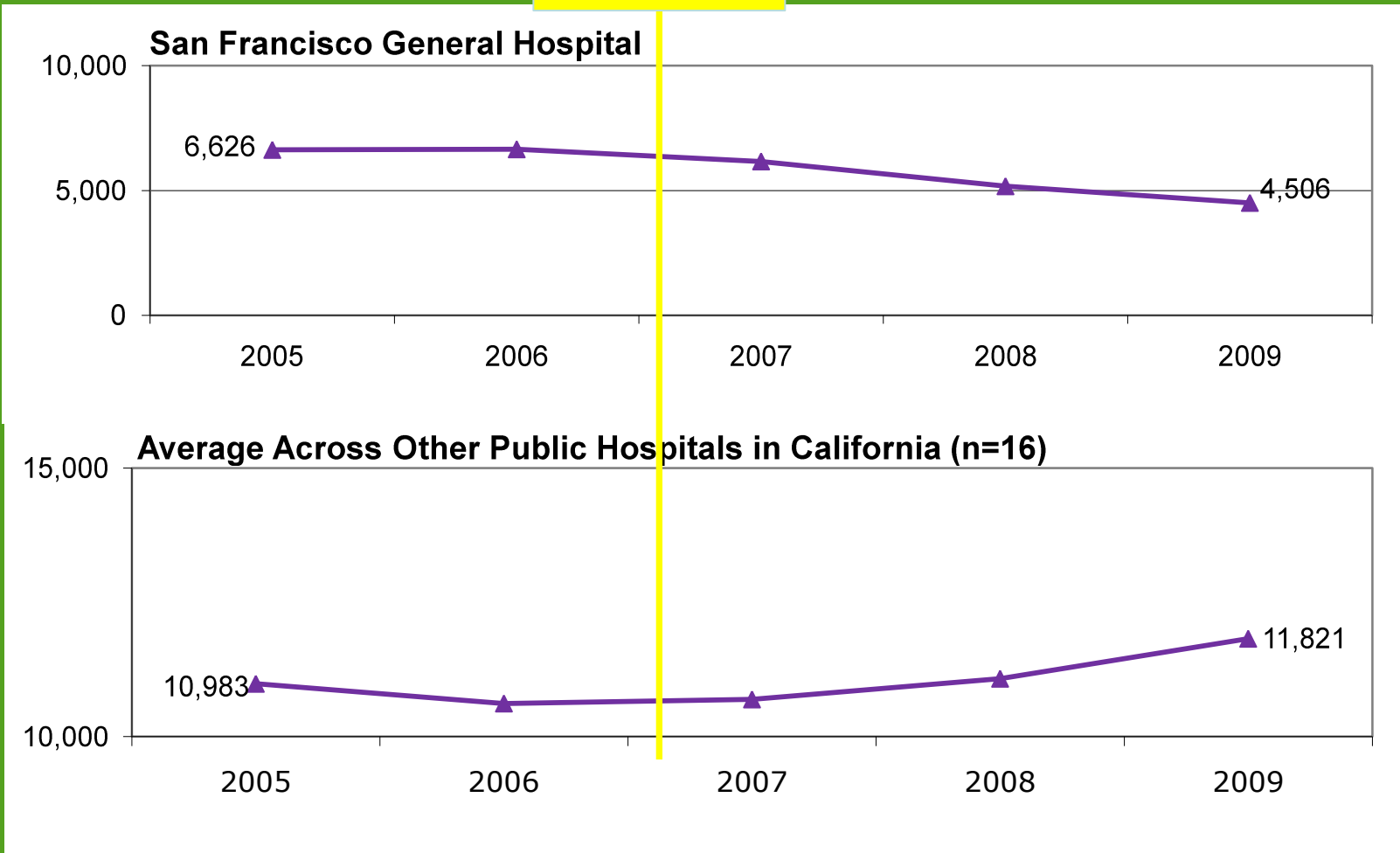
-Percentage of potentially avoidable hospitalizations at SFGH by uninsured adults declined from 2007 to 2009

-Most participants with ED visits or inpatient admissions received prompt outpatient follow-up

HSF Launch Coincides with Declining Rate of Non-Emergent ED Visits



HSF Launch



Source: Mathematica Analysis of OSHPD ED Discharge Records in CA Hospitals 2005-2009

In Our Participants' Own Words: Impact of Your Contributions:

“For me, Healthy San Francisco works. My medical home is just blocks from my apartment, and the services are effective even for a complicated, misunderstood condition like mine. San Francisco, you make me so proud.”

Majority of HSF Providers Surveyed Expressed Satisfaction with Program

Providers perceive that HSF has reduced duplication and improved care management and coordination

- Streamlined appointment scheduling

- Strength in Numbers disease registry

- Using medical home selection as an improved way to manage a patient population

Providers also noted various capacity constraints

eReferral system and eClinicalWorks system viewed as positive steps towards addressing constraints at DPH

In Our Participants' Own Words: Impact of Your Contributions:

“I'm very grateful that I have access to it, especially to the routine care, being able to build a relationship with your care provider as opposed to waiting for emergencies. And I think it also relieves our stress as well knowing that you have access to a doctor and you're not going to be billed astronomically just because you need it.”

Source: HSF Participant Focus Group Transcripts

Program Feedback & Evaluation (Mathematica Overall Finding)

- “ HSF is providing access to timely and coordinated primary care services to a population that greatly needs them. In general, HSF participants are very satisfied with their access to health care services.
- Overall, the results suggest that, even though the majority of these HSF participants were established patients in the HSF medical homes prior to enrolling, participating in the program alleviated financial and nonfinancial barriers to medical care for a large portion of enrollees.
- Most HSF participants are regularly receiving outpatient care at their medical homes, including recommended preventive services, and are using fewer ED services over time, both emergent and non-emergent, which suggests both improved care-seeking behavior and health status.”

Our Next Steps

Access

- Continue to invest HSF funding in improvements to expand specialty access
- Examples: eReferral, DPH Nurse Advice Line, HSF Customer Service, Optimizing Primary Care Experience

Retention

- Continue to invest in targeted improvements in retention
- Examples: HSF renewal lottery, targeted renewal communications, Renewal Toolkit for medical homes

Enrollment

- Continue to consider alternative enrollment pathways that align with staff resources and program goals

- Evaluation Reports
www.healthysanfrancisco.org/about_us/Reports/EvaluationReports.aspx
- HSF Annual Report
www.healthysanfrancisco.org/about_us/Reports/AnnualProgramReports.aspx

QUESTIONS



WORKSHOP: PROFIT AND LOSS STATEMENTS

What is a Profit and Loss Statement?

A Profit and Loss Statement is a financial document that summarizes the revenues and expenses incurred by a business during a specific period of time.

**PROFIT & LOSS STATEMENT
(Example)**

ABC Landscaping Company
1000 First Street
Sacramento, CA 95814
(916) 555-1234

January 2006		February 2006		March 2006	
Total Income	\$5,000	Total	\$2,000	Total Income	\$4,000
Expenses:		Expenses:		Expenses:	
Car	\$ 200	Car	\$ 200	Car	\$ 200
Equipment	\$1,000	Equipment	\$1,000	Equipment	\$ 300
Repair	\$ 300	Repair	\$1,100	Repair	\$ 100
Advertising	\$ 300	Advertising	\$ 300	Advertising	\$ 300
Depreciation	\$ 100	Depreciation	\$ 0	Depreciation	\$ 0
Meals & Entertain.	\$ 100	Meals & Entertain.	\$ 0	Meals & Entertain.	\$ 0
Cash Draw	<u>\$1,000</u>	Cash Draw	<u>\$1,000</u>	Cash Draw	<u>\$1,000</u>
Total Expenses	- \$3,000	Total Expenses	- \$3,600	Total Expenses	- \$1,900
Net Income:	\$2,000	Net Income:	- \$1,600	Net Income:	\$2,100

The information provided above is true and correct to the best of my knowledge.

(Signature and date of Person Earning Income)

Please refer to the next page to see how Healthy Families calculates your monthly income.

Who Can Use a Profit and Loss Statement?

Applicants who are self-employed must submit one of the following documents:

1. Recent Federal Tax Form 1040 with Schedule C

- How is annual income calculated using these forms?

2. Three Month Profit and Loss Statement

- If the applicant:

1. Lacks a copy of their tax return

OR

1. Their income has significantly changed since the completion of their last tax return.

What Must a Profit and Loss Statement Include?



A profit and loss statement must include:

- Business Name
- Business Address
- Business Phone Number
- Total Business Income
- Itemized Business Expenses
- Net Income
- “True and Correct” Statement
- Signature and Date

ABC Landscaping Company
1000 First Street
Sacramento, CA 95814
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January 2006		February 2006		March 2006	
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The information provided above is true and correct to the best of my knowledge.

(Signature and date of Person Earning Income)

****must be for the most recent completed three months prior to the date the application is submitted****

Good Example:

**PROFIT & LOSS STATEMENT
(Example)**

**ABC Landscaping Company
1000 First Street
Sacramento, CA 95814
(916) 555-1234**

January 2006		February 2006		March 2006	
Total Income	\$5,000	Total	\$2,000	Total Income	\$4,000
Expenses:		Expenses:		Expenses:	
Car	\$ 200	Car	\$ 200	Car	\$ 200
Equipment	\$1,000	Equipment	\$1,000	Equipment	\$ 300
Repair	\$ 300	Repair	\$1,100	Repair	\$ 100
Advertising	\$ 300	Advertising	\$ 300	Advertising	\$ 300
Depreciation	\$ 100	Depreciation	\$ 0	Depreciation	\$ 0
Meals & Entertain.	\$ 100	Meals & Entertain.	\$ 0	Meals & Entertain.	\$ 0
Cash Draw	<u>\$1,000</u>	Cash Draw	<u>\$1,000</u>	Cash Draw	<u>\$1,000</u>
Total Expenses	- \$3,000	Total Expenses	- \$3,600	Total Expenses	- \$1,900
Net Income:	\$2,000	Net Income:	- \$1,600	Net Income:	\$2,100

The information provided above is true and correct to the best of my knowledge.

(Signature and date of Person Earning Income)

Bad Example:

Rock Castle Construction	
Profit & Loss	
January 1 through December 15, 2015	
◇ Jan 1 - Dec 15, 15 ◇	
Ordinary Income/Expense	
Income	
40100 · Construction Income	447,537.34
40500 · Reimbursement Income ▶	<u>2,119.80</u> ◀
Total Income	449,657.14
 Cost of Goods Sold	
50100 · Cost of Goods Sold	14,766.19
54000 · Job Expenses	<u>165,299.14</u>
Total COGS	<u>180,065.33</u>
 Gross Profit	 269,591.81
 Expense	
60100 · Automobile	6,844.94
60600 · Bank Service Charges	125.00
62100 · Insurance	20,125.09
62400 · Interest Expense	1,995.65
62700 · Payroll Expenses	120,347.21
63100 · Postage	104.20
63600 · Professional Fees	250.00
64200 · Repairs	1,525.00
64800 · Tools and Machinery	2,820.68
65100 · Utilities	<u>2,269.31</u>
Total Expense	<u>156,407.08</u>
 Net Ordinary Income	 113,184.73

What are Disallowable Expenses?

Disallowable expenses are expenses that the program does not allow. These are:

For Medi-Cal/Healthy Families/Healthy Kids:

- **Meals and Entertainment**
- **Depreciation**
- **Cash Withdrawal**

For Healthy San Francisco:

- **Meals and Entertainment**
- **Depreciation**

Calculating the Average Monthly Net Income: Step #1

For all programs:

$$\begin{array}{r} \text{Total Income} \\ - \text{Total Expenses} \\ \hline \text{Net Income} \\ + \text{Disallowable Expenses} \\ \hline \text{Adjusted Net Profit} \end{array}$$

** This must be done for each month on the Profit and Loss Statement**

Calculating the Average Monthly Net Income: Step #2

Average Monthly Net Income Calculation:

Net Profits: Month #1

+ Month # 2

+ Month #3

Total Net Profit

Divide by 3

Average Monthly Net Income

Exercise

Juan Arellano is a single 55 year old man. He is self employed. His business is “Arellano Lawns and More”. Attached is his 3-month profit and loss statement. He lives in San Francisco and is currently uninsured. He has not had insurance in the past 90 days. Determine:

- **Is Juan’s Profit and Loss statement is acceptable**
- **Which expenses are “disallowable”?**
- **What is Juan’s Monthly Average Net Income?**
- **What figure will you input as Juan’s monthly income in One-e-App?**
- **Is Juan eligible for Healthy San Francisco?**

Next Steps

NEXT REFRESHER TRAININGS:

- June 2012
- April GGHI Luncheon – April 27th
 - RSVP: pong@sfhp.org

Next Steps

- Continue to look for monthly HSF Assistor Updates
- Any suggestions or feedback? Let your training leads know.
- Please be sure to return your evaluation.

Your feedback is appreciated!

Thank you!