

## **Harmonia CEO and Service Report 10/18/23**

### **CEO Report**

*-submitted by Valerie Nowak, CEO*

Consulting:

Magellan Group

- September status reports attached.

Incept-Mike Davern

- Digital Recruitment Campaign being considered for Mental Health Program
  - One time cost \$4,176
  - Monthly cost \$860/mos
- Although ongoing recruitment is necessary for the clinic, costs are being considered.

Jessica Russo

- Continued monthly posts as per contract.

CCNY

- Dashboard complete; in testing phase.

Bonadio

- Beverly continues to meet with Paul on a bi-monthly basis to address compliance and assist with regulatory changes and building Harmonia's Compliance Plan.
- Special meeting planned for 10/18 to include Michelle regarding new requirements for self-disclosures of any and all overpayments to OMIG.

Sr84wd

- AR is complete. Val is approving final and coordinating mailing list.

Gross-Shuman

- Bylaws will need to be finalized (including any and all changes) once Governance completes review.
- Roadway Agreement
  - Val reached out to Nick regarding the determination that the roadway is our responsibility due to the easement. We have not been able to connect. He did leave a message that Harmonia does indeed have an easement.
  - It appears at this point we will be responsible for full winter maintenance of the road. Other responsibilities are still undetermined.
    - The cost burden for Harmonia is an additional \$500 for this season to plow the entire road.
- Val contacted Nick regarding ambiguity on invoicing for services.
  - Unable to connect to discuss concerns.
    - Awaiting itemized invoice
    - Awaiting new bill at the proposed reduced amount of \$2,440. Continue to receive bills for original amount, as of 10/3/23.

Dawn Ferguson, LCSW-R, CASAC-G (new)

- To assist in the Mental Health Clinic. Dawn is an expert with OMH regulations. She can assist in review/edits to the clinical manual, clinical supervision, training of clinical supervisors and chart

audits. This will assist Megan as she is without a Program Manager. Dawn will average about 20/week at \$32/hr as a 1099. Per-diem contract in place.

#### Strategic Planning:

- No update; process in limbo (see September report).
- Next meeting planned 12/8. Will determine need/interest/value in continuing.

#### Facilities:

- Facilities:
  - Leak in one office at Derby being addressed.
  - Front door lock replaced at Hamburg office. New keys issued and old keys collected.
- Foundation-Building Committee.
  - Building exploration: Committee continues to meet monthly (last meeting 10/12/23).
    - Plan to develop a sub-group for vision and planning, utilizing program leads as determined.
    - Discussions about how Upper Edge Consulting could assist to support the determined vision.
    - Planning to view another space in Hamburg currently available for lease.

#### Other business:

- Fall Update letter sent to Towns/Foundation. About 100 town legislators and foundation contacts. Adds personal touch-point to the towns we serve and the foundations who have/may support us.
- For staff fun, Harmonia Day 10/4 was celebrated by wearing Harmonia T-shirts or teal. The annual Tomato Sandwich Day (Val cooks specialty tomato sandwiches for all staff) was on 10/11.
- Michelle, Bev and Val worked to develop a total compensation statement for all employees. These were distributed on 10/12/23 with an explanation letter (this included percentage of fall raises for eligible employees).
- Finalized engagement with ESC (Employer Services Corporation)
  - Met with implementation team. Timeline and plan in place. Bev and Michelle are working the plan.
- Upper Edge Consulting
  - Meeting held with Diana Cihak and Julianne Yates on 10/10. Board member Tristan Keelan attended. All posed questions and concerns which were satisfied during discussion. Tristan provided analysis and recommendations to be shared with the Board.
  - Val and Marta will continue to discuss and determine how and when to proceed.

#### **Mental Health:**

*-submitted by Megan Brautlacht, Dir of MH Clinics*

#### Clinic Updates:

- 1,173 clients; 3 prescribers, 14 clinicians (1 starting 10/10/23, 2 leaving: 10/27/23 & 11/02/23), 2 interns. 1 School Program Coordinator.
- Waitlist ended 09/18/23, then re-activated due to resignations 10/02/23.
- Open positions: Mental Health Programs Manager, 2 Derby Clinicians, 3 Hamburg Clinicians.

- Clinical Consultant Dawn Ferguson, contracted on 10/11/23 to assess current practices, policies and procedures, and workflows of the Mental Health Clinic for alignment, misalignment or gaps with current standards, regulations, and best-practices. Dawn will then work with Megan to address misalignments/gaps and execute PIP.

**Audit:**

- Clinic Operating Certificates valid through 01/31/25.
- PIP monitoring visit conducted by OMH 04/04/23 – 04/06/23.
  - Monitoring Letter received 08/23/23, Megan submitted PIP 09/21/23.

**Part 599 Regs and Coding changes:**

- Review and update of current Clinical Policy Manual by Megan continues.
- Changes in the clinical chart in EMR are being completed because of the updated Manual.
- Dawn Ferguson (above) to assist.

**Value Network:**

- Highmark, Amerigroup, and Monroe-Molina Plans Contract – Metrics Monitoring continues. Megan will head up and report CQI updates at bi-monthly meetings.
- Payments for 2022 contract success should be made soon.

**OMH Overdose Prevention QIC**

- Clinic meets many of NYS expectations related to the opioid crisis and Megan is working on incomplete areas.
  - Currently addressing need for staff to be trained/increase comfort with treating dual disordered clients as result of systematic changes (i.e. OMH/OASAS merge)

**CCNY data/Dashboard Project:**

- Michelle and Tristan developed Provider Productivity Power BI dashboard 09/20/23: Currently in testing phase.

**Growth Opportunities:**

- In-School Counseling Program, “Turn-It-Around”:
  - Sarah submitted grant applications to expand program to Mother Cabrini Health Foundation 07/26/23 and Garman Family Foundation 09/05/23.
    - Award/Denial anticipated late October-early November.
- Business Plan is being developed by Megan and Magellan, meeting monthly.
  - Complete aside from Financials, waiting on Michelle to present baselines.
  - Planned completion moved to November.

**Health Homes:**

*-submitted by Kristy Gasiewicz, HH Program Director*

**Current Status:**

- Kristy spoke to the licensing board in regard to former employee investigation. Case went in front of the board on September 12, 2023; sentenced to 1 month of actual suspension, 23 months stayed suspension, upon return to practice, 2 years’ probation. Employee did not contest the charges.
- All COVID restrictions have been lifted from Health Home. August was the last month of telehealth for Health Home Plus clients. Due to the nature of the Health Home Plus client, case managers have to see all Health Home clients in person. If a case manager does not see a client in person, the Health Home will not be able to bill at the higher rate and will have to bill at the lower rate. This has made it difficult with some clients due to safety concerns of not being able to see clients in their homes.

- Health Home continues to get applications. Interviews were set up for September, in which both applicants did not show for their interviews.

Growth Opportunities:

- Continuing to pursue outreach opportunities with Friends of Night People.
- Kristy and Val met with Kalos Health Long-term Managed Care (LTMC) on 9/19/23. Manager attended with four staff (SW and CMs). They are required to partner with Health Homes and praised Harmonia's HH program. Mutual referral system already in place.

**Senior Services:**

*-submitted by Jennifer Gunia, Senior Services Program Coordinator*

Case Management General Updates

- Work continues on Formal SS Business Plan (planned completion pushed to Dec).
- Jen and Taylor created client surveys and mailed out 40 surveys across Case Management System. In process of data implementation and evaluation.

CarePanion General Updates:

- The goal was to hire 5 new CarePanions at 20 hrs/wk for 2023. Limited bid list has been released and we were able to bid on clients and hire new CarePanion worker Leslee Chilcott start date of 10/10/23.
- 2 County Clients and 2 Private Pay Clients on hold due to loss of staff and current full CarePanion caseloads. New CP Leslee will be taking the 2 County Clients.

WNYICC:

- Team is building caseloads over the last few months:
  - Community Health Coach Program- 1 client
  - Caregiver Program-none
  - Healthy Ideas-none
  - Falls Prevention Program- 2 active, 2 completed program.

Growth Opportunities:

- Exhale (3 yr grant)
  - "Pathways" project meetings held 1-2x/month.
    - Monthly respites are scheduled for the 3<sup>rd</sup> Thursday of the month.
    - Next session is 10/19.
    - Jen attends sessions to provide information and resources to caregivers. Marissa Biondolillo started facilitating the Caregiver support group.
- Grants
  - Wilson Legacy Grant (1 yr grant)
    - Caregiver Support for Caregivers
      - Will provide mental health and senior support to Caregivers thorough education and resources.
      - In development - Caregivers have been identified, formal monthly program agenda being finalized.
      - Planned implementation for November.

**Compliance/HR Report:**

*-submitted by Beverly Eagan, HR and Compliance Specialist*

**Human Resources:**

Filled positions:

- Kathryn Blanchard – Mental Health Clinician
- Kelsey Nicosia – Mental Health Clinician
- Emma Scumaci (not employed-volunteer) -- Clinical Student Extern
- Erin Figiel (not employed-volunteer) -- Clinical Student Intern

Changes (resignations, reassignments, terminations):

- Veronica Smith – Mental Health Clinician (resignation)
- Jessica Grobe – Mental Health Clinician (resignation)
- Melinda Ransford – Front Desk Asst. (Involuntary termination: excessive absenteeism)

Open Positions:

- Health Homes Case Manager
- Office Manager
- Front Office Asst.
- Mental Health Clinician
- Mental Health Programs Manager
- CarePanion (ongoing)

Recruitment:

- Now that the school year is underway, we will resume our campus recruiting program. We were advised by some of the colleges to hold off until September, after the school year is underway.
- We are continuing to pursue our passive recruiting program. We would like to plan an event for February. A “mixer” of sorts where Harmonia would be able to tell our story, promote our brand and engage with potential candidates that have already been identified as prospective hires.
- We are anxious to begin work with the Applicant Tracking System with ESC. This will help us streamline our processes, ensuring our applicants have a positive and professional experience and provide us with valuable metrics so that we can better track the results of our efforts as well as ensure that we are compliant with our hiring practices.
- We are taking a new approach to the new hire breakfast. Going forward the leadership team will focus on addressing how they incorporate our values in the day-to-day operations of their dept./programs. The new hire will now complete a “Passport to Harmonia” which involves short fifteen-minute meetings with each member of leadership independently to discuss the details of their individual programs.

Compliance:

- The Chief Compliance Officer presented an annual training to the Board which highlighted the interplay between organizational culture, compliance culture and our values.
- The compliance committee reviewed HCC’s policy for Business Associate Agreements, the accompanying “decision tree,” general information sheet and the third-party questionnaire used to qualify the business associate. There were some general updates and information shared on a variety of topics.
- There were some minor violations to HIPAA inasmuch as they were internal and on a small scale. One concerned the release of a client file to CPS and the other involved a mix-up between two clients related by marriage who had the same last name. Addressed internally through focused training.

General Updates:

- We are moving ahead with our collaboration with ESC and are currently working diligently to prepare for open enrollment. We have discontinued our relationship with Evans Bank as our “Broker of Record.” We will be working with ESC to put together our plan offerings for 2024.