

CBISA™ Community Benefit



Lyon Software

User “enter” on your keyboard, or click your left mouse button to move through the screens



World leader in
software for tracking
and reporting
community benefits
and corporate social
responsibility ... serving
business and nonprofit
clients since 1984.

A large, stylized white graphic on a green background. It consists of several thick, curved lines that form a central vertical stem with two large, teardrop-shaped loops on either side, and a circular loop at the top left. The overall shape is reminiscent of a stylized figure or a decorative element.

What is Community Benefit and What Counts?

What is Community Benefit?



Community benefit programs or activities provide treatment and/or promote health and healing as a response to identified community needs.

For a program to “count”:

1. It must address a documented community need, and
2. It must have at least one of these community benefit objectives
 - a) Improve access to health services
 - b) Enhance population health
 - c) Advance generalizable knowledge
 - d) Demonstrate charitable purpose/relieve government burden

What is NOT Community Benefit



A program does not count as community benefit, if:

- A “prudent layperson” would question
- Doesn’t involve hospital resources
- Benefit the organization more than the community
- Is not accessible by (available to) the public
- Represents a normal “cost of doing business”
- Is associated with the current standard of care

What Qualifies (Counts) as a Community Benefit?



- ✓ Charity Care
- ✓ Losses on Certain Public Programs
- ✓ Hundreds of Community Benefit programs and services

What Qualifies (Counts) as a Community Benefit?



CHA/VHA Framework: fully described in the CHA's 2006 publication, *A Guide for Planning and Reporting Community Benefit*. Under this framework, the following items "count":

- ❖ Charity Care, at cost
- ❖ Unreimbursed Medicaid
- ❖ Unreimbursed Other Means-Tested Public Programs
- ❖ Community Health Improvement Services (category A)
- ❖ Health Professions Education (category B)
- ❖ Subsidized Health Services (category C)
- ❖ Research (category D)
- ❖ Contributions/Cash and In-kind (category E)
- ❖ Community Building Activities (category F)
- ❖ Community Benefit Operations (category G)

IRS 990H Part I



7 Charity Care and Certain Other Community Benefits at Cost

Charity Care and Means-Tested Programs	(a) Number of activities or programs (optional)	(b) Persons served (optional)	(c) Total community benefit expense	(d) Direct offsetting revenue	(e) Net community benefit expense	(f) Percent of total expense
a Charity care at cost (from worksheets 1 and 2)						
b Unreimbursed Medicaid (from worksheet 3, column a)						
c Unreimbursed costs – other means-tested government programs (from worksheet 3, column b)						
d Total Charity Care and Means-Tested Programs						
Other Benefits						
e Community health improvement services and community benefit operations (from worksheet 4)						
f Health professions education (from worksheet 5)						
g Subsidized health services (from worksheet 6)						
h Research (from worksheet 7)						
i Cash and in-kind contributions to community groups (from worksheet 8)						
j Total Other Benefits						
k Total (line 7d and 7j)						



Charity Care

- Free or discounted health services provided to persons who cannot afford to pay and who meet the organization's criteria for financial assistance



Medicaid and Other Means Tested Government Programs

- The shortfall created when a facility receives payments that are less than the cost of caring for “means tested” public program beneficiaries:
 - Medicaid
 - SCHIP
 - Public and/or indigent care (for low-income or medically indigent persons)
 - Cost of days, visits, or services not covered by Medicaid or other indigent care programs



Community Health Improvement Services (category A)

- Are carried out to improve community health and usually are subsidized by the organization.
 - Do not generate inpatient or outpatient bills, although they may involve a nominal fee
- Examples include:
 - Community health education
 - Self-help programs (e.g. smoking cessation)
 - Community-based screenings
 - Support groups and healthcare support services



Health Professions Education (category B)

- Programs that result in a degree, certificate, or training that is necessary to be licensed to practice as a health professional; or,
- Continuing education necessary to retain state license or certification by a board in the individual's specialty
- Health professions education costs:
 - Medical students
 - Interns, residents and fellows (except research fellows)
 - Nursing
 - Other allied health professions
 - Continuing health professions education if open to all qualified individuals in the community
 - Other students



Subsidized Health Services (category C)

- Patient care services the organization provides despite a financial loss, [even] after removing the effects of charity care and Medicaid shortfalls [and bad debt]
- Nevertheless, the service is provided because
 - It meets an identified community need, such as providing needed access to care for low-income consumers
 - If the service no longer were offered, access to health services would be impaired, or
 - Providing the service would become the responsibility of government or another tax-exempt organization
- Examples:
 - Behavioral health unit
 - Hospital clinic
 - Trauma center



Research (category D)

- Any study or investigation of which the goal is to generate generalizable knowledge, such as about:
 - Underlying biological mechanisms of health and disease, natural processes or principles affecting health or illness;
 - Evaluation of safety and efficacy of interventions for disease such as clinical trials and studies of therapeutic protocols;
 - Laboratory based studies; epidemiology, health outcomes and effectiveness
 - Behavioral or sociological studies related to health, delivery of care, or prevention
 - Studies related to changes in the health care delivery system; and
 - Communication of findings and observations (including publication in a medical journal)



Cash and In-Kind Contributions (category E)

- Funds and in-kind services donated to individuals or the community at large
 - Cash donations: as a general rule, count donations to organizations and programs that are consistent with your organization's goals and missions
 - In-kind contributions: include the value of hours donated by staff to the community while on the organization's payroll, cost of space donated to tax-exempt community groups (such as for meetings), and the financial value of donated food, equipment, and supplies




Community Building Activities(category F)

- Include programs that, while not directly related to health care, provide opportunities to address the root causes of health problems, such as poverty, homelessness, and environmental problems.
- Examples include:
 - Physical improvements and housing: community gardens, public works, Habitat for Humanity activities
 - Economic development: small business development, participation in an economic development council
 - Community Support: mentoring programs, neighborhood watch groups
 - Environmental improvements
 - Leadership development
 - Coalition building
 - Community health improvement advocacy
 - Workforce development



Community Benefit Operations (category G)

- Include costs associated with dedicated staff and community health needs and/or asset assessment, as well as other costs associated with community benefit strategy and operations.
- Examples include:
 - Community benefit staff
 - Needs assessment
 - Software
 - Costs to coordinate community benefit volunteer programs
 - Community benefit grant-writing and fundraising costs



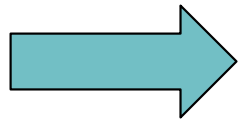
Why Should We Collect, Track and Report Community Benefit?



- Public Awareness Reasons
- Tax Exemption Reasons
- Sponsoring Reasons
- Management Reasons
- Mandatory State Reporting Reasons
- Competitive Reasons
- Other



CBISA™ Programs are Web Hosted



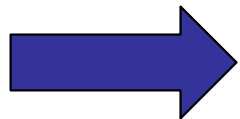
Lyon Software hosts the program, freeing up your IT resources



Lyon Software backs up your data daily and keeps it safe



Everyone in your organization is always on the same version of the software



The program is accessed through your internet browser and available wherever you are, whenever you want it!

Consistent Data Entry & Reports



- Collects Quantifiable Information per CHA/VHA Guidelines
 - A1-G3 Category Programs
 - Statistics: Persons Served, Expenses, Offsetting Revenue
 - Charity Care, Unpaid Cost of Medicaid, Means Tested Programs
- Collects Additional Information per State Guidelines
 - Unpaid Cost of Medicare
 - Bad Debt
- Collects Narrative Information
 - Stories, Examples of Leadership, Living Out Your Mission
 - Impacts and Program Evaluations



CBISA Survey™ is an abbreviated data entry software perfect for some hospitals with limited community benefit tracking and reporting needs. The CBISA Survey™ tool is only available through your Association and is not for sale as a “stand alone” software.

CBISA Survey™ still has the “look and feel” of CBISA Online™ and collects summary information in three modules: Activities/Occurrences, Financial Services, and Leadership Journal.

The CBISA Survey™ program can easily be upgraded to a full version of CBISA Online™ with no data loss.

Activity
Be Ready! Disaster Preparedness for Families

Activity Title Be Ready! Disaster Preparedness for Families
Category A1-Community Health Education

Description
Helping families create a disaster preparedness plan, focusing on guidelines set forth by FEMA and the Red Cross.

Targeted For Broader Community

Occurrences for this Activity: 1

Add Delete Undo Save

- 9th Ward Community Health Needs Assessments
- Bad Debt
- Be Ready! Disaster Preparedness for Families
- Cash Donations/Emergency
- Cholesterol Screenings
- Health Screenings-Blood Pressure
- Meals on Wheels
- Medical Student Internships
- Sunshine Daycare
- Thanksgiving Dinners
- TRIP (Teaching Responsible Injury Prevention)

Programs are entered

Return to Activity...
Be Ready! Disaster Preparedness for Families

Report Date: 3/31/2007

Description: 1st Quarter summary of Meetings at Community Centers

Number of Persons Served: 352

Total Costs / Expenses: 17500

Total Offsetting Revenue / Support: 5000

Occurrences

Add Delete Undo Save

03/31/2007 "1st Quarter summary of Meetings at C

Statistics are summarized

Menu I

Preview

Date Range
Start Date 1/1/2007 End Date 12/31/2007

Open in new window

- 1.) Activities Detail
- 2.) Financial Services Detail
- 3.) Leadership Journal Detail

Reports are printed

It's as easy as...

1 2 3



CBISA Online™ is our premier program for collecting, tracking, and reporting community benefit information. This comprehensive software allows you to collect quantifiable information (programs/activities, statistical occurrences, financial services including traditional charity care and government sponsored programs), qualitative information (narratives and stories surrounding community benefit), and program evaluations.

With ten user permission levels and the ability to customize the software through various defaults, CBISA Online™ is the perfect tool for single facilities or large health systems with many facilities.

CBISA Online™ offers over 75 single and multi-facility on-demand reports to preview, print, or export to another application. IRS Schedule H reporting options coming soon!

CBISA Online Options Help Sign Out
Community Hospital South 2007

Activities/Occurrences Financial Services Leadership Journal Outcomes Reports and Listings

General Objectives Indicators Settings/Format Target Audience Healthy Communities

Activity/General
Ask a Nurse

Activity Title
Ask a Nurse

Category
A3-e Health Care Support Services - Information & referral

Description
Information and referral from RN's and Licensed social workers.

Cost Center
Nursing

Phone Contact
x1111
Carol Murphy

Tracked Since 2007

Occurrences for this Activity: 2
Add Delete Undo Save More

Ask a Nurse
Behavioral health Screenings for at risk children
Cash Donations for Community Groups
Cash Donations for Emergency Assistance
Chamber of Commerce
CME for Physicians
Community Benefit Administration Costs
Community Urgent Care
Darian's Sleepover Party
E-Newsletter
Food Donations to County Food Bank
Get the Lead Out!
Grant Writing
Habitat for Humanity
Health Van
Hopkins Clinical Research Team
Life Flight
Nightingale Library
Nursing Scholarships
Palliative Care Group
Seeing is Believing
Shoo the Flu
Smile!
Support Group for Cancer Survivors
TRIP (Teaching Responsible Injury Prevention)

Record Created by: FRthack

current user: thack(System Administrator)

Activities/Occurrences

CBISA Online Options Help Sign Out
Community Hospital South 2007

Activities/Occurrences Financial Services Leadership Journal Outcomes Reports and Listings

Traditional Charity Care Unpaid cost of Medicaid Other Public Programs

Financial/Unpaid Cost of Medicaid

Date 12/31/2007

Description 4th Quarter Medicaid

Persons Served 1,625

Choose a method for figuring expenses (costs)
 a) Charges and a cost-to-charge ratio
 Total Charges
 Cost to charge ratio 0
 b) Enter costs directly \$4,062,500

Less: Government Reimbursements Received \$2,640,625

12/31/2007 "4th Quarter Medicaid"
 09/30/2007 "3rd Quarter Medicaid"
 06/30/2007 "2nd Quarter Medicaid"
 03/31/2007 "1st Quarter Medicaid"

Add Delete Undo Save More

Financial Services

CBISA Online Options Help Sign Out
Community Hospital South 2007

Activities/Occurrences Financial Services Leadership Journal Outcomes Reports and Listings

Menu 1 Leadership Reports Complete Summaries Control Listings Multi-Facility Export

Menu I

Preview Date Range
 Open in new window
 Start Date 1/1/2007 End Date 12/31/2007
 Report Orientation Portrait

- 1.) Activities Detail
- 2.) Activity Detail Full
- 3.) Selected Categories - Summary
- 4.) Selected Categories - Detail
- 5.) Selected Cost Centers
- 6.) Activities Targeted For...
- 7.) Outcomes...
- 8.) Financial Services Detail
- 9.) Elements of Cost
- 10.) Elements of Offsetting Revenue
- 11.) Comparative Trend
- 12.) Comparative Trend - Reversed
- 13.) Selected Formats
- 14.) Selected Settings
- 15.) Selected Ages
- 16.) Selected Genders
- 17.) Selected Special Needs
- 18.) Selected Counties
- 19.) Selected Healthy Community Goals-Concerns
- 20.) Selected User-Defined Codes - Activities
- 21.) Selected User-Defined Codes - Occurrences
- 22.) Activities with Collaborators

current user: thack(System Administrator)

Reports & Listings

CBISA Online Options Help Sign Out
Community Hospital South 2007

Activities/Occurrences Financial Services Leadership Journal Outcomes Reports and Listings

General Topics Narrative

Leadership Journal Narrative

Be sure to NOT enter any Protected Health Information (PHI) or community member names.

CEO, CFO, and Director of Advocacy participate in Health Care Coverage in America: Understanding

09/19/2007 "How well do helmets work? Very well!"
 06/19/2007 "Community Health Director and Admin"
 06/12/2007 "Hanging on the Baptist philosophy of a"
 01/04/2007 "CEO, CFO, and Director of Advocacy"
 06/19/2006 "Bring back my bonnie to me!"
 04/19/2006 "made the children laugh and play, laugh"

Send this Narrative to the state
 Spell Check

current user: thack(System Administrator)

Leadership Journal

CBISA Online Options Help Sign Out
Community Hospital South 2007

Activities/Occurrences Financial Services Leadership Journal Outcomes Reports and Listings

Community Benefit \$1,421,875

0/2007

AD: Coming Soon!
 Prenatal Education classes

/ Goals / Strategies / Intended Outcomes

babies. The incidence of low birthweight babies in Lucas County has steadily over the last four years (up to 4.3 % latest results). Strategy: prenatal classes for most at-risk pregnant women.

Spell Check

Specific Indicator
 # low birth weight babies among attendees vs. county wide statistics

Spell Check

Measurable Results / Outcomes
 The 400 attendees from last year showed 8 low birth weight babies born (2%) compared to 4.3% in Lucas County last year

Spell Check

Anecdotal Results / Outcomes

Spell Check

Record Created by user: thack

Outcomes

Facility Snapshots

Q1 2007
Q2 2007
Q3 2007 (Pending)

Delete Snapshot
Request Snapshot

Q3 2007 OK Cancel

Request from all Facilities

OK Cancel

Association Rollup™ requests a snapshot (or copy) of data from each hospital...

Facility Financial Rollup

Requests in Queue: 1

Combining Org Test Combining Org - State

Request Quarter3 FY 2007

Start Date 1/1/2007

End Date 9/30/2007

Accept Rollup Request Deny Rollup Request

OK Cancel

CBISA Online™ Accepts Request

Facility Rollup

Requests in Queue: 1

Combining Org Test Combining Org - State

Request Quarter3 FY 2007

Start Date 1/1/2007

End Date 9/30/2007

Accept Rollup Request Deny Rollup Request

OK Cancel

CBISA Survey™ Accepts Request

Activity/General

Be Ready! Disaster Preparedness for Families

Occurrences for this Activity:1

Add Delete Undo Save

- Be Ready! Disaster Preparedness for Families
- Cholesterol Screenings
- Health Screenings-Blood Pressure
- Meals on Wheels
- Sunshine Daycare
- Winter Weather Preparedness

Activity Title

Be Ready! Disaster Preparedness for Families

Category

A1-Community Health Education

Description

Helping families create a disaster preparedness plan, focusing on guidelines set forth by FEMA and the Red Cross.

Department

<Select a Department>

Phone

Contact

Tracked Since 2007

New fiscal quarter/year cumulative Snapshots (data copies) are available immediately after the hospital accepts the request!

Record Created by: thack

current user: thack(Rollup)



CBISA
Survey™

- No charge

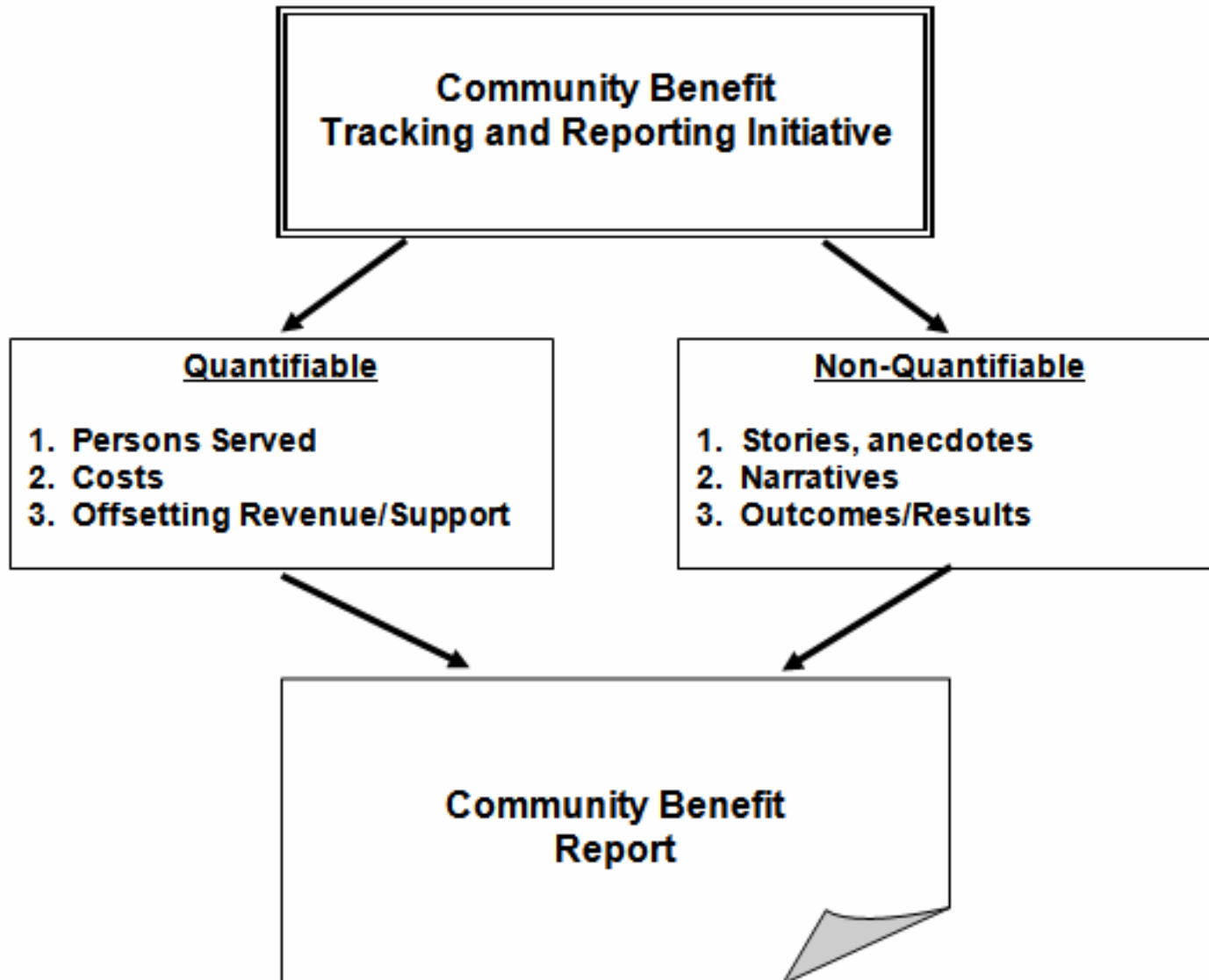
CBISA
Online™

- CHA/VHA Pricing
- State Pricing
- CAH Pricing

Call Lyon Software for a quote (419) 882-7184

Telling Your Story







“By communicating the benefits organizations provide—responding to community health needs, improving health in the community, and serving those in need—organizations illustrate accountability to their communities.”

Who Needs to Know?



- ❖ Community Members
- ❖ Communication Specialists
- ❖ Advocacy/Government Relations
- ❖ Fundraising/Development
- ❖ Governance/Strategic Planners
- ❖ Upper Level Management/Board Members



**Lyon Software...striving to make social
accountability reporting a streamlined
process...**

