

**Maine Department of Health and Human Services
Office of Aging and Disabilities Services**

Shared Living Rate Study

Provider Survey Instructions

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INTRODUCTION

As part of its ongoing effort to review payments for MaineCare services, the Maine Department of Health and Human Services (DHHS) is in the process of studying payments for Shared Living services.

Burns & Associates, Inc. (B&A) is assisting DHHS in this effort. As part of the study, B&A is distributing surveys to collect data regarding administrative oversight agencies' and providers' responsibilities and costs. These instructions are intended to assist providers in the completion of the survey.

The survey is voluntary, but all providers are strongly encouraged to participate as the information collected will be a key consideration in this review.

Data collected through this survey will be used solely for the purpose of evaluating Shared Living payments. Only aggregated data will be reported; no provider-specific information will be published.

Assistance with the Survey

B&A recognizes that the survey can be complicated, and has established several resources to assist providers in completing the survey:

- Providers are encouraged to read these general instructions.
- Additional instructions for certain questions are included in the survey and are designated with an icon 
- B&A has recorded a webinar to provide a detailed walk-through of the survey instrument. The webinar can be accessed through the web page established for this project at www.burnshealthpolicy.com/MaineSharedLiving. All providers are encouraged to listen to the instructional webinar.
- Questions regarding the survey can be directed to Karl Matzinger with B&A at kmatzinger@burnshealthpolicy.com or (602) 241-8515.

Overview of the Survey

The survey is a Microsoft Excel file and is compatible with Excel 2010 and newer versions. Broadly, it is designed to collect information in the primary areas:

- Administrative and Household Expenses
- Home Characteristics and Residents

Throughout the survey, fields in which providers may record data are shaded in light green. Some fields are restricted to numeric answers only. Examples are shaded in grey. Dark green fields are automatically calculated based upon other responses.

Completing and Submitting the Survey

Partially completed surveys will be accepted. If any information requested in the survey is unavailable, leave that field blank. Similarly, if there is any schedule that you cannot complete, that form may be skipped. Even if a submitted survey is incomplete, the information that you are able to provide will be considered as part of the analysis of survey responses.

When saving the survey, please add your name or your provider name to the beginning of the file name; for example, "Provider ABC Shared living Provider Survey".

The deadline for submitting completed surveys is March 1, 2019. Submit completed surveys to Barry Smith with B&A at bsmith@burnshealthpolicy.com.

If there are any factors that you believe should be considered but were not included in the survey, note those issues (and any other comments) in the transmittal email when submitting the survey. You may also submit any other documentation that you would like considered as part of this study.

The remainder of this document provides instructions for completing the forms included in the survey.

ADMINISTRATIVE EXPENSES

This section provides instructions for the Administrative worksheet, which captures expenses associated with the administration and operation of Shared Living homes. Administrative expenses include business-related costs such as hiring an accountant or purchasing office supplies. These costs are different from expenses associated with individuals receiving services, such as food and clothing. If you do not have or do not track administrative costs, choose ‘No’ on Line 1 and skip the remainder of this page.

Expense Categories If you track administrative expenses, enter ‘Yes’ from the drop down menu on line 1. Then report the total expense for each category for calendar year 2018.

It is understood that there may be some differences regarding how provider categorize their expenses. The categories provided on the form are common administrative expenses, but providers are not required to report an amount for each and should use the categories that are closest to their own accounting classifications. Additionally, Lines 7-9 are available to report expenses that do not fit well into the provided categories.

Do not include costs associated with transporting Shared Living residents as the mileage information will be captured on the Home schedule.

HOUSEHOLD EXPENSES

This section provides instructions for the household worksheet, which captures expenses associated with purchases on behalf of the individuals receiving services.

Expense Categories Report the total expense for each category (if applicable) for calendar year 2018. Additionally, Lines 6 to 8 are available to report expenses that do not fit well into the provided categories.

Do not include costs associated with transporting Shared Living residents as the mileage information will be captured on the Home schedule.