IRS Schedule H (Form 990) Supplemental Information

Part VI, line 2: Needs assessment: Describe how the organization assesses the health care needs of the communities it serves, in addition to any CHNAs reported in Part V, Section B.

In FY12, MedStar Montgomery Medical Center (MedStar Montgomery) conducted a Community Health Needs Assessment (CHNA) in accordance with the guidelines established by the Patient Protection and Affordable Care Act and the Internal Revenue Service.

The hospital's CHNA was led by nine Advisory Task Force (ATF) members, which was comprised of a diverse group of individuals, including grassroots activists, community residents, hospital representatives, public health leaders, and other stakeholder organizations, such as representatives from the U.S. Department of Health and Human Services. The ATF reviewed quantitative and qualitative community health data, as well as local, regional and national health goals.

Based on their findings, ATF members designed a survey to identify trends in how participants perceived the severity of key health issues in the following categories: wellness and prevention, access to care, quality of life, and environment. Community members responded to the survey by attending a community input session or completing it online or via hardcopy.

Based on the ATF's recommendation, the hospital identified Aspen Hill and Bel Pre as its Community Benefit Service Area (CBSA) – a geography with a high density of low-income or vulnerable residents within close proximity of the hospital. Heart disease was chosen as the health priority for the CBSA.

The hospital's FY12 CHNA and 3-year Implementation Strategies were endorsed by MedStar Mongomery's Board of Directors and approved by the MedStar Health Board of Directors. The document was published on the hospital's website on June 30, 2012.

As a proud member of MedStar Health, representatives from MedStar Montgomery routinely participate in the MedStar Health community benefit workgroup. The workgroup is comprised of community health professionals who represent all ten MedStar hospitals. The team analyzes local and regional community health data, establishes system-wide community health programming performance and evaluation measures and shares best practices.

Part VI, line 3: Patient education of eligibility for assistance: Describe how the organization informs and educates patients and persons who may be billed for patient care about their eligibility for assistance under federal, state, or local government programs or under the organization's financial assistance policy.

As one of the region's leading not-for-profit healthcare systems, MedStar Health is committed to ensuring that uninsured patients within the communities we serve who lack financial resources have access to necessary hospital services.[1] MedStar Health and its healthcare facilities will:

- Treat all patients equitably, with dignity, with respect and with compassion.
- Serve the emergency health care needs of everyone who presents at our facilities regardless of a patient's ability to pay for care.

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[1] This policy does not apply to insured patients who may be "underinsured" (e.g., patients with high-deductibles and/or coinsurance). This policy also does not apply to patients seeking non-medically-necessary services (including cosmetic surgery).

- Assist those patients who are admitted through our admissions process for non-urgent, medically necessary care who cannot pay for part of all of the care they receive.
- Balance needed financial assistance for some patients with broader fiscal responsibilities in order to keep its hospitals' doors open for all who may need care in the community.

In meeting its commitments, MedStar Health's facilities will work with their uninsured patients to gain an understanding of each patient's financial resources prior to admission (for scheduled services) or prior to billing (for emergency services). Based on this information and patient eligibility, MedStar Health's facilities will assist uninsured patients who reside within the communities we serve in one or more of the following ways:

- Assist with enrollment in publicly-funded entitlement programs (e.g., Medicaid).
- Assist with consideration of funding that may be available from other charitable organizations.
- Provide charity care and financial assistance according to applicable guidelines.
- Provide financial assistance for payment of facility charges using a sliding scale based on patient family income and financial resources.
- Offer periodic payment plans to assist patients with financing their healthcare services.

Each facility will post the policy, including a description of the applicable communities it serves, in each major patient registration area and in any other areas required by applicable regulations, will communicate the information to patients as required by this policy and applicable regulations and will make a copy of the policy available to all patients. Additionally, the Maryland Patient Information Sheet/MedStar's Patient Information Sheet will be provided to inpatients on admission and at time of final account billing.

MedStar Health believes that its patients have personal responsibilities related to the financial aspects of their healthcare needs. The charity care, financial assistance, and periodic payment plans available under this policy will not be available to those patients who fail to fulfill their responsibilities. For purposes of this policy, patient responsibilities include:

- Completing financial disclosure forms necessary to evaluate their eligibility for publicly-funded healthcare programs, charity care programs, and other forms of financial assistance. These disclosure forms must be completed accurately, truthfully, and timely to allow MedStar Health's facilities to properly counsel patients concerning the availability of financial assistance.
- Working with the facility's financial counselors and other financial services staff to ensure there is a complete understanding of the patient's financial situation and constraints.
- Completing appropriate applications for publicly-funded healthcare programs. This responsibility includes responding in a timely fashion to requests for documentation to support eligibility.
- Making applicable payments for services in a timely fashion, including any payments made pursuant to deferred and periodic payment schedules.
- Providing updated financial information to the facility's financial counselors on a timely basis as the patient's circumstances may change.
- It is the responsibility of the patient to inform the MedStar hospital of their existing eligibility under a medical hardship during the 12-month period.

Uninsured patients of MedStar Health's facilities may be eligible for charity care or sliding-scale financial assistance under this policy. The financial counselors and financial services staff will determine eligibility for charity care and sliding-scale financial assistance based on review of income for the patient and their family (household), other financial resources available to the patient's family, family size, and the extent of the medical costs to be incurred by the patient.

Part VI, line 4: Community information: Describe the community the organization serves, taking into account the geographic area and demographic constituents it serves.

Geographic

MedStar Montgomery is located in Olney, Maryland, in the northeastern corner of Montgomery County. The hospital has been a cornerstone of the community, with a long and rich history dedicated to serving Montgomery County residents and the surrounding counties. As part of this commitment, the hospital is developing programs and evaluating initiatives aimed to address and minimize disparities in health status.

The Community Benefit Service Area (CBSA), zip code 20906, sits on route 97, which is a main thoroughfare that allows traffic to flow from Washington, DC through Montgomery County to Howard County. It is composed of several neighborhoods including Aspen Hill, Bel Pre, Leisure World, Layhill, and parts of Glenmont. This area is a primary commuter route with heavy volumes of traffic from outside of Aspen Hill moving southbound and westbound into DC and Maryland. Glenmont is the last stop for the Washington metro and has high volumes of pedestrian and vehicular traffic.

This CBSA was selected due to its proximity to the hospital, coupled with a high density of low-income residents, underserved seniors and an ethnically diverse population. A special focus is on persons aged 50 and older having risk factors that are linked to heart disease. Aspen Hill is largely residential but plagued by demographically isolated neighborhoods: senior housing, multi-dwelling/apartments, and private homes. Each neighborhood tends to house persons of different socio-economic status which is directly linked to key determinants of population health.

Aspen Hill is an aging commercial area that has seen a decline in its economic vitality. In the 1980's, Aspen Hill was home to the largest employer in the county with 5,000 employees. Upon their departure, commercial businesses lost their main customer base and a 250,000 square foot vacant site remains. The deteriorating building and unused parking lot has created a negative ripple effect among commercial properties and the residential character of the area.[1] Residents and local business owners are advocating for change that will increase commerce and revitalize the local retail market.

Demographic

Medstar Montgomery's CBSA has 61,097 residents, over 40% of whom are age 54 or older. It is also home to Leisure World, a self-contained community for retired or semi-retired persons over the age of 52. According to Maryland's Department of Health and Mental Hygiene, the leading cause of death for both males and females in Montgomery County is cardiovascular disease (2011).[2]

MedStar Montgomery selected this area as the CBSA for several reasons. First, African American and Asian male populations in the area have the highest prevalence of heart disease, cholesterol and high blood pressure in Montgomery County (Maryland Department of Health and Mental Hygiene; Maryland Behavioral Risk Factor Surveillance System). Since nearly 38% of the Aspen Hill/Bel Pre population consists of these two groups, it is a high risk area where cardiovascular health education can have the greatest impact.

Second, the hospital used the Catholic Healthcare West's Community Needs Index (CNI), which measures the severity of health disparities based on five healthcare access barriers: income, culture/language, education, insurance, and housing. According to the CNI scoring methodology, a score of 1.0 indicates a ZIP code with the lowest socio-economic barriers, while a score of 5.0 represents a ZIP code with the most socio-economic barriers. Zip code 20906 scored 3.4 out of 5 indicating pervasive socioeconomic disparities in access to healthcare services. The median score for Montgomery County was 2.1.

[1]http://www.montgomeryplanning.org/development/minor_master_plan_amendments/documents/kominers_20853_statement_for_minor_master_plan_amendment_aspen_hill.pdf
[2]Maryland Assessment Tool for Community Health

Part VI, line 5: Promotion of community health: Provide any other information to describing how the organization's hospital facilities or other health care facilities further it's exempt purpose by promoting the health of the community (e.g., open medical staff, community board, use of surplus funds, etc.).

As a community partner, Medstar Montgomery engages in a number of activities to promote and improve the health and wellbeing of the community. Educating the community about chronic disease prevention and encouraging healthy behaviors is a priority at MedStar Montgomery. A Community Outreach Specialist with a public health background plays an important role by providing education and support services to underserved/low-income individuals.

MedStar Montgomery is committed to meeting the needs of vulnerable populations by establishing strategic partnerships and alliances. The hospital provides financial support to Proyecto Salud and Holy Cross Health Center: Aspen Hill, which enables these clinics to treat low-income, uninsured, ethnically diverse residents at free or low cost.

The hospital also provides in-kind space for day-to-day operation of Proyecto Salud's clinical space. With a focus on persons who speak Spanish as a primary language, services include physical examinations, health counseling, education, and laboratory services. In addition, Proyecto Salud offers a seasonal flu clinic. Prescription medications are made available through the Montgomery Cares program. The clinic also provides referrals for county specialty services, sexually transmitted infections and Human Immunodeficiency Virus (HIV) programs, Women's Cancer Control Program, Family Planning, and alcohol treatment and rehabilitation.

MedStar Montgomery in partnership with the Primary Care Coalition has also developed a coordinated referral program, known as Emergency Department (ED) - Primary Care (PC) Connect. The goal of the program is to reduce emergency department utilization by improving access to care for low-income uninsured patients, with a focus on continuity of care for improved healthcare status. A bilingual Population Health Navigator provides real time navigation during ED visit and works with the patient to assist them in scheduling an appointment at local safety-net clinic and educates them on ways to access care in non-emergency settings.

Part VI, line 6: Affiliated health care system: If the organization is part of an affiliated health care system, describe the respective roles of the organization and its affiliates in promoting the health of the communities served.

As a proud member of MedStar Health, MedStar Montgomery is able to expand its capacity to meet the needs of the community by partnering with other MedStar hospitals and associated entities. MedStar Health resources assist the hospital in community health planning to meet the needs of the uninsured and other vulnerable populations. Through its community health function, MedStar Health provides MedStar Montgomery with technical support to enhance community health programming and evaluation. MedStar's corporate philanthropy department identifies and seeks public and private funding sources to ensure the availability of high quality health services, regardless of ability to pay.
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Part VI, line 7: State filing of community benefit report: If applicable, identify all states with which the organization, or a related organization, files a community benefit report.

The community benefit report for MedStar Montgomery Medical Center is only filed in the state of Maryland.