



## **Methodist Health Services Corporation**

**Methodist Medical Center of Illinois Tax ID 37-0661223**

**Proctor Hospital Tax ID 37-0681540**

**Pekin Hospital Tax ID 37-0692351**

**Annual Non-Profit Hospital Community Benefit Plan Report  
For Fiscal Year Ending December 31, 2023**

## Annual Non Profit Hospital Community Benefits Plan Report

**Name of Hospital Reporting:** Methodist Health Services Corporation

**Mailing Address:** 221 NE Glen Oak Avenue Peoria, IL 61636  
(Street Address/P.O. Box) (City, State, Zip)

**Physical Address (if different than mailing address):**  
 \_\_\_\_\_  
(Street Address/P.O. Box) (City, State, Zip)

**Reporting Period:** 01 / 01 / 23 through 12 / 31 / 23 **Taxpayer Number:** 37-1111135  
Month Day Year Month Day Year

If part of a health system, list the other Illinois hospitals included in the health system (Note: A separate report must be filed for each Hosp).

<u>Hospital Name</u>	<u>Address</u>	<u>FEIN #</u>
<u>Methodist Medical Center of Illinois</u>	<u>221 NE Glen Oak Avenue Peoria, IL 61636</u>	<u>37-0661223</u>
<u>Proctor Hospital</u>	<u>5409 N Knoxville Avenue Peoria, IL 61614</u>	<u>37-0681540</u>
<u>Pekin Hospital</u>	<u>600 S 13th Street Pekin, IL 61554</u>	<u>37-0692351</u>
_____	_____	_____
_____	_____	_____

1. **ATTACH Mission Statement:**  
 The reporting entity must provide an organizational mission statement that identifies the hospital's commitment to serving the health care needs of the community and the date it was adopted.

2. **ATTACH Community Benefits Plan:**  
 The reporting entity must provide it's most recent Community Benefits Plan and specify the date it was adopted. The plan should be an operational plan for serving health care needs of the community. The plan must:

1. Set out goals and objectives for providing community benefits including charity care and government-sponsored indigent health care.
2. Identify the populations and communities served by the hospital.
3. Disclose health care needs that were considered in developing the plan.

3. **REPORT Charity Care:**  
 Charity care is care for which the provider does not expect to receive payment from the patient or a third-party payer. Charity care does not include bad debt. In reporting charity care, the reporting entity must report the actual cost of services provided, based on the total cost to charge ratio derived from the hospital's Medicare cost report (CMS 2552-96 Worksheet C, Part 1, PPS Inpatient Ratios), not the charges for the services.

Charity Care ..... \$ 2,382,785

**ATTACH Charity Care Policy:**  
 Reporting entity must attach a copy of its current charity care policy and specify the date it was adopted.

4. **REPORT Community Benefits** actually provided other than charity care.

See instructions for completing Section 4 of Form AG-CBP-1 (Community Benefits Plan Annual Report Form For Not For Profit Hospital)

Community Benefit Type

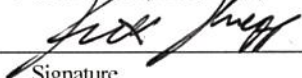
Language Assistant Services .....	\$ <u>23,528</u>
Financial Assistance .....	\$ <u>2,382,785</u>
Government Sponsored .....	\$ <u>54,903,880</u>
Donations .....	\$ <u>799,475</u>
Volunteer Services	
a) Employee Volunteer Services .....	\$ <u>0</u>
b) Non-Employee Volunteer Services .....	\$ <u>607,555</u>
c) Total (add lines a and b) .....	\$ <u>607,555</u>
Education .....	\$ <u>6,899,515</u>
Government-sponsored program services .....	\$ <u>0</u>
Research .....	\$ <u>0</u>
Subsidized health services .....	\$ <u>21,175,358</u>
Bad debts .....	\$ <u>7,397,042</u>
Other Community Benefits .....	\$ <u>548,325</u>

**Attach a schedule for any additional community benefits not detailed above.**

5. **ATTACH Audited Financial Statements for the reporting period.**

**Under penalty of perjury, I the undersigned declare and certify that I have examined this Annual Non Profit Hospital Community Benefits Plan Report and the documents attached thereto. I further declare and certify that the Plan and the Annual Non Profit Hospital Community Benefits Plan Report and the documents attached thereto are true and complete.**

Keith Knepp MD, President  
Name/ Title (Please Print)

  
Signature

Christi Kosheba, Regional Finance Director  
Name of Person Completing Form

Christi.Kosheba@Carle.com  
Electronic / Internet Mail Address

309-672-4893  
Phone: Area Code/ Telephone No.

7/30/2024  
Date.

309-672-4170  
Phone: Area Code/ Telephone No.

309-671-2853  
FAX: AreaCode/FAXNo.

**Carle Health - West Region**  
**Consolidating Non-Profit Hospital Community Benefits Plan Report**  
**For the Year Ending December 31, 2023**

	<b>Methodist</b>	<b>Proctor</b>	<b>Pekin</b>	<b>Consolidated 2023</b>	<b>% of total</b>	<b>% of net</b>
Charity Care	1,778,524	450,094	154,167	2,382,785	<b>2.52%</b>	<b>0.4%</b>
Language Assistant Services	22,470	390	668	23,528	<b>0.02%</b>	<b>0.0%</b>
Government Sponsored Indigent Health Care	38,611,783	12,167,298	4,124,799	54,903,880	<b>57.95%</b>	<b>9.7%</b>
Donations	726,985	-	72,490	799,475	<b>0.84%</b>	<b>0.1%</b>
Volunteer Services - Employee	-	-	-	0	<b>0.00%</b>	<b>0.0%</b>
Volunteer Services - Volunteer	270,621	117,806	219,128	607,555	<b>0.64%</b>	<b>0.1%</b>
Education	6,684,763	142,362	72,391	6,899,515	<b>7.28%</b>	<b>1.2%</b>
Government Sponsored Program Services	-	-	-	0	<b>0.00%</b>	<b>0.0%</b>
Research	-	-	-	0	<b>0.00%</b>	<b>0.0%</b>
Subsidized Health Services	13,821,202	7,354,156	-	21,175,358	<b>22.35%</b>	<b>3.7%</b>
Bad Debt	4,924,414	1,814,302	658,326	7,397,042	<b>7.81%</b>	<b>1.3%</b>
Other Community Benefits	455,117	93,208	-	548,325	<b>0.58%</b>	<b>0.1%</b>
<b>Total</b>	<b>67,295,880</b>	<b>22,139,615</b>	<b>5,301,968</b>	<b>94,737,463</b>	<b>100.00%</b>	<b>16.7%</b>
Net Patient Service Revenue	377,591,001	133,857,977	54,156,693	565,605,671		





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## **Charity Care Demographics**

**UnityPoint Health - Peoria Region**  
**Charity Care Demographics by Location**  
**For the Year Ending December 31, 2023**

<b><u>2023 Charity Accounts by Race</u></b>	<b><u>Methodist Medical Center of Illinois</u></b>	<b><u>Proctor Hospital</u></b>	<b><u>Pekin Hospital</u></b>	<b><u>System Totals</u></b>
Asian	16	4	-	20
American Indian Alaskan	7	3	-	10
Black	1,600	508	17	2,125
Native Hawaiian	4	2	2	8
White	3,945	1,366	1,353	6,664
Race Unknown	82	47	13	142
Declined	34	8	4	46
Totals	5,688	1,938	1,389	9,015

<b><u>2023 Charity Accounts by Gender</u></b>	<b><u>Methodist Medical Center of Illinois</u></b>	<b><u>Proctor Hospital</u></b>	<b><u>Pekin Hospital</u></b>	<b><u>System Totals</u></b>
Female	3,352	1,037	863	5,252
Male	2,336	901	526	3,763
Totals	5,688	1,938	1,389	9,015

<b><u>2023 Charity Care by Location</u></b>	<b><u>Methodist Medical Center of Illinois</u></b>	<b><u>Proctor Hospital</u></b>	<b><u>Pekin Hospital</u></b>	<b><u>System Totals</u></b>
Hospital	1,315,247	263,704	54,619	1,633,570
Emergency Department	463,277	186,390	99,548	749,215
Totals	1,778,524	450,094	154,167	2,382,785

**Top Five Reasons for Financial Assistance Application Denials**

1. Patient's income is over program guidelines
2. Unable to review application due to missing documents
3. Unable to review application due to missing/incomplete income verifications
4. Unable to review application due to missing proof of enrollment in state programs
5. Unable to review application due to patient not responding to questions about application



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## **Mission Statement**



## **OUR MISSION**

To be your trusted partner in all healthcare decisions.

## **OUR VISION**

Improve health by providing highly accessible, world-class care and service.

## **OUR VALUES**

At Carle Health we believe that when our values come from the heart, our daily behavior will reflect our commitment to our work and the people we serve. As an organization we all work together to practice and uphold these values:

### **Excellence:**

We're committed to being the very best in all we do.

### **Integrity:**

We're grateful for the trust placed in us by those we serve, and we always strive to do the right thing.

### **Inclusivity:**

We welcome, respect and value every individual.

### **Compassion:**

We seek to understand and empathize with others.

### **Accountability:**

We take ownership of everything we do in a way people can count on.



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## **Community Health Assessment**



2023  
Progress  
Report

# Greater Peoria

Community Health Improvement Plan





# Healthy Eating Active

## Carle Health Greater Peoria Lead Departments

- Hult Center for Healthy Living.
- Wellness Center.
- Employee and Corporate Wellness.

## Other Departments/Resources Involved

- Family Medical Center (FMC).
- Methodist College.
- Optimum Health Solutions.
- Pediatric providers.
- School-Based Health Centers.
- WellMobile.



**Identified Need:** Healthy Eating Active Living, or HEA is defined in the Community Health Needs Assessment (CHNA) as having healthy eating, active living, access to food and food security. HEAL was identified as a priority health issue for the tri-county communities. Nearly 70% of survey respondents from the CHNA reported eating less than three servings of fruits and vegetables in a day, and this same source notes that more than half of tri-county residents reported that they don't engage in physical activity for at least 30 minutes at least three times per week.

Males and those who were younger reported eating less fruits and vegetables per day, as did those who were Black/African American and those with lower education and lower household income – specifically in the Peoria and West Peoria regions. Exercise was rated lower for residents in the Eastern Woodford County region. Of sur-

were hungry in the past week. Hunger, or food insecurity, tended to be higher among homeless individuals or those with unstable housing. Hunger was less common among those who were white, had higher educational attainment and had higher household income.

**Target Populations:** Males and those who were younger reported eating less fruits and vegetables per day as did those who were Black/African American and those with lower education and lower household income – specifically in the Peoria and West Peoria regions. Exercise was rated lower for residents in the Eastern Woodford County region. Hunger was higher among homeless individuals or those with unstable housing. Hunger was less common among those who were white, had higher educational attainment and had higher household income.

## HEAL Goals and Objectives:

<b>GOAL</b>	Improve overall healthy eating and physical activity in the tri-county region.
<b>OBJECTIVE 1</b>	By December 31, 2025, increase accessibility of healthy food in the tri-county region by 10% through the support of community gardens. (Baseline: TBD).
<b>OBJECTIVE 2</b>	By December 31, 2025, increase adults reporting exercising one to five days a week among the tri-county region by 1%. (Baseline: 28% of adults reported no exercise at all; 2022 CHNA).



## STRATEGY 1

Support tri-county Partnership for a Healthy Community's (PFHC) Community Health Improvement Plan (CHIP) efforts: Gardening Interventions and Social Support.

### **TASK 1:** Identify key staff to participate in PFHC HEAL Action Team.

Carle Health Greater Peoria identified the Carle Health Hult Center for Healthy Living team of health educators and the Wellness Center team of health coaches and exercise specialists to participate in the PFHC's HEAL Action Team. Team members regularly attended PFHC's HEAL Action Team meetings and tracked all hours contributed among Carle Health Greater Peoria team members.

Three team members contributed 23 total staff hours to PFHC's HEAL Action Team in 2023.

### **TASK 2:** Disseminate PFHC campaign and recruitment messages to promote Gardening Interventions and Social Support Interventions.

To support PFHC's Social Support Interventions, Carle Health's Hult Center team assisted with the promotion of one tri-county HEAL event in 2023 by sharing the event information on Hult Center's Facebook page. The event was posted on Facebook on 8-10-23, 8-21-23 and 9-18-23, and in total, these posts reached 444 people/6 reactions/15 post engagements/6 shares.

Carle Health Hult Center also shared weekly efforts promoted by the HEAL Action Team on Facebook and Instagram, such as "Take a Walk Wednesday."

### **TASK 3:** Partner with PFHC and community resources to promote intervention strategies.

The Tri-County Hunger Walk, organized by Partnership for a Healthy Community and HEAL Action Team, took place on September 30, 2023. Three Carle Health Hult Center staff members attended the event and hosted a health fair table to educate attendees about healthy living. There were 70 participants at the event, and 785 pounds of food were donated to three local food pantries.

### **TASK 4:** Support community garden in region of concern at Family Medical Center (FMC).

To contribute to the PFHC's Gardening Interventions, FMC continued gardening efforts, producing and distributing 629 pounds of fresh produce. Most of the produce was donated to Sophia's Kitchen, a food pantry serving Peoria's low-income ZIP codes.



Carle Health Team Members  
Participating in the 2023  
Tri-County Hunger Walk



## STRATEGY 2

### Increase HEAL education and fitness opportunities for youth.

**TASK 1:** Identify internal regional HEAL education resources and collect baseline data – Hult Center, Methodist College, Nursing Education, FMC, etc.

Carle Health identified the Hult Center for Healthy Living community health education programs as the main resource to provide HEAL education opportunities to youth.

**TASK 2:** Identify external regional HEAL partners/resources.

Carle Health staff members engaged in the HEAL Action Team efforts worked closely with external community partners in 2023, including Tazewell County Health Department, University of Illinois Extension and others.

**TASK 3:** Provide HEAL community health education to target populations.

The Hult Center team provided education to 6,097 children in 2023 by providing interactive field trips on-site at Hult Center for Healthy Living and as outreach programming within the schools and community agencies.

Hult Center health coaches provided 1:1 nutrition education to 71 adolescents in 2023.

**TASK 4:** Utilize American Academy of Pediatrics (AAP) Bright Futures Guidelines to screen for HEAL and connect families with resources to address food insecurity and other social determinants of health (SDOH).

School-Based Health Center providers at three health centers (located at Peoria High, Manual High and Trewyn schools) used the AAP Guidelines for children and adolescent healthcare visits.

Carle Health School-Based Health Center healthcare providers used the AAP Bright Futures Guidelines during well-child visits in 2023 and will continue to use these guidelines moving forward. A total of 1,626 well-child visits were provided in 2023 among three School-Based Health Centers located in Peoria's low-income ZIP codes.

In January 2023, staff members from the Hult Center and a community health dietetics intern from Bradley University participated in a life simulator event for adolescents in Peoria County at the Woodruff Career and Technical Center. Throughout the event, Hult Center staff and the intern collaborated with students, providing guidance on budget-friendly grocery shopping and sharing various resources to address barriers to food security.

Providers at the Carle Health School-Based Health Center, alongside medical residents from FMC, employed the Bright Futures Guidelines to screen for SDOH and other barriers to food security. These screenings yield valuable insights, enabling providers to offer additional support to patients and facilitate connections to essential community resources, such as food pantries.

**TASK 5:** Share success stories of the HEAL efforts within the tri-county area.

In Year 1 (2023), a 16-year-old participant enrolled in the Hult Center WELL (Wellness Education and Lifestyle Learning) Program set a goal to integrate a greater variety of fruits and vegetables into their daily meals. The student received the "Good and Cheap" cookbook, which was endorsed during the tri-county Hunger Walk. Successfully implementing the cookbook, the patient managed to prepare five to six recipes from the cookbook. As a result, the patient expresses increased confidence in meal preparation and trying more fresh produce.



## STRATEGY 3

Increase physical activity among adult residents and staff.

**TASK 1:** Establish internal regional HEAL team to collect baseline data and create action plan for community and worksite wellness activities.

In 2023, an internal committee was established and began to create an action plan for community and worksite wellness activities for employees and community members. This transitioned to Carle Health as a regional effort and is no longer directed by Carle Health Greater Peoria.

**TASK 2:** Provide physical activity programming through WellMobile service line to promote increase in physical activity in leisure time.

In 2023, the WellMobile coordinator was working on scheduling the WellMobile to reach target populations in the 61603, 61604 and 61605 ZIP codes, and in rural areas within the tri-county region to incorporate fitness opportunities using Wellness fitness instructors.

The WellMobile was discontinued in fall 2023.

In 2023, the WellMobile planned 108 events throughout the tri-county area with 1,095 participants engaging in HEAL; 61 of those events were specifically planned to engage members of the 61603, 61604 and 61605 ZIP codes with 493 participants.

**TASK 3:** Provide worksite wellness to increase physical activity and HEAL for all employees.

In 2023, an internal committee was established and began to create an action plan for community and worksite wellness activities for employees and community members. This transitioned to Carle Health as a regional effort and is no longer directed by Carle Health Greater Peoria.

## SOCIAL MEDIA



# Mental Health

## Carle Health Lead Departments

- Trillium Place.

## Other Departments/Resources Involved

- Family Medical Center (FMC).
- Compliance Department, Human Resources.
- Hult Center for Healthy Living.
- Optimum Health Solutions.
- Nutrition and Dietetics.
- Analytics.



**Identified Need:** The 2022 Community Health Needs Assessment (CHNA) noted that “good” mental health fell over 73% among respondents from 2016 to 2022. This same source notes that reports of anxiety and depression doubled since the last assessment, and challenges to staying mentally healthy included stigma, unstable home environment and lack of teacher training to recognize symptoms. Challenges associated with accessing mental health services among the tri-county area included lack of knowledge of resources, lack of providers and diverse providers (people of color, multiple languages, LGBTQ+ friendly), lack of inpatient beds, lack of money, and lack of transportation.

**Target Populations:** According to the CHNA, those who reported having a mental health condition were more often younger, LGBTQ+, with lower household income, and had unstable or no housing. Those with lower educational attainment more often reported below average mental health. Peoria respondents more often reported a mental health condition. Woodford residents had the lowest proportion of residents reporting a mental health condition. Residents in Peoria/West Peoria more often reported below-average mental health compared to other areas in the county. The South West Peoria, North West Peoria and North East Peoria areas less often reported below-average mental health.

## Mental Health Goals and Objectives:

<b>GOAL</b>	Improve mental health, specifically with regard to suicide, depression and anxiety, within the tri-county region.
<b>OBJECTIVE 1</b>	By December 31, 2025, decrease the number of suicides in the tri-county area by 10%. (Baseline: Suicide deaths per 100,000 - PC 16.2, TC 14.7, WC 17.7, IL 11.1 tri-county 2015-2018 HCI Conduent).
<b>OBJECTIVE 2</b>	By December 31, 2025, increase the proportion of children and adults with mental health problems in the tri-county area who get treatment by 10%. (Baselines: Age-adjusted ER rate due to pediatric mental health per 10,000- PC 312.5, TC 275.5, WC 139.9, IL 192.3; and age-adjusted hospitalization rate due to adult mental health per 10,000- PC 286.8, TC 173.1, WC 113.4, IL 158.9 HCI Conduent; and % of respondents who indicated they spoke to someone about their mental health in the last 30 days- 40%, 2022 CHNA).





## STRATEGY 1

### Support tri-county PFHC's CHIP interventions: Culturally Adaptive Health Care and Telemedicine.

#### **TASK 1:** Identify key staff to participate in PFHC Mental Health Action Team.

Trillium Place staff member, Jonathan Gauerke, co-chairs the PFHC Mental Health Action Team alongside a staff member at OSF Strive. Mr. Gauerke also leads the Mental Health Action Team's Steering Committee and Telepsych Sub-Committee. In total, Carle Health employees contributed 84 staff hours to the PFHC Mental Health Action Team's efforts in 2023.

#### **TASK 2:** Partner with PFHC and community resources to promote intervention strategies.

2023 was the first year in the CHIP three-year cycle. Therefore, Year 1 was dedicated to building a sustainable action team that represented diverse members and agencies contributing to good mental health in the tri-county area. This action team will be responsible for promoting the chosen intervention strategies.

Carle Health Trillium Place led the PFHC's Mental Health Action Team in 2023. During this time, 18 partner agencies were represented at the monthly meetings, investing 292 volunteer hours in 2023. Partners included Annie Malone Center for Development, Banyan Center, Trillium Place, Central Illinois Friends, Bob Michael VA, Peoria Regional Office of Education, Phoenix Community Development Center, Peoria City/County Health Department, Children's Home Association of Illinois, Woodford County Health Department, Tazewell County Health Department, Carle Health, OSF Saint Francis Medical Center, Heartland Health Services, Home for All Continuum of Care, OSF Resource Link, OSF Strive, Carle Health Hult Center for Healthy Living and private counseling centers.

#### **TASK 3:** Identify trauma-informed care trainings for providers and mental health employees and create training implementation plan.

Trillium Place invested significant time training staff on trauma-informed care from the National Council for Mental Well-being called, "ACEs Are Not Destiny." The training was offered in April 2023 as a live, two-session event. Since the live event, Trillium Place, Carle Health inpatient units and Carle Health behavioral health clinics have continued to have team members complete the training through recorded sessions. Over 200 employees completed the training. The contract for the training concludes at the end of April 2024. Post-testing was offered for team members who are LCPCs due to state requirements. Next steps will be to continue meeting as a Core Implementation Team (CIT) to make plans for continued approaches for performing as a trauma-informed organization. This will include supervision, hiring and management approaches throughout our departments with the lens of trauma-informed care within our teams and with our contact with patients and clients.

Trillium Place incorporated a daily meeting known as the Regional Behavioral Health Daily Patient Planning Huddle, which continues to be held Monday through Friday each week. This huddle discusses service needs for individuals who are entering the emergency departments of Carle Health Methodist, Proctor and Pekin hospitals. The huddle involves managers from Carle Health ED and inpatient units along with the Trillium Place departments for community services. This collaboration of supports and service identification has been active since February 2023. Results from 2023 with the Trillium Place Strategic Plan have looked at reducing behavioral health ED visits by 5% for enrolled clients of Trillium Place Community Programs and non-enrolled clients. The results include a 12% reduction in behavioral health ED visits for non-enrolled clients of Trillium Place and a 35% reduction in enrolled clients.

The Carle Health analytics team transferred the High Emergency Department Utilizers dashboard from UnityPoint to Carle Health so that the team can continue to collect data over time and connect high utilizers (those with 10+ ER visits in 12 months or less) to primary care providers and resources to address health-related social needs.

Carle Health's Systemwide Approaches to Culturally Adapted Healthcare included:





Carle Health team members participated in culturally adapted healthcare trainings in 2023  
**95%** of staff completed health equity training.



23 multicultural forums were available to staff in 2023, drawing a total of  
**1,000** hours of participation for Carle Health employees (all Carle Health system, not available by region).



158 Greater Peoria Service Area leaders attended inclusive leadership sessions in 2023  
**46** hours of education.



Carle Health held five Health Equity Grand Round sessions for a total of  
**969** participants. Sessions were available to community members for continuing education credits.

- Two key electronic medical record (EMR) enhancements were added to better capture accurate and inclusive REAL (race, ethnicity, language) and SOGI (sexual orientation and gender identity) data from patients.
- Carle Health removed the race-based eGFR equation from clinical testing.
- In October 2023, Carle Health began screening for SDOH in inpatient settings.
- Carle Health submitted an application for the Healthcare Equality Index (HEI) in October 2023. HEI is the national LGBTQ+ benchmarking tool that evaluates healthcare facilities' policies and practices related to the equity and inclusion of their LGBTQ+ patients, visitors and employees. As a part of this application process, leaders at each Carle Health hospital completed a three-hour executive briefing session on LGBTQ+ inclusive healthcare.

**TASK 4:** Identify and coordinate regular meetings with supervisors for trauma-informed care and systemwide sustainability.

Trillium Place supervisors have participated in a Supervision Cohort that met monthly from May 2023 to April 2024 to have ongoing discussions for trauma-informed care from the National Council for Mental Wellbeing trainer of the “ACEs Are Not Destiny” training in April 2023.

**TASK 5:** Share success stories of the program within the tri-county area and with senior leadership/board.

The Mental Health Action Team and Trillium Place representative, Jonathan Gauerke, shared 2023 successes at the Partnership for a Healthy Community's annual meeting on March 7, 2024. This meeting included 79 representatives from diverse sectors and partner agencies. Highlights included the Carle Health Transgender Care Directory, the new telepsych provider list that was published, and Carle Health efforts in training staff and providers in health equity and culturally adapted healthcare.





## STRATEGY 2

Increase access to comprehensive behavioral health services, care coordination, and resources and supports.

**TASK 1:** Identify regional mental health access points and collect baseline data – Access Center Call Line, Systems of Care, Young Minds Center, High ED Utilizers, etc.

The Trillium Place Access Center has been a reliable resource for community members to seek information about mental health and available behavioral health services. The Access Center processes an average of 70 referrals per day. In 2022, the Access Center received 18,074 calls from the community and was on track to receive 19,000 by the end of 2023. Access to full 2023 data is unavailable due to the transition between UnityPoint Health (UPH) and Carle Health. Full data reports will be available for 2024, as the Epic transition for the Access Center occurred in December 2023.

Carle Health analytics team transferred the UPH High Emergency Department Utilizers dashboard to Carle Health so that the team can continue to collect data for high utilizers over time, specifically focusing on connecting patients with more than 10 ER visits within 12 months to a primary care provider.

**TASK 2:** Distribute patient experience surveys to patients utilizing mental health services and create an action plan for continuous improvement.

Many surveys were distributed to patients in Year 1, and data is being reviewed. There are a variety of patient surveys across Trillium Place outpatient sites, as well as inpatient and clinic sites. Since moving to NRC for survey collection, Carle Health has implemented a variety of strategies to improve our return rates and the perception of the experiences overall. Briefly, this includes:

- Survey optimization.
  - Implemented e-surveys (text/email).
  - Later added IVR (iterative voice recorded).
- Scripting for staff to promote filling out the survey and sharing feedback.
- Nurse manager rounding.
- Assigned a patient experience liaison.
- Regular service line meetings to discuss trends and ideas.
- Combined complaint and grievance data with PX scores.

**TASK 3:** Launch Young Minds Center to increase access to care and provide more resources for children, adolescents and families; continue providing and increasing services for telemedicine, Access Center Call Line, System of Care and High ED Utilizers management.

Trillium Place staff organizes the System of Care (SOC) community coalition, a group of collaborative partners tasked with developing a comprehensive, well-coordinated, culturally and linguistically competent, community- and data-driven youth mental health system of care, accessible to all ages 21 and younger in Peoria, Tazewell and Woodford counties. This team had many successes in 2023 including:

- Met with 65 community organizations/agencies.
- Held 11 SOC partner implementation meetings.
- Active engagement of approximately 30 community partners on average per month.
- Established five SOC work groups.
- Conducted two leadership presentations (one to the Trillium Place Board of Directors, one to Trillium Place leadership).
- Executed IRIS/Carle Health contract at end of year for SOC data management/onboarding purposes and onboarding Trillium Place behavioral health services (underway).
- Assisted six organizations in the community to onboard with IRIS.
- Hosted three community outreach events to gather data and involve partners and caregivers with lived experience.

**TASK 4:** Disseminate marketing and recruitment messages to promote mental health resources for youth and adults in Tri-County region.

Carle Health disseminated marketing campaigns to promote good mental health, suicide prevention and other mental health resources in 2023.

**TASK 5:** Share success stories of the mental health efforts within the tri-county area.

Trillium Place teams share a Mission Moment with the Board of Directors on a monthly basis. A recent story from November 2023 was shared about a certified community behavioral health clinic (CCBHC) care coordinator working with the clinician and discharge planner on the 6W Adult Behavioral Health Unit to meet the patient where they were at for their living situation post-discharge. The patient desired to go to the Trillium Place Adam Street Living Center for residential living rather than returning home with their father. The patient-first approach was a successful transition for more independence.

April 2024 brought a success story as a client receiving CCBHC services sent in a lengthy appreciation letter to their care coordinator being there for them on the road to recovery from alcohol abuse:

“

*I want to thank my healthcare coordinator. Thank you so much from the bottom of my heart for changing my outlook on life as a recovering alcoholic. Thank you for never preaching or pressuring me to change. I made my own choices. Thanks for all your support, without you and this program I wouldn't be where I am today. You opened up my eyes to a whole new world. You always made sure I got to appointments on time; you were so patient when some appointments were lengthy. You always could put a smile on my face. You always showed great concern and were an awesome listener. I admit I was hesitant when I first met you to move forward with you, but I am so glad I did. I am so proud to say I have been alcohol free for three months now, and I owe it to you, this program and myself. Want to say thank you for respecting my boundaries and being there for me. I consider you my angel and this program a blessing. I can't even begin to say thank you enough. This program works; I am proof.*

”



## STRATEGY 3

### Increase mental health prevention education and awareness to improve mental health.

**TASK 1:** Identify regional mental health prevention community education resources and collect baseline data – Hult Center, Methodist College, Nursing Education, Family Medical Center, etc.

Carle Health identified key prevention education resources including Hult Center for Healthy Living, Trillium Place and the Carle Eureka role in leading the Mental Health First Aid Cadre. The Mental Health First Aid Cadre includes Mental Health First Aid trainers from the Greater Peoria area, led by Joanie Montoya. The cadre meets monthly with the purpose of increasing the number of community members certified in Mental Health and Youth Mental Health First Aid, allowing trainers to network and improve best practices, and keeping those who are trainers certified by working together to meet their annual requirements.

Hult Center for Healthy Living provides space for a partner organization, The Beau Grant Foundation, to host a monthly SOS (Survivors of Suicide) support group that meets the first Wednesday of each month on-site at 5215 N. Knoxville, Ave., Peoria.

**TASK 2:** Establish partners to provide suicide prevention education and training opportunities to providers, medical students, medical staff and community members.

Carle Eureka provided Mental Health First Aid Training to five tri-county community participants in 2023, including two from Peoria County and three from Woodford County.

Carle Health Trillium Place provided Mental Health First Aid Training to 20 resident assistants at Eureka College in 2023. Carle Health Hult Center provided suicide prevention education in 2023 to 5,461 community members including 1,036 attending the Hult Center “Mega Brain” field trip.

Carle Health Hult Center attended the “National Night Out” in Washington, IL, on August 1, 2023, to promote the “Mega Brain” exhibit and local and national mental health resources.

Carle Health Hult Center educated NAMI tri-county board members and volunteers in May 2023 about mental health resources in the community and our collaborative efforts to reduce suicides in the tri-county area.

Carle Health Hult Center provided no-cost QPR (Question, Persuade, Refer) Suicide Prevention Gatekeeper training to:

- Nine NAMI tri-county board members on August 3, 2023.
- 45 University of Illinois College of Medicine medical residents and medical students on August 30, 2023.
- 36 Peoria Public Schools staff on November 13, 2023, and December 4, 2023.

**TASK 3:** Disseminate marketing and recruitment messages to promote mental health prevention education for youth and adults in the tri-county region.

Carle Health Hult Center shared information about the Trillium Place Access Center on Facebook on 9-1-24 and had 63 reach/1 share; Other posts promoting the 988 Lifeline number and local resources were posted on the Hult Center Facebook page throughout the year.

**TASK 4:** Support regional DEI efforts that include LGBTQ+ supports for community and staff.

Carle Health systemwide diversity, equity and inclusion efforts can be found [here](#), including the 2023 annual report.

Carle Health developed a Transgender Care Directory that was shared among community partners, on the website and via social media.

Carle Health Hult Center provided Safe Zone to eight Bradley University students in 2023.

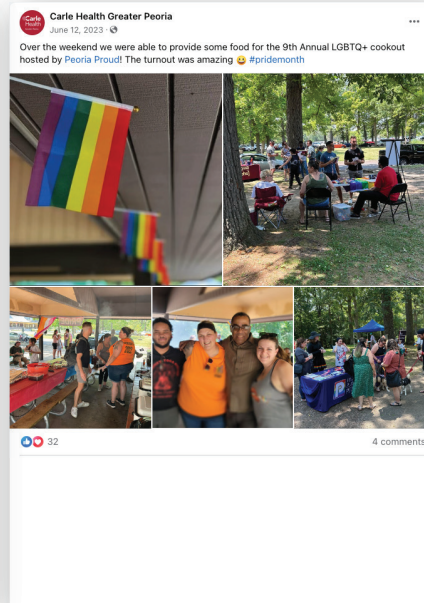
Carle Health supported the 9th Annual LGBTQ+ Cookout on June 12, 2023, hosted by Peoria Proud.

**TASK 5:** Share success stories of the mental health prevention education efforts within the tri-county area.

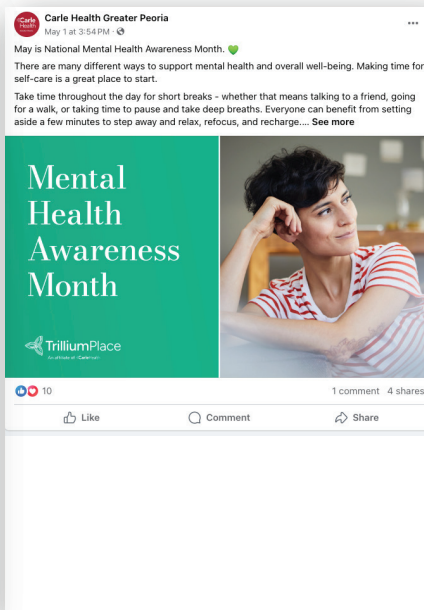
There were no success stories shared in Year 1.

# SOCIAL MEDIA

Carle Health supports LGBTQ+ health and community.



## Mental Health and Young Minds Center







# TrilliumPlace

Young Minds Center

An affiliate of  CarleHealth





# Obesity

## Carle Health Lead Departments

- Clinic Operations.

## Other Departments/Resources Involved

- Family Medical Center (FMC).
- Hult Center for Healthy Living.
- Optimum Health Solutions.
- Pediatric Providers (Pekin Pediatric Clinic).
- School-Based Health Centers.
- Weight Loss Clinic.
- Wellness Center.



**Identified Need:** Obesity has been identified as a priority health issue in the tri-county area. The effects of obesity include health conditions, lower quality of life and reduced lifespan, and it's one of the leading causes of preventable death in the United States. According to the 2022 Community Health Needs Assessment, Peoria County has seen an increase in the number of people diagnosed as overweight or obese from 64.4% in 2010 to 2014 to 64.6% in 2015 to 2019. Tazewell and Woodford counties have seen a decrease in these time frames. All three counties are slightly below the state average of 65.7%

(2015-2019). In the 2022 CHNA survey, respondents indicated that being overweight was their most prevalent diagnosed health condition.

**Target Populations:** There are significant differences in sex, age, housing and county of residence by weight status. Those who are female, older in age, lived in Tazewell County or reported unstable housing more often reported being overweight. Moreover, those who were homeless more often reported they were not overweight.

## Obesity Goals and Objectives:

<b>GOAL</b>	Reduce the proportion of residents with obesity (defined as overweight and obese) in the tri-county region.
<b>OBJECTIVE 1</b>	By December 31, 2025, reduce the proportion of adolescents with obesity in the tri-county region by 1%. (Baseline: High school students who had obesity-PC 14%, TC 13%, WC 9%, IL 15%, US 16% CDC 2019 YRBS).
<b>OBJECTIVE 2</b>	By December 31, 2025, reduce the proportion of adults (women) with obesity in the tri-county region by 2%. (Baseline: PC 64.6%, TC 64.8%, WC 64.8%, IL 65.7% IFRFSS 2015-2019).



## STRATEGY 1

### Support tri-county PFHC's CHIP efforts: Digital Health Interventions and Strong People – Healthy Weight.

**TASK 1:** Identify key staff to participate in PFHC Obesity Action Team.

Hult Center and the Weight Loss Clinic have been actively engaged in the PFHC Obesity Action Team meetings. They are tracking their time on their efforts for community benefit. Conversations are ongoing, and efforts are being made to improve coordination and capacity. A total of 36 staff hours were dedicated to PFHC's Obesity Action Team in 2023.

**TASK 2:** Disseminate PFHC campaign and recruitment messages to promote Digital Health Interventions and Strong People – Healthy Weight.

PFHC did not launch any campaigns in 2023 as interventions were being planned and not implemented during Year 1.

**TASK 3:** Partner with PFHC and community resources to promote intervention strategies.

No intervention strategies were promoted during Year 1 planning year.



## STRATEGY 2

### Reduce the proportion of adolescents with obesity through individualized health coaching for adolescents

**TASK 1:** Collect baseline data.

WELL (Wellness Education and Lifestyle Learning) program at Hult Center reached over 65 youth and adolescents last year providing individual health coaching sessions for those diagnosed as at risk for type 2 diabetes or obese. Health coaching took place at all three Carle Health School-Based Health Centers and at Hult Center. Referrals to the program were received from Carle Health pediatric primary care providers, medical residents at FMC, and Carle Health School-Based Health Center providers. Hult Center had 26 new patients referred between July 1, 2023, and December 31, 2023, and the referrals are increasing.

**TASK 2:** Develop recruitment campaign in tri-county area.

Hult Center leadership and the WELL program coordinator actively engaged in meetings with providers in 2023 and maintained ongoing conversations to ensure a steady flow of referrals. Also, Hult Center health educators have participated in numerous youth and adolescent health events throughout 2023, promoting the program to the target demographic.

**TASK 3:** Establish provider referral protocol.

Adolescents enrolled in the WELL one-on-one health coaching program were referred via the Epic EMR system. To be eligible for referral, they must have been either diagnosed as at risk for type 2 diabetes or have a body mass index (BMI) of 98% or higher.

**TASK 4:** Partner with community resources to educate about the Hult Center WELL adolescent health coaching program to increase referrals and establish coaching locations.

In 2023, Hult Center staff forged collaborations with various community partners to enhance the visibility of the WELL program and to facilitate the establishment of coaching sessions. Notable partnerships were established with Peoria School District 150 and FMC.

**TASK 5:** Provide individualized health coaching to adolescents at risk for developing type 2 diabetes.

WELL program at Hult Center reached over 65 youth and adolescents last year, providing individual health coaching sessions for those diagnosed as at risk for type 2 diabetes or obese.

**TASK 6:** Share success stories of the program within the tri-county area.

1) This year, a 14-year-old freshman student was referred to the WELL program through Manual High School's School-Based Health Center. During her school physical, she was diagnosed as being at risk for type 2 diabetes due to being obese and having several biometric markers. When the provider was reviewing possible interventions with the client and her caregiver, the client and caregiver specifically requested to be placed into the WELL program. This was a huge testament to the program as the family requested support because the client's sister was one of the first enrolled in the program when it was newly launched, and she was able to establish and maintain healthy habits and a healthy BMI.

2) One of WELL's success stories comes from WELL's youngest client so far. The client is currently in first grade. He is 6 years old, and at the first WELL consultation, he did not know what health meant, did not understand MyPlate or the five food groups, and couldn't put a food in a food group. Additionally, he did not understand the concept of a goal. Since then, he has had five WELL coaching sessions and has learned some of the importance of drinking water regularly and has learned what MyPlate is – and can describe in detail three of the five food groups, provide an example of a food and place it in a food group. Additionally, he's able to understand what a goal is, and his educator now sets a regular biweekly goal with the client. The educator plans to keep working with this client to identify barriers to potential health success and provide education, encouragement and discussion to empower him to a healthier life.



### STRATEGY 3

Reduce the proportion of adults with obesity through individualized support for weight loss.

**TASK 1:** Collect baseline data.

The Carle Health Weight Loss Clinic is not a free service; however, the team is tracking data due to the significant amount of weight lost among adult patients. Furthermore, community health data demonstrates that obesity is not limited to low-income residents and spans across counties and diverse areas. The Weight Loss Clinic conducted 55 new-patient consultations in 2023, 48 (87.2%) of which were considered to be in "metabolic crisis," five (9.0%) were considered having "severe imbalance" and one (1.8%) was "moderate imbalance." Forty-two (76.4%) of the 55 patients completed the program, and eight (14.5%) were discontinued due to the program ending.

Of the 42 patients who completed the program, the total starting cumulative weight among participants was 10,480 pounds. The total weight loss was 816.4 pounds (7.79%).

**TASK 2:** Launch weight loss clinic for adults.

The Carle Health Weight Loss Clinic was launched and operated in 2023; however, services concluded in December 2023.

**TASK 3:** Launch outreach body-composition scanning program to tri-county area.

Body-composition scanning was launched in 2023; however, WellMobile services concluded in fall 2023.

**TASK 4:** Develop recruitment campaign in tri-county area.

N/A; this effort concluded in December 2023.

**TASK 5:** Share success stories of the programs within the tri-county area.

N/A; this effort concluded in December 2023.

# Performance Management: Cancer

## Carle Health Lead Departments

- Oncology.

## Other Departments/Resources Involved

- North Allen.
- Hult Center for Healthy Living.
- Carle Health Pekin Hospital.
- Marketing.
- Tazewell County Health Department.
- Carle Health Methodist Hospital.
- Heartland Health Services.



**Identified Need:** Cancer was a priority concern identified in the previous CHIP cycle. Efforts will continue as “performance management” to ensure cancer interventions are continuing to make a positive community impact.

**Target Populations:** Cancer rates in Peoria County are higher than in the state of Illinois, and Tazewell County reports significantly higher rates of lung and breast cancer compared to the state of Illinois. Breast cancer screenings tended to be lower for women in unstable housing (home-

less) and those who live in the Peoria/West Peoria region. Colorectal cancer screenings tended to be less for those in an unstable housing environment and for residents who live in the Peoria/West Peoria or the Western Tazewell County areas. Smoking (lung cancer risk) was rated higher for residents with less education and those with lower income, as well as for those who live in the Peoria/West Peoria and Bartonville/Limestone regions.

## Cancer Goals and Objectives:

<b>GOAL</b>	Reduce the illness, disability and deaths caused by lung, breast and colorectal cancer in the tri-county region.
<b>OBJECTIVE 1</b>	By December 31, 2025, reduce the female breast cancer death rate in the tri-county region by 1%. (Baseline: 19.7 per 100,000 in 2018; PC 20.6, TC 20.6, WC 22.9).
<b>OBJECTIVE 2</b>	By December 31, 2025, reduce colorectal cancer death rate in the tri-county region by 1%. (Baseline: 13.4 per 100,000 in 2018; PC 11.6, TC 13.8, WC 12.1).
<b>OBJECTIVE 3</b>	By December 31, 2025, reduce lung cancer death rate in the tri-county region by 1%. (Baseline: TBD).
<b>OBJECTIVE 4</b>	By December 31, 2025, increase genetic screenings to identify high-risk patients (all cancers) in tri-county region by 1%. (Baseline: 34.8 per 100,000 in 2018; PC 39.2, TC 41.8, WC 36.9).



## STRATEGY 1

Support tri-county PFHC's Cancer Performance Management efforts – routine cancer screenings, improving community health, and reducing transportation and lodging barriers for active cancer patients.

**TASK 1:** Identify key staff to participate in/lead PFHC Cancer Action Team.

Carle Health identified the Oncology department's director to lead the PFHC Cancer Action Team for the 2023-2025 CHIP cycle. Anne Bowman, director of oncology, co-chaired the PFHC's Cancer Action Team alongside Tenille Oderwald from OSF Saint Francis Medical Center.

**TASK 2:** Disseminate PFHC campaign and recruitment messages to promote intervention strategies.

The tri-county regional Illinois Tobacco-Free Communities team at Hult Center for Healthy Living promoted the Illinois Tobacco Quitline and smoke-free/tobacco-free policies to increase strategies on reducing secondhand-smoke exposure and promoting lung health. Messaging was consistent among all partners including Hult Center, Woodford County Health Department, Peoria City/County Health Department and Tazewell County Health Department, as well as PFHC.

Illinois Tobacco-Free Communities promoted a radio ad campaign to promote smoke-free/tobacco-free campuses for three local radio stations – 97.3, 105.7 and 92.3 – and to promote lung health.

Carle Health introduced strategies to promote cancer screenings through social media platforms.

**TASK 3:** Partner with PFHC and community resources to promote intervention strategies.

Carle Health Hult Center partnered with Illinois Tobacco-Free Communities tri-county partners (Peoria City/County Health Department, Tazewell County Health Department and Woodford County Health Department) to promote smoking restrictions and policies to reduce the risk of lung cancer in the community. Hult Center also partnered with the American Cancer Society to increase lung cancer screening rates and connected with Heartland Health Services to increase breast cancer screening rates.



## STRATEGY 2

Increase the number of cancer screenings (breast, colorectal, and lung) to decrease cancer deaths.

**TASK 1:** Collect baseline data.

Carle Health collected baseline data to determine community areas of concern. Data included death rates among individuals with breast, colorectal and lung cancer. Data includes:

- Breast cancer baseline rates from 2018 were 19.7 per 100,000 females.
- Colorectal cancer rates from 2018 were 13.4 per 100,000 individuals.
- Lung cancer rates from 2018 were 34.8 per 100,000 individuals.

**TASK 2:** Develop recruitment campaign in tri-county area.

Partnered with Tazewell County Health Department, Peoria City/County Health Department and OSF HealthCare to establish an informational flier and recruit clients for the cancer screening events in 2023.

**TASK 3:** Track screening data internally and externally and monitor progress.

Data collected after the screening day events reported that 71% of adults ages 50 to 75 were screened for colorectal cancer, 38,000 mammogram screenings were performed for women ages 50 to 74, and 4,700 lung cancer screenings were performed for the tri-county regional area.

**TASK 4:** Share success stories of the program within the tri-county area.

There were no success stories shared in Year 1.



## STRATEGY 3

Collaborate with community partner agencies to offer community-wide cancer screening events and education.

**TASK 1:** Create planning committee to plan annual screening and education events.

A planning committee was created in early 2023 to plan annual screening and education events. The planning committee included North Allen, Hult Center for Healthy Living, Carle Health Pekin Hospital, Marketing, Tazewell County Health Department and Carle Health Methodist Hospital.

Team met quarterly to integrate strategies for the screening day and educational events.

The planning committee constructed reach-out efforts to collaborate services and health education across the PFHC and tri-county health departments to promote evidence-based programming for the day of the events.

Provided American Cancer Society educational materials on the day of the events, promoted tobacco-cessation programming including the Illinois Tobacco Quitline and involved community health educators as partnership volunteers to collaborate on the day of the event.

On the day of the event, community partners were divided into tables that focused on certain education compartments. The focus of the health education tables were breast, lung, colorectal and skin cancers; genetic testing; and nutrition health. Clients were given passports stamped by each health education table. If clients stopped at each table, they were incentivized to enter a raffle to win health-promoting baskets.

**TASK 2:** Develop recruitment campaign for tri-county area.

Two recruitment campaigns were launched in 2023 to recruit eligible patients for the two cancer screening days in May and November.

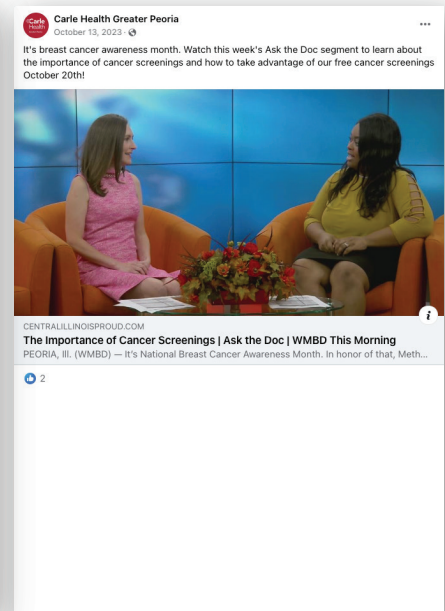
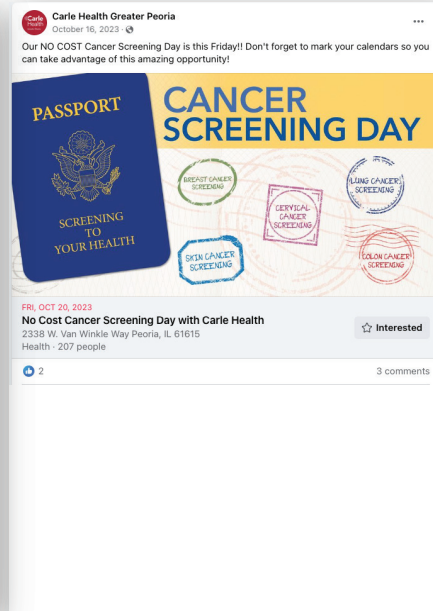
Dr. Christina Wigginton, radiologist at Carle Health Greater Peoria, was showcased on WMBD's "Ask the Doc" news segment on October 12.

The Carle Health team promoted the event on social media platforms, through the Carle Health employee page and through the local news channel to encourage site visits and recruitment efforts for screening days.



# SOCIAL MEDIA

## Cancer Screening Day on October 20, 2023



**TASK 3: Complete annual events.**

Free walk-in mammogram event was held on October 20, 2023.

Two cancer screening days were completed in May and November 2023.

Results of the May cancer screening event at Carle Health Pekin Hospital:

- Cervical cancer screenings – 10 total, two abnormal with follow-ups and one patient for HPV.
- Skin cancer screenings – 60 total, 17 abnormal with follow ups.
- Colorectal cancer screenings – 19 FIT kits distributed.
- Lung cancer screenings – 15 total, six abnormal requiring follow ups; one patient referred to SOC; three patients referred to Lung Nodule Clinic.
- Breast cancer screenings – 25 total, three abnormal requiring follow ups, one cancer diagnosis.

Results of the October cancer screening event at North Allen:

- Cervical cancer screenings – seven total.
- Skin cancer screenings – 44 total, 14 abnormal with follow ups.
- Colorectal cancer screenings – 19 FIT kits distributed.
- Lung cancer screenings – 15 total.
- Breast cancer screenings – 22 total, one abnormal requiring follow up.
- Genetic breast cancer screenings – 20 total, 13 requiring follow ups.

**TASK 4: Share success stories of the programs within the tri-county area.**

The Cancer Action Team shared 2023 successes at PFHC's annual meeting on March 7, 2024. This meeting included 79 representatives from diverse sectors and partner agencies. Highlights included regional tobacco-free efforts and outcomes from the 2023 cancer screening events.





## **Methodist Health Services Corporation**

**Methodist Medical Center of Illinois Tax ID 37-0661223**

**Proctor Hospital Tax ID 37-0681540**

**Pekin Hospital Tax ID 37-0692351**

## **Plain Language Charity Care Policy**

# Carle Financial Assistance Programs

At Carle, we believe that the cost of healthcare should not stop anyone from receiving necessary care. Our patients may be able to receive free or discounted care through one of our financial assistance programs. Completing a financial assistance application will help Carle determine if you may be eligible to receive free or discounted services. Additional information such as the Carle Financial Assistance Program application, participating providers, plain language summary and policies are available at [carle.org/financialassistance](http://carle.org/financialassistance).

## Eligible Services

Eligible Services are those services provided in accordance with the generally accepted standards of medical practice by one of the following Carle entities\*:

- Arrow Ambulance, LLC
- Carle Foundation Hospital
- Carle Home Care
- Carle Home Infusion
- Carle Hospice
- Carle Medical Supply
- Carle Physician Group
- Carle Danville Surgery Center
- Carle Champaign Surgery Center
- Carle Therapy Services

## Carle Hoopeston Regional Health Center and Clinic Locations:

- Carle Cissna Park
- Carle Danville Medical Office Center at The Riverfront
- Carle Mattoon on Hurst
- Carle Milford
- Carle Rossville
- Carle Tuscola
- Carle Watseka
- Carle Hoopeston at Charlotte Ann Russell
- Hoopeston Community Memorial Hospital

## Carle Richland Memorial Hospital and Clinic Locations:

- Carle Bridgeport
- Carle Olney - Family Practice Clinic
- Carle Olney - Primary Care Clinic
- Carle Richland Memorial Hospital
- Carle West Salem

## Carle BroMenn Medical Center and Clinic Locations:

- Carle West Physician Group
- Carle BroMenn Outpatient Center
- Carle BroMenn Comfort and Care Suites

## Carle Eureka Hospital and Clinic Locations:

- Carle Eureka
- Carle El Paso

## You can apply for assistance by:

- Downloading an application through Carle's website at [carle.org/financialassistance](http://carle.org/financialassistance)
- Obtaining a financial assistance application at any of our registration desks throughout our facilities and clinics.
- Requesting an application be mailed to you by:
  - Calling Patient Financial Services at (888) 71-CARLE, (888) 712-2753, or
  - Writing Carle Financial Assistance Program at PO Box 4024, Champaign, IL 61824-4024

Eligibility will be determined once a completed application is received by Carle. Staff will review your application, and if approved, match you with the most beneficial financial assistance program at Carle. Patients will not be charged more for care than Amounts Generally Billed (AGB) to those patients who have insurance.

\* Additional providers may provide services at a Carle location who are not participating under the CFAP. View listing of excluded services at [carle.org/FinancialAssistance](http://carle.org/FinancialAssistance).

2023 FPL Guidelines*		Effective date 3/1/2023		
Family Size	200%	300%	400%	600%
1	\$29,160	\$43,740	\$58,320	\$87,480
2	\$39,440	\$59,160	\$78,880	\$118,320
3	\$49,720	\$74,580	\$99,440	\$149,160
4	\$60,000	\$90,000	\$120,000	\$180,000
5	\$70,280	\$105,420	\$140,560	\$210,840
6	\$80,560	\$120,840	\$161,120	\$241,680
7	\$90,840	\$136,260	\$181,680	\$272,520
8	\$101,120	\$151,680	\$202,240	\$303,360
Add per each additional person	\$10,280	\$15,420	\$20,560	\$30,840
Program Eligibility	100% CFAP	CFAP 50% and CHRHC/CRMH IL Uninsured Discount Income Max	CAP 40% of Income	CFH/CBMC/CEH IL Uninsured Discount Income Max

Amounts Generally Billed (AGB) to Carle Financial Assistance Program participants will be determined by Medicare fee-for-service together with all private health insurers, during a prior 12-month period.

1. AGB determined through calculations of sum of all payments plus the sum of all bad debt and charity care adjustments divided by the sum of all charges in the time frame.
2. Time frame included in method is for October 1 through September 30 of the prior calendar year.



## **Methodist Health Services Corporation**

**Methodist Medical Center of Illinois Tax ID 37-0661223**

**Proctor Hospital Tax ID 37-0681540**

**Pekin Hospital Tax ID 37-0692351**

## **Current Charity Care Policy**





## Policy Number AD300

<b>Subject</b>	AD300 - Carle Financial Assistance Program		
<b>Category / Section</b>	Administration / Finance		
<b>Owner</b>	Manager – Self Pay Receivables Management		
<b>Reviewer(s)</b>	Director - Patient Financial Services; VP - Revenue Cycle Operations		
<b>Effective Date</b>	04/10	<b>Review Frequency</b>	3 years
<b>Approval Date</b>	12/21/2021		

<b>Scope of Policy/Procedure (applies to entities/locations marked below)</b>			
This document applies to <u>all</u> entities/locations listed below			
<b>Hospitals</b>	<b>Ambulatory/Off-Campus locations</b>	<b>Other Carle Entities</b>	
All Carle Hospitals listed below:	All Carle ambulatory/off-campus locations listed below:	All other Carle entities listed below:	
X Carle Foundation Hospital (Urbana CFH)	X CFH/CPG ambulatory locations <i>(also includes Home Health, Therapy Services, Medical Supply, Danville Surgicenter, Specialty Pharmacy)</i>	X	Arrow Ambulance, LLC
Carle Hoopston Regional Health Center (CHRHC)	CHRHC ambulatory locations <i>(includes, CARMC, Cissna Park, Danv-Fairchild, Mattoon-Hurst, Milford, Rossville, Tuscola, Watseka)</i>		Carle Retirement Centers <i>(Windsor of Savoy &amp; Windsor Court)</i>
Carle Richland Memorial Hospital (CRMH)	X Champaign SurgiCenter, LLC		Health Alliance Medical Plans
Carle Eureka Hospital (CEH)	Administration Building locations <i>(includes Carle at the Fields)</i>	X	Carle Cancer Institute Normal, LLC
X Carle BroMenn Medical Center (CBMC)	X Carle West Physician Group (CWPG)		FCC – FirstCarolinaCare Insurance Co.
	CRMH Ambulatory locations <i>(includes Bridgeport, Newton, West Salem, Olney, Specialty Services)</i>		CHPP—Carle Health Physician Partners
<b>Scope Exclusions (Mark this box and enter any departments or locations within a marked entity that are exempt from the policy/procedure.)</b>			
Christie Clinic LLC Providers, Life Watch, OSF Providers, Quest Diagnostics, All Other Third Party Providers			

### Attachments

- [AD300B - Carle Financial Assistance Program Limited and Non-Covered Service Listing](#)
- [AD300C – CFAP Area Homeless Shelters](#)

### Purpose

- A. To identify and assist those patients who are uninsured or underinsured and who are financially eligible to receive discounts for specified medical expenses through the Carle Financial Assistance Program. Carle will consider each patient’s ability to contribute to the cost of his or her care received and the financial ability of Carle to provide discounts for the care provided.
- B. All care rendered by an eligible Carle entity, except for services noted in policy AD300B, may be considered through the Carle Financial Assistance Program. Eligible entities are identified above.

### Definitions

- A. **Family/Household Size** - includes those dependents listed on tax returns, divorce decree, or child support order. Defined by the IRS for tax filing purposes under section 36B (d) (1), “a taxpayer’s family consists of the individuals for whom the taxpayer claims a personal exemption deduction under section 151 for the taxable year. Taxpayers may claim a personal exemption deduction for themselves, a spouse, and each of their dependents. Section 152 provides that a taxpayer’s dependent may be a qualifying child or qualifying relative, including an unrelated individual who lives with the taxpayer. Family size is equal to the number of individuals in the taxpayer’s family.”
- B. **Resident** – a person who lives in the state of Illinois and who intends to remain living within Illinois indefinitely. Relocation for the sole purpose of receiving health care benefits does not satisfy the residency requirement.
- C. **Underinsured** - a person without insurance benefits for services provided due to exclusions of coverage by the insurance provider. This does not apply to those circumventing insurance restriction or specification or out-of-network services.

**D. Generally accepted standards of medical practice:**

1. Standards that are based on credible scientific evidence published in peer-reviewed, medical literature generally recognized by the relevant medical community;
2. Physician Specialty Society recommendations;
3. The views of physicians practicing in the relevant clinical area; and
4. Any other relevant factors.

**E. Uninsured patient** - a person who is a patient and is not covered under a policy of health insurance and is not a beneficiary under a public or private health insurance, health benefit, or other health coverage program, including high deductible health insurance plans, workers compensation, accident liability insurance or other third party liability.

**F. Experian Information Solutions, Inc. (Experian)** – is a third party vendor that uses proprietary data analytics to provide unique information related to patients for the purpose of financial assistance and recovery of patient debt.

**Statement of Policy**

- A. Any patient or responsible party may apply for the Carle Financial Assistance Program, regardless of insurance coverage. Patients may apply for the Carle Financial Assistance Program at any time, including before care is received. If approved, the patient is eligible for 12 months from the date of approval.
- B. Certain identified patient populations are presumptively eligible for the Carle Financial Assistance Program. Further detailed information is contained within the [AD355 - Presumptive Eligibility for Financial Assistance](#).
- C. Carle desires that:
1. All patients, regardless of their immigration status or residency, be aware of the Carle Financial Assistance Program and all other financial assistance available at Carle;
  2. For those patients who are eligible to be identified as early in the care, treatment and billing process as possible; and
  3. That the process is as simple as possible for the patient.
- D. An application for government assistance must be completed if the patient appears to meet the eligibility criteria for such assistance. When appropriate, Carle staff or designee will use a screening checklist to assist in determining if the patient would qualify for government assistance.
1. Failure by a patient or responsible party to complete the government program application process and/or failure to cooperate during the application process will result in an automatic denial of financial assistance.
  2. If the patient applies for government assistance, documentation of the determination from the government program is required for reprocessing of the Carle Financial Assistance Program application.
  3. Patients who have a third party payment source that will reimburse more than the government program reimbursement will be excluded from the requirement of applying for government assistance.
- E. Patients who may be eligible for certain third party assistance programs must cooperate with program requirements to maintain eligibility within the Carle Financial Assistance Program.
- F. Patients covered by Medicare Part A or Part B must complete a Carle Financial Assistance application which includes a request that the patient provide a federal tax return and a defined list of assets. This asset list shall include the patient's bank account balances such as checking and savings, money market accounts and certificates of deposit.
- G. The Carle Financial Assistance Program discount amount is dependent on the applicant's household income and family size compared to the currently published Federal Poverty Level guidelines at the time of application.
- \*Exception:** patients covered by Medicare Part A or Part B must also follow the process as outlined in section F above.

CFAP Program Guidelines	Federal Poverty Level			
	≤ 200%	201 - 300%	≤ 400%	≤ 600%
<b>Carle Financial Assistance Program</b>	100% Discount	50% Discount	Yearly expenses capped at 40% of gross annual income.	N/A
<b>Illinois Uninsured Hospital Patient Discount Program</b>	Limits patient's Carle medical expenses to 20% of the household's gross annual income. See policy <a href="#">AD346 - IL Hospital Uninsured Patient Discount Program</a> for additional information.			

1. Consideration for the Carle Financial Assistance Program may occur through the following methods:
  - a. Presumptively through Financial Assistance Screening:
    - Carle will use Experian to identify those patients who may be presumptively eligible for Carle Financial Assistance Program at the 100% discount level.

b. Completing a financial assistance application and returning with required documentation. If a patient has questions regarding the application process, they can visit [Carle.org/FinancialAssistance](http://Carle.org/FinancialAssistance) or contact Carle at (888) 71-CARLE or (217) 902-5675.

- Applications are to be fully completed, signed, and returned with required documentation to:

Carle Financial Assistance Program  
PO Box 4024  
Champaign, IL 61824-4012

- **Resident** – Except for emergent situations outlined below, the Carle Financial Services Program is intended for Illinois residents only.
    - Residency verification documentation - if needed:
      - \* Any document within the income verification listing with a preprinted address
      - \* Valid state-issued identification card
      - \* Recent (last 60 days) residential utility bill
      - \* Valid lease agreement
      - \* Current vehicle registration card
      - \* Voter registration card
      - \* Mail addressed to patient at an IL address from a government office
      - \* Award letter from school
      - \* Statement from a family member that the patient resides at the same address with one of the above residency verifications.
  - Income eligibility will be based on the most current published Federal Poverty Guidelines.
    - Prior year's Federal Tax Return showing all household members and their adjusted gross income.
    - If the guarantor/patient did not file taxes, proof of prior year's income may consist of:
      - \* W2 from all jobs held
      - \* Self-employment income and expenses
      - \* Unemployment compensation
      - \* 1099 forms for the following types of income:
        1. Social Security
        2. Social Security Disability
        3. Veteran's pension
        4. Veteran's disability
        5. Private disability
        6. Worker's compensation
        7. Retirement Income
      - \* Child support, alimony or other spousal support
      - \* Other miscellaneous income sources.
    - If none of the above documents can be supplied, a written statement describing current household size and financial situation.
2. Patients who receive a determination of either an approval or denial under the Carle Financial Assistance Program may reapply after six (6) months from the date of original application signature in the event there are substantial or unforeseen material changes in their financial situation. In the case of extraordinary circumstances, an application may be submitted prior to the six (6) month limitation.
  3. Applicants may appeal the application determination by sending a written appeal to the Manager Self Pay Receivables Management. Further appeals may be directed to the Director Patient Financial Services, may be escalated to either the Vice President of Revenue Cycle Operations, the SVP, Chief Revenue Cycle Officer or the Chief Financial Officer and ultimately to the Community Care Review Committee..
  4. Translated copies of all Carle Financial Assistance Program materials are available in Spanish at [Carle.org/FinancialAssistance](http://Carle.org/FinancialAssistance) or by request to Carle representatives at [FinancialAssistance@Carle.com](mailto:FinancialAssistance@Carle.com) or by phone at (888) 71-CARLE.
- H. The Carle Financial Assistance Program discount will apply to the residual patient balances after all other payments from sources such as Medicare, insurance companies, third party legal settlements, and/or patient funds are received and posted.
1. Patients who purposefully circumvent insurance requirements (i.e. waiting periods, preauthorization, etc.) may be held responsible for the billable services and not receive any discounts on services.

2. Patients, who knowingly provide untrue information on the application for financial assistance, will be ineligible for financial assistance. Any financial assistance granted will be reversed, and the patient will be held responsible for the billable services.
  3. Non-emergent, out-of-network care including out-of-state Medicaid that would be paid by the patient's insurance company elsewhere will not be eligible for the Carle Financial Assistance Program because the patients have the opportunity to have their healthcare needs met at a participating provider.
  4. Emergent out-of-network care for those who qualify will be eligible under the Carle Financial Assistance Program policy guidelines after all other payment sources have been exhausted.
  5. Emergent out-of-state Medicaid patients are not required to complete the Carle Financial Assistance Program application process. They will be approved for a one time discount as eligible under the Carle Financial Assistance Program after proof of coverage is provided and all other payment sources have been exhausted.
- I. Discount will apply to any patient responsible balance retroactively, including those that have been referred to a collection agency if court costs have not yet been incurred. However, an application for government assistance may be requested as stated in C1.
1. Carle will not file collection suit liens on a primary residence.
  2. Carle will not authorize body attachments for purposes of medical debt collection.
- J. Carle will utilize the Centers for Medicare and Medicaid Services coverage guidelines when determining services that qualify for the Carle Financial Assistance Program.
1. Coverage will apply to health care services that a physician, exercising prudent clinical judgment, would provide to a patient for the purpose of evaluating, diagnosing or treating an illness, injury, disease or its symptoms;
  2. In accordance with the generally accepted standards of medical practice;
  3. Clinically appropriate, in terms of type, frequency, extent, site and duration, and considered effective for the patient's illness, injury or disease; and
  4. Not primarily for the convenience of the patient, family or physician and not more costly than an alternative service or sequence of services at least as likely to produce equivalent therapeutic or diagnostic results as to the diagnosis or treatment of that patient's illness, injury or disease.
- K. Carle Financial Assistance Program will not cover cosmetic, elective or non-medical retail services.
- L. Amounts Generally Billed (AGB) to Carle Financial Assistance Program participants will be determined by Medicare fee-for-service together with all private health insurers, during a prior 12-month period.
1. AGB determined through calculations of sum of all payments plus the sum of all bad debt and charity care adjustments divided by the sum of all charges in the time frame.
  2. Time frame included in method is for October 1 through September 30 of the prior calendar year.
- M. Patients who have been approved for the Carle Financial Assistance Program may re-apply annually from the date of original application approval. Carle Foundation will attempt to notify patients by mail 90 days before the current termination date of eligibility in the Carle Financial Assistance Program.

## Procedure

- A. Patients with financial concerns should be identified by Carle personnel as soon as possible in the registration, care, treatment or billing process.
1. A referral to Social Services, other pertinent staff or directly to a government program should be completed in order to obtain a determination of eligibility for Public Assistance.
    - a. Patients who fail to cooperate with the government program during the application process will automatically be denied for the Carle Financial Assistance Program.
    - b. If the patient does not meet the eligibility criteria for a government program or if they have a spend-down, they may be eligible for a Carle Financial Assistance Program discount.
  2. Patients are encouraged to apply for the Carle Financial Assistance Program within 90 days after discharge or provision of service. The application for the Carle Financial Assistance Program will be available on the Carle website [Carle.org/FinancialAssistance](http://Carle.org/FinancialAssistance), in all registration areas, the Patient Financial Services offices, Cashier areas and Social Services.
  3. Upon receipt of the Carle Financial Assistance Program application by Self Pay Receivables Management staff, EPIC Prelude and Resolute systems will be noted:
    - a. All collection activity will be held until the application processing is completed.
    - b. Application and supporting documentation will be scanned into OnBase and the paper copies destroyed.
    - c. Applicant will be notified of any missing documentation.
    - d. If the missing documentation is not returned within 30 days, a notification letter will be mailed to the applicant that indicates billing will commence.
  4. The completed application should include:
    - a. A fully filled in application with verification of the number of family/household members;
    - b. Signature of the applicant; and

- c. Prior year's tax return or other income verification for all wage earners in the family/household.
  - Parents' income will be used to determine financial eligibility for students who are over age 18 but still claimed as dependents for their parents' income tax purposes.
- B. When the application has been processed and the determination is made, a record of each application and associated documentation will be maintained by fiscal year.
  - 1. Applications received prior to April 23, 2013 are maintained in paper form and warehoused.
  - 2. Applications received on or after April 23, 2013 are maintained electronically within OnBase.
- C. All efforts will be made to send written determination to the applicant within 30 working days of receipt of the completed application. If the application is approved, the patient's account will be adjusted as soon as possible thereafter to reflect the discount.
- D. Patients who qualify for a partial discount of the balance will be required to pay the remainder due, as with other private pay accounts. Balances billed to a Carle Financial Assistance Program participant will not exceed amounts generally billed to other patients. See the [AD335 - Payment Policy](#) and [AD336 - Self-Pay Billing and Collection Policy](#).
- E. When Carle Foundation receives an application for the Financial Assistance Program that indicates treatment at any applicable Carle Foundation facility, the application, verification and determination will be applied to all other applicable Carle businesses.
- F. Information related to the Carle Financial Assistance Program will be regularly reported to the Director Patient Financial Services and the Senior Vice President Revenue Cycle Operations including:
  - 1. Adjustments
  - 2. Number of paper applications received
  - 3. Approvals
  - 4. Denials
  - 5. Backlogs
  - 6. Quality assurance measures

#### **Other Related Links**

[AD337 - Carle Regional Financial Assistance Program](#)

[Plain Language Summary - X0873](#)

[Non-Participating Provider List - X0271](#)

#### **References**

- 210 ILCS 88/27 – Fair Patient Billing Act (Illinois Public Act 96-965)
- 210 ILCS 89 – Hospital Uninsured Patient Discount Act
- [79 FR 78953 - Federal Register, Department of the Treasury \(IRS 501r Rules and Regulations\)](#)

#### **Electronic Approval on File**

Dennis Hesch

Executive Vice President/Chief Financial Officer

## **Carle Financial Assistance Program Area Homeless Shelters/Transitional Housing**

**Courage Connection:** Houses women and children (males up to age 17 with their mothers) fleeing domestic abuse and sexual assault.

Mailing Address: 1304 E. Main

Urbana, IL 61802

Phone Number: (217) 384-4462, domestic violence business office

Fax Number: (217) 384-4383

Service Area: Champaign, Piatt, Ford and Douglas counties

**City of Urbana-Transitional Housing Program for Homeless Families:** Provides housing and support services to selected homeless families with dependent children who have been residents of Champaign County for at least three months.

Mailing Address: 400 S. Vine St.

Urbana, IL 61801

Phone Number: (217) 328-8263

Fax Number: (217) 384-2367

Service Area: Champaign County

**Danville Rescue Mission:** Emergency and transitional shelter for single men.

Mailing Address: 834 N. Bowman Avenue

Danville, IL 61832

Phone Number: (217) 446-7223

**Dayspring Women & Children's Shelter:** Homeless Women & Children's Shelter- small shelter.

Mailing Address: 213 Bowmen Ave.

Danville, IL 61832

Phone Number: (217) 274-7424

**Jesus is the Way Prison Ministries, Inc.:** Provides follow-up assistance to just-released male inmates with employment, housing, food and spiritual needs.

Mailing Address: 602 S. Liberty Ave.

Rantoul, IL 61866

Phone Number: (217) 892-4044

Fax Number: (217) 892-5995

**Mattoon Public Action to Deliver Shelter (PADS):** Homeless shelter and food bank in Mattoon.

Mailing Address: 2017 Broadway Ave.

Mattoon, IL 61938

Phone Number: (217) 234-7237

**Restoration Urban Ministries:** Offers transitional housing, food pantry, clothing, substance abuse classes, and many other programs to assist teens, men and women.

Physical Address: 1213 Parkland Court

Champaign, IL 61820

Mailing Address: PO Box 3277

Champaign, IL 61826-3277

Phone Number: (217) 355-2662

**Safe Housing:** Temporary shelter for victims of domestic violence and sexual assault- UIUC Students Only

Mailing Address: Safe Housing

Family and Graduate Housing

1841 Orchard Place

Urbana, IL 61801

Phone Number: (217) 33-1216 (UIUC PD) Intake



**Salvation Army Stepping Stone Program:** Provides temporary and transitional housing for homeless men (18 and older) on a nightly basis. Men, Women & Families who comment to working the program. Can only house 2 families/individuals at a time.

Mailing Address: 2212 N. Market  
Champaign, IL 61822  
Phone Number: (217) 373-7830  
Fax Number: (217) 373-8441

**CU at Home:** Phoenix Day Drop-In Center (Tuesday – Friday 12p-5pm); Austin’s Place- Sober Women’s Shelter (must due intake during day hours) (Tuesday – Friday 12p-4pm); Men’s Sober Shelter is open every night 8:30pm-7:30am (must due intake during day hours) (Tuesday – Friday 12p-4pm)

Mailing Address: 70 E. Washington  
Champaign, IL 61820  
Phone Number: (217) 819-4569  
Emergency Number: (217) 888-0329

**Crosspoint at the Y—Residential Program:** Dormitory style housing for 23 homeless, self-sufficient women (18 and older); Domestic Violence Shelter & Transitional housing

Mailing Address: 201 N. Hazel Street  
Danville, IL 61832  
Phone Number: (217) 709-0331  
Fax Number: (217) 443-6845

## Bloomington Area Homeless Shelters/Transitional Housing

**Home Sweet Home Ministries:** Provides case management and other supportive services to the homeless such as shelter, hot meals, access to clothing and toiletries, and job training. Our goal is to help people find independence, restore their hope and share the love of Jesus Christ with them.

**Phone:** 309-828-7356 **Address:** 303 E. Oakland Avenue, Bloomington, IL 61701

**Website:** [Home Sweet Home Ministries - Humbly Serving Bloomington-Normal \(hshministries.org\)](http://HomeSweetHomeMinistries-HumblyServingBloomington-Normal(hshministries.org))

**Neville House Shelter:** Residents staying at Neville House work closely with a trained domestic violence advocate that will assist in finding resources for housing, childcare, employment, legal representation, transportation, and enhancement of life skills. Twenty-four hour emotional and educational support is available to assist individuals and families response to crisis and increase self-sufficiency.

**Phone:** 309-827-7070

**Address:** 1301 West Washington Street, Bloomington, IL 61701

**Website:** [Neville House Shelter - Domestic Violence Crisis Assistance \(mccainc.org\)](http://NevilleHouseShelter-DomesticViolenceCrisisAssistance(mccainc.org))

**Salvation Army Safe Harbor Shelter:** Services offered include emergency shelter, transitional housing, casework services, and food & nutritional programs.

**Phone:** 309-829-7399

**Address:** 601 West Washington Street, Bloomington, IL 61701

**Website:** [Bloomington \(salvationarmy.org\)](http://Bloomington(salvationarmy.org))

**Project Oz:** Homeless youth between the ages of 17-23. Offer survival aid, help finding and keeping a job, safety planning, GED enrollment, legal aid, medication connections, emotional support, and we’ll work to connect you to housing.

**Phone:** 309-827-0377; there is a 24-hour crisis worker who can talk to you about emergency housing by calling 2-1-1 anytime of night or day.

**Address:** 1105 W Front St., Bloomington, IL 61701

**Website:** [Housing and Homeless Resources | Project Oz](http://HousingandHomelessResources|ProjectOz)

**Oxford House Bloomington:** Males only. A concept in recovery from drug and alcohol addiction. In its simplest form, an Oxford House describes a democratically run, self-supporting and drug free home. Fill out application and set up interview.

**Phone:** 309-829-5014

**Address:** 501 McLean, Bloomington, IL 61701

**Website:** [Oxford House](http://OxfordHouse)

**Oxford House West Bloomington:** Women only. A concept in recovery from drug and alcohol addiction. In its simplest form, an Oxford House describes a democratically run, self-supporting and drug free home. Fill out application and set up interview.

**Phone:** 309-808-1632

**Address:** 704 W Scott Street, Bloomington, IL 61701

**Website:** [Oxford House](#)

**YWCA Labyrinth House:** A transitional living program for formerly incarcerated McLean County women. Residents live in a shared two-bedroom furnished apartment and receive on-site support from residential counselors each evening. Residents have access to economic/employment resources and a counselor/case manager. Residents are able to increase their privilege level over time and can remain for up to two years.

**Phone:** 309-662-0461

**Address:** 1201 North Hershey Road, Bloomington, IL 61704

**Website:** <https://ywcamclean.org/what-we-do/prevention-and-empowerment-services/labyrinth/>



<b>Title</b>	FIN - Presumptive Eligibility for Financial Assistance				
<b>Region</b>	Carle Health Central - BroMenn, Carle Health Central - Eureka, Carle Health East, Carle Health South				
<b>Scope</b>	All Entities				
<b>Document type</b>	Policy & Procedure				
<b>Owner</b>	Jodi Eeten (Mgr - Fin Svc Self Pay Rec)				
<b>Reviewer(s)</b>	Dawn Walden (Sr VP & Chief Revenue Cycle Officer), Renita Jackson (Dir - Financial Services)				
<b>Approver(s)</b>	APM Administrators, Dennis Hesch (Exec VP & Chief Finance and Strategy Officer)				
<b>Effective Date</b>	02/27/2014	<b>Next Review Date:</b>	08/02/2026	<b>Approval Date</b>	08/02/2023

**ATTACHMENTS** N/A

**PURPOSE/ SCOPE**

- A. To identify and assist those patients where financial need has been determined by other means outside of the Carle Financial Assistance application.
- B. Certain identified patient populations are presumptively eligible for the Carle Financial Assistance Program or Carle Regional Financial Assistance Program.
  - 1. Experian Financial Assistance Screening - Probable
  - 2. Homelessness
  - 3. Deceased with no estate
  - 4. Mental incapacitation with no one to act on patient’s behalf
  - 5. Illinois Medicaid eligibility
    - a. Title XIX
    - b. Title XXI
    - c. In-network Medicaid Managed Care plans
  - 6. WIC (Women, Infants and Children Nutrition Program)
  - 7. SNAP (Supplemental Nutrition Assistance Program)
  - 8. LIHEAP (Low Income Home Energy Assistance Program)
  - 9. Illinois Free Lunch and Breakfast Program
  - 10. Frances Nelson Health Center discount referral
  - 11. Community Health Care Clinic Referral
  - 12. Receipt of grant assistance for medical services

**DEFINITIONS**

- A. **Family/Household Size** - includes those dependents listed on tax returns, divorce decree or child support order. Defined by the IRS for tax filing purposes under section 36B (d) (1), “a taxpayer’s family consists of the individuals for whom the taxpayer claims a personal exemption deduction under section 151 for the taxable year. Taxpayers may claim a personal exemption deduction for themselves, a spouse, and each of their dependents. Section 152 provides that a taxpayer’s dependent may be a qualifying child or qualifying relative, including an unrelated individual who lives with the taxpayer. Family size is equal to the number of individuals in the taxpayer’s family.”
- B. **Resident** – a person who lives in the state of Illinois and who intends to remain living within Illinois indefinitely. Relocation for the sole purpose of receiving health care benefits does not satisfy the residency requirement.
- C. **Experian Information Solutions, Inc. (Experian)** – is a third party vendor that uses proprietary data analytics to provide unique information related to patients for the purpose of financial assistance and recovery of patient debt.

**STATEMENT OF POLICY**

- A. The Carle Foundation Hospital and other participating Carle entities (a.k.a. Carle) desire that all patients be aware of the various forms of assistance available.
- B. Carle will strive that those eligible for assistance be identified as early in the care and billing process as possible, and that the process be as simple as possible for the patient.

**PROCEDURE**

- A. Patients who appear to need financial assistance should be identified by Carle personnel as soon as possible in the registration, care, treatment or billing process.
- B. The following will serve as documentation of inclusion for certain presumptively eligible patients. This documentation is to be submitted to Self Pay Receivables Management for administration and management of the various discount programs at Carle.

1. Experian Financial Assistance Screening
  - a. Result of Probable with a low likelihood of payment
  - b. Documentation within the Experian web portal and/or Epic Prelude
2. Homelessness
  - a. Medical documentation of homeless status
  - b. Letter from local area shelter
3. Deceased with no estate
  - a. Death certificate
  - b. Deceased Patient Application Form
4. Mental incapacitation with no one to act on patient's behalf
  - a. Verification by Carle Social Worker or other qualified medical staff
  - b. Court documentation
5. Illinois Medicaid eligibility
  - a. HFS.com online verification.
6. WIC (Women, Infants and Children Nutrition Program)
  - a. Indication of participation on Carle Financial Assistance Program application
  - b. Copy of current participation document
  - c. Letter from WIC office
7. SNAP (Supplemental Nutrition Assistance Program)
  - a. Indication of participation on Carle Financial Assistance Program application
  - b. Copy of award letter
8. LIHEAP (Low Income Home Energy Assistance Program)
  - a. Indication of participation on Carle Financial Assistance Program application
  - b. Copy of award letter
9. Illinois Free Lunch and Breakfast Program
  - a. Indication of participation on Carle Financial Assistance Program application
  - b. Copy of award letter
    - Current exclusion: School districts that are approved to provide the IL Free Lunch and Breakfast Program to all school members are excluded from presumptive qualification. Listing published by State of Illinois Board of Education.
10. Frances Nelson Health Center discount referral
  - a. Discount referral form to Carle from Frances Nelson
11. Community Health Care Clinic Referral
  - a. Discount referral form to Carle from Community Health Care Clinic
12. Receipt of grant assistance for medical services
  - a. Copy of award letter

**OTHER RELATED LINKS AS APPLICABLE TO SITE**

**- ALL policies and links in process of being updated to include BRAVO entities.**

[FIN - Carle Financial Assistance Program](#)

[FIN - Carle Regional Financial Assistance Program](#)

[FIN - IL Hospital Uninsured Patient Discount Program](#)

[FIN - Self-Pay Billing and Collection Policy](#)

**REFERENCES**

- 210 ILCS 88/27 – Fair Patient Billing Act
- 210 ILCS 89 – Hospital Uninsured Patient Discount Act
- [79 FR 78953 - Federal Register, Department of the Treasury \(IRS 501r Rules and Regulations\)](#)



## **Methodist Health Services Corporation**

**Methodist Medical Center of Illinois Tax ID 37-0661223**

**Proctor Hospital Tax ID 37-0681540**

**Pekin Hospital Tax ID 37-0692351**

## **Community Benefit Narrative**

**Methodist Health Services Corporation**  
**(“Carle Health”)**  
**2023 Community Benefits Statement**

Carle Health - Methodist is a non-profit organization founded in 1900. The Medical Center is licensed for 349 beds. Methodist is a fully integrated healthcare organization offering acute care, obstetrical services, behavioral health care, post-acute care, wellness and prevention, physician offices, outpatient clinics, home care, and hospice.

Carle Health - Proctor is licensed for 185 beds. Proctor is a fully integrated healthcare organization offering acute care, behavioral health care, wellness and prevention, physician offices, and outpatient clinics.

Carle Health - Pekin is licensed for 85 beds. Pekin is a fully integrated healthcare organization offering acute care, wellness and prevention, physician offices, and outpatient clinics.

With 4,000+ full and part-time employees, Carle Health is the third largest employer in the Peoria/Pekin MSA.

As measured by both revenue and activity, Carle Health is the second largest healthcare provider in Central Illinois. In 2023, Carle Health – Peoria Region served 18,653 inpatients; 363,788 outpatient visits; 80,471 emergency visits; 32,466 home care visits; and 552,519 physician visits. Carle Health’s primary service area consists of Fulton, Peoria, Tazewell, and Woodford Counties. This geographic region represents 85% of all hospital admissions. The secondary service area includes 14 Central Illinois counties. Combined, Carle Health serves a population of nearly 1.0 million people.

## **Charity Care**

Provision of charity care is identified through careful monitoring of economic trends and availability of insurance from various sources. Screening of individuals identified as unable to pay the full cost of services is initiated by financial counselors. In addition, any employee may identify a potential charity need because of unanticipated medical care combined with the inability to pay.



## **Charity Care (continued)**

Communication of the availability of this program occurs through brochures distributed to patients at various locations within Carle Health, signs at certain locations, patient statements, telephone communications, Carle Health website and financial screening activities. In addition, identification may occur during billing and collection functions that identify inability to pay.

Access to this program is available through every point of entry into Carle Health including the emergency departments, outpatient services areas, and inpatient registration and through various hospital-operated clinics and physician offices.

During the charity care application process, the patient is asked to document their current economic status. The patient or responsible party may request a Finance Assistance Form and guidelines for Charitable Consideration at any time and at any point of entry into the Carle Health system, i.e., prior to or at the time of admission/registration, upon receipt of final bill or first statement, and at any point during the collection process. Carle Health will waive some or all charges based on the comparison of the patient's current economic status to the current Federal Poverty Guidelines and/or review of credit rating reports. In 2023, Carle Health total cost of uncompensated charity care provided was \$2,382,785

## **Language Assistance Services**

Carle Health provides interpreters or the use of a language assistance telephone service for its non-English speaking patients. In 2023, Carle Health provided \$23,528 in language assistance services to its patients.

## **Excess of Costs Over Reimbursement for Government Sponsored Programs**

Carle Health provides care to certain patients under payment arrangements with Medicare, Medicaid, and certain other government-sponsored programs. Services provided under these arrangements are paid at predetermined rates as defined by the programs.

The Medicare and Medicaid programs accounted for 70.9% of Carle Health gross patient revenue in 2023. Carle Health is paid below levels that fully compensate it for the underlying costs to provide care to Medicare and Medicaid beneficiaries. In 2023, the excess cost over reimbursement was \$26,030,717 for Medicare and was \$28,873,163 for Medicaid.

## **Donations**

### **Sponsorships & Community Benefit**

Carle Health provided direct financial support to various community organizations in 2023, in addition to sponsoring specific activities within charitable organizations. The total amount of this support was \$799,475. Examples of organizations that benefited from this support include the Susan G. Komen Foundation, Heart of Illinois United Way, and Hult Center for Healthy Living, and Easter Seals.

#### **Wellmobile**

The Carle Health Wellmobile is a van that provides community education and free or low-cost health screenings throughout central Illinois. In 2023, the Wellmobile performed over 8,000 screenings. These screenings identified individuals with abnormal blood pressure, abnormal blood glucose scores and abnormal cholesterol ratios.

Participants are informed about the Wellmobile locations through public service announcements, [www.wellmobile.org](http://www.wellmobile.org), community screening brochures that are available in doctor offices, and health fairs.

#### **United Way**

Carle Health was the third largest financial supporter of the Heart of Illinois United Way Campaign in 2023, which provides financial support annually to 85 area health and social services programs in Central Illinois.

### **Institutional Review Board**

The IRB is made up of local health care entities, which set protocols and review medical research projects for the local area. Carle Health medical research funding for IRB was \$15,759 in 2023.

### **Donated Office Space**

Carle Health donated the use of office space to Central Illinois Friends of People with Aids. The amount of support for the CFPWA office space was \$20,140 in 2022. Carle Health also donates office space for the Susan J. Komen Foundation in the Atrium building lobby. The support provided for the space was \$47,430 in 2023.

## **Volunteer Services**

For 2023, non-employee volunteers contributed 46,735 hours or approximately \$607,555 of labor dollars at Carle Health. Volunteer hours are recovering from significant reductions during the COVID-19 pandemic.

## Education

### Residency Program

In 2023, Carle Health Family Practice and Psychiatry Residency Program employed 45 residents and fellows throughout the year. Carle Health has agreements with several area clinics and organizations to rotate residents to provide services for the community at no cost. The net unreimbursed cost incurred by Carle Health for the 2023 Residency Program was \$6,462,122.

### Internships

In 2023, Carle Health provided internships in fields varying from student nurses, radiology technicians, and pharmacists. The unreimbursed cost to Carle Health to provide these internships was \$437,393

## Subsidized Health Services

Carle Health provides subsidized healthcare to patients in various service areas. The unreimbursed cost to Carle Health in 2023 was \$21,175,358 for the services listed.

- Pediatric GI
- Perinatology
- Child & Adolescent Psychiatry & Mental Health clinic
- In School Health
- System Based Primary and Express Care

## Bad Debt

For a variety of reasons, including, but not limited to, income level and lack of adequate insurance coverage, Carle Health may write off patient charges it deems to be uncollectible. In 2023, the cost of this uncompensated care, exclusive of amounts included in charity care, was \$7,397,042.

## Other Community Benefits

### Methodist Inn

The Methodist Inn provides no-cost overnight accommodations in a “hotel-like” setting within the hospital for patients’ families, patients, and loved ones. The Inn was started as a service to patients and their families several years ago. Many Carle Health patients live outside the Peoria area. Operating the Inn allows these people a place to stay the night before surgery and, if needed, the night following the ambulatory procedure. The Inn is also available for families of hospitalized patients.

## **Methodist Inn (continued)**

The Inn's rooms are fully furnished with twin beds and other amenities. The Inn has a lounge for the guests' use. A small breakfast nook has a microwave and vending machines. A continental breakfast is provided each morning for the guests of the Methodist Inn.

In 2023, Carle Health provided 804 nights of lodging in the Methodist Inn without charge. Using comparable area hotel rates, these nights had a value of \$64,320.

## **Pastoral Care**

Carle Health provides a comprehensive Pastoral Care Department staffed by an interfaith team of clergy who are trained in hospital ministry. In 2023, the Pastoral Care department had unreimbursed costs of \$484,005.

### **Clinical Ministry Team**

At the core of the funding received from Carle Health is a clinical ministry team that is available 24 x 7 to offer presence, comfort, support, crisis intervention, conflict management, and help with loss and grief. This service is integrated into our patient care model and is critical to the emotional and spiritual care and support offered to patients and their families. This team maintains a network of relationships to offer the widest range of patient support opportunities. Our team helps Carle Health ensure that the key life values of our patients and their families are actively respected and that important life rituals can be observed.

### **Chaplain Assistant Volunteer Training**

The Chaplain Assistant Volunteer Training program was started by the Carle Health Pastoral Care Department to train people from area congregations to promote health in our communities and congregations and to invite church members to become part of our Carle Health pastoral community visiting and supporting patients, their families, and our staff. The director of the department oversees the training and coordinates the volunteers' clinical work.

## **Pastoral Care (continued)**

### **Community Pastoral Care Program**

The purpose of this program is to:

- To make health care resources consistently available to the poor and under-served of Peoria.
- To make these resources available through the compassionate caring of area churches.
- To promote health in our community through area church and faith groups
- To improve relationships between Carle Health and area faith communities.
- To train congregations to minister effectively to people with health care concerns.
- To give the churches the awareness of community and regional resources.
- To promote community health fairs, health screenings, and clinic use to improve life.
- To empower people to become more health responsible for themselves and their families.

### **Pastoral Care Department Education**

The Pastoral Care department education program training has been provided for people in over 90 area churches. Since the inception of the program, over 360 individuals have participated in the training provided by the pastoral care program.

## **Community Outreach**

### **Ambulance Education**

Each ambulance squad in the Peoria area EMS System predetermines what emergency medical services (EMS) education is needed for their agency annually. The plans are submitted to the Illinois Department of Public Health for approval or revision. Each agency is responsible for obtaining the education resources. Carle Health provided education in 2023 for various EMS agencies. This education was provided at no cost to the agencies

### **Behavioral Health**

Carle Health has identified Behavioral Health as one of the most critical issues in healthcare for the local area. Programs are available for children, adolescents, adults and seniors, through inpatient, outpatient, partial hospitalization, and physician services. Carle Health Mental Health Clinic serves individuals and families who may not qualify financially for other behavioral health services in the community. In 2022, there were 2,470 inpatient mental health admissions resulting in 20,905 days of care. There were 5,194 visits for outpatient Behavioral Health services.

## **Community Outreach (Continued)**

### **Clinical Staffing for Behavioral Health Services**

Carle Health's inpatient staff meets with community providers and local school district personnel to discuss clinical issues for specific patients. This is done on a weekly basis and involves a minimum of three staff. Time spent varies, but the average is 60-90 minutes a week, discussing clinical issues and discharge issues. There is no charge to patients, families, or other facilities.

### **Behavioral Health Screenings**

Patients are also screened in the Diabetes Care Center and Cardiopulmonary Rehabilitation areas for depression or other potential mental disorders. All patients complete a questionnaire, which is reviewed by staff and if appropriate, follow up appointments are scheduled with a mental health provider to further assess and make appropriate referrals.

### **Basic Life Support/Cardio-Pulmonary Resuscitation; Automated External Defibrillator & First Aid Training**

Carle Health continues to provide classes for all levels of training for American Heart Association's approved Cardio-Pulmonary Resuscitation (CPR), with or without Automated External Defibrillator (AED) & First Aid Training with or without CPR/ AED for the adult, child, and infant population. Monthly CPR initial provider courses and renewal courses are currently offered at Carle Health. An instructor course for CPR that includes First Aid components is offered once each year.

Additional advanced American Heart Association courses for healthcare professionals such as Advanced Cardiac Life Support (ACLS) and Pediatric Life Support (PALS) Courses using the most current Emergency Cardiac Care guidelines also are offered through the Community Training Center.



**Methodist Health Services Corporation**  
**Methodist Medical Center of Illinois - Proctor Hospital - Pekin Hospital**  
**CY 2023 – 210 ILCS 76/22 Public Report**

§ 22(a): *In order to increase transparency and accessibility of charity care and financial assistance data, a hospital shall make the annual hospital community benefits plan report submitted to the Attorney General under Section 20 available to the public by publishing the information on the hospital's website in the same location where annual reports are posted or on a prominent location on the homepage of the hospital's website. A hospital is not required to post its audited financial statements.*

1. Reporting Period:
  - a. 1/1/2023 through 12/31/2023
2. Charity Care:
  - a. Hospital Total Charity at Cost: \$1,633,570
  - b. ED Subset: \$749,215
3. Total Net Patient Revenue
  - a. \$565,605,671
4. Carle Health System Total Community Benefits Spending
  - a. \$591,157,973
5. Data on Financial Assistance Applications:
  - a. The number of applications submitted to the hospital, both complete and incomplete;
    - i. 558
  - b. The number of applications approved; and
    - i. 456
  - c. The number of applications denied and the 5 most frequent reasons for denial.
    - i. Number Denied:
      1. 4
    - ii. Top 5 Reasons for Denial (Unordered):
      1. Patient's income is over program guidelines
      2. Unable to review application due to missing documents
      3. Unable to review application due to missing/incomplete income verifications
      4. Unable to review application due to missing proof of enrollment in state programs
      5. Unable to review application due to patient not responding to questions about application
6. To the extent that race, ethnicity, sex, or preferred language is collected and available for financial assistance applications, the data outlined in paragraph (5) shall be reported by race, ethnicity, sex, and preferred language.
  - a. Carle Health's Financial Assistance Program experiences the same five reasons for denial across all applicants; therefore, the top five reasons for denial are the same across all races, ethnicities, sexes, and preferred languages.
    - i. Top 5 Reasons for Denial (Unordered):
      1. Patient's income is over program guidelines
      2. Unable to review application due to missing documents
      3. Unable to review application due to missing/incomplete income verifications
      4. Unable to review application due to missing proof of enrollment in state programs
      5. Unable to review application due to patient not responding to questions about application