



BOARD MEETING

January 22, 2019



January Board Meeting Agenda
Tuesday, Jan. 22, 2019 – 6:15 p.m.
Beacon School

**The Mission of the Athens County Board of Developmental Disabilities
is to serve our community with compassion, innovation, and transparency**

1. Call to Order – Board President.
2. Roll Call – Arian Smedley.
3. Reading of Mission Statement.
4. Motion to approve Agenda.
5. New Business:
 - a. Motion to approve Dec. 4, 2018, Regular Board Meeting Minutes (Exhibit 1, Pages 1-6).
 - b. Motion to approve resolution expressing the appreciation to Alfred Crow, for his \$2,000 donation to Beacon School (Exhibit 2, Page 7).
 - c. Motion to approve resolution expressing the appreciation to Stephanie Goldsberry, for her \$600 donation to Beacon School (Exhibit 3, Page 8).
 - d. Motion to approve purchasing two (2) changing tables for the Beacon School locker rooms near the pool, for a total cost not to exceed \$12,000.
 - e. Motion to approve renewing membership with the Ohio Association of County Boards for 2019 (Exhibit 4, Pages 9-10).
 - f. Motion to approve providing \$3,000 as local match toward the 2020 Mobility Management Grant, managed by HAPCAP.
 - g. Motion to approve providing \$3,000 as local match toward the Athens County Community Singers' Ohio Arts Council grant application (Exhibit 6, Page 11).
 - h. Review Personnel Policies 2.1, 2.5 and Administrative Policy 53 (Exhibit 7, Pages 12-74).
 - i. Review and discuss ATCO Legacy Fund timeline (Exhibit 8, Page 75).
 - j. Review and discuss Managers' List for 2019 (Exhibit 9, Pages 76).
 - k. Motion to approve the 2019 Superintendent Professional Development Plan (Exhibit 10, Page 77).
 - l. Discuss health care costs for 2019.
 - m. Discuss meeting with DODD.
 - n. Discuss and review 10-year cost projections (Handout).
 - o. Motion to approve a 2% cost-of-living increase in annual salary for non-union employees (managers, administrative assistants – excluding the Superintendent), who were employed on or before January 1, 2019. The raise will be effective on the first day of the next pay period. The cost to the board will be \$19,000.00 annually.

6. Board Reports:

- a. Superintendent, Dr. Kevin Davis (Exhibit 11, Pages 78-85).
 - b. Director of Education, Becky Martin (Exhibit 12, Pages 86-93).
 - c. Director of Finance and Operations, Steve Kramer (Exhibit 13, Pages 94-115).
 - d. Director of Service and Support, Richard Suehrstedt (Exhibit 14, Page 116-117).
 - e. Director of Employment Options, Doug Mitchell (Exhibit 15, Pages 118-122).
 - f. Director of Integrate Athens, Autumn Brown (Exhibit 16, Pages 123-125).
 - g. Director of Human Resources, Gwen Brooks (Exhibit 17, Pages 126-128).
 - h. Director of Facilities and Transportation, Butch Withem (Exhibit 18, Page 129).
7. Comments from Visitors relative to the agenda.
8. Comments from Unions relative to the agenda.
9. Comments from the board.
10. Motion to enter into Executive Session per ORC 121.22 (G)(1) to consider the appointment, employment, dismissal, discipline, promotion, demotion, or compensation of a public employee or official, or the investigation of charges or complaints against a public employee, official, licensee, or regulated individual, unless the public employee, official, licensee, or regulated individual requests a public hearing.
11. Motion to return from Executive Session.
12. Motion to adjourn.

Exhibit 1

ATHENS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES
Board Meeting Minutes
Tuesday, Dec. 4, 2018 – 6:00 P.M.
8 Harper Street, The Plains, Ohio 45780

**The Mission of the Athens County Board of Developmental Disabilities is to serve our community
with compassion, innovation, and transparency**

Draft until Board approved

1. Margaret Demko, Board President, called the meeting to order at 6:09 p.m.
2. Arian Smedley did roll call.

ALLEN	Absent
BOND	Present
DEMKO	Present
HUTZEL	Present
JOLLEY	Present
OESTRIKE	Present
OLIVER	Present

(No roll call necessary) Administrative Staff in Attendance:

Dr. Kevin Davis	Superintendent
Becky Martin	Director of Education
Steve Kramer	Director of Finance
Doug Mitchell	Director of Employment Options
Robert Withem	Director of Transportation & Facilities
Autumn Brown	ATCO Transition Manager
Gwen Brooks	Director of HR
Arian Smedley	Assistant Superintendent

*See sign-in sheet for full list of attendees.

3. Hutzel read the Mission Statement.
4. Dr. Jolley motioned to approve the agenda.

MOTION#: 12-04-01
MOTION: JOLLEY
SECOND: OLIVER
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

5. New Business:
 - a. Hutzel to approve Oct. 24, 2018, Regular Board Meeting Minutes with noted adjustments (Exhibit 1, Pages 1-5).

Exhibit 1

MOTION#: 12-04-02
MOTION: HUTZEL
SECOND: BOND
AYES: BOND, DEMKO, HUTZEL, OLIVER
ABSTAIN: JOLLEY, OESTRIKE
CARRIES: YES

- b. Oestrike motioned to approve Oct. 30 & Nov. 7 2018, Special Board Meeting Minutes (Exhibit 2, Pages 6-9).

MOTION#: 12-04-03
MOTION: OESTRIKE
SECOND: JOLLEY
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

- c. Hutzel motioned to approve new position for the Employment Options Division (Exhibit 3, Page 10-12).

Discussion: Dr. Davis reminded the board that this was something initially discussed several years ago. He walked the board through the proposal in the packet. The brief discussion touched on the following topics:

- Benefits to providing a full-time position with benefits
- Added benefit of providing an option to an employee who will be will displaced by the ATCO transition

MOTION#: 12-04-04
MOTION: HUTZEL
SECOND: OLIVER
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

- d. Bond motioned to approve resolution for Myrdith Sherow for her donations to Beacon School (Exhibit 4, Page 13).

Discussion: Dr. Davis explained Myrdith Sherow's connection to the school (she is daughter of Beacon's first teacher) and her support of the school.

MOTION#: 12-04-05
MOTION: BOND
SECOND: JOLLEY
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

- e. Oestrike motioned to approve resolution for guest speakers Nicole Phillips and Chris Stewart for donating their time to the ACBDD during the November in-service training (Exhibit 5, Pages 14-15).

Exhibit 1

Discussion: Dr. Davis explained both speakers are local authors and professional speakers who donated their time during the November in-service.

MOTION#: 12-04-06
MOTION: OESTRIKE
SECOND: BOND
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

- f. The board discussed a proposal from Paul Richard, regarding the continuation of Journey To Be Still Yoga (Exhibit 6, Pages 16-17). Dr. Davis said this is something he would recommend supporting once it is finalized, given Richard's commitment over the last few years and the growth of his program. He added this is also in line with the ATCO transition – the ACBDD committed to supporting ancillary services into the future. However, part of Richard's proposal has changed, and so Dr. Davis asked that the board table a vote until the proposal is finalized.
- g. The board discussed the possibility of offering a \$500 donation to The Plains-Athens Community Church of the Nazarene, which consistently offers the ACBDD free meeting room space. The board preferred to respond to an invoice, as opposed to issuing a donation. Dr. Davis will follow up on this.
- h. Hutzel motioned to approve new policy regarding parking in the Beacon School lot, which would go into effect January 1, 2019 (Exhibit 7, Pages 18-19).

Discussion: Dr. Davis said this policy and the sign is the outcome from the discussion during the last board meeting. He added he has already met with the school's administration. They are in support of this policy.

MOTION#: 12-04-07
MOTION: HUTZEL
SECOND: OESTRIKE
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

- i. Hutzel motioned to allow only Athens County residents and/or county district school eligible students (Athens, Fed Hock, Nelsonville, Trimble, and Alexander) to attend Beacon, with the exception of currently enrolled students being able to finish this year (administration will explore capturing excess costs for these students). This motion will be re-evaluated in the Spring of 2019 (Exhibit 8, Page 20).

Discussion: Dr. Davis walked the board through the exhibit in the packet. He described the different scenarios – Student 1 (living in the county and in a school district), Student 2 (out of county and in a school district), and Student 3 (out of county and out of a school district). The question is whom should the ACBDD/Beacon School serve?

Exhibit 1

Historically, the ACBDD/Beacon School has served Students 1 and 2. We are in a position where we are being asked to serve Student 3. Dr. Davis said he would like to continue the practice of serving students who reside within our school districts, even if they are out of county (i.e. Students 1 and 2). Discussion included the following topics:

- How neighboring counties handle out-of-county AND out-of-district students
- The ACBDD/Beacon School's current practice
- Beacon's current enrollment
- The potential to serve students in high-need areas
- The potential to have to turn Athens County residents away if Beacon becomes full due to serving those who are residing outside of what has historically been the school's service area

MOTION#: 12-04-08
MOTION: HUTZEL
SECOND: BOND
AYES: BOND, DEMKO, HUTZEL, OESTRIKE, OLIVER
NO: JOLLEY
CARRIES: YES

- j. The board discussed the proposed SWOT analysis with feeder school districts. The board collectively was in support of proceeding with this exercise. The board recommended passing a resolution or motion stating its support of Beacon School. Dr. Jolley volunteered to draft that by the next board meeting.
- k. Oestrike motioned to approve a resolution authorizing the ACBDD to participate in the state of Ohio's Cooperative Purchasing Program (Exhibit 9, Page 21).

MOTION#: 12-04-09
MOTION: OESTRIKE
SECOND: OLIVER
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

- l. Dr. Davis said staff have received extensive training in the new Wait List process. He added staff are moving through the transition compassionately. He offered the board another opportunity to ask questions about their progress so far. One board member simply confirmed any questions about the Wait List can be directed to the SSA division (Exhibit 10, Pages 22-23).
- m. Dr. Jolley motioned to approve 2019 operating budget (Exhibit 11, Page 24).

MOTION#: 12-04-10
MOTION: JOLLEY
SECOND: OESTRIKE
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

Exhibit 1

- n. Hutzel motioned to approve allocating \$21,780 as local match for the 2019 FSS budget, for a total of \$50,000 (Exhibit 12, Page 25).

Discussion: There was brief discussion about who the funds are for, how families use the funds, and how families are notified about the funds.

MOTION#: 12-04-11
MOTION: HUTZEL
SECOND: BOND
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

- o. The board reviewed the 2019 Technology Plan (Exhibit 13, Pages 26-34).

6. Board Reports:

- a. Superintendent, Dr. Kevin Davis (Exhibit 14, Pages 35-53).
Report stands. He added that the Ethics Committee was unable to meet due to not having enough board members in attendance. No action was required; the meeting was simply to provide an update from a previous meeting. It will be rescheduled for a later date.
- b. Director of Education, Becky Martin (Exhibit 15, Pages 54-59).
Report stands. She highlighted Breakfast with Santa, scheduled for Dec. 8. She also encouraged the board members to attend any of the upcoming events listed in her report. Dr. Jolley said the Thanksgiving event was very nice, and the staff did a nice job organizing it.
- c. Director of Finance and Operations, Steve Kramer (Exhibit 16, Pages 60-71).
Report stands.
- d. Director of Service and Support, Richard Suehrstedt (Exhibit 17, Page 72).
Report stands.
- e. Director of Employment Options, Doug Mitchell (Exhibit 18, Pages 73-78).
Report stands. He highlighted their successes this fall. He added IHOP has hired four individuals, which was great news.
- f. ATCO Transition Manager, Autumn Brown (Exhibit 19, Pages 79-83).
Report stands. She highlighted ATCO is in its final weeks, and the transition continues to go smoothly. She also highlighted the ATCO Leaders donation, Christmas lunch, and other final plans through the end of the year.
- g. MUI Coordinator, Beth Atherton (Exhibit 20, Pages 84-85).
Report stands.

Exhibit 1

- h. Director of Human Resources, Gwen Brooks (Exhibit 21, Pages 86-89).
Report stands.
 - i. Director of Facilities and Transportation, Butch Withem (Exhibit 22, Page 90).
Report stands. He reiterated his thanks for the new school bus, which has been ordered.
- 7. No comments from Visitors relative to the agenda.
 - 8. No comments from Unions relative to the agenda.
 - 9. Regarding comments from the board, Dr. Jolley confirmed the next board meeting is Tuesday, January 22. An Ethics Committee meeting will be at 5:45. Dr. Davis stated it is possible the meeting will be hosted at the new Office of Integrate Athens. Board members will be notified once that has been finalized. Bond asked for an update on the number of staff impacted by the ATCO transition. Brown stated we started with 22 people, and now we are down to four staff members. Brown commended the success of the Outplacement Committee, which started shortly after the ATCO transition was announced. This committee was created specifically to assist staff members through their own transition.
 - 10. Oliver motioned to adjourn.

MOTION#: 12-04-12
MOTION: OLIVER
SECOND: BOND
AYES: BOND, DEMKO, HUTZEL, JOLLEY, OESTRIKE, OLIVER
CARRIES: YES

Exhibit 2



RESOLUTION

A resolution expressing the appreciation of the Athens County Board of Developmental Disabilities (ACBDD) to Alfred Crow for his generosity to Beacon School:

Whereas, Alfred has generously donated \$2,000.00 to Beacon School; and

Whereas, this donation will provide the means for the ACBDD to enhance services to the students of Beacon School; and

Whereas, the ACBDD recognizes this donation as a demonstration of love, compassion, and respect for our students; and

Whereas, a donation such as this has a direct and positive impact on the students supported at Beacon School; and

Whereas, the ACBDD sees Alfred as an exceptional community member and a role model for others; and

Be it resolved by the Athens County Board of Developmental Disabilities:

We hereby express our appreciation to Alfred Crow for his generosity, selflessness, community mindedness, and commitment to supporting our organization and the individuals we assist.

Board President

Date

Dr. Kevin Davis
Superintendent

Date

Exhibit 3



RESOLUTION

A resolution expressing the appreciation of the Athens County Board of Developmental Disabilities (ACBDD) to Stephanie Goldsberry for her generosity to Beacon School:

Whereas, Stephanie has generously donated \$600.00 to Beacon School, specifically to support camp programming for students; and

Whereas, this donation will provide the means for the ACBDD to enhance services to the students of Beacon School; and

Whereas, the ACBDD recognizes this donation as a demonstration of love, compassion, and respect for our students; and

Whereas, a donation such as this has a direct and positive impact on the students supported at Beacon School; and

Whereas, the ACBDD sees Stephanie as an exceptional community member and a role model for others; and

Be it resolved by the Athens County Board of Developmental Disabilities:

We hereby express our appreciation to Stephanie Goldsberry for her generosity, selflessness, community mindedness, and commitment to supporting our organization and the individuals we assist.

Board President

Date

Dr. Kevin Davis
Superintendent

Date

December 20, 2018

DEC 26 2018

Kevin Davis
Athens County Board of DD
801 West Union Street
Athens, Ohio 45701



Dear Superintendent Davis,

On behalf of the board of trustees and staff of the Ohio Association of County Boards of DD, thank you for being a member of Ohio's premier trade association for developmental disability professionals in 2018.

Over the past 12 months, we have accomplished a great deal together:

- We led the way on several major legislative and policy initiatives that had an immediate, direct, positive impact on county board operations, including the overhaul of Ohio's broken waiver waiting list process and the passage of a bill guaranteeing a full year of service credit for 9- and 10-month county board employees in the state's public employee retirement system.
- We helped to increase the quality, sustainability, and availability of services for people with developmental disabilities across the state by working together on many local challenges facing county boards, including issues related to financial forecasting, individual service planning, abuse prevention, crisis communications, early intervention, and community integration, among others.
- We collaborated and planned for our collective future at more trainings, regional meetings, and forums throughout the year than ever before, bringing together current and future leaders at our year-long executive development series, three SSA Forums, more than two dozen regional support meetings, and Ohio's two largest annual professional development conferences—the Spring Conference and the Annual Convention—the latter of which hosted more than 1,000 attendees over a three-day period.

While we accomplished many great things together in 2018, we know that—as in years past—the year ahead holds even greater promise. We are in the midst of finalizing our agenda for the incoming administration of Governor-elect Mike DeWine and the newly-elected 133rd General Assembly, which will include the introduction and consideration of the state's next two-year budget. We are creating new and exciting content for upcoming professional development events, and have already scheduled technical assistance appointments throughout the first quarter of the year across the state.

None of this is possible without your continued support as members of OACB. As is customary, your membership dues invoice is enclosed. Please note that – per a vote of the membership at the Delegate Assembly in November – all counties have had their enrollment numbers updated from 2006 levels to 2018 levels for the purpose of assessing membership dues this year. The enclosed invoice reflects the updated dues amounts that have been distributed and discussed over the past several months.

If you have any questions or require any additional information prior to processing your membership dues payment, please do not hesitate to contact me at the information below. It has been a pleasure to serve you in 2018—we look forward to working alongside you in the coming year to continue supporting people with developmental disabilities and their families.

Sincerely,

BRIDGET GARGAN
Executive Director

INVOICE

OACB

73 E Wilson Bridge Road, Suite B1
Worthington, OH 43085

DEC 26 2018

Date	Invoice #
12/4/2018	2019Dues-06

Bill To
Athens CBDD 801 W. Union St Athens, OH 45701

P.O. No.

Description	Amount
2019 OACB Membership Dues	11,845.00
Thank you for your support! Please include the invoice number on your checks payable to OACB.	
Total \$11,845.00	
Payments/Credits	
Balance Due \$11,845.00	

Exhibit 6

Date: January 15, 2019

To: Board Members of the Athens County Board of Developmental Disabilities

From: Stephanie H. Morris, MM, MT-BC
Neurologic Music Therapy Fellow
Founder/Director of the Athens County Community Singers

Re: Arts Access Grant Match Request

Dear Board Members,

As founder and director of the Athens County Community Singers (ACCS), *"a choir for all voices,"* this letter serves as a request to receive matching funds to assist with the 2019-2020 Arts Access Grant Match requirement. We are requesting \$3,000 from the ACBDD to help support our non-profit organization through Ohio Arts Council funding opportunities. The grant application is due **March 1, 2019** to cover operating expenses for 2 years.

- We anticipate an increase in our expenses, as we are now paying for rehearsal space at ARTS/West starting in February. They are charging us ½ price and "gifting" us the other half, but we will need to also pay for rehearsals in the fall.
- We had hoped to perform in the Stuart's Opera House lobby this summer for one of our Patriotic Concerts, but the funds we had set aside to do this are now being used for the paid rehearsal space mentioned above.
- Other operational costs like the contracted amount between Central Ohio Music Therapy, LLC and the ACCS Advisory Board have not changed. Those costs include my compensation to run 2 choirs (rehearsals and concerts), planning time, equipment, grant writing, etc.
- According to my contact at Ohio Arts Council, our "application should reflect just the first year of the grant period (July 1, 2019 – June 30, 2020). If awarded funding, you'll provide an update to us regarding the second year of funding next year."

Thank you for your support of the choirs.

First Review of Revised Policy

Updated and Current Versions

January 2019

Personnel Policies

- Policy 2-1 Vacancies: Identification, Announcement, and Application
 - Significant re-write of the language and update to title, “Recruitment, Selection and Appointment of Staff”
- Policy 2-5 Employment Procedures
 - Consider striking policy as topics covered are located in other policies as identified on the draft

Administrative Policy

- Policy 53 Major Unusual Incident/Unusual Incident
 - Significant re-write to reflect new DODD rule in effect as of late 2018

2-1 RECRUITMENT, SELECTION AND APPOINTMENT OF STAFF

Adopted	09/17/1996
Status	Draft – pending approval
Historical Versions	07/19/1999, 12/20/2005, 01/25/2011, 08/25/2015
Initiated by	Gwen Brooks, Director of Human Resources
Approved by	pending

Purpose

The Athens County Board of Developmental Disabilities (ACBDD) is committed to recruiting and selecting the best qualified candidates for vacant positions. Recruitment and selection activities shall be in compliance with all applicable employment laws and guided by a commitment to diversity through equal employment opportunity and affirmative action.

Recruitment and selection of bargaining unit positions is subject to the respective collective bargaining agreement.

Vacancy Identification & Classification

- A. The Superintendent, as the appointing authority, shall determine the adequacy, size, composition and qualifications of the workforce, staffing patterns and organizational structure, the duties to be included in each job classification and the standards of quality, productivity and performance to be maintained. As such, the Superintendent shall determine when a vacancy exists and shall be filled.
- B. New or changing positions must be reviewed by the Superintendent or designee for appropriate title, pay range, classified or unclassified status determination, and exempt or non-exempt status determination in accordance with the Fair Labor Standards Act prior to recruitment and selection activities.

Vacancy Recruitment & Selection

- A. Notice of Vacancy Posting
 1. Notices of vacancies of regular (ongoing) positions and term positions which occur or are imminent within the ACBDD shall be posted in program facilities and on the ACBDD website. Recruitment efforts will be made to reach the broadest and most diverse pool of applicants. Advertising in local media, social media, professional and state associations, and relevant websites will be considered based on the scope of the vacancy.
 2. Each vacancy posting shall specify the title, classification, employing department, summary of duties, the required qualifications, and method of application.
 3. Vacancies shall be posted for a minimum of fourteen (14) calendar days and may be extended or re-posted as needed.
- B. Eligibility and Application for Vacancies
 1. The ACBDD encourages and supports opportunities for promotion and transfer from within; however, the Superintendent reserves the right to employ from outside to fill vacancies. Qualified employees wishing to transfer to a vacant position should follow application requirements and will be given priority in screening.
 2. Former staff involuntarily terminated may be deemed ineligible for reemployment at the ACBDD.

3. Staff serving a probationary period are generally not eligible for consideration for any vacancy. Exceptions may be approved by the Superintendent or designee.
4. A current, certified application must be received for all final candidates prior to a job offer for a temporary, term or regular status position.
5. The ACBDD is prohibited from employing a person who has been convicted of or plead guilty to a disqualifying offense as defined in O.R.C. Section 5123.081 and O.A.C. 5123:2-2-02. The ACBDD requires all finalists to execute a written and signed statement indicating any convictions of, or guilty pleas to a disqualifying offense, even if the record of conviction has been sealed.
6. Finalists must be legally authorized to work in the United States of America.
7. The ACBDD maintains discretion to hire to control placement of relatives and members of the same household in accordance with policies 1-6 Nepotism and 2-4 Restriction on Assignment of Related Employees/Individuals Served.

C. Selection and Identification of Final Candidates

1. The method for applicant evaluation to be used in each selection process must be documented and approved by the Superintendent or designee prior to the beginning of the selection process.
2. Selection will be based on job-related qualifications such as education, experience, skill, training, ability, and job performance.
3. As a general rule, the same evaluation criteria will be utilized in assessing each candidate for the same vacant position. Reasonable accommodations will be incorporated in the evaluation of applicants who would be capable of performing the essential functions of the position and satisfying the evaluation criteria given the reasonable accommodation(s).
4. The ACBDD values diversity and has a strong commitment to affirmative action.
5. Staff affected by a reduction in force and not eligible for recall should be considered as internal applicants for positions for which they are qualified for 12 months from the effective date of termination.
6. Screening must include documented reference checks. References may be in letter form or by telephone contact. Telephone references require a written summary by the staff making the inquiry.
7. The Superintendent or designee will approve all recommendations for hire prior to candidate offers.

D. Appointments

1. All appointments shall be made in accordance with the requirements of the Board as well as state and federal regulations.
2. Preliminary offers of employment may be made contingent upon successful completion of required criminal background checks, medical examination including drug screening, required database background checks, and if applicable, review of candidate's driving record.
3. Criminal background checks, required database checks and education verifications as required will be conducted prior to appointment of staff as per OAC 5123:2-2-02.
4. Pre-employment medical evaluation by an ACBDD selected provider may be required.
5. If a position requires special licenses, certificates or registrations, verification of the credential must be provided and maintained as per policy 5.17 Certifications, License or Registrations Requirement.

6. Staff required or who may be required to transport individuals served or who may drive ACBDD vehicles must maintain a valid, driver's license and maintain a good driving record. An employee with six (6) or more points on his/her driving record is prohibited from transporting individuals in any vehicle.

Types of Appointments:

- A. Regular Appointment: Full or part-time classified or unclassified appointments (as per policy 1-2) with a duration of more than one hundred twenty consecutive days.
- B. Temporary Appointment: Short-term appointments of less than one hundred twenty days. All temporary appointments are unclassified as per ORC 124.30.
- C. Term Appointment: Appointments of a fixed duration greater than one hundred twenty days, but less than three years, without intention of continuing employment.
- D. Intermittent Appointment: Appointments in which an employee is scheduled to work as needed, and works fewer than one thousand hours per year. All intermittent appointments are unclassified as per ORC 124.30.

Section 2.1

Adopted: 9/17/96

Revised: 7/19/99; 12/20/05, 1/25/11, 8/25/15

Effective: 7/19/99; 12/20/05, 1/25/11, 8/25/15

2.1 VACANCIES: IDENTIFICATION, ANNOUNCEMENT, AND APPLICATION

1. Posting and Application

- a. Notices of permanent vacancies which occur or are imminent within the Board shall be posted in program facilities and newspapers and postings may include notices to universities, state associations, Ohio Department of Education (ODE) and ODDD.
- b. Each job posting or notice of a vacancy, insofar as practicable, shall specify the title, nature of the job, the required qualifications, and method of application. Positions shall be posted for a minimum of fourteen (14) calendar days or for such period as required by an applicable collective bargaining agreement. (ODE will not consider granting a temporary certificate unless the position has been posted with ODE for two (2) weeks and no applications with appropriate certification are received.) A re-posting of a vacancy may be set at less than fourteen (14) days.
- c. An application must be properly completed and submitted before an applicant will be considered for new employment. Current employees must submit a letter of intent to apply, along with an updated resume (as applicable), to the Board's Personnel Office, with a copy to the employee's immediate supervisor and supervisor of the vacant position.
- d. Application forms are available from the Board Administrative Office. Applications will be kept in an active file for one (1) year. EEOC requires applications to be kept on file for two (2) years.

2. Evaluation of Applicants

- a. Internal applicants shall be screened prior to external applicants for job openings. All applicants shall be evaluated according to how well their qualifications meet the requirement of the position. Not all applicants will be interviewed for each vacancy. Applicants must submit to reference checks, interviews, medical examinations, drug screening, background checks, database reviews, performance tests, and/or job-related screening procedures. Applications submitted after the deadline will not be considered.
- b. An applicant shall be required to provide any information and undergo any examinations necessary to demonstrate qualification for the position sought, insofar as such information and examination is job related and consistent with business necessity. Physical examinations, however, may only be required after a job offer has been made.
- c. As a general rule, the same evaluation criteria will be utilized in assessing each candidate for the same vacant position. In the case of applicants with a disability who would be capable of performing the essential functions of the position and

satisfying the evaluation criteria for the position with a reasonable accommodation, consideration of such accommodations will be incorporated in the evaluation of the applicant.

- d. State law requires the Board to investigate the background of all applicants. This background investigation includes an employment reference check, criminal records from the Bureau of Criminal Identification and Investigation (BCI) or the Federal Bureau of Investigation (FBI), a review of certain databases, and, if applicable, a review of the employee's driving record. The Board is prohibited from employing a person who has convicted of or plead guilty to a disqualifying offense as defined in O.R.C. Section 5123.081 and O.A.C. 5123:2-2-02. The Board requires, as part of standard operating procedure, all applicants to execute a written and signed statement indicating whether or not they have ever been convicted of, and/or plead guilty to a disqualifying offense, even if the record of conviction has been sealed.
- e. An applicant, to be eligible for employment with the Board, must be a citizen of the United States or a legal resident with authorization to work in the country.

3. Disqualification

- a. An applicant shall be eliminated from consideration if he or she:
 - 1. Does not possess the knowledge, skills, experience, and abilities necessary to effectively perform the duties of the vacant position;
 - 2. Has made a false statement of material fact on the application form or supplements thereto;
 - 3. Has committed or attempted to commit a fraudulent act at any stage of the selection process; or
 - 4. Is an alien not legally permitted to work.
 - 5. Subject to OAC 5123:2-2-02, has plead guilty to or been convicted of a disqualifying offense as defined in O.R.C. Section 5123.081 and O.A.C. 5123:2-2-02 or is listed on a database identified in OAC 5123:2-2-02.
- b. An applicant may be eliminated from consideration upon other reasonable grounds relating to job requirements.
- c. If an applicant is hired, and it is subsequently discovered that any of the above disqualifying criteria apply, the employee will be terminated for dishonesty, incompetency, nonfeasance, or malfeasance.

4. Basis for Selection

Appointments to vacant positions shall be made, based solely on the applicant's knowledge, skills, and abilities, and other job-related qualifications, as ascertained through fair and practical selection methods.

5. Appointments

All appointments shall be made in accordance with the requirements of the Board as well as state and federal regulations.

- a. Application Form – A Board application packet is required of all new applicants.
- b. References – At least three (3) references must be obtained for each new applicant. References may be in letter form or by telephone contact. Telephone references require a written summary by the Board staff making the inquiry.
- c. Conviction Record – Prior to hiring, each applicant must have an acceptable local report from the Athens County Sheriff's Department of any conviction record. He/she must also have an acceptable report from BCI and/or FBI (forms available).
- d. Transcript - If the position for which an applicant is being interviewed requires proof of education requirements, the Board must be supplied with an official transcript of college credits listed by years and the degree(s) obtained. Certain positions may require a certified copy of college transcript(s) as provided by the college registrar.
- e. Licenses, Certificates or Registrations – If a position requires special licenses, certificates or registrations, either a copy or an original (if required for position/certification) must be included with the application form.

Driver's License/Commercial Driver's License – A staff member whose position requires (or may require) transporting developmentally disabled citizens enrolled in the Board's programs or driving Board vehicles must obtain and maintain a valid, current driver's license, and proof of current auto insurance if they will be reimbursed for driving their personal vehicle, copies of which will be kept in the staff member's personnel file. A school bus driver's endorsement is required for the position of Vehicle Operator (Bus Driver). CDL license holders must notify their supervisor immediately of a driving suspension.

- f. Driving Record – A driving record from the Bureau of Motor Vehicles must be obtained for specific positions of the Board, particularly the position of Vehicle Operator (form available). An employee with six (6) or more points on his/her driving record is prohibited from transporting individuals in any vehicle.
- g. Health Examinations – An acceptable physical examination report, by a Board selected provider, a negative tuberculin test and any other medical test report required for each new permanent staff member are to be submitted to the Board Administrative Office within ten (10) days of employment (forms available). The physical qualifications for all positions are contained in each position description.

- h. Responsibility for paperwork completion – Upon approval for employment, the staff member shall be responsible for obtaining an appointment with the Administrative Office or designee prior to, or no later than, the first day of scheduled work to complete necessary payroll, staff member eligibility verification and fringe benefit forms.

6. Types of Appointments:

1. Classified Civil Service.

a. Certified.

A certified appointment is made from an eligibility list. An individual is certified after completing and passing an examination and being appointed from an eligibility list. A certified staff member has all the rights of civil service employees as contained in the Ohio Revised Code (unless exempted by CBA).

b. Provisional.

A provisional appointment is made in the absence of a complete eligibility list and continues in effect until appointment is made from an eligibility list. The staff member's rights are also terminated when he/she is succeeded by an appointment from the eligibility list.

- (1) Certification of a provisional staff member who completes at least six (6) months of service and passes a civil service test for the class for which he/she is employed shall be certified in that position before an eligibility list is prepared.
- (2) A provisional staff member with less than six (6) months of service must pass the test and attain a score that qualifies said staff member for a certified position.
- (3) Completing two (2) years in the same position (ORC 124.271) and the staff member becomes certified.

Section: 2.5

Adopted: 12/20/05

Revised: 1/25/11, 11/24/15

Effective: 12/20/05, 1/25/11, 11/24/15

2.5 EMPLOYMENT PROCEDURES

Commented [GB1]: CONSIDER STRIKING

A. It is the policy of the Board to employ persons who are qualified or trainable for employment by the fair standards of physical fitness, education, experience, aptitude and character for the position of employment available. Every effort will be made to place new employees in positions which will best utilize their abilities and in which they will be able to achieve both personal satisfaction and opportunity for growth.

Commented [GB2]: Covered in Policy 2-1

B. All decisions are made solely on the basis of job-related criteria. Interviews and certification screening will be done by the Superintendent or his/her designee, as appropriate. Qualified applicants will then be interviewed. All hiring will be done by the Superintendent.

Commented [GB3]: Covered in Policy 2-1

C. Licenses, Registrations and Certificates.

All staff shall comply with certification and license requirements of the State of Ohio, ODDD and/or ODE. In accordance with O.R.C. Section 5126.25, only properly certified employees shall be assigned to perform the duties which are required by the state of Ohio to be performed by certified personnel. Each employee is responsible for maintaining his/her certification. The Superintendent will verify all certifications. Any employee not certified under the conditions of O.R.C. Section 5126.25 will be dismissed. Employees must have their information on certification to the Superintendent or must have obtained a waiver in writing to submit said proof at a later date.

Commented [GB4]: Covered in Policies 3.4 and 5.17

D. Physical Examination.

After a job offer but prior to final job placement all prospective employees of the Board may be required to pass a physical examination by a physician designated by the Superintendent.

Commented [GB5]: Covered in Policy 3.2 and 2-1

E. Pre-Employment Verifications.

Reference checks, criminal background checks, educational transcript checks for all professional positions and job-related testing procedures will be conducted. Any job-related testing procedures will be administered in an objective manner. If an individual has a disability, the test will be administered in a manner that ensures the results reflect the skills, aptitude or other factors to be measured rather than the impaired skills. Only job-related skills will be evaluated. A minimum of three (3)

documented reference checks will be attempted before a candidate can be recommended for employment.

Commented [GB6]: Covered in Policy 2-1

- F. The most qualified applicants will be recommended to the Superintendent. The Superintendent will make the final decision with respect to hiring.

Commented [GB7]: Covered in Policy 2-1

- G. The Board will attempt to train and develop employees for promotion to higher-level positions. When vacancies occur above the entry level, Board staff will be given the opportunity to apply for such vacancies before outside recruitment is utilized.

Commented [GB8]: Covered in Policy 2-1 and 4.5

- H. When a position becomes vacant, said position will be posted for a minimum of fourteen (14) calendar days or for such period as required by an applicable collective bargaining agreement. If a qualified current employee wishes to transfer to the vacant position, he/she shall notify the Superintendent. The Board subscribes to a policy of promotion from within. However, the Superintendent reserves the right to employ from outside to fill vacancies.

Commented [GB9]: Covered in Policy 2-1

- I. The Board maintains the discretion to hire in attempt to control placement and employment of relatives and members of same household, as defined in Section 2.4 of this Policy Manual.

Commented [GB10]: Covered in Policy 2-1, 2-4 and 1-6

- J. All employees will be required to sign a confidentiality statement. A copy of the statement will be given to the employee. The original will be placed in the individual's personnel file.

Commented [GB11]: Procedural

(53) MAJOR UNUSUAL INCIDENT/UNUSUAL INCIDENT

Adopted	10/28/98
Status	Draft – pending approval
Historical Versions	2/21/06; 7/27/07, 2/25/14; 8/22/17
Initiated by	Beth Atherton, MUI Coordinator
Approved by	pending

Purpose

The purpose of this policy is to define and establish a system in order to recognize, report, review and investigate allegations of abuse and neglect, major unusual incidents (MUI) and unusual incidents (UI).

General

Athens County Board of Developmental Disabilities (ACBDD) employees, and any person providing services to individuals with developmental disabilities, irrespective of the setting, is mandated to report all suspected abuse and neglect incidences.

All licensed or certified service providers shall record the occurrence of unusual incidents and make such records available to the county board upon request. When an unusual incident occurs while an individual is receiving services from the county board, the county board shall record the unusual incident(s) and make available to licensed agency providers, independent providers and ICF/DDs upon request.

Reports made under section 5123.61 of the Revised Code and this rule are not public records as defined in section 149.43 of the Revised Code. Records may be provided to parties authorized to receive them in accordance with sections 5123.613 and 5126.044 of the Revised Code, to any governmental entity authorized to investigate the circumstances of the alleged abuse, neglect, misappropriation, or exploitation and to any party to the extent that release of a record is necessary for the health and welfare of the individual.

Intermediate Care Facilities for the Developmental Disabilities (ICF/DD) unusual incidents or major unusual incident for individuals who are living in an ICF/DD reports are to be made available immediately to the administrator or appointed administrator (exception if the administrator has been identified as the PPI). The ICF/DD's are required to follow federal guidelines that include the ICF/DD's to be notified of all incidents that occur immediately.

The ACBDD per ORC 5126.058 has incorporated the Memorandum of Understanding between mandated subscribers.

The ACBDD contracts with the Southern Ohio Council of Governments (SOCOG) to conduct Major Unusual Incident Investigations and Major Unusual Incident Reviews.

The ACBDD shall follow the requirements in OAC 51262-17-03 for the Abuse Registry.

All licensed or certified service providers including staff of the Athens County Board of DD shall report all alleged, suspected, or actual occurrences of major unusual incidents to the county

board immediately, but no later than four (4) hours, following the service provider's or county board's initial notification of the occurrence. All incident reports are to be submitted by 3:00 P.M. the following working day; the UI/MUI Coordinator/Designee will submit the preliminary information on the Ohio Department of Developmental Disabilities Incident Tracking System (ITS) by 5:00pm the following working day.

Failure to report incidents that pose a risk to individuals' health and welfare may result in penalties under Ohio Law, contract terminations, and for county board employees, disciplinary actions. Failure to cooperate in an investigation or incident review may result in disciplinary action.

UI/MUI Procedures

A. DEFINITIONS

1. "Administrative investigation" means the gathering and analysis of information related to a major unusual incident so that appropriate action can be taken to address any harm or risk of harm and prevent recurrence. There are three administrative investigation procedures (Appendix A, Appendix B, and Appendix C) that correspond to the three categories of major unusual incidents.
2. "Agency provider" means a provider, certified or licensed by the department that employs staff to deliver services to individuals and who may subcontract the delivery of services. "Agency provider" includes a county board while providing specialized services.
3. "At-risk individual" means an individual whose health or welfare is adversely affected or whose health or welfare may reasonably be considered to be in danger of being adversely affected.
4. "Common law employee" has the same meaning as in rule 5123:2-9-32 of the Administrative Code.
5. "County board" means a county board of developmental disabilities as established under Chapter 5126. of the Revised Code or a regional council of governments as established under Chapter 167 of the Revised Code when it includes at least one county board.
6. "Department" means the Ohio Department of Developmental Disabilities.
7. "Developmental center" means an intermediate care facility for individuals with intellectual disabilities under the managing responsibility of the department.
8. "Developmental disabilities employee" means any of the following:
 - (a) An employee of the department;

- (b) A superintendent, board member, or employee of a county board;
 - (c) An administrator, board member, or employee of a residential facility licensed under section 5123.19 of the Revised Code;
 - (d) An administrator, board member, or employee of any public or private provider of services to an individual with a developmental disability; or
 - (e) An independent provider.
9. "Incident report" means documentation that contains details about a major unusual incident or an unusual incident and shall include, but is not limited to:
- (a) Individual's name;
 - (b) Individual's address;
 - (c) Date of incident;
 - (d) Location of incident;
 - (e) Description of incident;
 - (f) Type and location of injuries;
 - (g) Immediate actions taken to ensure health and welfare of individual involved and any at-risk individuals;
 - (h) Name of primary person involved and his or her relationship to the individual;
 - (i) Names of witnesses;
 - (j) Statements completed by persons who witnessed or have personal knowledge of the incident;
 - (k) Notifications with name, title, and time and date of notice;
 - (l) Further medical follow-up; and
 - (m) Name of signature of person completing the incident
10. "Incident tracking system" means the department's web-based system for reporting major unusual incidents.
11. "Independent provider" means a self-employed person or a common law employee who provides services for which he or she must be certified in accordance with rules promulgated by the department and does not employ, either directly or through contract, anyone else to provide the services.
12. "Individual" means a person with a developmental disability.
13. "Individual served" means an individual who receives specialized services.
14. "Intermediate care facility for individuals with intellectual disabilities" has the same meaning as in section 5124:01 of the Revised Code.
15. "Investigative agent" means an employee of a county board or a person under contract with a county board who is certified by the department to conduct administrative investigations of major unusual incidents.

16. "Major unusual incident" means the alleged, suspected, or actual occurrence of an incident described in paragraph (C)(16)(a), (C)(16)(b), or (C)(16)(c) when there is reason to believe the incident has occurred. There are three categories of major unusual incidents that correspond to three administrative investigation procedures delineated in Appendix A, Appendix B, and Appendix C to this rule:

(a) Category A

- (i) Accidental or suspicious death. "Accidental or suspicious death" means the death of an individual resulting from an accident or suspicious circumstances.
- (ii) Exploitation. "Exploitation" means the unlawful or improper act of using an individual or an individual's resources for monetary or personal benefit, profit, or gain.
- (iii) Failure to report. "Failure to report" means that a person, who is required to report pursuant to section 5123.61 of the Revised Code, has reason to believe that an individual has suffered or faces a substantial risk of suffering any wound, injury, disability, or condition of such a nature as to reasonably indicate abuse, misappropriation, or exploitation that results in a risk to health and welfare or neglect of that individual, and such person does not immediately report such information to a law enforcement agency, a county board, or in the case of an individual living in a developmental center, either to law enforcement or the Department. Pursuant to division (C)(1) of section 5123.61 of the Revised Code, such report shall be made to the department and the county board when the incident involves an act or omission of an employee of a county board.
- (iv) Misappropriation. "Misappropriation" means depriving, defrauding, or otherwise obtaining the real or personal property of an individual by any means prohibited by the Revised Code, including Chapters 2911 and 2913 of the Revised Code.
- (v) Neglect. "Neglect" means when there is a duty to do so, failing to provide an individual with medical care, personal care, or other support that consequently results in serious injury or places an individual or another person at risk of serious injury. Serious injury means an injury that results in treatment by a physician, physician assistant, or nurse practitioner.
- (vii) Physical abuse. "Physical abuse" means the use of physical force

that can reasonably be expected to result in physical harm to an individual. Such physical force may include, but is not limited to, hitting, slapping, pushing, or throwing objects at an individual.

- (viii) Prohibited sexual relations. "Prohibited sexual relations" means a developmental disabilities employee engaging in consensual sexual conduct or having consensual sexual contact with an individual who is not the employee's spouse, and for whom the developmental disabilities employee was employed or under contract to provide care or supervise the provision of care at the time of the incident.
- (ix) Rights code violation. "Rights code violation" means any violation of the rights enumerated in section 5123.62 of the Revised Code that creates a likely risk of harm to the health or welfare of an individual.
- (x) Sexual abuse. "Sexual abuse" means unlawful sexual conduct or sexual contact as those terms are defined in section 2907.01 of the Revised Code and the commission of any act prohibited by Chapter 2907. of the Revised Code (e.g., public indecency, importuning, and voyeurism) when the sexual conduct, sexual contact, or act involves an individual.
- (xi) Verbal abuse. "Verbal abuse" means the use of words, gestures, or other communicative means to purposefully threaten, coerce, intimidate, harass, or humiliate an individual.

(b) Category B

- (i) Attempted suicide. "Attempted suicide" means a physical attempt by an individual that results in emergency room treatment, in-patient observation, or hospital admission.
- (ii) Death other than accidental or suspicious death. "Death other than accidental or suspicious death" means the death of an individual by natural cause without suspicious circumstances.
- (iii) Medical emergency. "Medical emergency" means an incident where emergency medical intervention is required to save an individual's life (e.g., choking relief techniques such as back blows, cardiopulmonary resuscitation, use of an automated external defibrillator, or use of an epinephrine auto injector).
- (iv) Missing individual. "Missing individual" means an incident that is

not considered neglect and an individual's whereabouts, after immediate measures taken, are unknown and the individual is believed to be at or pose an imminent risk of harm to self or others. An incident when an individual's whereabouts are unknown for longer than the period of time specified in the individual service plan that does not result in imminent risk of harm to self or others shall be investigated as an unusual incident.

(v) Peer-to-peer act. "Peer-to-peer act" means any of the following incidents involving two individuals:

- (a) Exploitation which means the unlawful or improper act of using another individual or another individual's resources for monetary or personal benefit, profit, or gain,
- (b) Theft which means intentionally depriving another individual of real or personal property valued at twenty dollars or more or property of significant personal value to the individual,
- (c) Physical act which means a physical altercation that:
 - (i) Results in an injury that is treated by a physician, physician assistant, or nurse practitioner; or
 - (ii) Involves strangulation, a bloody nose, a bloody lip, a black eye, a concussion, or biting which causes breaking of the skin; or
 - (iii) Results in an individual being arrested, incarcerated, or the subject of criminal charges
- (d) Sexual act which means sexual conduct and/or contact for the purposes of sexual gratification without the consent of the other individual.
- (e) Verbal Act which means the use of words, gestures, or other communicative means to purposefully threaten, coerce, or intimidate the other individual when there is the opportunity and ability to carry out the threat.

(vi) Significant injury. "Significant injury" means an injury of known or unknown cause that is not considered abuse or neglect and that results in concussion, broken bone, dislocation, second or third degree burns or that requires immobilization, casting, or five or more sutures. Significant injuries shall be designated in the incident tracking system as either known or unknown cause.

(c) Category C

- (i) Law enforcement. "Law enforcement" means any incident that results in the individual served being tased, arrested, charged, or incarcerated.
- (ii) Unanticipated hospitalization. "Unanticipated hospitalization" means any hospital admission or hospital stay over twenty-four hours that is not pre-scheduled or planned. A hospital admission associated with a planned

treatment or pre-existing condition that is specified in the individual service plan indicating the specific symptoms and criteria that require hospitalization need not be reported.

- (iii) Unapproved behavioral support. "Unapproved behavioral support" means the use of a prohibited measure as defined in rule 5123:2-2-06 of the Administrative Code or the use of a restrictive measure implemented without approval of the human rights committee or without informed consent of the individual or the individual's guardian in accordance with rule 5123:2-2-06 of the Administrative Code, when use of the prohibited measure or restrictive measure results in risk to the individual's health or welfare. When use of the prohibited measure or restrictive measure does not result in risk to the individual's health or welfare, the incident shall be investigated as an unusual incident.
- 17. "Physical harm" means any injury, illness, or other physiological impairment, regardless of its gravity or duration.
- 18. "Primary person involved" means the person alleged to have committed or to have been responsible for the accidental or suspicious death, exploitation, failure to report, misappropriation, neglect, physical abuse, prohibited sexual relations, rights code violation, sexual abuse, or verbal abuse.
- 19. "Program implementation incident" means an unusual incident involving the failure to carry out a person-centered plan when such failure causes minimal risk or no risk. Examples include, but are not limited to, failing to provide supervision for short periods of time, automobile accidents without harm, and self-reported incidents with minimal risk.
- 20. "Provider" means an agency provider or an independent provider.
- 21. "Qualified intellectual disability professional" has the same meaning as in 42 C.F.R. 483.430 as in effect on the effective date of this rule.
- 22. "Specialized services" means any program or service designed and operated to serve primarily individuals, including a program or service provided by an entity licensed or certified by the department.
- 23. "Systems issue" means a substantiated major unusual incident attributed to multiple variables and not to a specific person.
- 24. "Team" means, as applicable:
 - (a) The group of persons chosen by the individual with the core responsibility to support the individual in directing development of his or her individual service plan. The team includes the individual's guardian or adult whom the individual has identified,

- as applicable, the service and support administrator, direct support staff, providers, licensed or certified professionals, and any other persons chosen by the individual to help the individual consider possibilities and make decisions; or
- (b) An interdisciplinary team as that term is used in 42 C.F.R. 483.440 as in effect on the effective date of this rule.

25. "Unusual incident" means an event or occurrence involving an individual that is not consistent with routine operations, policies and procedures, or the individual's care or individual service plan, but is not a major unusual incident. Unusual incident includes, but is not limited to, dental injuries; falls; an injury that is not a significant injury; medication errors without a likely risk to health and welfare; overnight relocation of an individual due to a fire, natural disaster, or mechanical failure; an incident involving two individuals served that is not a peer-to-peer act major unusual incident; rights code violations or unapproved behavioral supports without a likely risk to health and welfare; emergency room or urgent care treatment center visits; and program implementation incidents.

26. "Working day" means Monday, Tuesday, Wednesday, Thursday, or Friday except when that day is a holiday as defined in section 1.14 of the Revised Code.

B. REPORTING REQUIREMENTS FOR MAJOR UNUSUAL INCIDENTS

1. Reports regarding all major unusual incidents involving an individual who resides in an intermediate care facility for individuals with intellectual disabilities or who receives round-the-clock waiver services shall be filed and the requirements of this rule followed regardless of where the incident occurred.
2. Reports regarding the following major unusual incidents shall be filed and the requirements of this rule followed regardless of where the incident occurred:
 - (a) Accidental or suspicious death
 - (b) Attempted suicide
 - (c) Death other than accidental or suspicious death
 - (d) Exploitation
 - (e) Failure to report
 - (f) Law enforcement
 - (g) Misappropriation
 - (h) Missing individual
 - (i) Neglect
 - (j) Peer-peer act
 - (k) Physical abuse
 - (l) Prohibited sexual relations

- (m) Sexual abuse
- (n) Verbal abuse

3. Reports regarding the following major unusual incidents shall be filed and the requirements of this rule followed only when the incident occurs in a program operated by a county board or when the individual is being served by a licensed or certified provider:
 - (a) Medical emergency
 - (b) Rights code violation
 - (c) Significant injury
 - (d) Unapproved behavioral support
 - (e) Unanticipated hospitalization
4. If an individual provider has been identified as the PPI for any of the MUIs that are listed below, the UI/MUI coordinator will contact the individual provider, and request that they not have any direct contact with individuals, until the administrative or criminal investigation has been completed. The individual's Services and Support Specialist (SSS) will assist the individual in choosing another provider if applicable
 - i. Physical Abuse
 - ii. Sexual Abuse
 - iii. Misappropriation
 - iv. Neglect
 - v. Prohibited sexual relations
 - vi. Verbal Abuse
 - vii. Failure to Report a major unusual incident
5. The county board shall have a system that is available twenty-four hours a day, seven days a week, to receive and respond to all reports required by this rule. The county board shall communicate this system in writing to all individuals receiving services in the county or their guardians as applicable, providers in the county, and to the department.
6. An agency provider shall develop and implement a written policy requiring staff of the agency provider to report a major unusual incident to senior management of the agency provider within two working days following the day staff become aware of a potential or determined major unusual incident.
7. Procedures for Responding to Anonymous Reports
 - a. Ask the caller for the individual's name, location and description of the incident.
 - b. Ask the caller if they have other information that may be helpful.
 - c. Next, contact law enforcement if the information reveals the individual's health and welfare is in danger or is injured and needs immediate medical attention.

Report to law enforcement the information received and request an officer to complete a Well Check with an SSA staff present.

- d. An SSA will visit the location with law enforcement and follow law enforcement's guidelines.
 - e. Evaluate and speak with the individual, assess, and observe for injuries
 - f. If the information reported from the anonymous caller does not contain information that warrants law enforcement contact, two staff from the county board will visit the location and speak with the alleged victim. If a family member or person who is speaking on behalf of the individual refuses to allow the county board staff to speak with the victim and the situation is not a MUI or life threatening, staff will offer services and provide the person with county board contact information.
8. The Athens County Board of DD MUI Coordinator or Designee shall serve as the contact person to receive and manage the report receipt process during normal business hours. For emergencies or after hours and holidays the Emergency Pager Number can be contacted and an SSA will assist the caller as applicable. Board employees, contracted providers, and families will be given these numbers.
9. Each department within the Athens County Board will enter all incidents for their department on an Unusual Incident Log/into the Gatekeeper system. The log will be reviewed monthly to determine if there are any trends or patterns that need addressed. Each department will send the UI log that has been signed by a designee and dated upon that review, each month to the ACBDD UI/MUI coordinator. The ACBDD UI/MUI coordinator then reviews the logs to ensure there are no missed MUIs or missed trends or patterns

10. Failure to Report

When a mandated reporter fails to report suspected abuse, neglect, or misappropriation as required by ORC 5123.61, they are guilty of a misdemeanor of the fourth degree. If the unreported abuse, neglect, or misappropriation constitutes a felony then the individual is guilty of a misdemeanor of the second degree.

Any ACBDD employee as defined in ORC 5123.60 who fails to report abuse, neglect, or misappropriation is additionally eligible to be included in the abuser registry established under ORC 5123.604.

C. COURT ORDERED PROTECTIVE SERVICES

Section 5126.33 of the ORC authorizes a County Board of DD to file a complaint with the Probate Court of the county in which the adult with developmental disabilities (the

"adult") resides for a court order authorizing the board to arrange for protective services. A complaint for protective services is filed when the following conditions exist:

- a. An adult with a developmental disability is at substantial risk of harm or death as a result of abuse, neglect, or exploitation.
- b. The adult does not have the ability to make decisions concerning food, clothing, shelter, health care, or other necessities.
- c. The adult is in need of services.
- d. No one is able or authorized by law to consent to services. Protective services are defined as services provided by a Board of DD to an adult to prevent and correct conditions resulting from abuse, neglect, and exploitation. Court-ordered protective services are only for an adult who is eligible for board services.

D. ACTIONS FOLLOWING DETERMINATION OF A MAJOR UNUSUAL INCIDENT

1. As soon as practical, but no later than four hours after becoming aware of a Major Unusual Incident, the provider shall verbally notify the legal guardian or advocate selected by the individual, unless the legal guardian or advocate is the primary person involved (PPI) that forms the basis for the reported incident. If the provider is unable to verbally notify the guardian or advocate, the provider shall document all efforts made to comply.
2. Immediately upon identification or notification of an MUI, the provider or county board, when acting as the provider for the individual, shall take all reasonable measures to ensure the health and welfare of any at-risk individual.
 - a. The Law Enforcement Agency, as defined in the ORC Section 5123.61, having jurisdiction over the location at which the incident occurred if the Major Unusual Incident includes conduct that would constitute a possible criminal act, including abuse or neglect. This report shall be made immediately upon notification that the incident has occurred. (Note: the MUI Coordinator or designee after reviewing the incident and it is determined the information meets criteria for a MUI that law enforcement needs contacted; such action will be implemented ASAP) If the incident is forwarded to SOCOG or the DODD MUI Unit and the MUI Coordinator or Designee receives confirmation from these two entities to confirm the incident is an MUI, the MUI Coordinator/Designee will contact law enforcement and report the incident or provide direction to the reporting staff to do so.
 - b. The local Children Services Agency and Municipal or County Peace Officer in the County in which the individual resides pursuant to the ORC. Section 2151.421, if

the individual is under twenty-one years of age and meets the definition of an abused or neglected child as defined in the ORC. Section 2151.03 and 2151.031. This report shall be made no later than four hours after the County Board's receipt of the initial notification from the provider pursuant to paragraph (D) (4) of this policy.

- c. The Service and Support Specialist, unless that person is the primary person involved (PPI), who forms the basis for the reported incident.
 - d. When an incident occurs at a program operated by a County or County Board contracting entity, notification is to be made to the other providers of services as necessary to ensure continuity of care and support for the individual.
 - e. Notification of Coroner. Section 313.12 of the Ohio Revised Code sets forth the requirements for notification of the Coroner. With the passage of Senate Bill 178, effective January 30, 2004, section 313.12 has been expanded to include reporting the death when "any mentally retarded person or developmentally disabled person dies regardless of the circumstances" to the Coroner. Therefore, all deaths that are investigated by the County Boards of DD and the state-operated developmental centers should have already been reported to the Coroner by mandated reporters: the attending physician, emergency medical services personnel, law enforcement, or funeral director.
3. The provider or county board staff shall immediately, but no later than four hours after discover of the incident, notify UI/MUI coordinator or designee through means identified by the county board of the following incidents or allegations:
- a. Accidental or suspicious death
 - b. Exploitation
 - c. Misappropriation
 - d. Neglect
 - e. Peer-peer to acts
 - f. Physical abuse
 - g. Sexual abuse
 - h. Verbal abuse; and
 - i. When the provider has received an inquiry from the media regarding a major unusual incident
4. For all MUIs, a provider shall submit a written incident report to the UI/MUI coordinator by 3:00 p.m. on the first working day following the day the provider becomes aware of a potential or determined MUI. The report shall be submitted in a format prescribed by the department.

5. The UI/MUI coordinator/designee shall enter preliminary information regarding the incident on the ITS and in the manner prescribed by the department by 5:00 p.m. on the first working day following the day the county board receives notification from the provider or otherwise becomes aware of the major unusual incident.
6. When a provider has placed an employee on leave or otherwise taken protective action pending the outcome of the investigation, the county board or department, as applicable, shall keep the provider apprised of the status of the investigation so that the provider can resume normal operations as soon as possible consistent with the health and welfare of any at-risk individual.
7. The county board shall have a system that is available twenty-four hours a day, seven days a week, to receive and respond to all reports required by this rule. The county board shall communicate this system in writing to all providers in the county and to the department.
8. The provider shall immediately report to the law enforcement entity having jurisdiction of the location where the incident occurred, any allegation of a criminal act. The county board shall ensure the notification has been made.
9. All allegations of abuse or neglect as defined in Section 2151.03 and Section 2151.031 of the Revised Code of an individual under the age of twenty-one years shall be immediately reported to the local public children's service agency. The notification may be made by the provider or the county board. The county board shall ensure the notification has been made.
10. The provider, including a county board as a provider, shall make the following notifications, as applicable, when the incident or discovery of the incident occurs when such provider has responsibility for the individual. The notification shall be made on the same day the incident or discovery of the incident occurs and include immediate actions taken.
 - a. Guardian or advocate selected by the individual or other person whom the individual has identified
 - b. Service and Support Administrator serving the individual
 - c. Other providers of services as necessary to ensure continuity of care and support for the individual.
 - d. Staff or family living at the individual's home who have responsibility for the individual's care

All notification or efforts to notify shall be documented. The county board shall ensure that all required notifications have been made.

11. Notification shall not be made if the person to be notified is the primary person involved, the spouse of the primary person involved, or the significant other of the

primary person involved, or when such notification could jeopardize the health and welfare of an individual involved.

12. Notification to a person is not required when the report comes from such person or in the case of a death when the family is already aware of the death.
13. In any case where law enforcement has been notified of an alleged criminal act, the department may provide notification of the incident to any other provider, developmental center, or county board for whom the PPI works, for the purpose of ensuring the health and safety of any at-risk individual. The notified provider or county board shall take such steps necessary to address the health and welfare needs of any at-risk individual and may consult the department in this regard. The department shall inform any notified entity as to whether the incident is substantiated. Providers, developmental centers, or county boards employing a PPI shall notify the department when they are aware that the PPI works for another provider.

E. INVESTIGATING MAJOR UNUSUAL INCIDENTS

1. The Athens County Board of DD shall employ at least one Investigative Agent or contract with a person or Government entity, including another County Board or Regional Council of Governmental, for the services of an Investigative Agent pursuant to the ORC. Section 5126.221 An Investigative Agent shall be certified by Ohio Department of Developmental Disabilities pursuant to rules adopted under the ORC Section 5126.25.
2. UI/MUI Coordinator or designee will implement the following process to determine if an unusual incident meets criteria to be a major unusual incident.
 - (a) The UI/MUI Coordinator or Designee makes the determination if an incident meets criteria for a MUI if it meets the following criteria:
 - i. Review the UI thoroughly to assess what is the risk to the individual's health and safety.
 - ii. Gather more information if necessary by contacting and speaking with the individual, provider, supervisor, or Service and Support Specialist.
 - iii. Ask for written statements if necessary. These written statements may be helpful later when making the determination after the information is gathered.
 - iv. Review the Individual Service Plan (ISP) or Individual Educational Plan (IEP) or other plans such as, Behavior Support Plans and IHP-type of plans provided by ICF/DD.

- v. Review all information obtained and if unable to make the determination contact either the Southern Ohio Council of Governments or the DODD MUI Regional Manager, and request assistance with making the determination.
 - vi. Once the UI has been determined it meets criteria for an MUI, start completing the documentation on the MUI Notification Form (see attached form).
 - vii. Complete the MUI Notification Form for SOCOG and forward to the COG with the incident report, ISP, BSP, and witness statements if collected with request for the investigative agent to conduct the investigation.
 - viii. To eliminate conflict in determining if an incident is a UI or MUI when it involves a county board staff, the MUI Coordinator may contact the MUI Unit Regional Manager by telephone to request assistance with determination.
- 2. Upon determination of an MUI, the Investigative Agent from the contracted entity/SOCOG will complete the MUI Investigation according to the required protocol. The investigative agent has 42 calendar days, or 30 business days, to complete the investigation. The investigative agent for SOCOG is responsible for scheduling interviews, gathering documentation, and other actions necessary to complete the investigation per the requirements mandated by the OAC 5123:2-17-02.
- 3. The Investigative Agent contracted through the SOCOG, shall immediately initiate the investigation within twenty-four (24) hours if the Major Unusual Incident involves any of the following:
 - a. Abuse, neglect, or misappropriation;
 - b. Any injury of an unknown or suspicious origin;
 - c. Suspicious or accidental death;
 - d. The individual cannot be located; or
 - e. Any other Major Unusual Incident the County Board determines should be investigated based on a review of the incident. The County Board can make a verbal request to the IA to collect written statements for any MUI the County Board determines this action is necessary.
- 4. Ohio Department of Developmental Disabilities may conduct a separate review or investigation of any Major Unusual Incident, or may request that a separate review or

investigation be conducted by another County Board, Regional Council of Government, or any other entity authorized to conduct such investigations. If a separate investigation is conducted, the investigation shall be completed within thirty days, unless the investigation is being conducted by Law Enforcement Agency or local Children Services Agency.

Except when law enforcement or the public children's service agency is conducting the investigation, the investigative agent shall conduct all interviews for MUIs unless the investigative agent determines the need for assistance with interviewing an individual. For MUIs that occur in an ICF/DD for individuals with intellectual disabilities, the investigative agent may utilize interviews conducted by the ICF/DD for individuals with intellectual disabilities or conduct his/her own interviews. If the investigative agent determines the information is reliable, the investigative agent may utilize other information received from law enforcement, the public children's service agency, or providers in order to meet the requirements of this rule. If a requirement cannot be met, the investigative agent shall document that the requirement cannot be met and the reasons therefore.

Except when law enforcement or the public children's services agency has been notified and is considering an investigation, the county board shall commence an administrative investigation. If law enforcement or the public children's services agency notifies the county board that it has declined to investigate, the county board shall commence the administrative investigation within a reasonable amount of time based on the initial information received or obtained and consistent with the health and welfare of all at-risk individuals, but no later than twenty-four hours for a major unusual incident in category A or no later than three working days for a major unusual incident in category B or category C.

5. The department shall conduct the administrative investigation when the major unusual incident includes an allegation is against:
 - i. The superintendent of a county board or developmental center
 - ii. The executive director of a regional council of government;
 - iii. A management employee who reports directly to the superintendent of the county board, the superintendent of a developmental center, or executive director or equivalent of a regional council of government.
 - iv. An investigative agent
 - v. A service and support administrator
 - vi. A major unusual incident contact or designee employed by a county board
 - vii. A current member of a county board
 - viii. A person having any known relationship with any of the persons specified in this policy when such relationship may present a conflict of interest or the appearance of a conflict of interest.
 - ix. An employee of a county board or a developmental center when it is alleged that the employee is responsible for an individual's death, has

committed sexual abuse, engaged in prohibited sexual activity, or committed physical abuse or neglect resulting in emergency room treatment or hospitalization.

6. A department-directed administrative investigation or administrative investigation review may be conducted following the receipt of a request from a county board, developmental center, provider, individual, or guardian if the department determines that there is a reasonable basis for the request.
7. The department may conduct a review or administrative investigation of any major unusual incident or may request that a review or administrative investigation be conducted by another county board, a regional council of governments, or any other governmental entity authorized to conduct an investigation.
8. If the provider is an ICF/DD, the ICF/DD shall investigate all Major Unusual Incidents involving individuals receiving services from the ICF/DD. This investigation shall be conducted in accordance with all applicable Federal Regulations, including 42 C.F.R. 483.420.
9. If the Major Unusual Incident involves an individual residing in an ICF/DD, and the incident occurs at a program operated by the Board or a Board contracting entity, the Board shall be responsible for ensuring compliance with all requirements of this policy. This policy shall not affect the responsibility of an ICF/DD to investigate reports of abuse and neglect as required by Federal Regulations.
8. An ICF/DD, excluding a Developmental Center, shall submit to the Board its investigation report within fourteen days of becoming aware of a Major Unusual Incident. The MUI Coordinator reviews the report to ensure the report is in compliance with the OAC requirements set forth in 5123:2-17-02. If the report is in compliance the MUI Coordinator accepts the report and will forward a copy of the ICF/DD's MUI report/summary to the investigative agent. For all other MUIs the MUI Coordinator will request the investigative agent from SOCOG to complete an investigation implementing the required "Protocol" as required by the OAC 5123:2-17-02.
10. An ICF/DD is required to conduct an investigation regardless of where an incident involving an individual of the ICF/DD occurs. If the MUI involves an individual who resides in an ICF/DD, including a developmental center, and the incident occurs at a program operated by a county board, it is the responsibility of the ICF/DD to complete an investigation and assure that the investigation complies with federal guidelines. The investigative agent may utilize or conduct a separate investigation. Copies of the full investigation shall be provided to the ICF/DD and the county board. All requirements in the MUI rule shall be met. The department shall resolve any conflicts that arise. This paragraph shall not affect the responsibility of an ICF/DD to investigate all reports of

abuse and neglect and to conduct an investigation in accordance with all applicable federal regulations; including 43 C.F.R. 483.420 (dated October 1, 2005).

11. When an agency provider, excluding a developmental center, conducts an internal review of an incident for which an MUI has been filed, the agency shall submit the results of its internal review of the incident, including statements and documents, to the county board within fourteen calendar days of the agency becoming aware of the incident.
12. All ACBDD employees shall cooperate with administrative investigations conducted by entities authorized to conduct investigations. Providers and county boards shall respond to requests for information within the timeframe requested. The timeframes identified shall be reasonable.
13. The investigative agent shall complete a report of the investigation and submit it for closure in the ITS within thirty working days unless the department grants an extension.
14. The report shall follow the format prescribed by the department. The investigative agent shall include the initial allegation, a list of persons interviewed and documents reviewed; a summary of each interview and document reviewed, and a findings and conclusions section, which shall include the cause and contributing factors to the incident and the facts that support the findings and conclusions.

F. MAJOR UNUSUAL INCIDENT WRITTEN SUMMARIES

1. No later than five working days following the county board's recommendation for closure via the incident tracking system, the county board, developmental center, or department shall provide a written summary of the administrative investigation of category A or category B major unusual incidents, including the allegations, the facts and findings, including as applicable, whether the case was substantiated or unsubstantiated, and preventive measures implemented in response to the major unusual incident to:
 - a. The individual, individual's guardian, or other person whom the individual has identified, as applicable; in the case of a peer-to-peer act, both individuals, individuals' guardians, or other persons whom the individuals have identified, as applicable, shall receive the written summary;
 - b. The licensed or certified provider and provider at the time of the major unusual incident; and,
 - c. The individual's service and support administrator or support broker, as applicable.

2. In the case of an individual's death, the written summary shall be provided to the individual's family upon request.
3. The Southern Ohio Council of Governments (SOCOG) shall send all written summaries to required parties per the MUI rule.
4. The written summary shall not be provided to the PPI, the PPI's spouse, or the PPI's significant other.
5. When the primary person involved is a developmental disabilities employee or a guardian, SOCOG shall, no later than five working days following the recommended closure of a case, make a reasonable attempt to provide written notice to the primary person involved as to whether the major unusual incident has been substantiated, unsubstantiated/insufficient evidence, or unsubstantiated/unfounded.
6. If a service and support administrator is not assigned, a county board designee shall be responsible for ensuring the preventive measures are implemented based upon the written summary.
7. The county board MUI coordinator or designee is responsible for communicating with the ICF/DD's administration or designee to ensure preventive plans have been completed and implemented.

G. DISPUTE OF MAJOR UNUSUAL INCIDENT INVESTIGATION FINDINGS

1. An individual, individual's guardian, individual's advocate, or provider may dispute the findings by submitting a letter of dispute and supporting documentation to the county board superintendent, or to the director of the department if the department has conducted the investigation, within fifteen calendar days following receipt of the summary. An individual may receive assistance from any person selected by the individual to prepare a letter and provide supporting documentation.
2. The superintendent or designee or the director or designee, as applicable, shall consider the letter of dispute, the supporting documentation, and any other relevant information and issue a determination within thirty calendar days of such submission and take action consistent with such determination, including confirming or modifying the findings or directing that more information be gathered and the findings be reconsidered.
3. In cases where the letter of dispute has been filed with the county board, the disputant may dispute the final findings made by the county board by filing those findings and any documentation contesting such findings that are disputed with the

director of the department within fifteen calendar days of the county board determination. The director will issue a decision within thirty calendar days.

H. REVIEW AND PREVENTION OF MAJOR UNUSUAL INCIDENTS

1. Agency providers shall implement a written procedure for the internal review of all MUIs and shall be responsible for taking all reasonable steps necessary to prevent the reoccurrence of MUIs.
2. Members of an individual's team shall ensure that risks associated with major unusual incidents are addressed in the individual plan or individual service plan of each individual affected and collaborate on the development of preventive measures to address the causes and contributing factors to the major unusual incident. The team members shall jointly determine what constitutes reasonable steps necessary to prevent the recurrence of major unusual incidents. If there is no service and support administrator, team, qualified intellectual disability professional, or agency provider involved with the individual, a county board designee shall ensure that preventive measures as are reasonably possible are fully implemented.
2. Each SSA will send the UI/MUI coordinator a written prevention plan per the UI/MUI rule for an MUI involving an Individual on his/her caseload. The MUI coordinator will file each prevention plan either in the MUI file. The SSA will coordinate with the team as needed to develop a prevention plan that will address the causes and contributing factors of the incident. The team members shall jointly determine what constitutes reasonable steps necessary to prevent the reoccurrences of UI/MUIs. (If there is no SSA, individual team, or agency provider involved with the individual, a county board designee shall ensure that preventive measures as written are reasonably possible. The MUI Coordinator will ensure that preventative measures are fully implemented.
3. The department shall review reports submitted by the Board for incidents listed in paragraph (K)(4) of the MUI Rule. The department may review any other reports and may obtain additional information necessary to consider the report, including copies of all investigation reports that have been prepared. Such additional information shall be provided within the time period specified by the department.
4. The department shall determine when to close the following cases: Abuse, neglect, misappropriation, death, exploitation, failure to report, missing individual, peer-to-peer acts, prohibited sexual relations, rights code violation, unapproved behavior support, significant injury (when cause is unknown), an incident that is the subject of a director's alert, any MUI investigated by the department.
5. The county board shall review and close reports regarding all incidents listed below:
 - a. attempted suicide
 - b. significant injury (when the cause is known)

- c. law enforcement
 - d. medical emergency
 - e. unscheduled hospitalizations
6. When determining that a case should be closed, the department and the county board shall consider the following criteria:
- a. Whether all reasonable measures have been taken to ensure the health and welfare of the individual.
 - b. Whether a thorough investigation of the incident has been conducted;
 - c. Whether the incident is part of a pattern or trend requiring some additional action;
 - d. Whether appropriate measures have been implemented or rules have been satisfied;
 - e. Whether all requirements set forth in statute or rule have been satisfied;
 - f. Whether the case meets the criteria for referral to the abuser registry unit pursuant to ORC Section 5123.51.

The department may review any case to ensure it has been properly closed and shall conduct sample reviews to ensure proper closure by the county board. The department may re-open any investigation that does not meet requirements of this rule. The county board shall provide any information deemed necessary by the department to close the case.

7. The ACBDD initiates action to address reoccurrence of MUI'S by implementing the following procedures.
- a. A prevention plan is developed based upon the individual's needs and input from the individual and guardian as applicable.
 - b. The team will review the recommendations noted by the investigator for the MUI, and will apply according to the individual and team decision. This policy and procedure does not require the team or any agency to apply the recommendations noted by the investigator to the prevention plan.
 - c. The team consists of different employees from various agencies involved with the individual and is not limited to any certain agency or individual.

- e. The MUI Coordinator/Designee will submit the Prevention Plan and recommend closure to the Internal Tracking System at the DODD.

I. ANALYZING MAJOR UNUSUAL INCIDENTS TO IDENTIFY PATTERNS AND TRENDS

1. By January 31st of each year, a provider shall conduct an in-depth review and analysis of trends and patterns of major unusual incidents occurring during the preceding calendar year and compile an annual report which contains:
 - (a) Date of review;
 - (b) Name of person completing review;
 - (c) Time period of review;
 - (d) Comparison of data for previous three years;
 - (e) Explanation of data;
 - (f) Data for review by major unusual incident category type;
 - (g) Specific individuals involved in established trends and patterns (i.e., five major unusual incidents of any kind within six months, ten major unusual incidents of any kind within a year, or other patterns identified by the individual's team);
 - (h) Specific trends by residence, region, or program;
 - (i) Previously identified trends and patterns; and
 - (j) Action plans and preventive measures implemented to address noted trends and patterns.
2. A provider other than a county board shall send the annual report to the county board for all programs operated in the county by February 28th of each year. The county board shall review the annual report to ensure that all issues have been reasonably addressed to prevent recurrence of major unusual incidents. The county board shall keep the annual report on file and make it available to the department upon request.
3. A county board that provides specialized services shall send the annual report to the department for all programs operated by the county board by February 28th of each year. The department shall review the annual report to ensure that all issues have been reasonably addressed to prevent recurrence of major unusual incidents.
4. Each county board or as applicable, each council of governments to which the county board belongs, shall have a committee that reviews trends and patterns of MUIs. The committee shall be made up of a reasonable representation of the county board(s), provider agencies, families, and other stakeholders deemed appropriate by the committee.
7. The role of the committee shall be to review and share the county or council of government's aggregate data prepared by the county board or council of government

to identify trends, patterns, or areas for improving the quality of life for individuals supported in the county or counties.

8. The committee shall meet each March to review and analyze data for the first six months of the calendar year and each March to review and analyze data for the preceding calendar year. The county board or council of governments shall send the aggregate data prepared for the meeting to all participants at least ten calendar days in advance of the meeting.
9. The county board or council of governments shall record and maintain minutes of each meeting, distribute the minutes to members of the committee, and make the minutes available to any person upon request.
10. The department shall ensure follow-up actions identified by the committee have been implemented.
11. The department shall prepare a report on trends and patterns identified through the process of reviewing MUIs. The department shall periodically, but at least semi-annually, review this report with a committee appointed by the director of the department which shall consist of at least six members who represent various stakeholder groups, including Ohio Legal Rights Service and the Ohio Department of Job and Family Services. The committee shall make recommendations to the department regarding whether appropriate actions to ensure the health and safety of individual served have been taken. The committee may request for the department to obtain additional information as necessary to make recommendations.

J. UNUSUAL INCIDENTS REQUIREMENTS

1. Required reporting
 - a. The Athens County Board of DD requires anyone who becomes aware of an unusual incident to report it to the person designated by each program component who can initiate proper action. These reports must be made no later than twenty-four (24) hours after the occurrence of the incident. Individual providers shall forward UI/MUIs to the county board by fax or in person the same day the UI is discovered and/or they can call the county board SSA or MUI coordinator and report the incident by phone.
 - b. The agency provider and county board as a provider shall ensure that all staff is trained and knowledgeable regarding the policy and procedure.
 - c. If the UI occurs at a site operated by the county board or at a site operated by an entity with which the county board contracts, the county board or contracted entity shall notify the licensed provider or staff, guardian, or other person whom the individual has identified, as applicable, at the individual's residence.

The notification shall be made by 3:00pm on the first working day following the day the unusual incident is discovered.

- d. The provider providing services when the unusual incident occurs shall notify other providers of services as necessary to ensure continuity of care and support for the individual.
- e. Each agency provider and independent provider shall maintain a log of all unusual incidents. The log shall include, but is not limited to, the name of the individual, a brief description of the unusual incident, any injuries, time, date, location, cause and contributing factors, and preventive measures.
- f. Members of an individual's team shall ensure that risks associated with unusual incidents are addressed in the individual plan or individual service plan of each individual affected.
- g. A provider, upon request by the department or a county board, provide any and all information and documentation regarding an unusual incident and investigation of the unusual incident.
- e. f. When the county board is a provider of relevant services, the department shall review, on a monthly basis, a representative sampling of county board logs. The county board shall submit the specified logs to the department upon request. The department shall review the logs to ensure all MUIs have been reported and trends and patterns have been identified and addressed.
- g. The agency provider and the county board as a provider shall ensure that trends and patterns of UIs are included and addressed in each individual's service plan as applicable.

K. OVERSIGHT

1. The county board shall review, on a quarterly basis, a representative sample of provider logs, individual provider unusual incident logs, including logs where the county board is a provider for the purpose of ensuring that all MUIs required to be reported have been reported and that trends and patterns have been identified and addressed. The sampling shall be made available to the department for review upon request.
2. The department shall conduct reviews of county boards and providers as necessary to ensure the health and welfare of individuals and compliance with the requirements of this policy. Failure to comply with the requirements of this policy may be considered by the department in any regulatory capacity, including certification, licensure, and accreditation.

2. The department shall provide access to the ITS to this single state Medicaid agency and the Ohio Legal Rights Service in accordance with Section 5123.604 of the Revised Code.

L. ACCESS TO RECORDS

1. Reports made under the ORC Section 5123.61 and this policy are not public records as defined in the ORC Section 149.43. Records may be provided to parties authorized to receive them in accordance with the ORC Sections 5123.613 and 5126.044 of the revised code, to any governmental entity authorized to investigate the circumstances of the alleged abuse or neglect, misappropriation, or exploitation and to any party to the extent that release of record is necessary for the health or welfare of an individual.
2. The county board or the department shall not review, copy, or include in any reports required by this policy the personnel records of an employee that is confidential under State or Federal statutes or rules, including medical and insurance records, Worker's Compensation records, Immigration status forms (I-9), and Social Security numbers. The provider shall redact any confidential information contained in a record before copies are provided to the county board or the department. A provider shall make all other records available upon request by a county board or the department. A provider shall provide confidential information, including the date of birth and social security number, when requested by the department as part of the abuser registry process in accordance with rule 5123:2-17-03 of the Administrative Code.
7. The MUI Coordinator may forward the Major Unusual Incident Investigative Report to a county board supervisor and staff at supervisor's discretion (the MUI report is not shared with the PPI or staff that may constitute a conflict between supervisor and other staff). This is to ensure pertinent information is shared with staff that is involved with the individual to prevent the possibility of another MUI reoccurring or to compose a prevention plan.

M TRAINING AND TECHNICAL ASSISTANCE

1. Agency providers and county boards shall ensure staff employed in direct services positions are trained on the requirements of this rule prior to direct contact with any individual. Thereafter, staff employed in direct services positions shall receive annual training on the requirements of this rule including a review of health and welfare alerts issued by the department since the previous year's training.
2. Agency providers and county boards shall ensure staff employed in positions other than direct services positions are trained on the requirements of this rule no later than ninety calendar days from date of hire. Thereafter, staff employed in positions other than direct services positions shall receive annual training on the requirements of this rule including a review of health and welfare alerts issued by the department since the previous year's training.

3. The department shall provide technical assistance and training to providers and county boards as necessary. The department shall periodically monitor compliance with the provisions of this rule.

DRAFT

APPENDIX

INVESTIGATION PROTOCOL

The investigation consists of four basic steps:

- A. Planning the Investigation,
- B. Gathering Information,
- C. Analysis of Information, and
- D. Completion of an Investigation Report.

The investigator should take the following steps in conducting an investigation:

1. Initiate the investigation (see Steps 2-9) within 48 hours of the time the report was filed. Some cases require immediate investigation. The administrative investigation should not interfere with the criminal investigation. For incidents that are referred to law enforcement and a criminal investigation is ongoing, there should be follow-up (see Step 4).
2. Secure all physical evidence; take photographs of injuries (as needed) and secure/sketch photograph the scene of the incident.
3. Visit the scene of the incident as soon as possible (if applicable).
4. Follow-up with law enforcement, CSB, if needed.
5. Review all relevant documents relating to the primary person involved that forms the basis for the reported incident and the alleged victim.
6. Interview all direct witnesses to the incident, including the individual. Document the interviews.
7. Interview medical professionals (as needed) as to the possible cause of age of injuries. Document the interviews.
8. Interview others who may have relevant information - Service and Support Administrators, Program Directors, medical personnel who treated the injured individual. Document the interviews.
9. Gather written statements from all relevant witnesses.
10. Conduct follow-up interviews, if needed.
11. Complete an investigation report, which includes the following:
 - a. Clear statement of the allegation and the basic question(s) to be answered by the investigation,
 - b. Evaluation of all witnesses and documentary evidence in a clear, complete and non-ambiguous manner,
 - c. Evaluation of the relative credibility of the witnesses,
 - d. A succinct and well-reasoned analysis of the evidence, and
 - e. A clearly stated conclusion, which identifies which allegations were and were not substantiated.

Manual: Admin
Adopted: 10/28/98
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2/25/14; 8/22/17

53. MAJOR UNUSUAL INCIDENT/UNUSUAL INCIDENT

POLICY

Athens County Board of Developmental Disabilities (ACBDD) employees, and any person providing services to individuals with developmental disabilities, irrespective of the setting, is mandated to report all suspected abuse and neglect incidences.

The purpose of this policy is to define and establish a system in order to recognize, report, review and investigate allegations of abuse and neglect, major unusual incidents (MUI) and unusual incidents (UI).

All licensed or certified service providers shall record the occurrence of unusual incidents and make such records available to the county board upon request. When an unusual incident occurs while an individual is receiving services from the county board, the county board shall record the unusual incident(s) and make available to licensed agency providers, independent providers and ICF/DDs upon request.

Reports made under section 5123.61 of the Revised Code and this rule are not public records as defined in section 149.43 of the Revised Code. Records may be provided to parties authorized to receive them in accordance with sections 5123.613 and 5126.044 of the Revised Code, to any governmental entity authorized to investigate the circumstances of the alleged abuse, neglect, misappropriation, or exploitation and to any party to the extent that release of a record is necessary for the health and welfare of the individual.

Intermediate Care Facilities for the Developmental Disabilities (ICF/DD) unusual incidents or major unusual incident for individuals who are living in an ICF/DD reports are to be made available immediately to the administrator or appointed administrator (exception if the administrator has been identified as the PPI). The ICF/DD's are required to follow federal guidelines that include the ICF/DD's to be notified of all incidents that occur immediately.

The ACBDD per ORC 5126.058 has incorporated the Memorandum of Understanding between mandated subscribers.

The ACBDD contracts with the Southern Ohio Council of Governments (SOCOG) to conduct Major Unusual Incident Investigations and Major Unusual Incident Reviews.

The ACBDD shall follow the requirements in OAC 51262-17-03 for the Abuse Registry.

All licensed or certified service providers including staff of the Athens County Board of DD shall report all alleged, suspected, or actual occurrences of major unusual incidents to the county board immediately, but no later than four (4) hours, following the service provider's or county board's initial notification of the occurrence. All incident reports are to be submitted by 3:00 P.M. the following working day; the UI/MUI Coordinator/Designee will submit the preliminary information on the Ohio Department of Developmental Disabilities Incident Tracking System (ITS).

Failure to report incidents that pose a risk to individuals' health and welfare may result in penalties under Ohio Law, contract terminations, and for county board employees, disciplinary actions. Failure to cooperate in an investigation or incident review may result in disciplinary action.

UI/MUI PROCEDURES

A. DEFINITIONS

1. "Administrative investigation" means the gathering and analysis of information related to a major unusual incident so that appropriate action can be taken to address any harm or risk of harm and prevent recurrence. There are three administrative investigation procedures (Appendix A, Appendix B, and Appendix C) that correspond to the three categories of major unusual incidents.
2. "Agency provider" means a provider, certified or licensed by the department or a provider approved by the Ohio Department of Medicaid to provide services under the transitions developmental disabilities waiver, that employs staff to deliver services to individuals and who may subcontract the delivery of services. "Agency provider" includes a county board while providing specialized services.
3. "At-risk individual" means an individual whose health or welfare is adversely affected or whose health or welfare may reasonably be considered to be in danger of being adversely affected.
4. "County board" means a county board of developmental disabilities as established under Chapter 5126. of the Revised Code or a regional council of governments as established under Chapter 167 of the Revised Code when it includes at least one county board.
5. "Department" means the Ohio Department of Developmental Disabilities.
6. "Developmental center" means an intermediate care facility under the managing responsibility of the department.
7. "Developmental disabilities employee" means any of the following:
 - (a) An employee of the department
 - (b) An employee of a county board
 - (c) An employee of an agency provider in a position that includes providing specialized services to an individual; or

- (d) An independent provider.
8. "Incident report" means documentation that contains details about a major unusual incident or an unusual incident and shall include, but is not limited to:
- (a) Individual's name;
 - (b) Individual's address;
 - (c) Date of incident;
 - (d) Location of incident;
 - (e) Description of incident;
 - (f) Type and location of injuries;
 - (g) Immediate actions taken to ensure health and welfare of individual involved and any at-risk individuals;
 - (h) Name of primary person involved and his or her relationship to the individual;
 - (i) Names of witnesses;
 - (j) Statements completed by persons who witnessed or have personal knowledge of the incident;
 - (k) Notifications with name, title, and time and date of notice;
 - (l) Further medical follow-up; and
 - (m) Name of signature of person completing the incident
9. "Incident tracking system" means the department's web-based system for reporting major unusual incidents.
10. "Independent provider" means a self-employed person who provides services for which he or she must be certified under rule 5123:2-2-01 of the Administrative Code or a self-employed person approved by the Ohio Department of Medicaid to provide services under the transitions developmental disabilities waiver and does not employ, either directly or through contract, anyone else to provide the services.
11. "Individual" means a person with a developmental disability.
12. "Individual served" means an individual who receives specialized services.
13. "Intermediate care facility" means an intermediate care facility for individuals with intellectual disabilities as defined in rule 5123:2-7-01 of the Administrative Code.
14. "Investigative agent" means an employee of a county board or a person under contract with a county board who is certified by the department to conduct administrative investigations of major unusual incidents.
15. "Major unusual incident" means the alleged, suspected, or actual occurrence of an incident when there is reason to believe the health or welfare of an individual may be adversely affected or an individual may be placed at a likely risk of harm, if such individual is receiving services through the

developmental disabilities service delivery system or will be receiving such services as a result of the incident. There are three categories of major unusual incidents that correspond to three administrative investigation procedures delineated in Appendix A, Appendix B, and Appendix C to this rule:

(a) Appendix A

- (i) Accidental or suspicious death. "Accidental or suspicious death" means the death of an individual resulting from an accident or suspicious circumstances.
- (ii) Exploitation. "Exploitation" means the unlawful or improper act of using an individual or an individual's resources for monetary or personal benefit, profit, or gain.
- (iii) Failure to report. "Failure to report" means that a person, who is required to report pursuant to section 5123.61 of the Revised Code, has reason to believe that an individual has suffered or faces a substantial risk of suffering any wound, injury, disability, or condition of such a nature as to reasonably indicate abuse, misappropriation, or exploitation that results in a risk to health and welfare or neglect of that individual, and such person does not immediately report such information to a law enforcement agency, a county board, or in the case of an individual living in a developmental center, either to law enforcement or the Department. Pursuant to division (C)(1) of section 5123.61 of the Revised Code, such report shall be made to the department and the county board when the incident involves an act or omission of an employee of a county board.
- (iv) Misappropriation. "Misappropriation" means depriving, defrauding, or otherwise obtaining the real or personal property of an individual by any means prohibited by the Revised Code, including Chapters 2911 and 2913 of the Revised Code.
- (v) Neglect. "Neglect" means when there is a duty to do so, failing to provide an individual with any treatment, care, goods, supervision, or services necessary to maintain the health or welfare of the individual.
- (vi) Peer-to-peer act. "Peer-to-peer act" means one of the following incidents involving two individuals served:
 - (a) Exploitation which means the unlawful or improper act of using an individual or an individual's resources for monetary or personal benefit, profit, or gain.

- (b) Theft which means intentionally depriving another individual of real or personal property valued at twenty dollars or more or property of significant personal value to the individual.
- (c) Physical act that occurs when an individual is targeting, or firmly fixed on another individual such that the act is not accidental or random and the act results in an injury that is treated by a physician, physician assistant, or nurse practitioner. Allegations of one individual choking another or any head or neck injuries such as a bloody nose, a bloody lip, a black eye, or other injury to the eye, shall be considered major unusual incidents. Minor injuries such as scratches or reddened areas not involving the head or neck shall be considered unusual incidents and shall require immediate action, a review to uncover possible cause/contributing factors, and prevention measures.
- (e) Sexual act which means sexual conduct and/or contact for the purpose of sexual gratification without the consent of the other individual.
- (e) Verbal act which means the use of words, gestures, or other communicative means to purposefully threaten, coerce, or intimidate the other individual when there is the opportunity and ability to carry out the threat.
- (vii) Physical abuse. "Physical abuse" means the use of physical force that can reasonably be expected to result in physical harm or serious physical harm as those terms are defined in section 2901.01 of the Revised Code. Such force may include, but is not limited to, hitting, slapping, pushing, or throwing objects at an individual.
- (viii) Prohibited sexual relations. "Prohibited sexual relations" means a developmental disabilities employee engaging in consensual sexual conduct or having consensual sexual contact with an individual who is not the employee's spouse, and for whom the developmental disabilities employee was employed or under contract to provide care or supervise the provision of care at the time of the incident.
- (ix) Rights code violation. "Rights code violation" means any violation of the rights enumerated in section 5123.62 of the Revised Code that creates a likely risk of harm to the health or welfare of an individual.
- (x) Sexual abuse. "Sexual abuse" means unlawful sexual conduct or sexual contact as those terms are defined in section 2907.01 of the

Revised Code and the commission of any act prohibited by Chapter 2907. of the Revised Code (e.g., public indecency, importuning, and voyeurism).

- (xi) Verbal abuse. "Verbal abuse" means the use of words, gestures, or other communicative means to purposefully threaten, coerce, intimidate, harass, or humiliate an individual.

(b) Appendix B

- (i) Attempted suicide. "Attempted suicide" means a physical attempt by an individual that results in emergency room treatment, in-patient observation, or hospital admission.
- (ii) Death other than accidental or suspicious death. "Death other than accidental or suspicious death" means the death of an individual by natural cause without suspicious circumstances.
- (iii) Medical emergency. "Medical emergency" means an incident where emergency medical intervention is required to save an individual's life (e.g., choking relief techniques such as back blows, cardiopulmonary resuscitation, epinephrine auto injector usage, or intravenous for dehydration).
- (iv) Missing individual. "Missing individual" means an incident that is not considered neglect and an individual's whereabouts, after immediate measures taken, are unknown and the individual is believed to be at or pose an imminent risk of harm to self or others. An incident when an individual's whereabouts are unknown for longer than the period of time specified in the individual service plan that does not result in imminent risk of harm to self or others shall be investigated as an unusual incident.
- (v) Significant injury. "Significant injury" means an injury of known or unknown cause that is not considered abuse or neglect and that results in concussion, broken bone, dislocation, second or third degree burns or that requires immobilization, casting, or five or more sutures. Significant injuries shall be designated in the incident tracking system as either known or unknown cause.

(c) Appendix C

- (i) Law enforcement. "Law enforcement" means any incident that results in the individual served being arrested, charged, or incarcerated.
- (ii) Unapproved behavior support. "Unapproved behavior support" means the use of an aversive strategy or intervention prohibited

by paragraph (J) of rule 5123:2-1-02 of the Administrative Code or an aversive strategy implemented without approval by the human rights committee or behavior support committee or without informed consent, that results in a likely risk to the individual's health and welfare. An aversive strategy or intervention prohibited by paragraph (J) of rule 5123:2-1-02 of the Administrative Code that does not pose a likely risk to health and welfare shall be investigated as an unusual incident.

- (iii) **Unscheduled hospitalization.** "Unscheduled hospitalization" means any hospital admission that is not scheduled unless the hospital admission is due to a pre-existing condition that is specified in the individual service plan indicating the specific symptoms and criteria that require hospitalization.
- 16. "Primary person involved" means the person alleged to have committed or to have been responsible for the accidental or suspicious death, exploitation, failure to report, misappropriation, neglect, physical abuse, prohibited sexual relations, rights code violation, sexual abuse, or verbal abuse.
- 17. "Provider" means an agency provider or independent provider that provides specialized services.
- 18. "Qualified intellectual disability professional" has the same meaning as in 42 C.F.R. 483.430 (October 1, 2012).
- 19. "Specialized services" means any program or service designed and operated to serve primarily individuals, including a program or service provided by an entity licensed or certified by the department.
- 20. "Unusual incident" means an event or occurrence involving an individual that is not consistent with routine operations, policies and procedures, or the individual's care or individual service plan, but is not a major unusual incident. Unusual incident includes, but is not limited to, dental injuries; falls; an injury that is not a significant injury; medication errors without a likely risk to health and welfare; overnight relocation of an individual due to a fire, natural disaster, or mechanical failure; an incident involving two individuals served that is not a peer-to-peer act major unusual incident; and rights code violations or unapproved behavior supports without a likely risk to health and welfare.
- 21. "Working day" means Monday, Tuesday, Wednesday, Thursday, or Friday except when that day is a holiday as defined in section 1.14 of the Revised Code.

B. PROCEDURES FOR NOTIFICATION AND REPORTING REQUIREMENTS FOR MAJOR UNUSUAL INCIDENTS

1. Immediately upon identification or notification of a major unusual incident, the provider shall take all reasonable measures to ensure the health and welfare of at-risk individuals. The provider and county board shall discuss any disagreements regarding reasonable measures in order to resolve them. If the provider and county board are unable to agree on reasonable measures to ensure the health and welfare of at-risk individuals the department shall ensure the health and welfare of at-risk individuals and the department shall make the determination. Such measures shall include:
 - a. Upon identification of an MUI that involves a sexual abuse allegation:
 - i. Provider, MUI Coordinator, or contracted entity shall report the incident immediately to law enforcement and request immediate assistance
 - ii. Assist the individual to the local emergency room if the individual is injured, but inform law enforcement so an officer can meet the individual at the hospital.
 - iii. MUI coordinator/designee shall contact the supervisor or the provider and recommend that the PPI be reassigned as soon as possible to a non-direct care duty or placed on administrative leave pending the outcome of the investigation
 - b. Physical abuse allegation- follows the recommendations listed above under Sexual Abuse
 - c. Verbal abuse- re-assign the PPI to another non-direct care task until the investigation is completed, if applicable. The PPI can continue to work if the situation is warranted and the supervisor monitors the PPI (each verbal abuse allegation is different, the supervisor will decide what immediate action shall be taken to ensure the health and welfare of individual)
 - d. Neglect- Individual received injuries due to PPI neglect, re-assign the PPI immediately to non-direct care duties or place on administrative leave pending the outcome of the investigation
 - i. Contact law enforcement if the alleged neglect circumstance involves possible criminal activity
 - e. Misappropriation- The PPI shall not have any access to the funds of any individual until the investigation is completed.
 - i. Reassign another provider or staff to monitor the individual's funds by establishing a new Payee.
 - ii. Reassignment of the PPI shall depend upon the recommendation of the supervisor and/or the UI/MUI Coordinator/designee

- f. The UI/MUI coordinator/designee can make a recommendation to ensure the health and welfare of the individual or group of individuals to a provider for any PPI that has been named as harming or suspected of causing harm an individual or group of individuals.
- g. If an individual provider has been identified as the PPI for any of the MUIs that are listed below, the UI/MUI coordinator will contact the individual provider, and request that they not have any contact with the individual, until the administrative or criminal investigation has been completed. The individual's Services and Support Specialist (SSS) will assist the individual in choosing another provider if applicable
 - i. Physical
 - ii. Sexual
 - iii. Misappropriation
 - iv. Neglect
 - v. Prohibited sexual relationship
 - vi. Verbal
 - vii. Failure to Report a major unusual incident

Reports of MUIs involving abuse, neglect, exploitation, misappropriation, or death, attempted suicide, failure to report, law enforcement, missing individual, peer-to-peer acts, and prohibited sexual relations shall be filed in all cases regardless of where the incident occurred, and all requirements of this rule shall be followed. Reports regarding the remaining categories of MUIs shall be filed and the requirements of this rule followed only when the incident occurs in a program operated by a county board or when the individual is being served by a licensed or certified provider.

- 2. The provider shall immediately but not later than four hours of the initial knowledge of the incident notify the Athens County Board of DD by one of the following ways: contacting the Athens County Board on call, contacting the MUI Coordinator, or contacting the assigned SSA by telephone. It is noted the provider MUST make contact with one of the listed ACBDD employees, as leaving a message or faxing an unusual incident does not merit notification under any of the following circumstances:
 - a. The Major Unusual Incident requires notification of Law Enforcement Agency;
 - b. The Major Unusual Incident requires notification of a Children Services Agency;
 - c. The provider has received inquiries from the media regarding a Major Unusual Incident that has not been previously reported; or
 - d. The Major Unusual Incident raises immediate concerns regarding the individual's health and welfare such that more immediate notification regarding the incident is necessary.

3. The provider shall submit a written incident report to the Athens County Board of DD by 3:00 P.M. the next working day following the provider's initial knowledge of any Major Unusual Incident. This report shall be submitted in a format prescribed by the Ohio Department of Developmental Disabilities. This form shall be available in all the county board offices.

4. Failure to Report

When a mandated reporter fails to report suspected abuse, neglect, or misappropriation as required by ORC 5123.61, they are guilty of a misdemeanor of the fourth degree. If the unreported abuse, neglect, or misappropriation constitutes a felony then the individual is guilty of a misdemeanor of the second degree.

Any ACBDD employee as defined in ORC 5123.60 who fails to report abuse, neglect, or misappropriation is additionally eligible to be included in the abuser registry established under ORC 5123.604.

5. Procedures for Responding to Anonymous Reports

- a. Ask the caller for the individual's name, location and description of the incident.
- b. Ask the caller if they have other information that may be helpful.
- c. Next, contact law enforcement if the information reveals the individual's health and welfare is in danger or is injured and needs immediate medical attention. Report to law enforcement the information received and request an officer to complete a Well Check with an SSA staff present.
- d. An SSA will visit the location with law enforcement and follow law enforcement's guidelines.
- e. Evaluate and speak with the individual, assess, and observe for injuries
- f. If the information reported from the anonymous caller does not contain information that warrants law enforcement contact, two staff from the county board will visit the location and speak with the victim. If a family member or person who is speaking on behalf of the individual refuses to allow the county board staff to speak with the victim and the situation is not a MUI or life threatening, staff will offer services and provide the person with county board contact information.

C. COURT ORDERED PROTECTIVE SERVICES

Section 5126.33 of the ORC authorizes a County Board of DD to file a complaint with the Probate Court of the county in which the adult with developmental disabilities (the "adult") resides for a court order authorizing the board to arrange for protective services. A complaint for protective services is filed when the following conditions exist:

- a. An adult with a developmental disability is at substantial risk of harm or death as a result of abuse, neglect, or exploitation.
 - b. The adult does not have the ability to make decisions concerning food, clothing, shelter, health care, or other necessities.
 - c. The adult is in need of services.
 - d. No one is able or authorized by law to consent to services. Protective services are defined as services provided by a Board of DD to an adult to prevent and correct conditions resulting from abuse, neglect, and exploitation. Court-ordered protective services are only for an adult who is eligible for board services.
1. As soon as practical, but no later than four hours after becoming aware of a Major Unusual Incident, the provider shall verbally notify the legal guardian or advocate selected by the individual, unless the legal guardian or advocate is the primary person involved (PPI) that forms the basis for the reported incident. If the provider is unable to verbally notify the guardian or advocate, the provider shall document all efforts made to comply.
 2. Immediately upon identification or notification of an MUI, the provider or county board, when acting as the provider for the individual, shall take all reasonable measures to ensure the health and welfare of any at-risk individual.
 - a. The Law Enforcement Agency, as defined in the ORC Section 5123.61, having jurisdiction over the location at which the incident occurred if the Major Unusual Incident includes conduct that would constitute a possible criminal act, including abuse or neglect. This report shall be made immediately upon notification that the incident has occurred. (Note: the MUI Coordinator or designee after reviewing the incident and it is determined the information meets criteria for a MUI that law enforcement needs contacted; such action will be implemented ASAP) If the incident is forwarded to SOCOG or the DODD MUI Unit and the MUI Coordinator or Designee receives confirmation from these two entities to confirm the incident is an MUI, the MUI Coordinator/Designee will contact law enforcement and report the incident or provide direction to the reporting staff to do so.
 - b. The local Children Services Agency and Municipal or County Peace Officer in the County in which the individual resides pursuant to the ORC. Section 2151.421, if the individual is under twenty-one years of age and meets the definition of an abused or neglected child as defined in the ORC. Section 2151.03 and 2151.031. This report shall be made no later than four hours after the County Board's receipt of the initial notification from the provider pursuant to paragraph (D) (4) of this policy.
 - c. The Service and Support Specialist, unless that person is the primary person involved (PPI), who forms the basis for the reported incident.

- d. When an incident occurs at a program operated by a County or County Board contracting entity, the licensed or certified provider of Residential or Supported Living services where the individual resides.
 - e. Notification of Coroner. Section 313.12 of the Ohio Revised Code sets forth the requirements for notification of the Coroner. With the passage of Senate Bill 178, effective January 30, 2004, section 313.12 has been expanded to include reporting the death when "any mentally retarded person or developmentally disabled person dies regardless of the circumstances" to the Coroner. Therefore, all deaths that are investigated by the County Boards of DD and the state-operated developmental centers should have already been reported to the Coroner by mandated reporters: the attending physician, emergency medical services personnel, law enforcement, or funeral director (see attachment 3).
3. The provider or county board staff shall immediately, but no later than four hours after discover of the incident, notify UI/MUI coordinator or designee through means identified by the county board of the following incidents or allegations:
- a. Accidental or suspicious death
 - b. Exploitation
 - c. Misappropriation
 - d. Neglect
 - e. peer-peer to acts
 - f. physical abuse
 - g. sexual abuse
 - h. verbal abuse; and
 - i. when the provider has received an inquiry from the media regarding a major unusual incident

For all MUIs, all agency providers, independent providers, and county boards as a provider shall submit a written incident report to the UI/MUI coordinator no later than 3:00 p.m. the next working day following initial knowledge of a potential or determined MUI. The report shall be submitted in a format prescribed by the department.

The UI/MUI coordinator/designee shall enter preliminary information regarding the incident on the ITS and in the manner prescribed by the department by 3:00 p.m. on the working day following notification by the provider or becoming aware of the MUI.

When a provider has placed an employee on leave or otherwise taken protective action pending the outcome of the investigation, the county board or department, as applicable, shall keep the provider apprised of the status of the investigation so that the provider can resume normal operations as soon as possible consistent with the health and welfare of any at-risk individual.

The county board shall have a system that is available twenty-four hours a day, seven days a week, to receive and respond to all reports required by this rule. The county board shall communicate this system in writing to all providers in the county and to the department.

The provider or county board shall immediately report to the law enforcement entity having jurisdiction of the location where the incident occurred, any allegation of abuse, including misappropriation, or neglect, which may constitute a criminal act. The county board shall ensure the notification has been made.

All allegations of abuse or neglect as defined in Section 2151.03 and Section 2151.031 of the Revised Code of an individual under the age of twenty-one years shall be immediately reported to the local public children's service agency. The notification may be made by the provider or the county board. The county board shall ensure the notification has been made.

The provider, including a county board as a provider, shall make the following notifications, as applicable, when the incident or discovery of the incident occurs when such provider has responsibility for the individual. The notification shall be made on the same day the incident or discovery of the incident occurs and include immediate actions taken.

- a. Guardian or advocate selected by the individual or other person whom the individual has identified
- b. Service and Support Administrator serving the individual
- c. Licensed or certified residential provider
- d. Staff or family living at the individual's home who have responsibility for the individual's care

All notification or efforts to notify shall be documented. The county board shall ensure that all required notifications have been made.

Notification shall not be made if the person to be notified is the PPI, the PPI's spouse, or the PPI's significant other.

Notification to a person is not required when the report comes from such person or in the case of a death when the family is already aware of the death.

In any case where law enforcement has been notified of an alleged crime, the department may provide notification of the incident to any other provider, developmental center, or county board for whom the PPI works, for the purpose of ensuring the health and safety of any at-risk individual. The notified provider or county board shall take such steps necessary to address the health and welfare needs of any at-risk individual and may consult the department in this regard. The department shall inform any notified entity as to whether the incident is substantiated. Providers, developmental centers, or county boards employing a PPI shall notify the department when they are aware that the PPI works for another provider.

4. The Ohio Department of Developmental Disabilities shall notify Ohio Legal Rights Service of all reported allegations of abuse, neglect, and Major Unusual Incidents in accordance with The ORC Section 5123.604.

5. The Athens County Board of DD MUI Coordinator or Designee shall serve as the contact person to receive and manage the report receipt process during normal business hours. For emergencies or after hours and holidays the Emergency Pager Number can be contacted and an SSA will assist the caller as applicable. Board employees, contracted providers, and families will be given these numbers.
6. Each department within the Athens County Board will enter all incidents for their department on an Unusual Incident Log/into the Gatekeeper system. The log will be reviewed monthly to determine if there are any trends or patterns that need addressed. Each department will send the UI log that has been signed by a designee and dated upon that review, each month to the ACBDD UI/MUI coordinator. The ACBDD UI/MUI coordinator then reviews the logs to ensure there are no missed MUIs or missed trends or patterns.

Upon determination of an MUI, the Investigative Agent from the contracted entity/SOCOG will complete the MUI Investigation according to the required protocol.

The investigative agent has 42 calendar days, or 30 business days, to complete their investigation. The investigative agent for SOCOG is responsible for scheduling interviews, gathering documentation, and other actions necessary to complete the investigation per the requirements mandated by the OAC 5123:2-17-02.

After reviewing the report, if the UI/MUI Coordinator determines the report is not in compliance, the coordinator will respond in writing to the Investigative Agent and list the reason(s) for rejecting the report. Upon submission of an accepted report, the coordinator will sent this acceptance in writing to SOCOG.

7. If the provider is a Developmental Center, all reports required by this policy shall be made directly to the Ohio Department of Developmental Disabilities or as specified by the Ohio Department of Developmental Disabilities.

D. INVESTIGATING MAJOR UNUSUAL INCIDENTS

1. Immediately upon receipt of a report (determination has been made incident is a MUI) of a Major Unusual Incident, the UI/MUI Coordinator/Designee shall review the incident to ensure that the provider has taken all reasonable measures necessary to protect the health and safety of the individual(s) and determine whether any additional actions must be taken. The Athens County Board of DD may request that this review be conducted by another County Board, SOCOG, DODD, or any other Government entity authorized to conduct investigations.
2. The Investigative Agent contracted through the SOCOG, shall immediately initiate the investigation within twenty-four (24) hours if the Major Unusual Incident involves any of the following:
 - a. Abuse, neglect, or misappropriation;
 - b. Any injury of an unknown or suspicious origin;

- c. Suspicious or accidental death;
 - d. The individual cannot be located; or
 - e. Any other Major Unusual Incident the County Board determines should be investigated based on a review of the incident. The County Board can make a verbal request to the IA to collect written statements for any MUI the County Board determines this action is necessary.
3. The Athens County Board of DD shall employ at least one Investigative Agent or contract with a person or Government entity, including another County Board or Regional Council of Governmental, for the services of an Investigative Agent pursuant to the ORC. Section 5126.221 An Investigative Agent shall be certified by Ohio Department of Developmental Disabilities pursuant to rules adopted under the ORC Section 5126.25.
 4. MUI Coordinator or designee will implement the following process to determine if an unusual incident meets criteria to be a major unusual incident. County board staff may assist the investigative agent by gathering documentation or enter information into the ITS or other administrative or clerical duties that are not specific to the investigative agent role.
 - a. The UI/MUI Coordinator or Designee makes the determination if an incident meets criteria for a MUI if it meets the following criteria:
 - i. Review the UI thoroughly to assess what is the risk to the individual's health and safety.
 - ii. Gather more information if necessary by contacting and speaking with the individual, provider, supervisor, or Service and Support Specialist.
 - iii. Ask for written statements if necessary. These written statements may be helpful later when making the determination after the information is gathered.
 - iv. Review the Individual Service Plan (ISP) or Individual Educational Plan (IEP) or other plans such as, Behavior Support Plans and IHP-type of plans provided by ICF/DD.
 - v. Review all information obtained and if unable to make the determination contact either the Southern Ohio Council of Governments or the DODD MUI Regional Manager, and request assistance with making the determination.
 - vi. Once the UI has been determined it meets criteria for an MUI, start completing the documentation on the MUI Notification Form (see attached form).

- vii. Complete the MUI Notification Form for SOCOG and forward to the COG with the incident report, ISP, BSP, and witness statements if collected with request for the investigative agent to conduct the investigation.
 - viii. To eliminate conflict in determining if an incident is a UI or MUI when it involves a county board staff, the MUI Coordinator may contact the MUI Unit Regional Manager by telephone to request assistance with determination.
5. Ohio Department of Developmental Disabilities may conduct a separate review or investigation of any Major Unusual Incident, or may request that a separate review or investigation be conducted by another County Board, Regional Council of Government, or any other entity authorized to conduct such investigations. If a separate investigation is conducted, the investigation shall be completed within thirty days, unless the investigation is being conducted by Law Enforcement Agency or local Children Services Agency.

Except when law enforcement or the public children's service agency is conducting the investigation, the investigative agent shall conduct all interviews for MUIs unless the investigator determines the need for assistance with interviewing an individual. For MUIs that occur in an ICF/DD, the investigative agent may utilize interviews conducted by the ICF/DD or conduct his/her own interviews. If the investigative agent determines the information is reliable, the investigative agent may utilize other information received from law enforcement, the public children's service agency, or providers in order to meet the requirements of this rule. If a requirement cannot be met, the investigative agent shall document that the requirement cannot be met and the reasons therefore.

Except when law enforcement or the public children's services agency has been notified and is considering an investigation, the county board shall immediately, but no later than twenty-four hours after discovery of any of the incidents listed below, commence and document the initiation of the investigation. If law enforcement or the public children's services agency notifies the county board that it has declined to investigate, the county board shall commence investigation within twenty-four hours of such notification.

- a. Abuse
 - b. Exploitation
 - c. Misappropriation
 - d. Neglect
 - e. Prohibited sexual relations
 - f. Rights code violation
 - g. Suspicious or accidental death
 - h. Any other MUI the county board determines should be initiated immediately or within twenty-four hours.
6. A separate investigation shall be conducted if the following circumstances are present:
- a. The Major Unusual Incident includes an allegation that the person responsible for the incident is:

- i. The Superintendent of a County Board or the Executive Director of a Regional Council of Government;
 - ii. A County Board management employee as specified in the ORC. Section 5126.22.
 - iii. A current member of a County Board appointed pursuant to the ORC. Section 5126.02; or
 - iv. A person having any known relationship with any of the persons specified in this policy.
 - b. The Major Unusual Incident includes an allegation that a Board employee is responsible for the death of an individual, has committed sexual abuse against an individual, or has committed any other abuse or neglect against an individual that has resulted in an emergency room visit or hospitalization.
 - c. The Board has requested that the Ohio Department of Developmental Disabilities conduct a separate investigation, and the department has determined that there is a reasonable basis for the request.
 - d. An individual, advocate selected by the individual, or the legal guardian, as applicable, or provider has made a complaint to Ohio Department of Developmental Disabilities regarding an investigation conducted by the Board and the department has determined that there is a reasonable basis for the complaint.
7. If the provider is an ICF/DD, the ICF/DD shall investigate all Major Unusual Incidents involving individuals receiving services from the ICF/DD. This investigation shall be conducted in accordance with all applicable Federal Regulations, including 42 C.F.R. 483.420.
 8. If the Major Unusual Incident involves an individual residing in an ICF/DD, and the incident occurs at a program operated by the Board or a Board contracting entity, the Board shall be responsible for ensuring compliance with all requirements of this policy. This policy shall not affect the responsibility of an ICF/DD to investigate reports of abuse and neglect as required by Federal Regulations.
 9. An ICF/DD, excluding a Developmental Center, shall submit to the Board its investigation report within fourteen days of becoming aware of a Major Unusual Incident. The MUI Coordinator reviews the report to ensure the report is in compliance with the OAC requirements set forth in 5123:2-17-02. If the report is in compliance the MUI Coordinator accepts the report and will forward a copy of the ICF/DD's MUI report/summary to the investigative agent. For all other MUIs the MUI Coordinator will request the investigative agent from SOCOG to complete an investigation implementing the required "Protocol" as required by the OAC 5123:2-17-02.

An ICF/DD is required to conduct an investigation regardless of where an incident involving an individual of the ICF/DD occurs. If the MUI involves an individual who

resides in an ICF/DD, including a developmental center, and the incident occurs at a program operated by a county board, it is the responsibility of the ICF/DD to complete an investigation and assure that the investigation complies with federal guidelines. The investigative agent may utilize or conduct a separate investigation. Copies of the full investigation shall be provided to the ICF/DD and the county board. All requirements in the MUI rule shall be met. The department shall resolve any conflicts that arise. This paragraph shall not affect the responsibility of an ICF/DD to investigate all reports of abuse and neglect and to conduct an investigation in accordance with all applicable federal regulations; including 43 C.F.R. 483.420 (dated October 1, 2005).

When an agency provider, excluding a developmental center, conducts an internal review of an incident for which an MUI has been filed, the agency shall submit the results of its internal review of the incident, including statements and documents, to the county board within fourteen calendar days of the agency becoming aware of the incident.

All ACBDD employees shall cooperate with administrative investigations conducted by entities authorized to conduct investigations. Providers and county boards shall respond to requests for information within the timeframe requested. The timeframes identified shall be reasonable.

The investigative agent shall complete a report of the investigation and submit it for closure in the ITS within thirty working days unless the department grants an extension.

The report shall follow the format prescribed by the department. The investigative agent shall include the initial allegation, a list of persons interviewed and documents reviewed; a summary of each interview and document reviewed, and a findings and conclusions section, which shall include the cause and contributing factors to the incident and the facts that support the findings and conclusions.

10. MUI Written Summaries

No later than five calendar days following the closure of a case, via the ITS, the county board, cog, developmental center, or department shall provide a written summary of the investigation including the allegations, the facts and findings, including as applicable, whether the case was substantiated or unsubstantiated, and preventive measures implemented in response to the incident to:

- a. The individual or individual's legal guardian or an advocate selected by the individual, as applicable.
- b. The licensed or certified provider and provider at the time of the incident.
- c. Service and Supports Specialist serving the individual or other person selected by the individual to coordinate services.
- d. In the case of an individual's death, the written summary shall be provided to the individual's family upon request.

The Southern Ohio Council of Governments (SOCOG) shall send all written summaries to required parties per the MUI rule.

The written summary shall not be provided to the PPI, the PPI's spouse, or the PPI's significant other. No later than five working days following the closure of a case, the county board shall make a reasonable attempt to notify the PPI as to whether the MUI has been substantiated, unsubstantiated/insufficient evidence, or unsubstantiated/unfounded.

The county board MUI coordinator or designee is responsible for communicating with the ICF/DD's administration or designee to ensure preventive plans have been completed and implemented.

11. Dispute MUI Summary Findings Procedure

An individual, individual's guardian, individual's advocate, or provider may dispute the findings by submitting a letter of dispute and supporting documentation to the county board superintendent, or to the director of the department if the department has conducted the investigation, within fifteen calendar days following receipt of the summary. An individual may receive assistance from any person selected by the individual to prepare a letter and provide supporting documentation.

The superintendent or designee or the director or designee, as applicable, shall consider the letter of dispute, the supporting documentation, and any other relevant information and issue a determination within thirty calendar days of such submission and take action consistent with such determination, including confirming or modifying the findings or directing that more information be gathered and the findings be reconsidered.

In cases where the letter of dispute has been filed with the county board, the disputant may dispute the final findings made by the county board by filing those findings and any documentation contesting such findings that are disputed with the director of the department within fifteen calendar days of the county board determination. The director will issue a decision within thirty calendar days.

12. Disciplinary Action

The employee's supervisor from the County Board will administer disciplinary action that the supervisor determines to be applicable. The Agency Provider employee's supervisor will handle disciplinary action that the supervisor determines to be applicable. (The county board administration can request a Provider Compliance Review for Agency Providers and Independent Providers to be completed either by the SOCOG or the department.)

E. REVIEW, REMEDY, AND PREVENTION OF MAJOR UNUSUAL INCIDENTS

1. The Board and agency providers shall implement a written procedure for the internal review of all MUIs and shall be responsible for taking all reasonable steps necessary to prevent the reoccurrence of MUIs.

2. Each SSA will send the UI/MUI coordinator a written prevention plan per the UI/MUI rule for an MUI involving an Individual on his/her caseload. The MUI coordinator will file each prevention plan either in the MUI file. The SSA will coordinate with the team as needed to develop a prevention plan that will address the causes and contributing factors of the incident. The team members shall jointly determine what constitutes reasonable steps necessary to prevent the reoccurrences of UI/MUIs. (If there is no SSA, individual team, or agency provider involved with the individual, a county board designee shall ensure that preventive measures as written are reasonably possible. The MUI Coordinator will ensure that preventative measures are fully implemented.
3. The Ohio Department of Developmental Disabilities shall review reports submitted by the Board for incidents listed in paragraph (K)(4) of the MUI Rule. The department may review any other reports and may obtain additional information necessary to consider the report, including copies of all investigation reports that have been prepared. Such additional information shall be provided within the time period specified by the department.
4. The Ohio Department of Developmental Disabilities shall determine when to close the following cases: Abuse, neglect, misappropriation, death, exploitation, failure to report, missing individual, peer-to-peer acts, prohibited sexual relations, rights code violation, unapproved behavior support, significant injury (when cause is unknown), an incident that is the subject of a director's alert, any MUI investigated by the department.
5. The county board shall review and close reports regarding all incidents listed below:
 - a. attempted suicide
 - b. significant injury (when the cause is known)
 - c. law enforcement
 - d. medical emergency
 - e. unscheduled hospitalizations
6. When determining that a case should be closed, Ohio Department of Developmental Disabilities (department) or the Board shall consider the following criteria:
 - a. Whether all reasonable measures have been taken to ensure the health and welfare of the individual.
 - b. Whether a thorough investigation of the incident has been conducted;
 - c. Whether the incident is part of a pattern or trend requiring some additional action;
 - d. Whether appropriate measures have been implemented or rules have been satisfied;
 - e. Whether all requirements set forth in statute or rule have been satisfied;

- f. Whether the case meets the criteria for referral to the abuser registry unit pursuant to ORC Section 5123.51.

The department may review any case to ensure it has been properly closed and shall conduct sample reviews to ensure proper closure by the county board. The department may re-open any investigation that does not meet requirements of this rule. The county board shall provide any information deemed necessary by the department to close the case.

- 7. The ACBDD initiates action to address reoccurrence of MUI'S by implementing the following procedures.
 - a. A prevention plan is developed based upon the individual's needs and input from the individual and guardian as applicable.
 - b. The team will review the recommendations noted by the investigator for the MUI, and will apply according to the individual and team decision. This policy and procedure does not require the team or any agency to apply the recommendations noted by the investigator to the prevention plan.
 - c. The team consists of different employees from various agencies involved with the individual and is not limited to any certain agency or individual.
 - d. The MUI Coordinator/Designee requests the team-SSA or Provider-to forward what actions have been implemented for the Prevention Plan within 5-days by email after receiving the MUI Summary Findings of the MUI Investigation.
 - e. The MUI Coordinator/Designee will submit the Prevention Plan and recommend closure to the Internal Tracking System at the DODD.

F. ANALYZING MAJOR UNUSUAL INCIDENTS TO IDENTIFY PATTERNS AND TRENDS

- 1. County boards and agency provider shall analyze MUIs to identify trends and patterns semi-annually (July 31st and January 31st, respectively) with the annual review being comprehensive for the year.
- 2. County boards shall conduct the analysis and follow-up for all entities operated by county boards such as workshops, schools, transportation, and for all individual providers. The county board shall send its analysis and follow-up actions to the department by August 31st for the semi-annual review and by February 28th for the annual review.
- 3. Each agency provider shall send its analysis and follow-up actions to the county board for all programs operated in the county by August 31st for the semi-annual review and by February 28th for the annual review. The county board shall keep the analysis and follow-up actions filed and make them available to the department upon request.

4. The county board and department shall review the analysis to ensure that all issues have been reasonably addressed to prevent reoccurrence.
5. The county board shall ensure that trends and patterns of MUIs are included and addressed in the affected individual's service plan.
6. Each county board or as applicable, each council of governments to which the county board belongs, shall have a committee that reviews trends and patterns of MUIs. The committee shall be made up of a reasonable representation of the county board(s), provider agencies, families, and other stakeholders deemed appropriate by the committee.
7. The role of the committee shall be to review and share the county or council of government's aggregate data prepared by the county board or council of government to identify trends, patterns, or areas for improving the quality of life for individuals supported in the county or counties.
8. The committee shall meet each September to review and analyze data for the first six months of the calendar year and each March to review and analyze data for the preceding calendar year. The county board or council of governments shall send the aggregate data prepared for the meeting to all participants ten calendar days in advance of the meeting. The county board or council of governments shall hold the first meeting no later than September 30th.
9. The county board or council of governments shall record and maintain minutes of each meeting, distribute the minutes to members of the committee, and make the minutes available to any person upon request.
10. The department shall ensure follow-up actions identified by the committee have been implemented.
11. The department shall prepare a report on trends and patterns identified through the process of reviewing MUIs. The department shall periodically, but at least semi-annually, review this report with a committee appointed by the director of the department which shall consist of at least six members who represent various stakeholder groups, including Ohio Legal Rights Service and the Ohio Department of Job and Family Services. The committee shall make recommendations to the department regarding whether appropriate actions to ensure the health and safety of individual served have been taken. The committee may request for the department to obtain additional information as necessary to make recommendations.

G. UNUSUAL INCIDENTS REQUIREMENTS

1. Required reporting
 - a. The Athens County Board of DD requires anyone who becomes aware of an unusual incident to report it to the person designated by each program component who can initiate proper action. These reports must be made no later than twenty-

four (24) hours after the occurrence of the incident. Individual providers shall forward UI/MUIs to the county board by fax or in person the same day the UI is discovered and/or they can call the county board SSA or MUI coordinator and report the incident by phone.

- b. The agency provider and county board as a provider shall ensure that all staff is trained and knowledgeable regarding the policy and procedure.
- c. If the UI occurs at a site operated by the county board or at a site operated by an entity with which the county board contracts, the county board or contracted entity shall notify the licensed provider or staff or family, as applicable, at the individual's home. The notification shall be made the same day that the incident is discovered.
- d. Each agency provider and county board as a provider shall maintain a log of all UIs. The log shall include, but not be limited to, the name of the individual, a brief description of the incident, any injuries, time, date, location, causes and contributing factors, and preventive measures.
- e. The county board shall review, on a quarterly basis, a representative sample of provider logs, individual provider logs, and logs where the county board is a provider for the purpose of ensuring that all MUIs required to be reported have been reported and that trends and patterns have been identified and addressed. The sampling shall be made available to the department for review upon request.
- f. When the county board is a provider of relevant services, the department shall review, on a monthly basis, a representative sampling of county board logs. The county board shall submit the specified logs to the department upon request. The department shall review the logs to ensure all MUIs have been reported and trends and patterns have been identified and addressed.
- g. The agency provider and the county board as a provider shall ensure that trends and patterns of UIs are included and addressed in each individual's service plan as applicable.

H. OVERSIGHT

- 1. The department shall conduct reviews of county boards and providers as necessary to ensure the health and welfare of individuals and compliance with the requirements of this policy. Failure to comply with the requirements of this policy may be considered by the department in any regulatory capacity, including certification, licensure, and accreditation.
- 2. The department shall provide access to the ITS to this single state Medicaid agency and the Ohio Legal Rights Service in accordance with Section 5123.604 of the Revised Code.

I. ACCESS TO RECORDS

1. Reports made under the ORC Section 5123.61 and this policy are not public records as defined in the ORC Section 149.43. Records may be provided to parties authorized to receive them in accordance with the ORC Sections 5123.613 and 5126.044 of the revised code, to any governmental entity authorized to investigate the circumstances of the alleged abuse or neglect, misappropriation, or exploitation and to any party to the extent that release of record is necessary for the health or welfare of an individual.
2. The county board shall not review, copy, or include in any reports required by this policy the personnel records of an employee that is confidential under State or Federal statutes or rules, including medical and insurance records, Worker's Compensation records, Immigration status forms (I-9), and Social Security numbers.
3. The Board may review, but not copy, personnel records that include confidential information about an employee including, but not limited to, payroll records, performance evaluations, disciplinary records, correspondence to employees regarding status of employment, motor vehicles, and criminal records checks. The County Board may include in reports required by this rule information about the results of the review of personnel records specified in this paragraph.
4. The county board may review and copy personnel records prepared in connection with the provider's daily operations, such as training records, time sheets, and work schedules.
5. Upon the department's request, the provider shall provide to the department copies of personnel records that are not confidential. Any party entitled to receive a report required by this rule may waive receipt of the report. Any waiver of receipt of a report shall be made in writing.
6. The provider shall redact any confidential information contained in a record as identified in paragraph (O)(2) of this rule before the copies are provided to the county board or the department.
7. The MUI Coordinator may forward the Major Unusual Incident Investigative Report to a county board supervisor and staff at supervisor's discretion (the MUI report is not shared with the PPI or staff that may constitute a conflict between supervisor and other staff). This is to ensure pertinent information is shared with staff that is involved with the individual to prevent the possibility of another MUI reoccurring or to compose a prevention plan.

J. TRAINING AND TECHNICAL ASSISTANCE

1. All agency providers and county boards shall ensure their staff is trained on the requirements of this rule regarding the identification and reporting of MUIs and UIs prior to unsupervised contact with any individual and in all cases, no later than thirty calendar days after employment. Thereafter, all employees shall receive training during each calendar year which shall include a review of health and welfare alerts released since the previous calendar year's training.

2. All individual providers shall follow the requirements for initial training on the provisions of the MUI Rule according to their certification requirements and shall receive annual training from the date of certification on identification and reporting of MUIs and UIs and health and safety alerts released since the previous calendar year's training.
3. All agency providers and county boards shall ensure that all staff responsible for administrative compliance with this rule receives training on all applicable requirements of this rule at the time of employment or no later than thirty calendar days from the time of employment and each calendar year thereafter. The training shall include the review of health and welfare alerts released since the previous calendar year's training.
4. The county board shall ensure that staff responsible for conducting investigations receive initial and annual department approved training.
5. The department shall provide technical assistance and training to providers and county boards as necessary. The department shall periodically monitor compliance with the provisions of this rule.

APPENDIX

INVESTIGATION PROTOCOL

The investigation consists of four basic steps:

- A. Planning the Investigation,
- B. Gathering Information,
- C. Analysis of Information, and
- D. Completion of an Investigation Report.

The investigator should take the following steps in conducting an investigation:

1. Initiate the investigation (see Steps 2-9) within 48 hours of the time the report was filed. Some cases require immediate investigation. The administrative investigation should not interfere with the criminal investigation. For incidents that are referred to law enforcement and a criminal investigation is ongoing, there should be follow-up (see Step 4).
2. Secure all physical evidence; take photographs of injuries (as needed) and secure/sketch photograph the scene of the incident.
3. Visit the scene of the incident as soon as possible (if applicable).
4. Follow-up with law enforcement, CSB, if needed.

5. Review all relevant documents relating to the primary person involved that forms the basis for the reported incident and the alleged victim.
6. Interview all direct witnesses to the incident, including the individual. Document the interviews.
7. Interview medical professionals (as needed) as to the possible cause of age of injuries. Document the interviews.
8. Interview others who may have relevant information - Service and Support Administrators, Program Directors, medical personnel who treated the injured individual. Document the interviews.
9. Gather written statements from all relevant witnesses.
10. Conduct follow-up interviews, if needed.
11. Complete an investigation report, which includes the following:
 - a. Clear statement of the allegation and the basic question(s) to be answered by the investigation,
 - b. Evaluation of all witnesses and documentary evidence in a clear, complete and non-ambiguous manner,
 - c. Evaluation of the relative credibility of the witnesses,
 - d. A succinct and well-reasoned analysis of the evidence, and
 - e. A clearly stated conclusion, which identifies which allegations were and were not substantiated.



ATCO Legacy Fund

Proposed Timeline



Meeting with the Athens County Foundation
December 18, 2018

Proposed timeline: SPRING

- ACBDD sets amount to be awarded at Feb meeting
- ACBDD determines if weight given to independent or agency providers at Feb meeting
- March 1st – RFP sent out
- Deadline of April 1 for applications
- April 1 – May 15th Athens County Foundation Scoring and Recommendation Committee (chaired by the Athens County Foundation) reviews applications and makes award winner recommendations to Superintendent for inclusion into the May Board packet
- May Board meeting – award winners officially approved and granted funds
- After May meeting, before awarding of funds, the Board would enter into a “contract” agreement with the winning agency/independent for awarding of funds
- First of June – a small awards ceremony with the Athens County Foundation, the Board, and the winners

Proposed timeline: FALL

- ACBDD sets amount to be awarded at June/July meeting
- ACBDD determines if weight given to independent or agency providers at June/July meeting
- August 1st – RFP sent out
- Deadline of Sept 1 for applications
- Sept 1 – Oct 15th Athens County Foundation Scoring and Recommendation Committee (chaired by the Athens County Foundation) reviews applications and makes award winner recommendations to Superintendent for inclusion into the Oct Board packet
- Oct Board meeting – award winners officially approved and granted funds
- After Oct meeting, before awarding of funds, the Board would enter into a “contract” agreement with the winning agency/independent for awarding of funds
- First of Nov – a small awards ceremony with the Athens County Foundation, the Board, and the winners

Managers List for 2019
“We don’t sell ice cream”

- Guide first year of Integrate Athens
- Successfully implement first year of ATCO Legacy Fund
- Continue making progress with policy workgroup
- Continue KOC at Beacon (if OU is able to participate)
- Continue positive and intentional public relations
- Continue successful union negotiations
- Develop administrative “listening tour” with stakeholders
- Implement staff engagement survey
- Streamline communication between Athens JFS (perhaps through MOU)
- Finalize 10-year cost projections
- Update EI policy and procedures
- Complete Beacon School Success initiative
- Explore adding an additional preschool classroom
- Develop plan for introducing ABA (starting with in service)
- Select new Beacon mascot
- Explore revamping Beacon basketball team (other teams?)
- Explore extending school day
- Explore excess cost opportunities with public school districts
- Reach and maintain 100 community employed individuals
- Provide employment services to 3-5 Beacon students using Title XX
- Help to secure employment for 3-5 individuals with significant need using Title XX
- Initiate new pre-vocational class in day hab setting, serve 15-20 individuals annually
- Place 30 new individuals in jobs and maintain 80% retention
- Increase billing by 20%
- Increase advocacy efforts – identify 4 new self-advocates
- Facilitate community connections. Specifically: connecting providers with the community, developing FANs, long-term plan for yoga, assist Community Singers finalize their transition
- Review and streamline Intake/Eligibility Process (explore MEORC option)
- Improve ISP revision/addendum process
- Revise Case Management only ISP format (One Page Profile + Discovery)
- Implement revised productivity calculation (Labor-management issue)
- Implement and monitor supported living tracker
- Complete waiting list assessment for individuals on the transitional list that are assigned an SSA
- Expand collaboration with mental health services – Hopewell, Integrated Services, 317 Board
- Update waiver policy and procedures
- Repair Beacon sign
- Finalize ATCO building transition to commissioners
- Finalize renovations to Harper, Lavelle
- Fine-tune custodial team
- Explore using MEORC for IA services

Exhibit 10



ACBDD - Administration

801 West Union Street - Athens, Ohio 45701

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Kevin Davis, Superintendent

athenscbdd.org

Superintendent Professional Development Plan

Dr. Kevin Davis

January 22, 2019

The Superintendent Professional Development Plan assures the continuing education requirements are completed across the span of the Superintendent's certification. Having completed the advance curriculum for administrators in Ohio's developmental disabilities service delivery system, the Superintendent is required to complete 120 hours of continuing professional education during each certification for a five year term.

The Superintendent will earn a minimum of thirty (30) hours of continuing education each year by attending some of the following:

- Spring and Fall conferences sponsored by the Ohio Association of County Boards (OACB)
- Winter and Summer conferences sponsored by Ohio Superintendents of County Board of Developmental Disabilities (OSCBDD)
- OSCBDD Executive Committee meetings
- OSCBDD Region 4 meetings
- Southern Ohio Council of Governments (SOCOG) Board meetings
- Mid-East Ohio Regional Council (MEORC) Board meetings
- Other trainings provided by the Ohio Department of Developmental Disabilities, OACB, OSCBDD, ACBDD, or other agencies

The Board pre-approves leave for professional growth of said attendance and agrees to the actual and necessary expenses, including registration, travel, and hotel costs.

The Board will review, update, and approve the Superintendent's professional development plan annually.

Board President

Date



Administration

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Dr. Kevin Davis, Superintendent
athenscbdd.org

January Board Report

Kevin Davis, Superintendent

- Leadership Meetings – Multiple leadership meetings (with senior management) were held during the month. Various topics of interest to all managers were discussed in an effort to have all managers working together including updates on critical issues, preparation for events, negotiation discussions, and board planning. The meetings were held on Wednesday December 19, and January 9 and 16th.
- All Managers' meetings – All managers' meeting (with any staff who have management responsibilities) was not held during this time due to conflicts with the holidays.
- Ohio Association Of County Boards – **Articles attached** – these are informational only as to give a glimpse of what issues are occurring in the DD field across the state.
- The Southern Ohio Council of Governments Superintendent's meeting was held on Thursday, January 10th. I was not able to attend on behalf of the Board, but I was able to provide input.
- The MEORC Board of Director's meeting will be held on Friday, January 25. I will attend on behalf of the Board.
- Family Children First Council executive committee meeting met on December 19 and on January 16th.



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- I will be serving as the Chair-elect (vice-chair) for 2019 with the Athens County Family and Children First Council – this leads to being the Chair Person for the Council in 2020.
- I was invited by Dr. Gibbs of the Athens City Schools to participate in a “Bias and Discrimination Community Focus Group”. The group has gathered multiple times for planning purposes and held a community forum on Sept 12th. The next meeting will be in December. I will keep the Board updated of the group’s progress.
- On January 10th, we met with ABEA Labor/Management meeting to discuss the return to work plan/possibilities for a teacher who has been on administrative leave.
- As a reminder we are working with the Albany VFW for a January Bear Polar Plunge for a Beacon fundraiser. This will be held on January 26th, 2019.
- We have begun implementing our new parking policy – with the displaying of signs. We continue to face some issues. We will be developing strategies to help alleviate the issue.
- On January 15, we (leadership team and MEORC) met to develop implementation strategies for our new three-year strategic plan.
- On December 12, we had our annual all staff appreciation breakfast, which was prepared by the management team. It was very well attended.



- On December 11, several staff members (including myself) were able to attend the new MUI rule update at a state-wide regional training, which was held in The Plains.



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- On January 8, we went to Columbus and visited with Director Martin. We requested several state-funded waivers, and we were also able to present him with a Passion Flower as a retirement acknowledgment.



- On December 18, we met with the Athens County Foundation to begin planning the ATCO Legacy Fund. There will be more information coming for the Board in the February meeting.
- There have been several changes within our management team. Beth Atherton will be leaving February 8 to take a position with the DODD. We are planning how best to proceed with her position. Megan Stack, RN, will be taking over as our Health Services Manager beginning February 1. At the end of January, Mark Cullison, Joanne Heinzman, and Laurie Gregg will be leaving as part of the ATCO transition. We are extremely grateful for their service over the years.
- Our new gymnasium floor is complete. It looks amazing, and should last our students for years to come.



- I have renewed my Superintendent certification (attached). It is now valid through 2024.



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CERTIFICATE/REGISTRATION NUMBER: 103705

EFFECTIVE/EXPIRATION DATES: 3/25/2019 - 3/25/2024

ISSUE DATE:
12/24/2018

NAME: DAVIS, KEVIN RAY


TYPE: Certification of County Board of DD Superintendent or
Assistant Superintendent

VALIDATION: Superintendent

LEVEL: Not Applicable

GRADE: Provisional

STATUS: Renewal



Director or Designee,
Ohio Department of
Developmental
Disabilities

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Ohio Association of County Boards
Serving People with Developmental Disabilities

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RELEASES

Nine DD-related bills move in General Assembly's legislative "Lame Duck"

By Erich Hiner, OACB

Published Friday, January 4, 2019 9:00 am

In a marathon of legislative votes during the final week of 2018, the Ohio General Assembly took action on several bills with the potential to impact county boards people they support.

Covering the final two months at the end of each two-year legislative session, the so-called "Lame Duck" period is lawmakers' final chance to advance bills before a legislative session starts. Of the nine DD-related bills that were acted on in the 2018 Lame Duck period, two were newly amended in December to include language about county boards. As such, they were not previously tracked in OACB's Bill Tracker.

SB 21 was a bill concerning the minimum number of poll workers at Ohio polling places. It was amended in committee in mid-December, however, to include language a bill opposed by OACB. The language would have required all levy ballot language to express annual tax rates in dollars and cents per \$100,000 of fair market value about the amendment, OACB drafted a [letter to Senate Majority Caucus](#) outlining the bill's issues. The amended SB 21 subsequently failed to reach its final vote in not become law.

SB 265 was amended in mid-December to include language from HB 72, a bill requiring health plan issuers to implement a step therapy protocol with regard to providing users with a process to request an exemption. Patients affected by the bill could include many people served by county boards. The amended version awaiting a signature from the governor.

The other DD-related bills on which action was taken during Lame Duck are listed below. These bills have been covered at length in the OACB Bill Tracker, which is available for download in MemberConnect.

- [HB 271](#) (Signed into law by the Governor)
- [HB 300](#) (Awaiting Governor's Signature or Veto)
- [HB 338](#) (Signed into law by the Governor)
- [HB 491](#) (Signed into law by the Governor)
- [HB 572](#) (Signed into law by the Governor)
- [HB 595](#) (Signed into law by the Governor)
- [SB 259](#) (Signed into law by the Governor)

As of January, the 2019-20 legislative calendar has begun. OACB will provide details on the association's advocacy goals for the new legislative session in future editions of PolicyBrief.

Members with questions about Lame Duck and the recently completed legislative biennium should contact Erich Bittner (ebittner@oacbdd.org) at 614-431-0616.

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2018 Annual Conference
2018 Spring Conference



Ohio Association of County Boards
Serving People with Developmental Disabilities

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RELEASES

Developments continue in Ball v. Kasich lawsuit, trial date scheduled for 2020

By Adam Herman, OACB

Published Friday, December 21, 2018 11:00 am

Over the past few months, several developments have occurred in the ongoing *Ball v. Kasich* litigation that are likely of interest to county boards of DD. While each has its own complex legal explanation, we have prepared a brief summary below to ensure that members are kept up to date on the general progress of the lawsuit. If you have questions about any of the items presented below should feel free to email "drolegal@oacbdd.org" for more information.

Guardians Make Claims Against Plaintiffs, Defendants on ICFs

In September, guardians who have intervened in the lawsuit on behalf of families they claim are not represented by Disability Rights Ohio filed cross-claims that a defendants (including the State of Ohio and OACB) and the plaintiffs (Disability Rights Ohio) are acting together in a conspiracy to limit ICF options for people with disabilities. It is presumed their goal is to enhance ICF options in the state. All affected parties filed motions to dismiss these cross-claims, which are seen by many as opposed to one another and generally counter to the nature of how Ohio's system operates. In October, the guardians dismissed their cross-claims against Disability Rights Ohio. This issue remains to be resolved, with final responses due in January.

Class definition narrows significantly

In September, the court clarified its class definition, stating that a person "[m]ust have received options counseling" to be included in the class action suit, which is counseling that is currently being utilized." The class is further limited to people who, after options counseling, "have affirmatively stated that they want community services and have not had them provided" (as opposed to people who only express that they may be interested, without a firm commitment). This ruling is seen by many as a setback to plaintiffs' attempts to establish a class, as it dramatically reduces the number of people who could feasibly be included.

In response to this restricted class definition, plaintiffs filed a motion in October requesting the court reconsider its decision. They argued that the definition was too narrow and allows the State to define scope of options counseling. Because the court had yet to consider the plaintiffs' request for reconsideration, however, the court used its new class definition to severely limit the plaintiffs' discovery requests in late November. Essentially, this means that the plaintiffs can only request documents, interview information from the much smaller pool of individuals who meet the court's new definition.

On December 7, the court rejected the plaintiffs' argument that the class definition is too narrow. At this time, the narrower class definition continues to substantiate the merits of the plaintiffs' lawsuit.

Settlement Talks Continue, Trial Scheduled

Attorneys representing Disability Rights Ohio and the State of Ohio continue to discuss options for a possible settlement to prevent the need for a full-blown trial. While these discussions have not yielded any public settlement proposals to date, OACB remains hopeful that a settlement could be possible, thereby avoiding the expense and distraction that a trial is likely to bring.

In the event that settlement talks do not produce a resolution, however, the court has set a date for the trial to begin: February 24, 2020.

OACB will continue to participate in these proceedings and ensure that the interests and voices of county boards of developmental disabilities and the people they represent. During the interim, members with questions about the case should feel free to email drolegal@oacbdd.org with questions or requests for more information.

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RELEASES

Ohio Governor-Elect Mike DeWine names OPRA's Jeff Davis as next DODD Director

By Erich Hiner, OACB

Published Thursday, January 10, 2019 11:00 am

Ohio Governor-Elect Mike DeWine announced Thursday, January 10, that Jeff Davis, executive director of the Ohio Provider Resource Association (OPRA), will be the next director of the Ohio Department of Developmental Disabilities (DODD).

Davis previously served as a deputy director at DODD from 1991 to 2007 and oversaw legislative and rule-making activities. During his previous tenure at the department, Davis also oversaw public information and parent and self-advocacy initiatives. Davis has also served as director of integrated health services for Buckeye Community Health Plan, a managed care plan that contracts with the State of Ohio to provide services for Medicaid recipients.

Davis joined OPRA in 2011 as the organization's director of government affairs. In this role, he acted as the organization's voice at the Ohio Statehouse and coordinated feedback on and the implementation of statewide policy issues affecting Ohioans with developmental disabilities. OPRA's membership includes more than 150 for-profit and non-profit organizations providing services to people with developmental disabilities.

Throughout his career, Davis has been a steadfast advocate for Ohioans with developmental disabilities and their families and a regular contributor to statewide workgroups and joint initiatives (such as the recently concluded [Fix The List](#) campaign). Last year, he oversaw the launch of [DSP Ohio](#), a statewide campaign to address Ohio's workforce shortage of direct support professionals.

"Jeff has proven himself to be a time-tested leader in Ohio's DD system," said OACB Executive Director Bridget Gargan. "He has been a valuable partner to OACB boards and a vocal advocate for people with developmental disabilities learning and living in the community. We look forward to working with him in the years ahead."

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RELEASES

Newly sworn in Gov. Mike DeWine signs executive order on disability hiring at state agencies, job development

By Erich Hiner, OACB

Published Monday, January 14, 2019 12:00 pm

Minutes after being sworn in the early morning of Monday, January 14, Ohio Gov. Mike DeWine signed an executive order issuing several new directives for state agency disability hiring practices and job development.

"The whole purpose is to do everything that we can within our power to make sure that people with disabilities have the opportunity for employment—both inside and outside state government," Governor DeWine said during a midnight inauguration ceremony at his family home in Greene County.

Executive Order 2019-03D does the following:

1. Creates a statewide ADA coordinator position within the Department of Administrative Services (DAS) to advise all state executive agencies on disability rights;
2. Requires state agencies to review their hiring practices every year and identify and eliminate barriers to employment for people with disabilities;
Directs all state agencies to adopt policies prohibiting disability-based discrimination;
3. Requires state agencies to work with the ADA coordinator and OOD to create disability hiring goals and to collect and review self-reported data from state employees to measure disability hiring progress;
4. Mandates regular disability etiquette and awareness training for state employees;
5. Directs the Office of Information Technology to review the state's online job application portal to ensure it is accessible to people with disabilities; and
6. Requires the Department of Job and Family Services to explore creating digital tools to match people with disabilities to jobs in the private sector.

[Click here](#) to read the full text of the executive order.

While Ohio's state agencies must already comply with state and federal anti-discrimination laws, DeWine's order to codify these standards at the agency level and remove barriers for jobseekers with disabilities and expand accessible job hunting tools is a positive first step for the new administration. OACB is encouraged that the interests of people with disabilities appear to be high on the new governor's agenda with this early action.

DeWine signed five other executive orders shortly after being sworn into office. [Click here](#) to read about the other orders. [Click here](#) to watch a video of Governor DeWine being sworn in ceremony and the signing of the orders from the Ohio Channel.



Image courtesy of the Ohio Governor's Office

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Beacon School

801 West Union Street - Athens, Ohio 45701
 Phone: 740-594-3539 - Fax: 740-593-3189
 Becky Martin, Director of Educational Services
 athenscbdd.org

Report to the Board January 22, 2019

Breakfast with Santa was a huge success again this year! Between the breakfast and the chance auction, we were able to raise over \$2,550.00! I would like to thank Beacon staff for many hours of planning & decorating, Gigi's for donating the food, Athens Masons for volunteering to cook, the local businesses for donating items for the auction, and all the members of the community for their support of this event.

We would like to thank Stephanie Goldsberry for the \$600.00 donation for summer camp, and Alfred Crow (my dad) for his \$1000.00 donation to the PTA. He had also previously donated \$1000.00 and purchased the shirts for the students to wear to the zoo last year. We are very thankful for the continued support of these great folks.

Our annual staff party and ornament exchange took place on December 19th. The staff enjoyed pizza and desserts, and were presented gifts from Ruth and I.

Beacon Singers performed their second concert of the year on December 21st, with "Songs of the Season" as the theme. As always, they did an excellent job! There was everything from electric guitars, bells, and props throughout the show that kept the crowd entertained. Thanks to Stephanie Morris for providing this service to our students.

We will be celebrating the 100th day of school on Friday, January 25. Activities will be happening throughout the day in individual classrooms, and the entire school will celebrate in the cafeteria beginning at 1:00. Cake and punch will be served. Please join us!

On January 28th we will be welcoming a student from Ohio University's Saudi Program to Beacon School. We are excited to have the opportunity to host this student and look forward to sharing experiences.



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EARLY INTERVENTION Highlights for JANUARY 2019 ACBDD Meeting

Caseload for DECEMBER 2018: TOTAL = 36 Additions = 0 Exits = 2

Caseload for January 2019: (as of Jan 8): TOTAL = 35 Additions = 4 Exits = 5

Evaluations/Assessments for NOVEMBER 2018

Eligibility Evaluations = 0 (2 evaluations were scheduled but both families cancelled)

Redeterminations = 1

Physical Therapy evaluation only = 1

Evaluations/Assessments for DECEMBER 2018

Eligibility Evaluations = 5 Redeterminations = 1

*****TOTAL IN-KIND HOURS** for the year 2018 contributed by the DD staff to the Help Me Grow Early Intervention System = 259.32 *** *These IN-KIND hours consisted of a total of 82 evaluations (eligibility, redeterminations, physical therapy, transitions, which encompasses travel, scoring, reports and consultations.*

Trainings and/or Meetings Attended:

****December 4, 2018:** Professional Development: *Primary Service Provider (PSP) Approach to Teaming: Myth Busting and Solving Implementation Challenges* presented by Tiffany Madden and Laura Friedman, DODD EI Consultants, in Chillicothe, Ohio attended by Mary Ann Smathers, and Hopewell Health Help Me Grow EI staff.

****January 8, 2019:** Early Intervention Update meeting between Becky Martin and Mary Ann Smathers to review 2018 early intervention services delivered by the ACBDD and Hopewell Health.

OTHER News:

--December 14, 2018 was the **2nd Annual Help Me Grow Holiday Celebration** held at Beacon School. A total of 120 people attended the party! Food was provided as well as fun time in the pool, activities in the gym, and attendance by Santa and Mrs. Claus as well as Santa's reindeer (Calming Companion dogs). Baskets of goodies were added this year as raffle items. Families filled out raffle tickets and put them in envelopes matching the baskets. The baskets contained various items such as cleaning supplies, art and craft supplies, bath time supplies, baking supplies and personal hygiene supplies. A total of 19 baskets were raffled. A big **THANK YOU** goes out to the ACBDD **Managers** who donated items. The managers donated so many items that we ended up making 2 baskets of cleaning supplies!! Also, **thank you** to Beacon School for the use of the facilities. This celebration was a collaborative effort between the Athens County Board of Developmental Disabilities, Hopewell Health and Integrated Services. An Ohio University student, Izzy Lovett, coordinated the party, the food donations, the basket donations

and the activities and attraction. **Thank you,** Izzy, for all of your dedication and hard work! The celebration was a blast!

--The second half results from the statewide Help Me Grow 2018 Family Questionnaire have arrived, please see attached.

“Celebrating our Achievements:”

This achievement celebration goes out to a set of parents who needed a way to get their children to understand time spent at Dad’s home verses time spent at Mom’s home. Based on their Developmental Specialist’s recommendation of making a visual chart with pictures (of dad and mom) on a calendar matching visitation days, the parents took it a step further and wrote out “DAD” and “MOM” because they discovered both children are recognizing letters. This has been working out quite well. Kudos to these parents!

Respectfully submitted,
Mary Ann Smathers, MA SpEd
Senior Developmental Specialist

Athens County

2018 Family Questionnaire Comments

Q11: What in Early Intervention has worked well with your family?
Sign language has really helped.
Flexible scheduling with home visits, utilizing resources available to use and toys/items already in our home. We also love how the developmental specialist and therapists are flexible and willing to focus on my son's needs at the time, even if they are outside of our IFSP goals.
Help Me Grow Visit, them showing us what to do to help our kids learn.
The home visitor helped my son with speech. At the beginning of the program, he could not even make sounds but now is able to say a few words and also makes a lot of sounds.
{My child} and I have worked with {our provider} and I feel he has made outstanding progress with her help
They have become part of our family. My son enjoys the visits and learns something new every time.
The way they work with my schedule. The way that they interact with my kids. Show me different ways to teach my son new things. My kids love them.
Sign language. Magnets on the fridge.
Q12: What could make Early Intervention work better for your family?
We have been satisfied with everything so far.
Nothing.
Frequent visits
Not sure I would change anything. We have been helped with anything we asked
Possibly more frequent visits.
Nothing they are doing everything possible and more than I could ever think of.
Q13: What part of Early Intervention has had the biggest impact for your family?
The activities
Just having their support has been so helpful. They are always willing to listen, offer advice, and cheer our son on when he accomplishes something, no matter how big or small. We can rely on them to be there, and that has been a blessing.
Help me grow visits. {Our provider} is the best!
They were able to help get my son certain items which was very useful for his development.
Coming to the house and working with {my child} in his home environment.
Helping my child learn how to make sounds in order to put words together. Also, helping us with his behavioral issues.
Their practices with my son and understanding.
The visits and observing different techniques.
Additional Comments
We love Katy! She has been awesome with Luc.



Directions: Please use the space below to answer the following questions as best you can about your time in Help Me Grow Early Intervention.

11. What in Early Intervention has worked well with your family?

My support team are so friendly and full of ideas for whatever goal we are setting.

12. What could make Early Intervention work better for your family?

13. What part of Early Intervention has had the biggest impact for your family?

They are my biggest "cheerleader"
The life of a mother of a special needs child
can be isolating.

Additional Comments:



Directions: Please use the space below to answer the following questions as best you can about your time in Help Me Grow Early Intervention

11. What in Early Intervention has worked well with your family?

Seeing the results, and the positive changes that my child is experiencing since enrolled in the program. Positive praise to me from Mary Ann. Being able to process progress that my child has made.

12. What could make Early Intervention work better for your family?

I think if starting the program earlier with my child, I would have seen quicker results. Unfortunately the milestones assessment was done with pediatrician at the 2 year mark.

13. What part of Early Intervention has had the biggest impact for your family?

Seeing the effectiveness of the program

Additional Comments:



Directions: Please use the space below to answer the following questions as best you can about your time in Help Me Grow Early Intervention.

11. What in Early Intervention has worked well with your family?

Using more words with him
has worked really well and
he now can occupy himself
while I cook, clean, etc.

12. What could make Early Intervention work better for your family?

Nothing Everything is
working great

13. What part of Early Intervention has had the biggest impact for your family?

Using our word about how we
feel.

Additional Comments:

Athens County Board of Developmental Disabilities Business Manager's Report

January 22, 2019

Notice to the Board and Stakeholders:

The following schedules detail financial performance of the Athens County Board of DD as of November 30, 2018. All schedules are reconciled with the Athens County Auditor's records as required by statute.

<u>Revenue By Month 2018</u>													
401 General	Jan.	Feb.	Mar.	Apr	May	June	July	August	Sept	Oct	Nov	Dec	Total
General Tax Beacon				3,937,178					2,802,386				6,739,564
Trailer Tax				51,886					23,486				75,373
Homestead & Rollback					291,509					298,144	7,575		597,228
Grants	79,639	213,065	236,755	219,650	259,258	71,277	75,543	271,032	317,888	139,115	212,440		2,095,663
Lunch Sales		766	1,435	288	1,132	419	221	380	880	1,054	553		7,126
Contract Services													
Other Receipts				6,227									6,227
Martin Match Receipts			12										12
Supported Living Subsidy	161,161			162,650			158,690			160,179			642,679
DODD TCM Match Transfer		641	7										648
Refunds			197,127	2,815	2,322		716	68		218,014	653		421,714
Reimbursements	207	4,261	185	5,976	5,666	542	3,581	8,366	23	6,811	47		35,665
Gifts & Donations	250		2,067	457	1,000	200							3,974
Other Non-Rev (Misc Rec)	3,255	4,722	854	1,693	4,873	2,251	6,857	11,166	3,112	3,041	1,056		42,881
Transfers In													
Fund Totals:	244,512	223,455	438,442	4,388,820	565,760	74,689	245,607	291,011	3,147,775	826,359	222,323	0	10,668,754
Revenue - Beac Cap Impr													
Fund Totals:	0	0	0	0	0	0	0	0	0	0	0	0	
Grand Total:	244,512	223,455	438,442	4,388,820	565,760	74,689	245,607	291,011	3,147,775	826,359	222,323	0	10,668,754

Athens County Board of Developmental Disabilities Business Manager's Report

Expenses By Month - 2018													
401 General	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept	Oct	Nov	Dec	Total
Salaries	331,453	324,525	314,303	331,789	504,824	292,340	290,574	300,161	347,986	334,985	510,491		3,883,431
Health Insurance	105,582	108,994	29,459	207,508	120,146	117,341	121,451	109,910	14,255	209,655	126,688		1,270,988
Medicare	4,392	4,350	4,201	4,426	3,233	3,933	3,901	4,043	4,667	6,872	4,555		48,572
Workers Compensation								40,594			0		40,594
PERS / STRS	46,387	47,270	46,203	64,381	57,640	46,972	41,475	41,486	62,423	50,247	48,167		552,652
Contract Services	123,278	87,451	53,184	135,259	95,849	52,925	64,480	34,043	33,737	104,603	85,759		870,567
Rentals	6,160	7,380	5,130	9,063	4,490	8,325	3,843	2,472	5,325	5,738	2,425		60,351
Non waiver Supported Living	4,490	21,741	12,889	39,235	4,974	41,014	15,947	8,158	8,216	19,973	36,610		213,246
Repairs / Maintenance	1,156	4,317	338	2,459	9,497	552	1,286	2,592	244	1,156	5,256		28,854
Supplies	15,937	18,970	12,872	21,541	15,346	15,922	18,683	18,493	15,018	15,238	16,462		184,481
Equipment	5,210	3,522	4,055		1,000	3,075		9,962	2,281	4,631	0		33,736
Other Expenses	39,031	2,615	2,495	37,919	1,351	432	552	649	1,515	1,600	4,636		92,794
Medicaid Match - TCM											0		
Family Support Services	6	2,508	4,122	2,891	2,019	5,860	2,234	4,037	6,702	3,411	8,765		42,555
Medicaid Waiver Match	511,372			511,372			963,344			613,362	0		2,599,450
Utilities	11,068	8,869	13,330	11,598	10,318	11,513	8,712	11,112	10,557	10,386	9,746		117,210
Fees-Settlement				101,573					67,526		0		169,099
Advertising-Printing	2,257	1,058	1,545	2,325	874	1,966	501	1,627	2,612	1,355	1,863		17,982
Travel / Reimbursement	3,780	1,223	4,293	3,973	2,182	4,980	3,713	2,583	1,962	3,581	2,643		34,912
Election Expense													
Transfer Out													
Fund Totals:	1,211,557	644,793	508,418	1,487,310	833,745	607,149	1,540,695	591,920	585,024	1,386,794	864,066	0	10,261,472
Capital Improvements	26,116	7,500	0	0	3,483	5,743	4,585	4,056	112,599	32,833	17,245	0	214,161
Grand Total:	1,237,674	652,293	508,418	1,487,310	837,228	612,892	1,544,751	595,976	617,857	1,419,627	881,311	0	10,475,633

Athens County Board of Developmental Disabilities Business Manager's Report

Revenue Levels Year-to-Date at 11/30/2018 (91.67% of YTD)

Line	Account	Budget	Actual		Percentage Collected
			2017 YTD	2018 YTD	
General					
1	0085.410100 S31 - General Tax Beacon	6,817,459	6,817,459	6,739,564	98.86%
2	0085.410400 S32A - Trailer Tax	94,926	94,926	75,373	79.40%
3	0085.412100 S31A - Homestead & Rollback	595,471	602,589	597,228	
4	0085.412500 S33 - Grants	2,200,845	2,453,573	2,095,663	95.22%
5	0085.413110 S37 - Lunch Sales	6,500	5,500	7,126	109.63%
6	0085.413120 S38 - Contract Services				0.00%
7	0085.417100 S39 - Other Receipts	146,789	1,826	6,227	4.24%
8	0085.417110 Martin Match Receipts		53	12	
9	0085.417120 Supported Living Subsidy	595,494	652,354	642,679	107.92%
10	0085.417130 DODD TCM Match Transfer		1,595	648	
11	0085.417140 S40 - Refunds	250,000	482,119	421,714	168.69%
12	0085.417150 S41 - Reimbursements	35,000	60,024	35,665	101.90%
13	0085.417500 S35 - Gifts & Donations	15,000	21,683	3,974	26.49%
14	0085.417800 S43 - Other Non-Revenue (Misc Rec)	10,000	173,565	42,881	428.81%
15	0085.422100 S44 - Transfers In				
	Grand Totals:	10,767,484	11,367,266	10,668,754	

Athens County Board of Developmental Disabilities Business Manager's Report

Expenditure Levels Year-to-Date at 11/30/2018 (91.67% of YTD)

Line	Account	Budget	Actual		Percentage
			2017 YTD	2018 YTD	Spent
General					
1	4356.510200 Salaries	4,331,196	3,739,031	3,883,431	89.66%
2	4356.520150 Health Insurance	1,345,664	1,242,359	1,270,988	94.45%
3	4356.522100 Medicare	62,802	50,207	48,572	77.34%
4	4356.524100 Workers Compensation		47,670	40,594	
5	4356.525100 PERS / STRS	601,743	521,399	552,652	91.84%
6	4356.530100 Contract Services	763,337	879,033	870,567	114.05%
7	4356.530101 Rentals	78,191	68,865	60,351	77.18%
8	4356.530102 Non-Waiver Supported Living	197,500	246,222	213,246	107.97%
9	4356.530200 Repairs / Maintenance	37,382	34,960	28,854	77.19%
10	4356.540100 Supplies	164,539	153,701	184,481	112.12%
11	4356.550100 Equipment	40,000	23,551	33,736	84.34%
12	4356.560100 Other Expenses	72,000	180,966	92,794	128.88%
13	4356.560101 Medicaid Match - TCM	N/A	N/A	N/A	
14	4356.560102 Family Support Services	50,000	37,957	42,555	85.11%
15	4356.560103 Medicaid Waiver Match	2,682,744	2,424,576	2,599,450	96.90%
16	4356.560107 Utilities	112,193	105,517	117,210	104.47%
17	4356.560110 Fees-Settlement	166,486	166,486	169,099	101.57%
18	4356.560200 Advertising-Printing	34,128	28,942	17,982	52.69%
19	4356.560300 Travel / Reimbursement	27,578	27,940	34,912	126.59%
20	4356.560500 Election Expenses				
21	4356.580100 Transfer Out				
	Fund Total:	10,767,483	9,979,382	10,261,472	

Athens County Board of Developmental Disabilities Business Manager's Report

2018	January	February	March	April	May	June	July	August	Sept	Oct	Nov	Dec
Beg. Fund Balance	3,510,128	2,543,083	2,121,745	2,051,769	4,953,279	4,685,294	4,152,834	2,857,745	2,556,836	5,119,588	4,559,153	3,917,410
Revenues	244,512	223,455	438,442	4,388,820	565,760	74,689	245,607	291,011	3,147,775	826,359	222,323	0
Expenditures	(1,211,557)	(644,793)	(508,418)	(1,487,310)	(833,745)	(607,149)	(1,540,695)	(591,920)	(585,024)	(1,386,794)	(864,066)	0
Ending Fund Balance	2,543,083	2,121,745	2,051,769	4,953,279	4,685,294	4,152,834	2,857,745	2,556,836	5,119,588	4,559,153	3,917,410	3,917,410
Funds Transferred to Rsrve Fd												
Adjusted Ending Balance	2,543,083	2,121,745	2,051,769	4,953,279	4,685,294	4,152,834	2,857,745	2,556,836	5,119,588	4,559,153	3,917,410	3,917,410
Min Fund Bal. (@ 25%)	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871
Variance from Min Fd Bal	(148,788)	(570,126)	(640,102)	2,261,408	1,993,423	1,460,963	165,875	(135,034)	2,427,717	1,867,282	1,225,539	1,225,539
Carryover Percentage	23.62%	19.71%	19.06%	46.00%	43.51%	38.57%	26.54%	23.75%	47.55%	42.34%	36.38%	36.38%

Fund Number, Name	Balance
401 General Fund	3,917,409.91
403 Supported Living Fund	14,078.96
015 Beacon Bond Fund	2,640.77
404 Capital Improvement Fund	987,635.88
All Funds	4,921,765.52

General Fund Balance Calculation	
Balance at 01/01/2018	3,510,127.82
Revenues	10,668,754.46
Expenditures	(10,261,472.37)
Balance at 11/30/2018	3,917,409.91

*Budgeted expenditures of \$10,767,483 x 25% = \$2,691,871.

If you have any questions regarding this financial information please contact me via the information below.

Stephen P. Kramer
 Director of Finance and Operations, ACBDD
 740-594-3539 ext. 224
skramer@athenscbdd.org

ACBDD Transactions 11-16-2018 thr 12-15-2018

General

4356.520150 Health Insurance

American United Life Insurance Company	December, 2018 - Life Insurance Premium	11/26/2018	\$1,619.75
Delta Dental of Ohio, Inc.	December, 2018 - Dental Insurance Premium	11/26/2018	\$4,406.90
Medical Mutual of Ohio	January, 2018 - Vision Insurance Premium	12/03/2018	\$1,259.50
Patrick Benefits Administrators	check register dated 11/21/18 - HRA deductibles	11/26/2018	\$825.60
Patrick Benefits Administrators	Check register dated 12/06/2018 - HRA deductibles	12/06/2018	\$14,231.76
Patrick Benefits Administrators	Check Register dated 11/16/18 - HRA deductibles	11/16/2018	\$9,695.24
Patrick Benefits Administrators	Check Register dated 11/30/18 - HRA deductibles	12/01/2018	\$6,153.34
Peoples Insurance Agency, LLC	December, 2018 - HRA Adm fees	11/19/2018	\$403.00
Peoples Insurance Agency, LLC	December, 2018 - AFE MHSA - HSA Administration Fee	11/19/2018	\$27.00
TelaDoc Care, LLC	December, 2018 - TeleDoc Care Administration Fees	12/12/2018	\$282.75
U. S. Bank Institutional Custody Services	December, 2018 - HRA premiums less one employee deduction check	11/19/2018	\$86,897.71
U. S. Bank Institutional Custody Services	December, 2018 - HSA premiums	11/19/2018	\$15,020.24

Health Insurance Total: 140,822.79

4356.522100 Medicare

Athens County Auditor	December 2018 - Medicare Contributions	12/15/2018	\$4,536.78
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Medicare Total: 4,536.78

4356.525100 PERS / STRS

Athens County Auditor	December 2018 PERS/STRS Contribution	12/15/2018	\$47,397.56
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PERS / STRS Total: 47,397.56

4356.530100 Contract Services

Aramark Dallas Lockbox	November, 2018 - Food Services Contract	12/04/2018	\$7,292.80
Atco, Inc.	November, 2018 - Beacon Kitchen Assistant	12/14/2018	\$718.19
Atco, Inc.	November, 2018 - Production Aide - Balch 140 hours @ \$10.46/hr	12/14/2018	\$1,463.70
Atco, Inc.	November, 2018 - Half cost of Atco secretary 156.13 hours @ \$7.80/hr	12/14/2018	\$1,217.81
Atco, Inc.	November, 2018 - Atco office help 62.50 hrs @ \$11.21/hr and SSA scanning of 104 hours @ \$11.21.	12/14/2018	\$2,337.29
Atco, Inc.	November 2018 consumer wages of 8 hours @ \$9.30/hr	12/06/2018	\$74.40
Atco, Inc.	November, 2018 - Job Trainers - 25.75 hrs of Other Services Admin; 103.75 hrs of ODD Adult; 66.2	12/06/2018	\$5,197.52
Athens County Commissioners	2017 State Auditor Costs - 401 DD - Beacon School	11/19/2018	\$12,125.05
Balch, Freda	November, 2018 - 16 days of providing consumer transportation instead of running bus	12/03/2018	\$89.60
BCI	November, 2018 - BCI & FBI webchecks	12/04/2018	\$253.00
Biancone, Sally	Nov 14, 19, 30 & Dec 2 & 4, 2018 - 12 hours of pictures - swimming, classroom, art, movies - websi	12/05/2018	\$300.00
Biancone, Sally	December 4, 8 and 12, 2018 - 7.25 hrs of pictures at \$25/hr	12/13/2018	\$181.25
Cintas Corporation	uniforms	11/19/2018	\$28.40
Cintas Corporation	uniforms	12/05/2018	\$28.40
Cintas Corporation	uniforms	12/01/2018	\$28.40
Cintas Corporation	uniforms	12/11/2018	\$28.40
Cross Management	November, 2018 HR Contract	12/10/2018	\$242.50
Koch, Steven	November 19 - 2.50 hrs at \$25/hr-PPAAC	12/01/2018	\$62.50
Koch, Steven	November 5, 12 and 27 - 3.50 hrs of \$25/hr -PPAAC	12/01/2018	\$87.50
Nagy PT, Adrienne	November, 2018 - PT services -22.5 hrs for EI: 9.25 hrs for School Age; & 5.25 hrs for Atco @ \$50/	12/11/2018	\$1,837.50
One Call Now	200 Parent Broadcast Plan	12/12/2018	\$362.25
Southern Ohio Council of Governments	October, 2018 - MUI Investigative Agent Services - 108.42 hrs @ \$45/hr	11/26/2018	\$4,878.90
The Healthy Edge, LLC	12/12/18 - random drug screen DOT	12/13/2018	\$139.00
Time Warner	December, 2018 - Atco Cable	12/12/2018	\$83.67

Time Warner	December, 2018 - PersonnelPlus Internet	12/10/2018	\$287.50
Time Warner	December, 2018 - Internet	12/10/2018	\$3,044.50
Treasurer of State, %OH Dept of MR/DD	Athens 1Q 19 ADM fees 1.25 % Administrative Fees for 7/1/18 to 9/30/18	11/20/2018	\$37,034.74
Treasurer State of Ohio	Enrollment fee for DAS cooperative purchasing program	12/06/2018	\$100.00
Contract Services Total: 79,524.77			
4356.530101 Rentals			
B & C Communications	December, 2018	11/19/2018	\$100.00
City of Athens	January, 2019 - Reserved Parking #30 in parking garage	12/11/2018	\$125.00
O.U. Office of the Bursar	ACBDD Board Meeting Baker Center Room Charge Room 235 on October 24, 2018	12/10/2018	\$75.00
Southeastern Ohio Management Company	January, 2018 - PersonnelPlus Rent - 1002 East State Street	11/19/2018	\$2,100.00
Rentals Total: 2,400.00			
4356.530102 Non-Waiver Supported Living			
Athens Metropolitan Housing	December, 2018 - Rent	12/04/2018	\$433.00
Athens Metropolitan Housing	December, 2018 - Rent	12/04/2018	\$309.00
Athens Metropolitan Housing	December, 2018 - Rent	12/04/2018	\$321.00
Athens Metropolitan Housing	December, 2018 - Rent	12/04/2018	\$311.00
Athens Metropolitan Housing	December, 2018 - Rent	12/04/2018	\$424.00
Athens Metropolitan Housing	December, 2018 - Rent	12/04/2018	\$424.00
Athens Metropolitan Housing	December, 2018 - Rent	12/04/2018	\$298.00
Athens Metropolitan Housing	replaced door/handle to bedroom	12/01/2018	\$487.71
Athens on Demand	308 tickets for transit for four individuals during December 2018 to February 2019	12/01/2018	\$616.00
Balch, Freda	Patient copay on dentures	11/19/2018	\$100.00
Boyd, Jazzlynn Nicole	October 11, 12, 18, 19, 24, & 26, 2018 - 52 units of HPC at \$4.19/unit	12/05/2018	\$217.88
Budget Pest Control %Thomas Bailey	first bed bug treatment	12/03/2018	\$125.00
Creative Foundations	Difference owed for 2018 adult day services 10/31/18 - Revised	12/10/2018	\$1,173.41
Creative Foundations		Nov-18 12/10/2018	\$867.68
Creative Foundations		Nov-18 12/10/2018	\$230.88
Creative Foundations	September-November, 2018	12/10/2018	\$2,077.40
R.H.D.D., Inc.	JM & MS - October, 2018 - JW July-October, 2018	11/20/2018	\$11,115.95
Ripple, Thomas E.	November 12 and 26, 2018 - two one hour massage therapy treatments	12/04/2018	\$120.00
Sech-Kar Company	October, 2018	11/20/2018	\$1,548.80
Sech-Kar Company	November, 2018	11/20/2018	\$445.28
Sofa and Mattress Outlet	sofa and chass	12/06/2018	\$638.95
Non-Waiver Supported Living Total: 22,284.94			
4356.530200 Repairs / Maintenance			
Advanced Painting	painting conference room & office at Bus Garage	11/20/2018	\$3,380.00
Ohio Pest Control	11/30/18 - Atco	12/03/2018	\$45.00
Ohio Pest Control	11/30/18 - Harper Street	12/05/2018	\$58.00
Ohio Pest Control	11/30/18 - Beacon	12/05/2018	\$52.00
Poynter's Business Solutions	Quarterly Maintenance 11/14/18 to 02/13/2019 - PersonnelPlus	11/16/2018	\$200.00
Poynter's Business Solutions	SSA (Harper Street) Quarterly Base rate charge for 11/15/18 to 2/14/2019	11/16/2018	\$500.00
Repairs / Maintenance Total: 4,235.00			
4356.540100 Supplies			
Atco Employee Council	Reimbursement for rollerbowl pop, bowling games and Avalanche Pizza for year end league bowlin	12/03/2018	\$187.71
Atco, Inc.	Reimbursement for clothing and DJ Community Dance	11/19/2018	\$465.67
Athens Sun & Fun	Alkalinity increaser	12/01/2018	\$69.98
Athens Sun & Fun	pool supplies	12/03/2018	\$281.21
C & E Stores (Athens)	building supplies - Beacon	12/01/2018	\$11.98

C & E Stores (Athens)	building supplies - Beacon	12/01/2018	\$16.17
C & E Stores (Athens)	building supplies - Harper Street	11/19/2018	\$15.84
C & E Stores (Athens)	building supplies - Harper Street	12/12/2018	\$8.29
Classic Solutions	building supplies - Beacon/Atco/Bus Garage/Harper Street	12/03/2018	\$545.00
Classic Solutions	building supplies - Beacon	12/10/2018	\$157.08
Cline Welding Supply	55 gal sodium hypochlorite and 15 gals muractic acid	12/14/2018	\$439.00
First National Bank Omaha	switch	11/26/2018	\$135.78
First National Bank Omaha	medeco lock with 2 keys	12/05/2018	\$116.15
Kramer, Stephen	Reimbursement for purchase of gas card for PersonnelPlus consumer to get back and forth from w	12/13/2018	\$25.00
Kroger - Columbus Customer Charges	food items for Atco fall festival	11/20/2018	\$69.12
Kroger - Columbus Customer Charges	food items for Atco fall festival	11/20/2018	\$32.44
Lowe's Home Centers, Inc. (Athens)	building supplies - Beacon	12/13/2018	\$46.16
Lowe's Home Centers, Inc. (Athens)	building supplies - Bus Garage	12/14/2018	\$49.35
Lowe's Home Centers, Inc. (Athens)	building supplies - Beacon	12/05/2018	\$9.49
Lowe's Home Centers, Inc. (Athens)	building supplies - Bus Garage	11/26/2018	\$18.19
Matheny Motor Truck Sales	vehicle parts	12/05/2018	\$166.29
MD Computer Services, Inc.	63 door numbers	12/01/2018	\$76.82
Oriental Trading Company	candy cane cellophane bags and candy - PersonnelPlus	12/11/2018	\$119.70
Parr Public Safety Equipment	mini century lightbar	12/06/2018	\$235.11
Performance Signs	six 18" x 12" aluminum signs "ACBDD Parking Only" - Beacon	11/19/2018	\$150.00
Performance Signs	two 7 foot post	12/06/2018	\$40.00
Randy V. Moore Petroleum Distribution LLC	214 gals of diesel delivered on 11/27/18 @ \$2.72/gal	12/03/2018	\$582.08
Randy V. Moore Petroleum Distribution LLC	228 gals of unleaded delivered on 11/28/18 @ \$2.115/gal	12/03/2018	\$482.22
Randy V. Moore Petroleum Distribution LLC	318 gals of diesel delivered on 11/13/18 @ \$2.84/gal	11/19/2018	\$903.12
Randy V. Moore Petroleum Distribution LLC	183 gals of unleaded delivered on 11/13/18 @ \$2.215/gal	11/19/2018	\$405.35
Randy V. Moore Petroleum Distribution LLC	322 gals of diesel delivered on 12/11/18 @ \$2.45/gal	12/13/2018	\$788.90
Randy V. Moore Petroleum Distribution LLC	252 gals of unleaded delivered on 12/11/18 @ \$1.985/gal	12/13/2018	\$500.22
Randy V. Moore Petroleum Distribution LLC	160 gals of diesel delivered on 11/20/18 @ \$2.84/gal	12/01/2018	\$454.40
Randy V. Moore Petroleum Distribution LLC	192 gals of unleaded delivered on 11/20/18 @ \$2.215/gal	12/01/2018	\$425.28
Randy V. Moore Petroleum Distribution LLC	227 gals of diesel delivered on 12/4/18 @ \$2.59/gal	12/10/2018	\$587.93
Randy V. Moore Petroleum Distribution LLC	234 gals of unleaded delivered on 12/4/18 @ \$1.985/gal	12/10/2018	\$464.49
Randy V. Moore Petroleum Distribution LLC	oil	12/10/2018	\$1,256.20
Reserve Account	postage for SSA office	11/19/2018	\$1,000.00
Reserve Account	postage - ADM/School	11/19/2018	\$1,000.00
Robertson Heating Supply Co. of Ohio	building supplies - Beacon	12/01/2018	\$66.34
Robertson Heating Supply Co. of Ohio	building supplies - Beacon - balance due	12/10/2018	\$1.06
Staples Business Advantage	office supplies - PersonnelPlus	12/10/2018	\$240.14
Staples Business Advantage	office supplies - PersonnelPlus	12/10/2018	\$25.31
State Electric Supply	building supplies - Beacon	12/05/2018	\$99.70
State Electric Supply	building supplies - Harper Street	12/11/2018	\$297.74
Synchrony Bank (Amazon)	EWO's rlc-092/rlc-093 lamp bulb for viewsonic projector lamp bulb	12/03/2018	\$99.99
Synchrony Bank (Amazon)	Juppy Ultra Comfy Baby Walker	11/19/2018	\$29.99
Synchrony Bank (Amazon)	nuby non-drip 3 stage grow nurser	12/13/2018	\$6.98
Synchrony Bank (Amazon)	Nukote WM196 ink jet refill kit	12/06/2018	\$8.34
Synchrony Bank (Amazon)	crayola erasable highlighter of \$16.78; Kemp BVM Resuscitator Adult of \$26.74; and credit from Ke	12/06/2018	\$13.53
Synchrony Bank (Amazon)	two Fosmon WaveLink 51004HOM Wireless Door Open Chime and three Fosmon WaveLink51007	11/16/2018	\$139.95
Synchrony Bank (Amazon)	Professor Color Remanufactured Ink	11/19/2018	\$55.88
Synchrony Bank (Amazon)	One each Kemp BVM Resusitator Child and Adult	11/19/2018	\$59.44

Synchrony Bank (Amazon)	18" Acrylic bubble half dome mirror with black rim, round indoor security mirror - Beacon	12/05/2018	\$30.14
Synchrony Bank (Amazon)	Pacon Card Stock, five Subang 1500 County Self Adhesive dots, two printworks white cardstock an	12/01/2018	\$151.51
Synchrony Bank (Amazon)	calendars - SSA office	12/13/2018	\$51.61
Synchrony Bank (Amazon)	two Sturdy Better Homes and Gardens Maddox Crossing Dining chairs - Athens Integrate Office	12/10/2018	\$189.80
Synchrony Bank (Amazon)	one Logitech MK2470 Wireless Keyboard and mouse combo - keyboard and mouse included	12/11/2018	\$18.99
The Richmond Company	5 Cert 1 Renew Class: Online Renewal (Med) & Skill	11/29/2018	\$175.00
The Richmond Company	3 Cert 1 Renew Class; - one line training (Med)	12/05/2018	\$105.00
Uni-Select USA, Inc.	vehicle parts	12/01/2018	\$37.27
Uni-Select USA, Inc.	vehicle parts	12/10/2018	\$14.59
Uni-Select USA, Inc.	vehicle part	12/10/2018	\$4.69
Warehouse Tire	three tires	12/05/2018	\$1,111.14
Warehouse Tire	tires	12/12/2018	\$341.78
Warehouse Tire	tires	12/10/2018	\$341.78
Washington Auto Parts, Inc.	vehicle parts	12/13/2018	\$256.32
Supplies Total: 16,311.73			
4356.550100 Equipment			
CDW Government	25 ACAD MS SEL+WIN PRO 10 alng upgrades (Windows 10 Pro Licenses)	12/10/2018	\$1,321.50
Montgomery Trailer Sales	tandem axle kit and installation	12/04/2018	\$1,670.00
News-2-You, Inc.	5 unique learning licenses from 1/272019 to 1/26/2020	12/06/2018	\$2,640.50
Time Clock Plus	RDT Touch 400 - timeclock kiosk for Bus Garage	12/12/2018	\$1,479.30
Equipment Total: 7,111.30			
4356.560100 Other Expenses			
First National Bank Omaha	pizzas for board meeting/training on 12/4/18 purchased from Donatos	12/05/2018	\$83.30
First National Bank Omaha	1 year SHRM Membership for Gwen Brooks Professional Association Membership	12/07/2018	\$184.00
Smedley, Arian	Reimbursement for purchase from Krogers for supplies for end of year - Staff breakfast on 12/12/18	12/13/2018	\$144.97
Washburn, Jacob (Jake)	video worked - 37.50 hours @ \$20/hr - ACBDD - this is a reissue - original check lost in mail	11/28/2018	\$750.00
Washburn, Jacob (Jake)	video work 80.50 hours @ \$20/hr - PersonnelPlus Gala this is a reissue - original check lost in mail	11/28/2018	\$1,610.00
Washburn, Jacob (Jake)	Check #741550 was lost in mail for 80.50 hours of video work for PersonnelPlus Gala	11/28/2018	-\$1,610.00
Washburn, Jacob (Jake)	Check #741549 was lost in mail for 37.50 hours of video work ACBDD	11/28/2018	-\$750.00
West, Rebecca	reimbursement for lifeguard recertification	11/20/2018	\$225.00
Other Expenses Total: 637.27			
4356.560102 Family Support Services			
Beyond Play	little spill cup, refo smart cups and hand-held massager - family support services	12/01/2018	\$62.80
First National Bank Omaha	6 night hotel stay at Super 8 Motel - family support service	12/05/2018	\$482.64
Good Works, Inc.	Reimbursement for materials purchased from Lowes, Ketchum's General Storage, C& E - family su	12/06/2018	\$166.37
Hedges, John	Reimbursements - Walmart air conditioner; Huddle Tires tires; and Nelsonville Mobile Homes windc	11/20/2018	\$446.97
Pilates & Moore	ten sessions - family support services	11/19/2018	\$500.00
Synchrony Bank (Amazon)	Deer Stags Boys GORP Hiking Boots - family support services	12/07/2018	\$44.99
Synchrony Bank (Amazon)	sic eeyore stuffed animal, graco pack'n play portable playard, simple joys by carters baby boys 6 pi	12/14/2018	\$143.07
Synchrony Bank (Amazon)	pillow pets stuff animal plush Disney 16" eeyore - family support services	12/14/2018	\$37.99
Synchrony Bank (Amazon)	Tommee Tippee - 0-6 month orthodonitc baby dummy & 6-18 month cherry teat soother - family su	12/01/2018	\$9.84
Synchrony Bank (Amazon)	Suma-ma cute dinosaur print tops& pants 2 piece pajamia outlet - family support services	12/01/2018	\$8.87
Synchrony Bank (Amazon)	Tommee Teepee closer to nature fun pacifier, 6-18 months and Tommee Tippee Esentials basics fun	12/01/2018	\$21.22
Synchrony Bank (Amazon)	its, bubzi co white noise soundmachine and sleep aid night light, new baby gift woodland owl decor	12/01/2018	\$166.31
Synchrony Bank (Amazon)	Mpow 068 Kids earn protection safety ear muffs NRR 25dB noise reduction hearing protection for k	12/01/2018	\$12.99
Synchrony Bank (Amazon)	inktastic - Pipeliner Like My Daddy infact creeper - family support services	12/01/2018	\$19.99
Synchrony Bank (Amazon)	Crane USA filter-free cool mist humidifers for kids - owl - family support services	12/01/2018	\$34.16
Synchrony Bank (Amazon)	0-2 year toddler infant baby boys long sleeve romper, pants, hat outfit - family support services	12/01/2018	\$9.41

Synchrony Bank (Amazon)	Safety first grow and go 3-in-1 convertible car seat - family support services	12/01/2018	\$137.23
Synchrony Bank (Amazon)	s clothes set wild boy long sleeve tshirt top & pants outfits, pampers swaddlers disposable diapers,	12/01/2018	\$199.47
Synchrony Bank (Amazon)	r Long sleeve romper print set; Michef Baby Bowls, baby feeding bowls set with mash and serve bo	12/07/2018	\$59.72
Synchrony Bank (Amazon)	Bring on the Cake It's my first birthday boy bodysuit - family support services	12/07/2018	\$13.99
Synchrony Bank (Amazon)	Hellowi Proud Owner of a Bearded Daddy Toddler bodysuit - family support services	12/07/2018	\$9.50
Synchrony Bank (Amazon)	Emmababy newborn daddy's little main print baby romper and camo cotton long pants - family supp	12/07/2018	\$9.78
Synchrony Bank (Amazon)	1:1 music phone toy yphone animal play cell phone, vtech magic star learning table, graco my ride t	12/07/2018	\$239.54
Synchrony Bank (Amazon)	Leapfront my pal scout - family support services	12/07/2018	\$24.63
Synchrony Bank (Amazon)	3 piece set newborn baby boys striped long sleeve deer tops pants hat outfit - family support servi	12/07/2018	\$9.33
Synchrony Bank (Amazon)	SPOP batman kid winter jacket with hood - family support services	12/07/2018	\$41.88
Synchrony Bank (Amazon)	Belkin 8 outlet conserve switch surger protector with 4 foot cord and remote - family support service	12/07/2018	\$35.39
Synchrony Bank (Amazon)	Apple iPod Touch 16GB (5th Generation) - family support service	12/07/2018	\$168.99
Walmart Community/Synchrony Bank	Verizon Wi-Fi Box, 3 months of Wi-Fi, joint braces, MP3 player, peaceful muisic to laod on MP3 play	11/19/2018	\$328.33
Walmart Community/Synchrony Bank	girls coat - family support services	12/11/2018	\$18.68
Williams, Erica R.	reimbursement for purchase from Cacade DAFO for hot dog inserts - family support services	12/07/2018	\$64.00

Family Support Services Total: 3,528.08

4356.560107 Utilities

American Electric Power	Beacon electric from 10/25/18 to 11/27/18	12/03/2018	\$2,342.09
American Electric Power	8 Harper Street electric 10/11/18 to 11/08/18	11/16/2018	\$450.10
American Electric Power	Bus Garage electric from 10/10/18 to 11/9/18	11/16/2018	\$244.03
American Electric Power	Atco electric from 10/19/18 to 11/16/18	11/26/2018	\$996.20
American Electric Power	Atco light from 10/19/18 to 11/16/18	11/26/2018	\$10.01
Athens-Hocking Co Recycling Centers, Inc	commercial recycling pick up for December, 2018 - Harper Street	12/03/2018	\$12.00
BFS Petroleum	630 gals of LP gas - Bus Garage	12/01/2018	\$970.20
City of Athens	Atco water from 10/17/18 to 11/20/18 - 34,000 gals	12/03/2018	\$167.28
City of Athens	Beacon water from 10/3/18 to 11/8/18 - 51,000 gals	11/19/2018	\$554.75
Columbia Gas	Beacon gas from 9/11/18 to 10/09/18	11/19/2018	\$271.30
Columbia Gas	Atco gas from 10/12/18 to 11/12/18	11/16/2018	\$411.00
Columbia Gas	PersonnelPlus gas from 10/12/18 to 11/12/18	11/16/2018	\$60.56
Direct Energy Business, LLC	8 Harper Street light from 10/9/18 to 11/6/18	11/26/2018	\$3.24
Frontier	December, 2018 - Harper Street 740-0001	12/12/2018	\$30.62
Frontier	December, 2018 - Beacon Fax 740-593-3189	12/12/2018	\$30.62
Frontier	December, 2018 - Atco 740-592-6659	12/12/2018	\$237.26
Frontier	December, 2018 - 740-592-1098 MUI fax line and Beacon alarm system	12/12/2018	\$116.81
Frontier	December, 2018 - PersonnelPlus fax line 740-593-8236	12/06/2018	\$41.07
Frontier	December, 2018 - Bus Garage fax 740-594-5048	12/06/2018	\$34.00
Interstate Gas Co (IGS)	October, 2018 - Beacon	11/26/2018	\$318.08
Le-Ax Water Dept.	St. Rt. 56 water from 10/10/18 to 11/14/18	12/03/2018	\$19.50
Le-Ax Water Dept.	Bus Garage water from 10/10/18 to 11/14/18 - 2000 gals	12/03/2018	\$28.50
Le-Ax Water Dept.	disconnect St. Rt. 56 water	12/10/2018	\$200.00
Shred-IT USA, LLC	10/17 SSA \$156.75; 11/7- PersonnelPlus \$57.25; 11/7 Beacon \$57.25	11/26/2018	\$271.25
The Plains Water & Sewer District	6 Harper Street water from 10/29/18 to 12/11/18 - 3,700 gals	12/14/2018	\$68.41
Verizon Wireless	December, 2018 - phones for Beacon, PersonnelPlus, Bus Garage and SSA	11/19/2018	\$1,778.82
Waste Management	December, 2018 - Atco	12/10/2018	\$650.83
Waste Management	December 2018 - Beacon	12/10/2018	\$221.70
Waste Management	December, 2018 - Bus Garage	12/01/2018	\$167.69

Utilities Total: 10,707.92

4356.560200 Advertising-Printing

APG Media of Ohiom KKD	legal ad for bids for school bus	12/10/2018	\$36.25
Minuteman Press	100 business cards for Becky Martin	11/26/2018	\$29.67
Spartan Athletic Club	half page winter sports program ad - PersonnelPlus	12/05/2018	\$75.00
Advertising-Printing Total: 140.92			
4356.560300 Travel / Reimbursement			
Atherton, Beth	Travel 11/19 to 11/29/2018	12/10/2018	\$170.04
Brown, Autumn	Travel 9/4/18 to 11/29/18	12/03/2018	\$694.88
Cablish-Kristofco, Susan	Tuition/Professional Growth Reimbursement for OCALI conference on November 14-16 - hotel and	11/20/2018	\$300.00
Cablish-Kristofco, Susan	Travel 08/23/2018	11/20/2018	\$106.82
Casey, Margaret	Travel 9/6/18 to 10/30/18	12/12/2018	\$200.83
Casey, Margaret	Travel 11/8 to 11/20/18	12/14/2018	\$20.82
Dunlap, Kristopher	Travel 9/26/18 to 12/14/18	12/14/2018	\$183.34
Finsterwald, Emily	Travel 9/13/18 to 10/02/18	12/14/2018	\$67.42
First National Bank Omaha	Holiday Inn Express stay on 11/28 to 11/30 - T. Lawrence - OACBDD conference	12/12/2018	\$415.80
First National Bank Omaha	two night hotel stay at Holiday Inn Express on 11/28 thru 11/30 - D. Suehrstedt	12/03/2018	\$415.80
First National Bank Omaha	PER 5.13 - Tuition Professional Growth - hotel stay for Samantha Dunlap attending OCALICOn con	11/20/2018	\$297.30
First National Bank Omaha	one night hotel stay at Holiday Inn Express on 11/28 - Beth Atherton	12/01/2018	\$187.05
Graham, Elizabeth	Travel 10/04/18 to 12/05/18	12/14/2018	\$85.02
Hagen, Cale W.	Travel 12/04/18 to 12/12/18	12/12/2018	\$104.75
Hagen, Cale W.	Travel 11/1/18 to 11/16/18	11/16/2018	\$157.34
Hagen, Cale W.	Travel 11/19/18 to 11/30/18	12/05/2018	\$125.57
Harrison, Audra	Travel 10/09/18 to 11/29/18	12/05/2018	\$173.86
Hart, Jamie	Travel 10/2/18 to 10/29/18	11/20/2018	\$77.17
Hart, Jamie	travel 11/5/18 to 11/28/18	12/05/2018	\$49.92
Janes-Tinkham, Carol	Travel 8/30/18 to 11/28/18	12/01/2018	\$137.45
Janes-Tinkham, Carol	Travel 11/29/2018 to 12/14/2018	12/14/2018	\$21.80
Kendrick, Stephanie	Travel 11/7 to 12/10	12/10/2018	\$115.10
Kramer, Stephen	Travel 12/07/2018	12/13/2018	\$110.09
Mitchell, Jodi	Travel 12/3/18 to 12/12/18	12/12/2018	\$117.83
Mitchell, Jodi	Travel 11/2/18 to 11/30/18	12/06/2018	\$220.94
North-Moss, Barbara	Travel 10/01/18 to 12/12/18	12/12/2018	\$56.35
OACBDD	Registration fees for OACBD 35th Annual Convention Nov 28-30 - Demko, Brooks, Atherton, Davis	12/11/2018	\$2,705.00
OSCBDD	2019 Superintendent Development Program - Arian Smedley	12/01/2018	\$500.00
Sincoff, David	Travel 12/4/18 to 12/14/18	12/14/2018	\$113.80
Smathers, Mary Ann	Travel 12/3/18 to 12/11/18	12/12/2018	\$173.31
Smathers, Mary Ann	Travel 11/5 to 11/26/18	12/01/2018	\$217.40
Swackhamer, Jerry W.	Travel 09/18/18 to 11/27/18	12/05/2018	\$77.72
Travel / Reimbursement Total: 8,400.52			
Capital Improvement			
7809.550100 Capital Improvements			
Capital Choice Office Furniture, LLC	yle BBF and FF with locks, black 21" with center drawer, maple 48"H bookcase, file lateral 35" two	12/06/2018	\$3,588.97
Floor & Moore, Inc.	flooring for Integrate office	12/01/2018	\$9,608.88
Synchrony Bank (Amazon)	eight Flash Furniture 18" x 96" rectangular wood folding traning/seminar table with smooth clear coa	12/03/2018	\$623.36
Synchrony Bank (Amazon)	two Ikea 8 drawer dreser, black-brown - Integrate Office	12/03/2018	\$1,058.00
Synchrony Bank (Amazon)	3 Seville Classics Airlift S3 Electric Standing desk frames and two Nature inspired printed area rug	12/03/2018	\$1,497.98
Synchrony Bank (Amazon)	two Flash Furniture 18" x 96" rectangular wood folding training/seminar table with smooth clear coa	12/03/2018	\$156.00
Synchrony Bank (Amazon)	nature inspired printed runner rug slip resistant for rubber back exotic patterns - Integrate Office	12/03/2018	\$35.80

Synchrony Bank (Amazon)	Bonzy Recliner chair contemporary leather recliner for modern living room - Integrate Office	12/05/2018	\$350.00
Synchrony Bank (Amazon)	one 42" round table top, easily accommodates seating for 4 - Integrate Office	12/05/2018	\$226.24
Synchrony Bank (Amazon)	one Fairview Game Rooms Contemporary nesting coffee table set - Integrate Office	12/05/2018	\$199.00
Synchrony Bank (Amazon)	unter stool, Windsor rocking chair; two winsome wood mission shelving, two Christopher Knight hor	12/05/2018	\$1,929.26
Synchrony Bank (Amazon)	International Caravan furniture piece chair - Integrate office	12/05/2018	\$133.55
Capital Improvements Total: 19,407.04			

Grand Totals:

\$367,446.62

Exhibit 13
Athens County Board of Developmental Disabilities
Business Manager's Report

January 22, 2019

Notice to the Board and Stakeholders:

The following schedules detail financial performance of the Athens County Board of DD as of December 31, 2018. All schedules are reconciled with the Athens County Auditor's records as required by statute.

<u>Revenue By Month 2018</u>													
401 General	Jan.	Feb.	Mar.	Apr	May	June	July	August	Sept	Oct	Nov	Dec	Total
General Tax Beacon				3,937,178					2,802,386				6,739,564
Trailer Tax				51,886					23,486				75,373
Homestead & Rollback					291,509					298,144	7,575		597,228
Grants	79,639	213,065	236,755	219,650	259,258	71,277	75,543	271,032	317,888	139,115	212,440	51,326	2,146,990
Lunch Sales		766	1,435	288	1,132	419	221	380	880	1,054	553	909	8,035
Contract Services													
Other Receipts				6,227									6,227
Martin Match Receipts			12										12
Supported Living Subsidy	161,161			162,650			158,690			160,179			642,679
DODD TCM Match Transfer		641	7										648
Refunds			197,127	2,815	2,322		716	68		218,014	653	87	421,801
Reimbursements	207	4,261	185	5,976	5,666	542	3,581	8,366	23	6,811	47	3,353	39,018
Gifts & Donations	250		2,067	457	1,000	200						600	4,574
Other Non-Rev (Misc Rec)	3,255	4,722	854	1,693	4,873	2,251	6,857	11,166	3,112	3,041	1,056	376	43,257
Transfers In													
Fund Totals:	244,512	223,455	438,442	4,388,820	565,760	74,689	245,607	291,011	3,147,775	826,359	222,323	56,652	10,725,406
Revenue - Beac Cap Impr													
Fund Totals:	0	0	0	0	0	0	0	0	0	0	0	0	
Grand Total:	244,512	223,455	438,442	4,388,820	565,760	74,689	245,607	291,011	3,147,775	826,359	222,323	56,652	10,725,406

Exhibit 13
Athens County Board of Developmental Disabilities
Business Manager's Report

Expenses By Month - 2018													
401 General	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept	Oct	Nov	Dec	Total
Salaries	331,453	324,525	314,303	331,789	504,824	292,340	290,574	300,161	347,986	334,985	510,491	332,631	4,216,062
Health Insurance	105,582	108,994	29,459	207,508	120,146	117,341	121,451	109,910	14,255	209,655	126,688	40,464	1,311,452
Medicare	4,392	4,350	4,201	4,426	3,233	3,933	3,901	4,043	4,667	6,872	4,555	4,537	53,109
Workers Compensation								40,594					40,594
PERS / STRS	46,387	47,270	46,203	64,381	57,640	46,972	41,475	41,486	62,423	50,247	48,167	47,398	600,050
Contract Services	123,278	87,451	53,184	135,259	95,849	52,925	64,480	34,043	33,737	104,603	85,759	28,523	899,090
Rentals	6,160	7,380	5,130	9,063	4,490	8,325	3,843	2,472	5,325	5,738	2,425	260	60,611
Non waiver Supported Living	4,490	21,741	12,889	39,235	4,974	41,014	15,947	8,158	8,216	19,973	36,610	17,381	230,627
Repairs / Maintenance	1,156	4,317	338	2,459	9,497	552	1,286	2,592	244	1,156	5,256	250	29,104
Supplies	15,937	18,970	12,872	21,541	15,346	15,922	18,683	18,493	15,018	15,238	16,462	12,447	196,928
Equipment	5,210	3,522	4,055		1,000	3,075		9,962	2,281	4,631	0	7,111	40,847
Other Expenses	39,031	2,615	2,495	37,919	1,351	432	552	649	1,515	1,600	4,636	1,412	94,207
Medicaid Match - TCM													
Family Support Services	6	2,508	4,122	2,891	2,019	5,860	2,234	4,037	6,702	3,411	8,765	2,303	44,858
Medicaid Waiver Match	511,372			511,372			963,344			613,362			2,599,450
Utilities	11,068	8,869	13,330	11,598	10,318	11,513	8,712	11,112	10,557	10,386	9,746	9,701	126,911
Fees-Settlement				101,573					67,526				169,099
Advertising-Printing	2,257	1,058	1,545	2,325	874	1,966	501	1,627	2,612	1,355	1,863	111	18,093
Travel / Reimbursement	3,780	1,223	4,293	3,973	2,182	4,980	3,713	2,583	1,962	3,581	2,643	7,462	42,373
Election Expense													
Transfer Out													
Fund Totals:	1,211,557	644,793	508,418	1,487,310	833,745	607,149	1,540,695	591,920	585,024	1,386,794	864,066	511,992	10,773,465
Capital Improvements	26,116	7,500	0	0	3,483	5,743	4,585	4,056	112,599	32,833	17,245	19,273	233,434
Grand Total:	1,237,674	652,293	508,418	1,487,310	837,228	612,892	1,544,751	595,976	617,857	1,419,627	881,311	531,266	11,006,899

Exhibit 13
Athens County Board of Developmental Disabilities
Business Manager's Report

Exhibit 13
Athens County Board of Developmental Disabilities
Business Manager's Report

Revenue Levels Year-to-Date at 12/31/2018 (100.00% of YTD)

Line	Account	Budget	Actual		Percentage Collected
			2017 YTD	2018 YTD	
General					
1	0085.410100 S31 - General Tax Beacon	6,817,459	6,817,459	6,739,564	98.86%
2	0085.410400 S32A - Trailer Tax	94,926	94,926	75,373	79.40%
3	0085.412100 S31A - Homestead & Rollback	595,471	602,589	597,228	
4	0085.412500 S33 - Grants	2,200,845	2,594,229	2,146,990	97.55%
5	0085.413110 S37 - Lunch Sales	6,500	5,822	8,035	123.62%
6	0085.413120 S38 - Contract Services				0.00%
7	0085.417100 S39 - Other Receipts	146,789	1,826	6,227	4.24%
8	0085.417110 Martin Match Receipts		53	12	
9	0085.417120 Supported Living Subsidy	595,494	652,354	642,679	107.92%
10	0085.417130 DODD TCM Match Transfer		1,595	648	
11	0085.417140 S40 - Refunds	250,000	664,573	421,801	168.72%
12	0085.417150 S41 - Reimbursements	35,000	64,640	39,018	111.48%
13	0085.417500 S35 - Gifts & Donations	15,000	21,983	4,574	30.49%
14	0085.417800 S43 - Other Non-Revenue (Misc Rec)	10,000	176,236	43,257	432.57%
15	0085.422100 S44 - Transfers In				
	Grand Totals:	10,767,484	11,698,285	10,725,406	

Exhibit 13
Athens County Board of Developmental Disabilities
Business Manager's Report

Expenditure Levels Year-to-Date at 12/31/2018 (100.00% of YTD)

Line	Account	Budget	Actual		Percentage
			2017 YTD	2018 YTD	Spent
General					
1	4356.510200 Salaries	4,331,196	4,065,220	4,216,062	97.34%
2	4356.520150 Health Insurance	1,345,664	1,365,762	1,311,452	97.46%
3	4356.522100 Medicare	62,802	54,583	53,109	84.57%
4	4356.524100 Workers Compensation		47,670	40,594	
5	4356.525100 PERS / STRS	601,743	567,642	600,050	99.72%
6	4356.530100 Contract Services	763,337	923,634	899,090	117.78%
7	4356.530101 Rentals	78,191	72,401	60,611	77.52%
8	4356.530102 Non-Waiver Supported Living	197,500	257,722	230,627	116.77%
9	4356.530200 Repairs / Maintenance	37,382	35,192	29,104	77.86%
10	4356.540100 Supplies	164,539	172,755	196,928	119.68%
11	4356.550100 Equipment	40,000	35,309	40,847	102.12%
12	4356.560100 Other Expenses	72,000	181,610	94,207	130.84%
13	4356.560101 Medicaid Match - TCM	N/A	N/A	N/A	
14	4356.560102 Family Support Services	50,000	40,776	44,858	89.72%
15	4356.560103 Medicaid Waiver Match	2,682,744	2,424,576	2,599,450	96.90%
16	4356.560107 Utilities	112,193	113,382	126,911	113.12%
17	4356.560110 Fees-Settlement	166,486	166,486	169,099	101.57%
18	4356.560200 Advertising-Printing	34,128	29,575	18,093	53.01%
19	4356.560300 Travel / Reimbursement	27,578	37,423	42,373	153.65%
20	4356.560500 Election Expenses				
21	4356.580100 Transfer Out		750,000		
	Fund Total:	10,767,483	11,341,718	10,773,465	

Exhibit 13
Athens County Board of Developmental Disabilities
Business Manager's Report

2018	January	February	March	April	May	June	July	August	Sept	Oct	Nov	Dec
Beg. Fund Balance	3,510,128	2,543,083	2,121,745	2,051,769	4,953,279	4,685,294	4,152,834	2,857,745	2,556,836	5,119,588	4,559,153	3,917,410
Revenues	244,512	223,455	438,442	4,388,820	565,760	74,689	245,607	291,011	3,147,775	826,359	222,323	56,652
Expenditures	(1,211,557)	(644,793)	(508,418)	(1,487,310)	(833,745)	(607,149)	(1,540,695)	(591,920)	(585,024)	(1,386,794)	(864,066)	(511,992)
Ending Fund Balance	2,543,083	2,121,745	2,051,769	4,953,279	4,685,294	4,152,834	2,857,745	2,556,836	5,119,588	4,559,153	3,917,410	3,462,069
Funds Transferred to Rsrve Fd												
Adjusted Ending Balance	2,543,083	2,121,745	2,051,769	4,953,279	4,685,294	4,152,834	2,857,745	2,556,836	5,119,588	4,559,153	3,917,410	3,462,069
Min Fund Bal. (@ 25%)	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871	2,691,871
Variance from Min Fd Bal	(148,788)	(570,126)	(640,102)	2,261,408	1,993,423	1,460,963	165,875	(135,034)	2,427,717	1,867,282	1,225,539	770,199
Carryover Percentage	23.62%	19.71%	19.06%	46.00%	43.51%	38.57%	26.54%	23.75%	47.55%	42.34%	36.38%	32.15%

Fund Number, Name	Balance
401 General Fund	3,462,069.27
403 Supported Living Fund	14,078.96
015 Beacon Bond Fund	2,640.99
404 Capital Improvement Fund	968,362.39
All Funds	4,447,151.61

General Fund Balance Calculation	
Balance at 01/01/2018	3,510,127.82
Revenues	10,725,406.15
Expenditures	(10,773,464.70)
Balance at 12/31/2018	3,462,069.27

* Reserve account balance is \$1,500,000 (not included in balance)

*Budgeted expenditures of \$10,767,483 x 25% = \$2,691,871.

If you have any questions regarding this financial information please contact me via the information below.

Stephen P. Kramer
Director of Finance and Operations, ACBDD
740-594-3539 ext. 224
skramer@athenscbdd.org

ACBDD Transactions 12-16-2018 thru 01-15-2019

General

4356.520150 Health Insurance

DataPath Financial Services, Inc.	2019 First of two depoits for employer portion of HSA	12/17/2018	\$14,000.00
Delta Dental of Ohio, Inc.	January, 2018 - Dental Insurance Premium	12/19/2018	\$4,536.63
TelaDoc Care, LLC	January, 2019 - TeleDoc Care Administration Fees	01/14/2019	\$278.40
U. S. Bank Institutional Custody Services	January, 2019 - HSA premiums	01/14/2019	\$15,569.98
U. S. Bank Institutional Custody Services	January, 2019 - HRA premiums less 4 employee deduction checks	01/14/2019	\$65,461.80

Health Insurance Total: 99,846.81

4356.530100 Contract Services

Atco, Inc.	December, 2018 - Production Aide - Balch 140 hrs @ \$10.46/hr	01/14/2019	\$1,463.70
Atco, Inc.	December, 2018 - Atco Secretary - 150 hours @ \$7.80/hr	01/14/2019	\$1,170.00
Atco, Inc.	Three months Severance pay	01/14/2019	\$6,277.42
Atco, Inc.	December, 2018 - Beacon Kitchen Assistant	01/14/2019	\$708.92
Atco, Inc.	November and December, 2018 - Consumer Training Wages - 32 hrs @ \$9.30/hr	01/14/2019	\$306.90
Atco, Inc.	December, 2018 - Job Trainers - 13.25 hours ADM Non Funded; 90.50 hours for Adult ODI	01/14/2019	\$3,836.88
Atco, Inc.	Fourth Quarter consumer wage adjustment	01/14/2019	\$473.92
Atco, Inc.	December, 2018 - Atco Office Support 69 hrs @ \$11.21/hr	01/14/2019	\$1,244.31
Atco, Inc.	December, 2018 - Scanning 79.50 hrs @ \$11.21/hr	01/14/2019	\$891.20
Balch, Freda	December 4 to 21, 2018 - 12 days of providing consumer transportation instead of running t	12/18/2018	\$67.20
BCI	December, 2018- FBI/BCI webchecks	01/04/2019	\$192.00
Biancone, Sally	Dec 14, 18 & 21, 2018 - 12.50 hours at \$25/hr of pictures - Kindness Day with Intermediate	01/04/2019	\$312.50
Bierster, Christopher	Nov 5, 7, 13, 14, 16, 28, 30 and Dec 5, 7, 14, and 19, 2018 - 29 hrs @ \$15/hr - Atco Idol an	01/04/2019	\$435.00
Career Connections, Inc.	12/17 to 12/21 - 40.74 hrs receptionist services at SSA building	01/04/2019	\$637.21
Cintas Corporation	uniforms	12/18/2018	\$28.40
Cross Management	December, 2018 - HR contract - final	01/14/2019	\$100.00
Haynes Kessler Myers & Postalakis Incorp	Professional/Legal Services December 19, 2018	01/14/2019	\$90.00
Holzer Clinic, LLC	August 2018 - DOT physicals	01/14/2019	\$70.00
Koch, Steven	Dec 5, 9, 10 & 11, 2018 - PPAAC council 7.25 hrs @ \$25/hr	01/04/2019	\$181.25
Mid East Ohio Regional Council d/b/a MEO	Accrediation Mastery full package \$11,770; Human Resource Assessment \$850; Nurse Qu	01/04/2019	\$34,722.00
Nagy PT, Adrienne	December, 2018 - PT Services - 1 hr for Atco; 5.75 hrs for School Age and 30.25 hrs for Ei	01/14/2019	\$1,850.00
Primary Solutions	Infall Maintenance Agreement - Annual Billing for 2019	12/18/2018	\$2,970.00
Southern Ohio Council of Governments	November, 2018- 111.67 hrs of MUI investigative Agent Services @ \$45/hr	01/04/2019	\$5,025.15
Southern Ohio Council of Governments	2019 MUI Office Assistant Services	01/14/2019	\$1,600.00
The Healthy Edge, LLC	09/05/2018 - Non DOT Drug screen	01/04/2019	\$39.00
Time Warner	January, 2019 - Atco Cable	01/14/2019	\$83.67
Time Warner	January, 2019 - Internet	01/14/2019	\$3,044.50
Time Warner	January, 2019 - PersonnelPlus Internet	01/14/2019	\$287.50

Contract Services Total: 68,108.63

4356.530101 Rentals

B & C Communications	January, 2019	01/14/2019	\$100.00
City of Athens	February, 2019 - Parking Garage rental - 30 Reserved	01/14/2019	\$125.00
Pitney Bowes	SSA postage meter rental from 10/30/18 to 1/29/19	01/15/2019	\$204.00
Pitney Bowes	ADM postage meter rental from 10/30/2018 to 1/29/2019	01/14/2019	\$308.76
Southeastern Ohio Management Company	February, 2019 - PersonnelPlus Rent - 1002 East State Street	01/14/2019	\$2,100.00

Treasurer of State - Dept of Administrative	Rental of radio from 7/1/18 to 9/30/18	12/18/2018	\$30.00
Treasurer of State - Dept of Administrative	Rental of radio from 10/1/18 to 12/31/18	12/18/2018	\$30.00
Rentals Total: 2,897.76			
4356.530102 Non-Waiver Supported Living			
Athens Metropolitan Housing	replaced new crisper drawer in refrigerator	01/11/2019	\$91.00
Athens Metropolitan Housing	January, 2019 - Rent	01/11/2019	\$321.00
Athens Metropolitan Housing	January, 2019 - rent	01/11/2019	\$309.00
Athens Metropolitan Housing	January, 2019 - Rent	01/11/2019	\$424.00
Athens Metropolitan Housing	January, 2019 - Rent	01/11/2019	\$424.00
Athens Metropolitan Housing	January, 2019 - rent	01/11/2019	\$298.00
Athens Metropolitan Housing	January, 2019 - Rent	01/11/2019	\$433.00
Boyd, Jazzlynn Nicole	November 1, 2, 9 and 15, 2018 - 34 units of HPC @ \$4.19/unit	12/17/2018	\$142.46
Buckeye Community Services	October 23 to December 6, 2018 - HPC and mileage	01/11/2019	\$1,786.51
Budget Pest Control %Thomas Bailey	Second Bed Bug Treatment	01/11/2019	\$125.00
Creative Foundations	ADS Services - December 2018	01/11/2019	\$995.75
Creative Foundations	ADS Services December 2018	01/11/2019	\$901.22
Creative Foundations	ADS Services - December, 2018	01/11/2019	\$153.92
Havar, Inc.	NDS-A and NTB December,2018	01/11/2019	\$307.84
Havar, Inc.	NDS-B; NTB, NDF-B - December, 2018	01/11/2019	\$1,061.88
Havar, Inc.	NPC-A1 and NTN1 - October, 2018	01/11/2019	\$993.99
Havar, Inc.	NPC-A1 and NTN1 - November, 2018	01/11/2019	\$1,222.93
Havar, Inc.	NPC-A1 and NTN1 - December, 2018	01/11/2019	\$567.85
Havar, Inc.	June, 2018	12/18/2018	\$557.68
Havar, Inc.	June, 2018	12/18/2018	\$370.15
Havar, Inc.	August, 2018	12/18/2018	\$199.51
Havar, Inc.	September, 2018	12/18/2018	\$230.88
Havar, Inc.	October, 2018	12/18/2018	\$232.92
Havar, Inc.	November, 2018	12/18/2018	\$242.17
Havar, Inc.	June, 2018	12/18/2018	\$576.38
Havar, Inc.	July, 2018	12/18/2018	\$504.84
Havar, Inc.	August, 2018	12/18/2018	\$1,391.25
Havar, Inc.	September, 2018	12/18/2018	\$1,264.06
Havar, Inc.	October, 2018	12/18/2018	\$1,499.71
Havar, Inc.	November, 2018	12/18/2018	\$1,094.27
R.H.D.D., Inc.	November, 2018	01/11/2019	\$5,009.31
Ripple, Thomas E.	December 3 and 17 - two one hour massage therapy treatments	01/11/2019	\$120.00
Non-Waiver Supported Living Total: 23,852.48			
4356.530200 Repairs / Maintenance			
Poynter's Business Solutions	Beacon copier 1/11/19 to 4/10/19 and overage charges for 2018	01/14/2019	\$2,087.19
Sears Home Services #2440	Kenmore washer repairs - Atco	12/18/2018	\$95.23
Repairs / Maintenance Total: 2,182.42			
4356.540100 Supplies			
4imprint, Inc.	Value White Coffee Mugs for PP businesses	01/04/2019	\$204.04
AED Brands, LLC	cardiac science powerheart g3 pediatric pads	01/11/2019	\$110.87
American National Red Cross	12/7 - Adult and Pediatric First Aid/CPR/AED with Anaphylaxis and epinephrine auto-injector	12/18/2018	\$28.00
C & E Stores (Athens)	building supplies - Atco	12/18/2018	\$20.95
Classic Solutions	building supplies - Beacon	01/14/2019	\$161.70

Classic Solutions	building supplies - Beacon	01/14/2019	\$425.55
First National Bank Omaha	remote start	01/11/2019	\$165.00
First National Bank Omaha	fuel card for PersonnelPlus consumer to get to work	01/11/2019	\$25.00
First National Bank Omaha	Food and Beverage Thickener ThickIt	12/17/2018	\$44.99
FYDA Freightliner Co./Inc	Invoice #C009033083:01 for \$177.55 less credit from statement of 163.50 - vehicle parts	01/14/2019	\$14.05
Kroger - Columbus Customer Charges	fuel card for PersonnelPlus consumer to get to work	01/07/2019	\$25.00
Lowe's Home Centers, Inc. (Athens)	light bulbs for SSA lamps	12/18/2018	\$56.90
Lowe's Home Centers, Inc. (Athens)	building supplies - Bus Garage	01/14/2019	\$27.00
Matheny Motor Truck Sales	vehicle part	01/14/2019	\$440.98
Matheny Motor Truck Sales	vehicle parts	01/14/2019	\$64.20
Ohio Cat	vehicle parts	01/14/2019	\$37.48
Randy V. Moore Petroleum Distribution LLC	144 gals of diesel delivered on 12/18/18 @ \$2.39/gal	01/11/2019	\$344.16
Randy V. Moore Petroleum Distribution LLC	243 gals of unleaded delivered on 12/18/18 @ \$1.905/gal	01/11/2019	\$462.92
Randy V. Moore Petroleum Distribution LLC	320 gals of diesel delivered on 1/4/19 @ \$2.27/gal	01/11/2019	\$726.40
Randy V. Moore Petroleum Distribution LLC	217 gals of unleaded delivered on 1/4/19 @ \$1.795/gal	01/11/2019	\$389.52
Randy V. Moore Petroleum Distribution LLC	112 gals of unleaded delivered on 1/8/19 @ \$1.795/gal	01/14/2019	\$201.04
Randy V. Moore Petroleum Distribution LLC	276 gals of diesel delivered on 1/8/19 @ \$2.20/gal	01/14/2019	\$607.20
Reserve Account	postage	01/14/2019	\$1,000.00
Risch Home Health Care, Inc.	Convaid Cruiser CX14 cordura- princess pink, H- Harness, three point posting belt and pad	01/04/2019	\$2,385.95
Robertson Heating Supply Co. of Ohio	building supplies - Beacon	01/14/2019	\$13.44
Robertson Heating Supply Co. of Ohio	building supplies - Bus Garage	01/14/2019	\$3.04
Supply Post Business Products	office supplies - ADM of \$1449.16 and building \$6.36	01/11/2019	\$1,455.52
Synchrony Bank (Amazon)	Crescent CTK170CMP2 Mechanics tools set	01/14/2019	\$104.62
Synchrony Bank (Amazon)	LinelaX Adult Bibs, JINTAOFA Women Dining Clothing Protectors and RMS 3 pack adult bibs	01/14/2019	\$75.75
Synchrony Bank (Amazon)	100 day worries, cuyler, margery, 100 days of school stickers; two Chenille Kraft 100 days pack	01/14/2019	\$70.01
Uni-Select USA, Inc.	vehicle parts	01/14/2019	\$49.50
UPS	shipping charges to Parr Public Safety	12/17/2018	\$6.17
USI	8 rolls of USI standard laminating film	12/17/2018	\$318.94
Walmart Community/Synchrony Bank	desk lamps for SSA office desks	12/18/2018	\$315.12
Supplies Total: 10,381.01			
4356.560100 Other Expenses			
Atco, Inc.	ACBDD consumer gala ticket offset	12/17/2018	\$1,000.00
First National Bank Omaha	Purchases from Joann Fabric of \$39.97 and Dunhams of gift cards for retirement gifts for E	01/14/2019	\$139.87
MD Computer Services, Inc.	door numbers	01/14/2019	\$27.16
MD Computer Services, Inc.	two 8 x 10 solid walnut plaques	01/14/2019	\$150.00
Mid East Ohio Regional Council d/b/a MEO	2019 Membership Fees	01/04/2019	\$15,337.00
Nelsonville Area Chamber of Commerce	2019 Membership Fees for PersonnelPlus	01/14/2019	\$175.00
Southern Ohio Council of Governments	Certification fee for Stephen Kramer for Business Manager certification	01/14/2019	\$75.00
Southern Ohio Council of Governments	2019 Annual Membership of \$500 and 2019 Advocacy Meeting Services of \$375	01/14/2019	\$875.00
Other Expenses Total: 17,779.03			
4356.560102 Family Support Services			
Good Works, Inc.	Difference owed for materials purchsed from C&E - family support services	12/18/2018	\$50.46
Treasurer of State, %OH Dept of MR/DD	1.25% Adminstrative Fees for 10/1/18 to 12/31/18	01/14/2019	\$42,821.23
Family Support Services Total: 42,871.69			
4356.560103 Medicaid Waiver Match			
Treasurer of State, %OH Dept of MR/DD	Waiver IO - 10/1/18 to 12/31/18	01/14/2019	\$613,362.00
Medicaid Waiver Match Total: 613,362.00			

4356.560107 Utilities

American Electric Power	Bus Garage electric from 11/10/18 to 12/12/18	12/18/2018	\$303.77
American Electric Power	8 Harper Street electric from 11/9/18 to 12/11/18	12/17/2018	\$800.72
American Electric Power	Atco light from 11/17/18 to 12/19/18	01/14/2019	\$10.00
American Electric Power	Atco electric from 11/17/18 to 12/20/18	01/14/2019	\$1,513.60
American Electric Power	Beacon electric from 11/28/18 to 12/31/18	01/14/2019	\$2,072.48
Athens-Hocking Co Recycling Centers, Inc	January, 2019 - SSA recycling	01/14/2019	\$12.00
City of Athens	Atco water from 11/20/2018 to 12/18/2018 - 8,000 gals	01/14/2019	\$130.36
City of Athens	Beacon water from 11/8 to 12/5 - 39,000 gals	12/17/2018	\$437.39
City of Athens	Beacon water from 12/5/18 to 1/3/19 - 36,000 gals	01/14/2019	\$442.49
Columbia Gas	Atco gas from 11/12/18 to 12/13/18	12/18/2018	\$411.00
Columbia Gas	PersonnelPlus gas from 11/12/18 to 12/13/18	12/18/2018	\$153.87
Columbia Gas	Beacon gas from 10/10/18 to 11/07/18	12/18/2018	\$473.63
Direct Energy Business, LLC	Harper Street light 11/07/2018 - 12/09/2018	01/04/2019	\$3.49
Frontier	January, 2019 - Atco phones	01/14/2019	\$238.37
Frontier	January, 2019 - 740-592-1098 MUI fax line and Beacon alarm system	01/14/2019	\$117.97
Frontier	January, 2019 - 740-797-0001 - Harper Street	01/14/2019	\$31.81
Frontier	January, 2019 - PersonnelPlus 740-593-8236	01/14/2019	\$42.30
Frontier	January, 2019 - Beacon Fax 740-593-3189	01/14/2019	\$31.81
Interstate Gas Co (IGS)	November, 2018 - Beacon Gas	01/04/2019	\$847.83
Le-Ax Water Dept.	Bus Garage water from 11/14 to 12/12/2018	01/04/2019	\$19.70
Shred-IT USA, LLC	12/12/2018 - Beacon	01/04/2019	\$57.00
The Plains Water & Sewer District	Harper Street water from 11/28 to 12/27/18 - 2000 gals	01/14/2019	\$39.06
Verizon Wireless	12/08/2018 to 01/07/2019 phones for Beacon, PersonnelPlus, SSA and Bus Garage	12/17/2018	\$1,782.52

Utilities Total: 9,973.17**4356.560200 Advertising-Printing**

APG Media of Ohiom KKD	December, 2018 - Advertising for PersonnelPlus in the Annual Manual	01/14/2019	\$343.00
Minuteman Press	300 Christmas Cards printed 2 sides with printed envelopes for PersonnelPlus	01/14/2019	\$277.30

Advertising-Printing Total: 620.30**4356.560300 Travel / Reimbursement**

Hagen, Cale W.	Travel 12/13/18 to 12/27/18	01/14/2019	\$91.12
Hagen, Cale W.	Travel 1/3/19 to 1/11/19	01/14/2019	\$62.76
Mitchell, Jodi	Travel 12/17/18 to 12/20/18	01/14/2019	\$36.84
Sincoff, David	Travel 10/3/18 to 11/30/18	01/14/2019	\$149.22

Travel / Reimbursement Total: 339.94**7809.550100 Capital Improvements**

Synchrony Bank (Amazon)	order was cancelled by Amazon	12/18/2018	-\$133.55
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Capital Improvements Total: -133.55

Capital Improvement Total: -133.55

Grand Totals:**\$892,081.69**

Athens County Board of Developmental Disabilities

Board Submission by Richard Suehrstedt

Area of Supervision: Service and Support Administration

Jan. 22, 2019

Department Highlights:

- Dec. 4 - Dick attended a meeting of the Early Childhood Collaborative to network and coordinate services with other child-serving agencies throughout the county. It is a quarterly meeting to enhance communication and resources.
- Dec. 6 – Dick and Tristin met with representatives of Integrated Health Care to discuss issues common to the support of individuals served by the MH and DD system. This was a first meeting and established lines of communication and collaboration.
- Dec. 10 – Dick and Doug Mitchell traveled to Hocking County to meet with representatives of Hocking and Perry County Boards of DD and OOD to develop strategies to increase participation in Project SEARCH. Each county will seek candidates for referral to the program, which allows students eligible for graduation to extend 1 year to receive vocational training at O’Bleness Hospital.
- Dec. 14 – MEORC provided the 3rd Person Centered Review for 2018. Feedback was positive and helps to assure that the SSA Dept. remains focused on the issues designed to assure accreditation success and adaptation to evolving rules.
- Dec. 20 – Arletta Hinger of Primary Solutions provided training to the SSA Dept. on TCM (Targeted Case Management) and an overview of the Gatekeeper plan module.
- Jan. 3 – Dick and several SSA’s met with a provider to address concerns about transportation. A plan was developed to address the concerns including improvements in communication between the provider and the individuals.
- Jan. 8 – Dick participated in a presentation to DODD with Kevin, Arian, Steve and Scott to seek additional state resources to support waiver needs.
- Jan. 8 – Tristin and several SSA’s participated in a demonstration of the Imagine IS – a DODD system to manage ISP’s and improve access to individual’s, guardians and providers. Further assessment of the system is ongoing.
- Jan. 14 - 16 – interviews conducted for open Administrative Assistant position.

Nov. 2018 Data:

Individuals Receiving SSA Services	386
Eligibility Referrals	5
# Determined Eligible	0
Annual ISP's Completed	27
ISP Addendums and Revisions	10
Waiver Enrollments (IOW)	1
Waiver Enrollments (LV1W)	0
Waiver Enrollments (SELF)	1
Total Enrolled (LV1W)	53
Total Enrolled (IOW)	151
Total Enrolled (SELF)	6
# Agency providers	26
# Independent Providers	44
November Productivity	71%

Dec. 2018 Data

Individuals Receiving SSA Services	387
Eligibility Referrals	2
# Determined Eligible	0
Annual ISP's Completed	35
ISP Addendums and Revisions	17
Waiver Enrollments (IOW)	1 –pending from Nursing Facility
Waiver Enrollments (LV1W)	0
Waiver Enrollments (SELF)	0
Total Enrolled (LV1W)	53
Total Enrolled (IOW)	152 (1 transfer from Franklin County)
Total Enrolled (SELF)	6
# Agency providers	26
# Independent Providers	44



PersonnelPlus Employment Services

A Program of the Athens County Board of DD

personnelplus.org

facebook.com/PersonnelPlus

Still the one in Athens County after 35 years!



December 2018

Board Report

Finishing the Year Strong!

Job Development

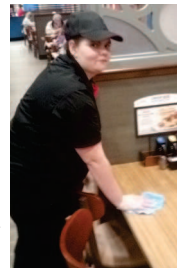


Angela Carter
Job Developer

It's hard to believe that another year has come and gone. We were able to finish out the end of a year helping several job seekers find placements in the community.

Patrick M., a referral from OOD, started his job at Bassett House on 12/8/18. Patrick came to PersonnelPlus in order to look for employment but in the meantime he was able to find employment at Bassett House. He works there as an aide and PersonnelPlus has been providing him services by ensuring he has the things he needs in order to maintain his employment. We have assisted him with purchasing uniform clothing as well as fuel cards.

Kim C interviewed at IHOP and was offered a job there as a dishwasher to begin with. She wanted to try being a hostess but those positions were all filled. She started her job on 12/13/18 and began her orientation and training. During that time she was able to try being a hostess but decided that it was too fast paced for her. After that she was moved to busser and seems to enjoy that job. She has continued to do well at her job with on the job supports in order to help her learn and maintain her job.



Rosemary M. started her job at Heritage Apartments in December. While Rosemary got the job on her own, she worked with PersonnelPlus for several months before being offered a position at Heritage where she can work in janitorial a few days a week.

As we move on to the new year we look forward to new job placements and new partnerships as well as continuing to grow with those we already work with and our existing partnerships.

December truly has been a month of good tidings and joy for many of our candidates, as employers have been happy to hire them into the right roles. Between supporting the candidates who have gotten placed last month, and new hires for this month, it's been quite a whirlwind!

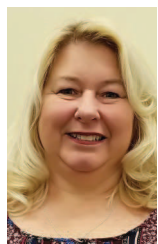
This month of December, IHOP has been hiring, training and molding their staff through an intensive process. A few of my candidates have decided that this isn't the right role for them, or the intense schedule of training has proven too much for them to handle. This seems unfortunate, but "the right role for the right person" is our motto and it is what is best for our job seekers, ultimately. James T is still going strong in his position there and is doing a great job. Congratulations, Jim!



Marcus Dobro
Job Developer

Aaron L accepted his position at Kroger a few months ago. We had a good meeting with our partner there, Nikki Nichols-Store Recruiter, to help Aaron figure out some of his hurdles he needed to overcome. He had transportation issues and other things that were possible impediments to continuing there, but now that has been worked out. Congratulations Aaron!

Job Training



Heather Clemons
Training Coord.

Intakes- Two intakes were completed for new job seekers who will receive service this month.

Community Based Assessment- Two Community Based assessments were completed. The sites

Included Holiday Inn Express and Big Lots.

On the Job Supports- On-the-Job Support Job Training was completed with 5 people who were new hires in December. The job sites included Walmart, IHop, and Rocky Boot Grill.

Employee Development- Employee development was done with multiple job seekers. Applications were submitted at Rocky Boot Grill, Kroger's, PetSmart, McDonalds, Big Lots, Ohio University, and IHop. A job trainer met with each of job seekers weekly to assist them in their job search. The trainer helped individuals fill out applications both online and in the community. They conducted mock interviews and researched possible job opportunities.

Employment Support Coordinator for Community Employees

It was a hectic but great December at PersonnelPlus! Holiday events combined with new hires, schedule changes, and winter break kept me very busy!



Jona Moberg
Employment
Support Coord.

In December I visited over 30 businesses and followed up with over 50 community employees in one manner or another. The primary issues that were addressed related to time off or schedule changes related to the holidays. Keeping the individual, their employer and the team apprised of changes is crucial to maintaining job successes.

The PPAAC had a great Holiday party at Tammy's Country Kitchen in Nelsonville. Everyone had a great time! We were so excited that Julie Jones, former Employment Support Coordinator, PPAAC advisor and great friend was able to attend! The PPAAC is also getting ready to kick off 2019! Keep a look out for updates regarding our membership drive.



Sue Orth will be joining the staff at PersonnelPlus on January 2, 2019.

Sue will be sharing job duties as a Training Coordinator along with Heather Clemons. Sue worked at Atco for 17 years, starting her career as an Adult Service Aide and was working as a Community Inclusion Specialist when Atco closed.

Welcome to the team Sue!



Sue Orth
Training Coord.



Employment Options Division

ACBDD TRANSITION SERVICES



Amy Goldsberry
Transition Coord.

December was a successful month for Transition coordination and planning purposes! If you recall my November board report, you may remember my review of the changing role of this position. I am grateful to Doug Mitchell, my supervisor, for working with me in creating a role that is most beneficial to transition age individuals, their families, and those who work regularly with them. This is an on-going process and we are working hard to create a position that has lasting results, one of clear coordination and linkage of families to services. I have been working closely with Doug to identify goals, possible future projects, and clarify responsibilities and services.

I continued to grow relationships with area schools who are interested in receiving transition assistance. Most recently, I met with students and teachers from Tri-County Career Center to discuss regular activities once school resumes in January. They are looking for assistance and guidance for 7-8 young teens regarding identifying career interests, work values, identifying goals, and future planning.

A planning meeting was held with staff at Beacon School to discuss transition services, Title XX funds, and clarify expectations. A meeting was held earlier this year to discuss services, and we have decided to change directions with what we will be working on to better meet the needs of the teens and teacher expectations. We agreed that the more shape that we give to this role of Transition Coordinator; the more important it would be to clarify to other staff, community members, and families. Everyone agreed that hands-on experiences and trips to community businesses would be more beneficial than weekly one-on-one sessions. A follow-up meeting has been scheduled for the beginning of January to begin implementation and discuss eligibility for Title XX funds. More to come on this!



Project Search held an Open House at the beginning of December where interested individuals and their families could meet the staff, learn about the program and different internships available, see the classroom where participants meet daily for soft-skill education and development, and tour the facility. I was excited to take one young woman that I have been working with and even more encouraged to see other county board enrollees present. Attendees received free-bees from Tri-County, connected with their staff and OOD representatives, and also received a packet of information that included flyers, and

application for program admission, and upcoming important events. Doug and I met with SSA's who work with transition-age individuals to identify possible referrals to the program. We were excited to identify five potential candidates for the upcoming program! More to come on this- for sure!

I continued to provide transition services at Beacon School, Tri-County Career Center, and Federal Hocking in addition to meeting with interested county board enrollees who responded to a previous mailing. I have attended employment-related meetings with OOD, county board enrollees and their SSA's and assisted in brainstorming solutions to barriers for successful community employment. The needs of transition-aged individuals are ever changing and it is encouraging to be part of the solution when it comes to overcoming barriers that these individuals and their families often face. I met with SSA's who work with transition-age individuals to discuss services, possible options, and funding sources to help them achieve their transition goals. Lastly, I began work on a bi-monthly newsletter that will be sent out with the New Year! Be watching for the latest addition!

Section 1: Jobs

2018	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
New Hires	0	1	3	3	5	2	1	1	2	3	4	7
Total number jobs filled	0	1	5	8	13	15	16	17	19	3	4	7
Total number of individuals employed in the community	80	78	79	80	80	79	78	77	78	79	83	88
Job tryouts for month	0	0	0	0	0	0	0	0	0	0	2	0
Job offers to Job Seekers	0	1	4	3	5	2	1	1	2	3	4	7
Job offers accepted by Job Seekers	0	1	4	3	5	2	1	2	2	3	4	7
Jobs placed and lost since January 1, 2018	0	0	1	1	2	2	0	2	0	2	0	2
Jobs lost due to termination since January 1, 2018	0	0	0	0	0	0	0	1	0	0	0	0
Job losses regardless of year placed or reason (not counted above)	1	3	2	2	3	1	2	1	1	0	0	1
Number of individuals receiving active Job Development Services (an active job search in place)	21	22	16	14	17	19	22	21	21	24	20	15
Temporary Summer Youth Employment	0	0	0	0	0	1	0	2	2	1	1	1

Section 2: Internships/Community Based Assessments

2018	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Total Number of individuals receiving OOD assessments; CBA, CX, Job Coaching, On the Job Supports, Activities of Daily Living, etc.	4	6	3	6	8	3	1	0	2	5	6	7

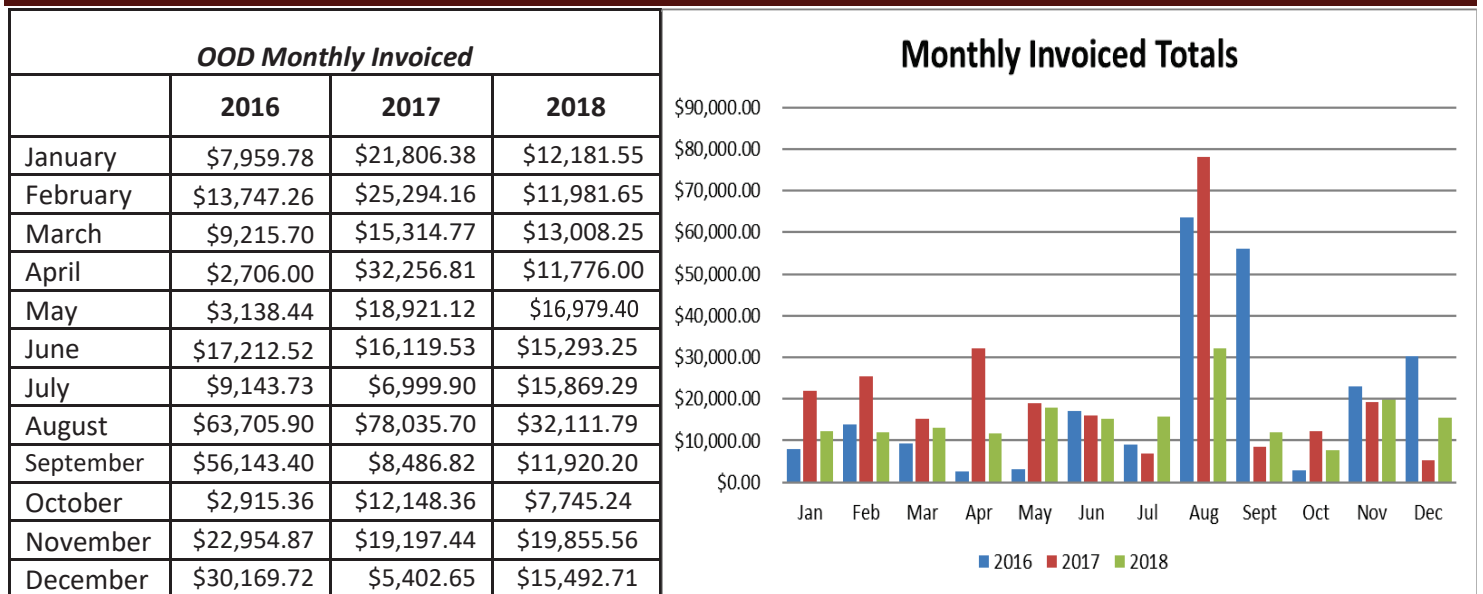
Section 3: Atco or Other Day Habilitation Centers

2018	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Total number of Atco or other Day Hab. Individuals referred to PersonnelPlus to actively seek employment (OOD) for the month	3	2	1	0	1	0	2	2	4	1	1	0
Total number of Atco or other Day Hab. Individuals PersonnelPlus has obtained jobs for in 2018	0	0	1	2	0	0	0	0	0	0	0	0

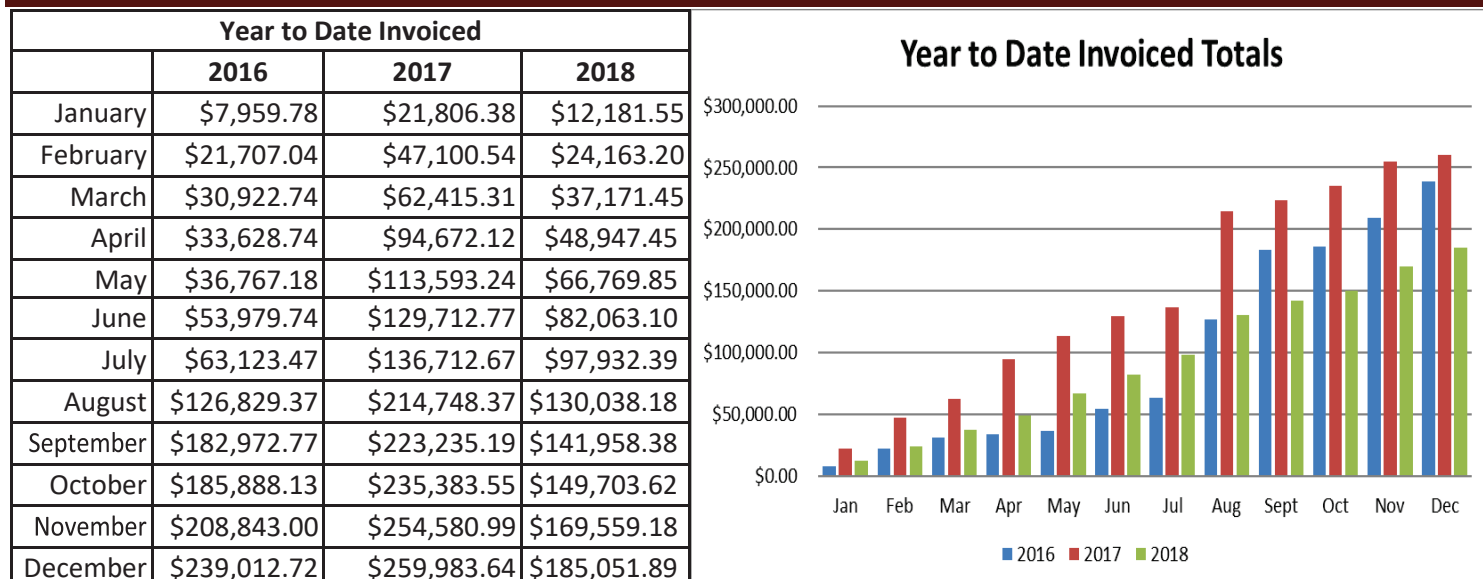
Section 4: Total Services Provided

2018	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Total number of individuals receiving Community Employment Services via PersonnelPlus	105	106	98	100	105	102	101	100	101	108	109	110

MONTHLY INVOICED TOTALS



YEAR TO DATE INVOICED TOTALS



Updates From Integrate Athens

ACBDD Board Report
January 2019



Autumn Brown
Director of Integrate Athens

Tina Wilson
Integrate Athens Coordinator

Leslie Perry
Community Integration Specialist

Dates to Remember

Advocacy Empower Hour

2nd and 4th Wednesday of month

Next Dates:

January 23rd

February 13th and 27th

March 13th and 27th

Food for Thought

First Tuesday of each month

February 5th and March 5th

“A lot of different flowers make a bouquet.”

— Unknown

ADVOCACY EMPOWER HOUR START-UP

Integrate Athens led the first Advocacy Empower Hour on January 9th and will be hosting the Empower Hour every 2nd and 4th Wednesday each month.

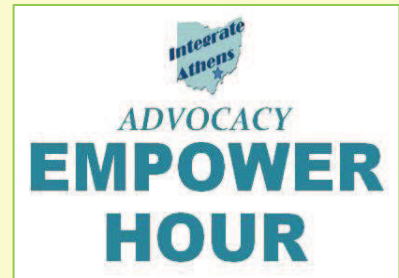
The group is open to anyone interested in advocating for issues that impact people with developmental disabilities.

The first meeting brought to light how people with disabilities feel isolated and trapped by the limited transportation options they have. Factors noted were: lack of taxi and transit services in rural areas, the cost of private transportation, and a shortage of direct support professionals.

Other topics that came from the brainstorming session include having more social connections in our community, technology learning and access, community safety, and self-defense, all things the advocacy meeting would like to see



As ATCO came to a close in December of 2018, a community integrated focused group known as the “Community Outreach Work Group” was continuing to build relationships with community partners, day habs, people we serve, and others interested in being a part of our inclusive efforts. As we move



happen in 2019 and that was just from the first meeting!

Please help us get the word out that this advocacy effort is happening and we need more people to join the ranks to help our advocacy efforts in Athens County grow and help people with developmental disabilities have a voice.

The January 23rd meeting will be to dig deeper into the topic of transportation and what people think could be some creative solutions to help people get to and from the places they choose to go when they choose to go.

into 2019 and Integrate Athens kicks off, we will have a monthly noon lunch meet up for community partners, day hab leaders as well as the people who attend day habs, and anyone else who wants to help Athens County become even more inclusive! The First Food for Thought will be February 5th at Noon. Soup will be available for lunch, as we know many community partners use their lunch break to meet with us.

Integrate Athens Board Report



DD Awareness and Advocacy Day

March 5th is Developmental Disabilities Awareness and Advocacy at the Ohio State House. Integrate Athens will be meeting helping get the word out to be sure Athens County has a presence at the event.

Yoga transitions to Integrate Athens

Journey to be still Yoga, a community partner from ATCO will be transitioning to using the Integrate Athens space for their next session.

On the 7th of January Paul Richard, Yoga Instructor held the first yoga event at Integrate Athens new office, people visited the space and Paul provided orientation. He discussed the importance of respecting the yoga experience each person who attends and how direct support personnel can participate in Yoga, modeling the experience to the person they are assisting.



Thank you to Butch, Jeff, and Rex

The Integrate Athens Team would like to recognize the hard work these three have done to get the office space together. Butch has coordinated the renovations, Jeff has been busy cleaning and prepping the space, moving things from ATCO to the new office and every other detail asked of him. Rex installed the cabinets, door locks and numerous other unknown items that were needed to get the space ready!

More to come from Integrate Athens...

Integrate Athens is the unique division of the county board that will support our agency, our community, and the people we serve learn about inclusion. We are just getting set up, our community is so very supportive of the initiatives of the Athens County Board of DD and all we do, we want the community to take a lead in learning what inclusion looks, feels, and sounds like.

Leslie Perry is overseeing Tuesday Night Rec, Janet Wallisch is our Wednesday League Bowling Coordinator and Special Olympics Coordinator. Leslie will also be available to

help individuals and providers learn about community partners and connecting to meaningful events in the community.

Goodlife learning will be facilitated from Integrate Athens, along with increased Advocacy efforts that will be guided by the people we serve and the issues they would like to address. We will also support F.A.N.S, Community Partners, and connect Day Habs to community events and resources to provide meaningful integrated experiences to the people they serve and there is more to come!

Save the Date

ATCO Idol 2019 will be May 23rd



Integrate Athens will partner with Stuart's Opera House for the 2019 ATCO Idol performance. Mark your calendars for an evening of entertainment that you will not want to miss! For more information contact Leslie Perry or Chris Biester at (740)541-9600

Integrate Athens Team Contact Information:

The office is located at 9033 Lavell Rd. Athens, Ohio
(Take Lurig Road off State Rt 682, Lavelle is on left about ¼ of mile from 682)
The phone number for Integrate Athens is (740)541-9600, this is a shared line in the office.

Autumn Brown email: abrown@athenscbdd.org

Tina Wilson email: cwilson@athenscbdd.org

Leslie Perry email: lperry@athenscbdd.org

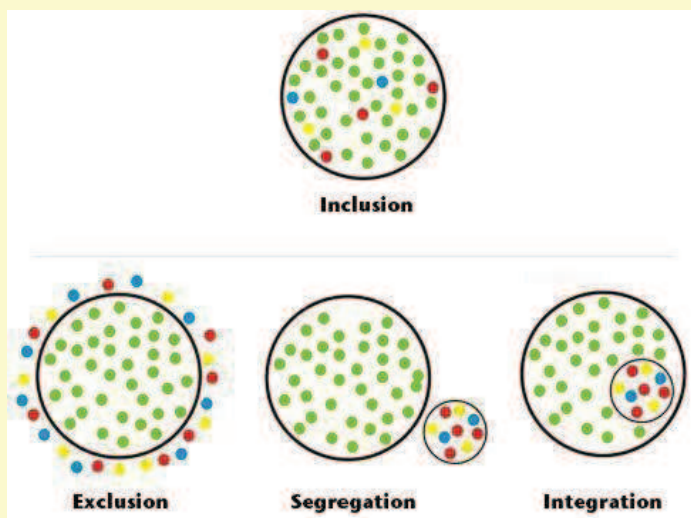
Sara Brumfield, FANS: fans@athenscbdd.org

Janet Wallisch, Special Olympics Bowling email: jwallisch@athenscbdd.org

THINK INCLUSION!

Thinking of our current services, here is a model that helps us better understand the terms we use as we work towards inclusion. Most people with disabilities are in the exclusion, segregation, and occasionally integration zone.

Inclusion means respected, accepted, and engaged as an individual among other individuals. That is our targeted OUTCOME at Integrate Athens!





ACBDD - Administration
Kevin Davis, Superintendent

Human Resources Board Report

January 2019
Gwen Brooks, Director of Human Resources

The purpose of the Human Resources (HR) report is to share HR metrics and information that may be helpful in guiding strategic decisions by the Board. Please let me know if there is other data you are interested in seeing related to our human resources.

December/January Activity Updates

- Written confirmations of layoff delivered to management employees impacted by closure of ATCO
- Health Insurance Open Enrollment occurred December 4-14. We will experience the following changes:
 - Medical/Rx: 3.66% premium increase, no change in carrier (Medical Mutual)
 - Dental: 9.5% premium increase, no change in carrier (Delta Dental)
 - Vision: 28.53% premium reduction, change in carrier from MMO/VSP to VSP directly
 - Life/AD&D: 38.71% premium reduction, change in carrier from One America to Hartford
- One position filled:
 - New Training Coordinator added to Employment Options as approved by the Board December 2018: filled internally by Sue Orth
- Selection processes underway for:
 - Administrative Assistant, Service & Support Administration – engaged Career Connections to assist with this search
- All Staff Appreciation Breakfast coordinated by Arian Smedley, produced and served by managers was held 12/12/18



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Human Resources Board Report Summary
January 22, 2019

	January 2019	February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	2019 Averages
STAFF COUNT	93	0	0	0	0	0	0	0	0	0	0	0	93.0
Full-time	70												70.0
Part-time	10												10.0
Substitute	13												13.0
													2019 Totals
SEPARATIONS	10	0	0	0	0	0	0	0	0	0	0	0	10
Voluntary	5												5
Involuntary	5												5
NEW HIRES	0	0	0	0	0	0	0	0	0	0	0	0	0
Full-time	0												0
Part-time	0												0
Substitute	0												0
GRIEVANCES IN PROGRESS	0	0	0	0	0	0	0	0	0	0	0	0	0
ABEA In Progress	0												0
Arbitration	0												0
ABEA Resolved	0												0
PGO In Progress	0												0
Informal	0												0
PGO Resolved	0												0
Workers Comp Claims	1	0	0	0	0	0	0	0	0	0	0	0	1

Staff Count January 2019

Program/Location	JobClassification	FT	PT	SUB	Grand Total
Admin-Beacon	Admin Support	1			1
	Administration	7			7
Admin-Beacon Total		8			8
ATCO	Administration	2			2
	Adult Services	1			1
ATCO Total		3			3
Beacon	Admin Support	1			1
	Administration	1			1
	Certification for EI	2			2
	Dept. of Ed.	17	2	10	29
	Facilities	1			1
Beacon Total		22	2	10	34
Employment Options	Admin Support	2			2
	Administration	1			1
	Adult Services	6			6
Employment Options Total		9			9
Integrate Athens-Lavelle	Administration	1			1
	Adult Services	2		1	3
Integrate Athens-Lavelle Total		3		1	4
Lavelle Rd	Administration	1			1
	Facilities	2	3		5
	Transportation	2	5	2	9
Lavelle Rd Total		5	8	2	15
SSA-Harper	Admin Support	1			1
	Administration	2			2
	Adult Services	1			1
	Case Management	16			16
SSA-Harper Total		20			20
Grand Total		70	10	13	93

Salary Continuation Plan January 2019

Program/Location	JobClassification	Salary & Health Continuation	Grand Total
ATCO	Adult Services	2	2
	Transportation	1	1
ATCO Total		3	3
Grand Total		3	3



Administration

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 Dr. Kevin Davis, Superintendent
 athenscbdd.org

Butch Withem

Facility\Transportation Director

January 14, 2019

We received notice from Ohio Cat that our new Thomas bus will be delivered the end of March, 2019. We are looking forward to the addition to our fleet.

Since 1-4-2019 we have been operating 4 busses and 1 van route for Beacon school. The transition went very well. We have experienced 2 two-hour delays from the inclement weather so far this winter. The snow we received the weekend of 1-12-2019 was about 3 to 4 inches and was removed on Sunday in anticipation of school on 1-14-2019.

The flooring for the new Integrate Athens space at Lavelle Road has been installed and the cabinets are in place. We are installing the countertop and the appliances will arrive later this week. Most of the furniture is in place and many of the final touches will be complete by the ACABDD meeting in January, 2019.

The Beacon gym floor was refinished and ready for use on January 4, 2019, when the students returned.

As you know the last day for individuals at Atco was December 21, 2018, since then we have been removing the contents. We have repurposed some of the contents to Lavelle Rd. and Beacon. Much of the contents were of little value so they have been donated to other dayhabs and ReUse. We have removed the surveillance equipment for reuse at Lavelle Rd and Beacon. We toured the facility with representatives from the Athens County Commissioners and plan another meeting after they decide who is moving into the facility. We intend on leaving any contents the County may want to keep. We have given Athens County building plans and specifications that we had accumulated over the years. We still plan to complete this process by the end of January of 2019.



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