

Title:	Reporting to Customers	Effective Date:	10/01/2020
Author:	Sue Nayda	Last Review Date:	09/10/2021
Location:	All Locations	Last Revision Date:	
Functional Area:	Operations		

POLICY

It is the policy of Liberty Healthcare Corporation, and its affiliates, to document satisfaction of and compliance with contract requirements in periodic written reports to our customers. This policy lays out standards for documentation and reporting in Liberty's contracts with a full time Executive/Program Director.

PROCEDURE

At a minimum, every customer with a full time Executive/Program Director will receive a written narrative report on either a monthly or quarterly basis, and an Annual Program Summary.

The contract between the customer and Liberty provides guidance on the specifications for the narrative reports. Some contracts lay out very detailed requirements for monthly reporting, including performance standards and data elements that should be addressed in the report. Where the contract does not provide expectations for reporting, the Contract Manager must provide the standards to the Director, and also determine the frequency of reporting (monthly or quarterly).

It is important to understand that in most cases, monthly reports are a matter of public record. They should not contain confidential information such as protected health information or identifiable staff or service recipient names. If the contract requires such information, it should go into an attachment to the report that is clearly labeled confidential. Summary data should be contained in the actual narrative report.

The narrative report is an opportunity to assure our customers we are achieving performance standards and implementing contract requirements. The report should address progress toward performance standards and contract requirements. In the event standards and/or requirements are not fully met, the Director must explain the reason and the plan to achieve the standard and/or requirement.

In addition to the narrative reports, some customers require Liberty to provide data, either in the form of a spreadsheet or actual data entry into their system. The data spreadsheets should be attached to the monthly narrative. It is very important to note that Key Performance Indicators (KPI's) tracked in the program's Liberty QualityCare® program are NOT data that should be shared with our customers. Rather, KPI's are privileged, confidential indicators developed for quality improvement purposes. KPI's and data requirements of the customer should be maintained separately.

Where Liberty has multiple contracts with the same customer of a similar nature, one report can be written as long as it covers all locations. Reports should be submitted to the customer and copied to the Contract Manager and Executive Operations Coordinator and should be completed as soon as possible after the end of the month but no later than the 15th of the following month.

Annually, the Executive/Program Director, Contract Manager, and VP of Marketing collaborate to develop an Annual Program Summary. This is a high level two-page document that summarizes key information about the contract and Liberty's performance that serves to demonstrate our value to the customer. It is written with top level management of the customer organization in mind, though it may also be distributed to key stakeholders and used in marketing. Within

two months of the end of the contract year, the Annual Program Summary must be completed and approved by the COO.

Liberty strives to have relationships with all levels of the customer organization. The Contract Manager and Director meet regularly with customer representatives throughout the course of the year. It is best practice to have an annual meeting with higher level representatives of the customer organization to review the Annual Summary.

Approved By: _____

Revision History

Version	Date	Author	Summary of Changes
#1	10/01/2020	Sue Nayda	Policy Created
#2	09/10/2021	Sue Nayda	Reviewed without changes