



## MEMORANDUM

TO: Programs of All Inclusive Care for the Elderly (PACE)  
FROM: HOS-M Project Team  
DATE: October 28, 2016  
RE: Medicare Health Outcomes Survey-Modified 2017 Administration

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The Centers for Medicare & Medicaid Services (CMS) has contracted with the National Committee for Quality Assurance (NCQA) to oversee the administration of the Medicare Health Outcomes Survey-Modified (HOS-M) for Programs of All Inclusive Care for the Elderly (PACE). A CMS-approved survey vendor, DataStat, Inc., will conduct HOS-M in 2017 on behalf of PACE programs. CMS has also contracted with RTI International (RTI) to provide additional survey support in the administration of HOS-M, as well as data analysis.

HOS-M is an abbreviated version of the Medicare Health Outcomes Survey (HOS), which CMS uses to assess participant physical and mental health functioning. CMS uses the HOS-M to evaluate program participants using limitations on activities of daily living (ADL) to generate information for frailty payment adjustment.

This memo includes the information your organization needs to comply with 2017 CMS HOS-M reporting requirements. This document is organized as follows:

- Reporting Requirements.
- Contracting With the CMS-approved Survey Vendor.
- Survey Administration.
- Sampling Process.
- Contact Information.
- Attachment 1—List of PACE Programs Required to Report HOS-M.

### Reporting Requirements

All PACE programs with Medicare contracts in effect on or before January 1, 2016, and with enrollment of at least 30 beneficiaries as of October 2016, are required by CMS to administer HOS-M in 2017.

### Contracting with the CMS-approved Survey Vendor

DataStat, Inc. is the CMS-approved survey vendor for administering HOS-M in 2017. Each PACE program must contract directly with DataStat, Inc., to administer HOS-M. PACE programs are responsible for having survey vendor contracts in place no later than **Friday, January 13, 2017**. DataStat, Inc.'s contact information is as follows:

Ellen Johnson  
DataStat, Inc.  
3975 Research Park Dr.  
Ann Arbor, MI 48108  
Phone: (734) 994-0540 x158  
E-mail: [ejohnson@datastat.com](mailto:ejohnson@datastat.com)

When contracting with DataStat, Inc., please keep in mind that PACE programs must cover the cost of survey administration.

The HOS-M Project Team closely monitors survey vendor performance as the survey progresses by reviewing survey vendor mailing materials and telephone scripts, requiring survey vendor progress reports, monitoring telephone interviewing, and performing site visits. The HOS-M Project Team also assesses survey vendor performance against both the *2017 Medicare Health Outcomes Survey Quality Assurance Guidelines and Technical Specifications V2.1* and the survey vendor's Quality Assurance Plan (QAP). The QAP documents all systems used to implement HOS-M, including telephone interviewing systems, data backup systems, and data security. The QAP also documents the process that the survey vendor uses to administer mailings and follow-up to respondents.

### **Survey Administration**

HOS-M will be administered from April through July 2017. PACE programs, depending on the size of their enrollment, will be required to provide information prior to survey administration, including contact information for each participant and up to two of their family contacts or other caregiver contacts.

RTI will draw the sample for 2017 HOS-M. To develop the sample frame, RTI works with PACE programs to verify mailing and enrollment information for program enrollees and to collect data for potential survey proxies. PACE programs should submit this information to RTI by January 9, 2017. RTI will hold an orientation webinar with programs on November 15, 2016 to provide an overview of the 2017 survey administration process. Programs will receive information directly from RTI about the webinar. If you have any questions for RTI, the contact information is as follows:

Rebekah Love  
RTI International  
Phone: (919) 485-5766  
E-mail: [rlove@rti.org](mailto:rlove@rti.org)

### **Sampling Process**

The sample size for 2017 survey administration will be 1,200 for PACE programs with at least 1,200 participants. For smaller PACE programs, the entire eligible enrollment is included.

**Programs with populations of  $\geq 1,200$  participants**

One thousand two-hundred (1,200) eligible program participants are randomly selected for HOS-M. Programs provide a list of those members who have become permanent nursing home residents, to be excluded from the survey process. Programs will need to append telephone numbers for each selected participant to a file provided by DataStat, Inc.

**Programs with populations of  $< 1,200$  participants**

All eligible participants are included in the sample. Programs will need to create a detailed contact list for all eligible participants.

**Contact Information**

Please direct questions to the HOS-M Project Team at [hos@ncqa.org](mailto:hos@ncqa.org).

**Attachment**

Attachment 1 is a list of PACE programs required to report HOS-M in 2017. If you believe that there are errors in this list, please contact the HOS-M Project Team at [hos@ncqa.org](mailto:hos@ncqa.org). We look forward to working with your organization on this important endeavor.

## ATTACHMENT 1

### Programs Required to Administer HOS-M in 2017

Contract ID	Contract Name	Organization Name
H0105	THE METHODIST OAKS	The Methodist Oaks d.b.a. The Oaks PACE
H0112	MORSE LIFE HOME CARE, INC.	Palm Beach PACE
H0216	PACE IOWA	Immanuel Pathways Iowa
H0390	PACE OF SOUTHWEST MICHIGAN, INC.	PACE of Southwest Michigan
H0477	SERENITY CARE, INC.	Serenity Care PACE
H0542	ALTAMED HEALTH SERVICES CORPORATION	AltaMed Health Services Corporation
H0613	TOTAL LONGTERM CARE, INC.	InnovAge Greater Colorado PACE
H0809	MERCY LIFE, INC.	Mercy LIFE
H0819	SENIOR LIFE YORK, INC.	York County PACE
H0839	VOANS SENIOR COMMUNITY CARE OF NORTH CAROLINA, INC	Senior CommUnity Care of North Carolina
H1043	FLORIDA PACE CENTERS, INC.	Florida Pace Centers, Inc.
H1234	LIFE ST. FRANCIS	LIFE St. Francis
H1239	KISSITO PACE OF ROANOKE, INC.	Kissito PACE Marketing
H1310	COMPREHENSIVE SENIOR CARE CORPORATION	CentraCare
H1357	CAROLINA SENIORCARE	Carolina SeniorCare
H1500	LIFE ST. JOSEPH OF THE PINES, INC.	LIFE St. Joseph of the Pines
H1518	CATHOLIC HEALTH SYSTEM BUFFALO PACE	Catholic Health LIFE
H1533	STAYWELL SENIOR CARE, INC.	StayWell Senior Care
H1714	VIA CHRISTI HEALTHCARE OUTREACH FOR ELDERS, INC.	Via Christi HOPE
H1904	PACE GREATER NEW ORLEANS	Pace Greater New Orleans
H2064	GEISINGER COMMUNITY HEALTH SERVICES	LIFE Geisinger
H2109	THE JOHNS HOPKINS HEALTH SYSTEM CORPORATION	Hopkins ElderPlus
H2218	HARBOR HEALTH SERVICES, INC.	Elder Service Plan of Harbor Health Services, Inc
H2219	FALLON COMMUNITY HEALTH PLAN	Summit ElderCare or Fallon Health
H2220	UPHAMS CORNER HEALTH COMMITTEE, INC.	Uphams Corner Health Committee, Inc.
H2221	CAMBRIDGE PUBLIC HEALTH COMMISSION	Elder Svc Pln/Cambridge Health Alliance
H2222	ELEMENT CARE, INC.	Element Care, Inc
H2223	ELDER SVC PLN/E BOSTON HEALTH CENTER	Elder Svc Pln/E Boston Health Center

<b>Contract ID</b>	<b>Contract Name</b>	<b>Organization Name</b>
H2318	PACE SOUTHEAST MICHIGAN	PACE Southeast Michigan
H2386	APPALACHIAN AGENCY FOR SENIOR CITIZENS, INC.	Appalachian Agency for Senior Citizens, Inc,
H2537	SPIRITTRUST LUTHERAN LIFE	SpiriTrust Lutheran LIFE
H2815	VOANS SENIOR COMMUNITY CARE OF COLORADO, INC	Senior CommUnity Care of Colorado
H2936	LIFECIRCLES	LIFECIRCLES
H2937	SENIOR LIFE GREENSBURG, INC.	Westmoreland county PACE
H2941	SENTARA LIFE CARE CORPORATION, INC	Sentara PACE
H2992	SENIORLIFE WASHINGTON, INC.	Senior LIFE Washington / Uniontown / Green
H3060	VIECARE BUTLER, LLC	LIFE Butler County
H3321	LORETTO INDEPENDENT LIVING SERVICES, INC.	Independent Living Srvcs Of Central Ny
H3322	SENIOR CARE CONNECTION, INC.	Eddy SeniorCare
H3329	CENTERLIGHT HEALTHCARE, INC.	CenterLight Healthcare
H3331	INDEPENDENT LIVING FOR SENIORS, INC.	ElderONE an Affiliate of Rochester Regional Health
H3430	SUNCOAST PACE, INC.	Suncoast PACE, Inc.
H3473	CHARLOTTESVILLE AREA RETIREMENT SERVICES, INC.	Blue Ridge PACE
H3493	LIFE AT LOURDES, INC.	LIFE at Lourdes
H3517	HUMBOLDT SENIOR RESOURCE CENTER, INC.	Redwood Coast PACE
H3613	MCGREGOR PACE	McGregor PACE
H3809	PROVIDENCE HEALTH & SERVICES - OREGON	Providence ElderPlace Portland
H3908	TRINITY HEALTH LIFE PENNSYLVANIA, INC.	Mercy LIFE - West Philadelphia
H3917	PITTSBURGH CARE PARTNERSHIP, INC.	Community LIFE
H3918	LIVING INDEPENDENCE FOR THE ELDERLY	LIFE Pittsburgh
H3919	ST. AGNES CONTINUING CARE CENTER	Mercy LIFE
H3925	PENNSYLVANIA PACE, INC.	Senior LIFE Johnstown
H3942	ELDERHAUS INC.	Elderhaus PACE
H4000	MEMORIAL HOSPITAL OF LARAMIE COUNTY	Wyoming PACE
H4074	MERCY LIFE OF ALABAMA	Mercy LIFE of Alabama
H4105	PACE ORGANIZATION OF RHODE ISLAND	PACE Organization Of Rhode Island
H4118	THE WASHTENAW PACE	Huron Valley PACE
H4142	CHEROKEE NATION COMPREHENSIVE CARE AGENCY	Cherokee Elder Care
H4203	PALMETTO HEALTH ALLIANCE	Palmetto SeniorCare PACE

<b>Contract ID</b>	<b>Contract Name</b>	<b>Organization Name</b>
H4235	SENIOR TOTAL LIFE CARE, INC.	Senior Total Life Care
H4305	TOTAL LIFE HEALTHCARE	Total Life Healthcare
H4326	PACE @ HOME, INC.	PACE@Home
H4393	CATHOLIC MANAGED LONG TERM CARE, INC.	ArchCare Senior Life
H4402	ALEXIAN BROTHERS COMMUNITY SERVICES	Alexian Brothers Community Services
H4517	AMARILLO MULTISVC CTR FR THE AGING INC	The Basics at Jan Werner
H4518	BIENVIVIR SENIOR HEALTH SERVICES	Bienvivir Senior Health Services
H4714	PACE OF THE SOUTHERN PIEDMONT, INC.	PACE of the Southern Piedmont, Inc.
H4999	THE LUTHERAN HOME FOR THE AGED	LIFE Northwestern Pennsylvania
H5007	PROVIDENCE HEALTH SYSTEM	Providence Health System
H5037	MOUNTAIN EMPIRE OLDER CITIZENS, INC.	Mountain Empire PACE
H5124	FRANCISCAN ACO, INC.	Franciscan Senior Health & Wellness
H5167	ROCKY MOUNTAIN HEALTH CARE SERVICES	Rocky Mountain PACE
H5212	COMMUNITY CARE, INC.	Community Care
H5213	TOTAL COMMUNITY CARE, L.L.C.	InnovAge Greater New Mexico PACE
H5403	ON LOK SENIOR HEALTH SERVICES	On Lok Lifeways
H5405	CENTER FOR ELDER'S INDEPENDENCE	Center For Elders' Independence
H5406	SUTTER HEALTH SACRAMENTO SIERRA REGION	Sutter SeniorCare PACE
H5493	LIFE AT ST. FRANCIS HEALTHCARE, INC.	Saint Francis LIFE
H5610	CARE RESOURCES	Care Resources
H5629	COMMUNITY ELDERCARE OF SAN DIEGO	St. Paul's PACE
H5822	MIDLAND CARE CONNECTION	Midland Care PACE
H5902	SENIOR LIFE ALTOONA, INC.	Senior LIFE Ebersburg
H5934	HOPE HOSPICE AND COMMUNITY SERVICES, INC.	Hope PACE
H5978	SENIOR LIFE LEHIGH VALLEY, INC.	PHI LIFE dba everyday LIFE
H6059	PACE OF GUILFORD AND ROCKINGHAM COUNTIES, INC.	PACE OF THE TRIAD
H6079	TOTAL LONGTERM CARE, INC.	InnovAge Greater California PACE
H6188	VIECARE ARMSTRONG, LLC	LIFE Armstrong
H6231	FRANCISCAN PACE, INC.	PACE Baton Rouge
H6310	INOVACARES	InovaCares for Seniors
H6371	LUTHERAN SENIOR HEALTHCARE, INC.	Lutheran Senior LIFE
H6551	LIFE ST. MARY	LIFE St. Mary
H6596	FALLON HEALTH WEINBERG, INC.	Fallon Health Weinberg-PACE

<b>Contract ID</b>	<b>Contract Name</b>	<b>Organization Name</b>
H6787	VOANS SENIOR COMMUNITY CARE OF MICHIGAN, INC.	Senior Community Care of Michigan
H6846	COMMUNITY CAREPARTNERS, INC.	CarePartners PACE
H6887	INSPIRA HEALTH NETWORK LIFE, INC	Inspira Health Network LIFE
H6941	LIFE PACE	LIFE PACE, INC.
H7003	PACE NEBRASKA	Immanuel Pathways Omaha
H7114	VALIR PACE FOUNDATION	Valir PACE Foundation
H7195	NORTHLAND PACE PROGRAM	Northland PACE Senior Care Services
H7501	ORANGE COUNTY HEALTH AUTHORITY	CalOptima PACE
H7660	VIECARE BEAVER, LLC	LIFE Beaver and Lawrence Counties
H7855	BRANDMAN CENTERS FOR SENIOR CARE, INC.	Brandman Centers for Senior Care
H8096	CENTRA HEALTH, INC.	Centra PACE
H8424	SIOUXLAND PACE, INC.	SIOUXLAND PACE, INC.
H8655	RIVERSIDE RETIREMENT SERVICES, INC.	Riverside PACE
H8777	COMPLETE SENIOR CARE, INC.	Complete Senior Care
H8800	TOTAL SENIOR CARE, INC.	Total Senior Care, Inc.
H9068	ALBRIGHT CARE SERVICES	ALBRIGHT CARE SERVICES
H9185	A&D CHARITABLE FOUNDATION, INC.	Great Lakes PACE
H9266	PIEDMONT HEALTH SERVICES, INC.	Piedmont Health SeniorCare
H9323	BEACON HEALTH & SOCIAL SERVICE, INC	Beacon of LIFE
H9592	CENTRAL VALLEY MEDICAL SERVICES CORPORATION	Fresno PACE
H9616	CENTRO DE SALUD DE LA COMUNIDAD DE SAN YSIDRO	San Diego PACE
H9830	NEWCOURTLAND LIFE PROGRAM	NewCourtland LIFE Program
H9998	LUBBOCK REGIONAL MENTAL HEALTH MENTAL RETARDATION	Silver Star