



PROVIDING  
RESPONSIBLE  
SUPPORT IN  
BALANCING  
RESIDENT CARE  
AND FINANCIAL  
PERFORMANCE

**YOUR SUCCESS  
IS OUR SUCCESS**

## RESPONSIBLE SUPPORT

Affinity Health Services has been serving senior living providers for over 29 years; providing advisory, consulting, and management services throughout the mid-Atlantic market. Affinity has a strong history of providing reputable service; demonstrating honesty, integrity and efficiency in our daily actions.

## YOUR TRUSTED PARTNER

We take great pride in the success of our clients. Your Success is Our Success! Together, we can improve the lives of our seniors and ensure our communities remain viable for future generations.

## MISSION AND VALUES

*We Exist to Make a Difference in Every Life We Touch, and we adhere to the highest level of honesty and ethical standards in our service to you.*



## ABOUT AFFINITY HEALTH SERVICES, LLC

Affinity Health Services was formed in 1996 for the purpose of providing comprehensive management services for senior living providers. In 2000, we expanded the scope of our service delivery to also provide consultation and advisory services to nursing facilities, personal care homes, and continuing care retirement communities.

Today, we provide a continuum of services that includes both comprehensive management and consulting and advisory services to senior living communities with various organizational structures and governing philosophies. Our experience spans all sectors of business including for-profit, not-for-profit, faith-based, hospital-based, county-operated and state-operated communities. We take great pride in the success of our contracted managed communities and consulting clients.

### YOUR SUCCESS IS OUR SUCCESS!

Affinity customizes its service plan based on the unique needs of each customer, providing responsible support in balancing resident care and financial performance.



*At the heart of our team is conscientious, compassionate, and knowledgeable professionals who are passionate and dedicated to improving the lives of our seniors.*

# MANAGEMENT SERVICES

AS THE CONTRACTED MANAGER, AFFINITY WILL EFFECTIVELY MANAGE YOUR ENTIRE OPERATION. WE WORK CLOSELY WITH THE BOARD/GOVERNING BODY TO ESTABLISH A STRATEGIC PLAN AND DEVELOP OPERATING PLANS TO SUPPORT THOSE STRATEGIC INITIATIVES.

Affinity provides hands-on service delivery to its management clients. We offer assistance to the onsite team in every aspect of operation. Our consultants are available to our clients and responsive to their day to day needs. Our consultant staffing is intentionally higher, which affords us lower consultant to facility assignment ratios. We find this to be integral in fostering successful client partnerships and organizational outcomes.

## **Affinity Health Services provides expertise in managing:**

- Nursing and Rehabilitation Centers
- Personal Care Facilities
- Independent Living Communities
- Continuing Care Retirement Communities

Your investment is taken seriously. Success requires a serious partnership. Since 1996, Affinity Health Services has provided that level of accountable expertise.

We work with hospital-based, non-profit, for-profit and government-based partners. We improve performance, profitability and the quality of life for the residents in your care.

## **The Management Services we offer include:**

- Revenue Cycle Management
- Operational Support
- Financial Advisory
- Regulatory and Clinical Support
- Marketing and Referral Development

Our team of experts provides a reliable and consistent record of success. Affinity Health Services will assume full management responsibility for the client, including, but not limited to, the hiring of key facility-level personnel.

# CONSULTING SERVICES

AFFINITY HEALTH SERVICES WILL COMPLEMENT YOUR CURRENT MANAGEMENT TEAM WITH CUSTOMIZABLE SOLUTIONS BASED ON YOUR INDIVIDUAL NEEDS. THE SCOPE OF WORK CAN BE AS INCLUSIVE AS THE CLIENT DESIRES.

As a full-service senior living provider, we are better positioned to serve our consulting and advisory clients as we face the same challenges and can provide solutions that have been field validated. Affinity Health Services offers a wide range of multi-disciplinary support to help you maximize your profitability, efficiency and compliance in today's ever-changing business environment.

**Our team of experts will keep your management practices up-to-date regarding:**

**Regulatory Support**, such as Pre-Survey Readiness / Mock Surveys, Infection Control Protocols and Focused Mock Surveys, Assistance with Plans of Correction and IDR development, Directed In-service Trainings, and Plan of Correction Implementation and Monitoring.

**Clinical Support**, including Policy and Procedure Development, Clinical Best Practice Standards, Education and Training Programs, Competency Assessments, Staffing Pattern Analysis, and Documentation Assessment and Training.

**Operational Support**, featuring Strategic Planning, Operating Plan Development, Operational Assessments, and Policy and Procedure Development.

**Financial Advisory**, with an emphasis on Financial Accounting and Reporting, Benchmarking, Internal Controls, Forecasting, and Situational Analysis.

**Marketing and Referral Development**, involving Census Support, Competitive Analysis, Strategy Development, Referral Pattern Assessment, and Marketing Action Plan Development.

**Revenue Cycle Management**, which includes Reimbursement Assessment, Staff Education and Training, Accounts Receivable Analysis, Full Outsourcing of Billing, Evaluation of Claim Denials, Assessment of Business Office Functions, and UMR assistance.

**Human Resources Advisory and Consulting Services**, will assist in recruiting, managing, retaining, and recognizing human capital as well as support in labor relations, legal compliance, benefits administration, policy review and development, worker's compensation, and administrative services.

**Senior Living Developer and Lending Services**, offers consulting services to developers, private investors, lenders, or owner/operators who seek the input of experienced consultants in evaluating the viability of your senior living project.



# REGULATORY AND CLINICAL SUPPORT

OUR NURSE CONSULTANTS BRING MORE THAN 200 YEARS OF COLLECTIVE EXPERIENCE TO OUR CLIENTS. OUR TEAM HAS STRONG EXPERIENCE WORKING WITH NURSING HOME AND PERSONAL CARE HOME REGULATORY COMPLIANCE.

Our team routinely assists facilities through survey and enforcement logistics, monitoring of special focus facilities and clients working under corporate integrity agreements. Our clinical consultants' expertise includes certification in wound care, certified dementia practitioner, advance certification of Resident Assessment Coordinators, Certified Legal Nurse Consultants, and certified training in infection prevention in long term care.

Affinity Health Services provides assistance with Assessing Survey Readiness through Mock Surveys and Focused Infection Control Surveys, Assistance with Plans of Correction and IDR development, Directed In-service Trainings, and Plan of Correction Implementation and Monitoring.

- Dementia Unit Mock Survey for Skilled Nursing
- Facilities and Personal Care Homes
- Interdisciplinary MDS, CAAs, and Care Plan
- Analysis and Team Training
- Medication Administration Compliance
- Personal Care/Assisted Living Department of Human Services Mock Survey
- Personal Care and Assisted Living Regulatory Training
- Policy and Procedure Development for Skilled Nursing Facilities and Personal Care Homes
- Quality of Life Program Assessment
- Survey Preparedness Planning
- Systematic Focus Review of each Federal Regulation

## **Regulatory support services include:**

- OBRA Mock Survey
- Post-Survey Correction Assistance
- Survey Plans of Correction Assistance and Implementation Monitoring
- Directed In-Service Program Presentations
- Informal Dispute Resolution Assistance
- Abuse Prevention and Mitigation Policies
- Accident Investigation Strategies and Reporting Mechanisms
- Assistance with Implementing and Monitoring Plan of Correction

We also support your nursing department with Director of Nursing (DON) mentoring, Nursing Department Assessments, Staffing Pattern Assessments, Infection Control Protocols, Education and Training, Clinical Competency Assessments, and Quality Assurance Performance Improvement activities.

## Clinical support services feature:

- DON Training, Support, and Mentoring
- MDS Coordinator Training and Support
- Nursing Department Benchmarking
- Nursing Department Budget Training
- Nursing Department Competency Programs
- Nursing Documentation Training for Compliance, Reimbursement and Risk Management
- Nursing Management Tools
- Nursing PPD Analysis and Comprehensive Data Collection
- Recruitment and Retention
- Recruitment and Retention Strategic Planning
- Clinical Practices GAP Analysis
- Clinical Capabilities Review
- Palliative Care Program and Training
- Restorative Nursing Program and Training
- Wound Care Consultation, Programs and Training
- Quality Assurance and Performance Improvement Assessment
- Education and Training Programs

## Benefits of the Products:

- Builds effective clinical leaders and managers Improves accuracy of documentation for appropriate reimbursement
- Creates strong scheduling modules
- Develops services to meet community needs and improve occupancy
- Effective nurse training
- Identifies areas for performance improvement
- Identifies areas of risk
- Maintains compliance with Department of Health / Department of Human Services and
- Establishes nursing department budget controls

# OPERATIONAL SUPPORT

WITH AFFINITY HEALTH SERVICES, YOU GET AN EXPERIENCED PARTNER TO ASSIST WITH STRATEGIC PLANNING AND ESTABLISHING REALISTIC OPERATING PLANS. WE WILL MANAGE AND MONITOR ONGOING PROGRESS TOWARD YOUR GOALS.

Our staff will pay attention to what we, as leaders, measure and monitor.

## **Operational Support Services include:**

- Full Operational Assessments
- Departmental Efficiency Assessments
- Implementation of Process Improvement
- Management Tools
- Labor Relations Management
- Operational Benchmarking Studies
- Personal Care/ Assisted Living Operational Analysis
- Policy and Procedure Manual Development
- Policy GAP Analysis Review
- Quality Assurance Programs
- Quality Improvement Programs
- Resident and Family Satisfaction Analysis and Improvement Plans
- Risk Management and Mitigation
- Strategic Planning
- Operational Planning
- Third-Party Contract Analysis
- HIPAA/Corporate Compliance reviews
- Coaching Supervision Training
- Resident-Centered Care Initiatives

FINANCIAL ADVISORY AND SUPPORT OFFERED BY  
AFFINITY HEALTH SERVICES WILL HELP YOU UNDERSTAND YOUR  
ORGANIZATION'S FINANCIAL POSITION AND IDENTIFY OPPORTUNITIES  
FOR IMPROVEMENT IN YOUR COMPANY'S BOTTOM LINE.

Most clients experience a quick return on investment through Increased Revenue, Accelerated Cash Flow, Reduced Claim Rejections and Decreased Accounts Receivable.

### **Financial Compliance / Support:**

We offer a comprehensive internal audit program that focuses on the efficiency and effectiveness of all business office critical functions, such as:

- Billing and Census
- Revenue Adjustments
- Accounts Receivable
- Accounts Payable
- Fixed Assets

We also provide Fiscal Intermediary Audit Assistance and Regulatory monitoring tools to measure Billing Compliance, Resident Trust Compliance and Cost Reporting.

### **Financial Accounting and Reporting:**

- Accounts Receivable monitoring and training for maximizing cash flow
- Full Outsourcing of financial management functions
- Chart of accounts development and implementation
- Customization of financial reports to meet the Governing Body/Board of Directors' needs and requirements
- Cost report documentation and compliance
- Compliance audits for business office internal control procedures

- Direct hands-on assistance with independent audits
- Financial/Operational reviews with Benchmarking Comparisons
- Key Indicator monitoring
- Management tools and reports
- Assistance with management reporting, variance analysis and cost containment opportunities
- Preparation of Annual Operating Budgets
- Assistance with development of Capital Budgets to anticipate, plan, and fund future needs
- Strategies for market repositioning
- Strategies for renovation, construction or acquisitions
- Financial Forecasting and Situational Analysis

### **Benefits of Affinity's Financial Services:**

- Understanding of your current reality and future projections
- Budget controls and monitoring
- Continuous and effective revenue and expense controls
- Efficient/timely Accounting Reporting Systems
- Improved cash flow
- Increased internal controls
- Lower Days Sales Outstanding (DSO)
- Reduced bad debt
- Timely month-end closing



# REVENUE CYCLE MANAGEMENT

AFFINITY HEALTH SERVICES EXPERTS ARE SKILLED IN GOVERNMENT AND THIRD-PARTY REIMBURSEMENT SYSTEMS AND ARE READY TO SUPPORT YOUR TEAM. WE OFFER A CUSTOMIZED APPROACH THAT BEST SUPPORTS YOUR OPERATIONAL GOALS.

Our experience with multiple billing systems can quickly improve your cash flow.

## **Affinity Health Services will provide:**

- Full Outsourcing of Government and Third-Party Billing
- Temporary Staffing During Transition Periods
- Assistance with Transitioning Billing In-House
- Evaluation of Claim Denials
- Staff Training on Best Practices to Enhance Efficiency
- Onsite and Offsite Medicare Compliance
- PDPM Accuracy Assessments
- Operational Assessments of Business Office Functions
- Accounts Receivable Analysis and Collections
- Medicare, Medical Assistance, Medicare Advantage Plan and Commercial Insurance Reimbursement Assessments
- UMR Preparation Assistance
- Ancillary Services Management
- Assistance with Collections
- Management of Claims Processing and Collections Cycle
- Medicaid Application Process
- Case Mix Management
- Medicare Part A Certification Support
- Medicare Training and Support Services
- RUG and MOS Management Support

Affinity's Revenue Cycle Management services can be contracted on either an interim basis during a change in staffing or utilized on an ongoing basis.

Recognizing that nursing home providers are facing difficult financial times, we can assist you in reducing your bad debt, accelerate cash flow, and provide recommendations to improve efficiency of your office staff.

We also evaluate your current clinical documentation, MDS completion, and resident care delivery processes for opportunities for more accurate government and third-party reimbursement. We can train your MOS Coordinators, IDCT Team, and Clinical Nurses on documentation, coding, and payment systems.

# MARKETING AND REFERRAL DEVELOPMENT

UNDERSTANDING YOUR CURRENT MARKET AND  
THE ROLE OF YOUR CAMPUS SERVES IN THE COMMUNITY  
WILL STRENGTHEN YOUR OCCUPANCY.

We can provide the tools you need to ensure you are measuring and monitoring the right data to continue your mission long into the future.

## **Marketing and Census Support Services Include:**

- Assess and develop new products and services according to market needs
- Assess external relationships with community-based entities as they relate to referral development admissions and potential 'partnership' programs and services
- Educate and train appropriate staff in the importance of marketing and customer service
- Evaluate a competitive comparison relative to the position of the facility and its competitors
- Evaluation of barriers to admissions
- Implement a customized, effective Marketing Strategy to meet and exceed budgeted goals
- Increase occupancy, balance payor mix and unify admission criteria
- Integrate a census-driven Marketing Team focusing on product and service development

## **Benefits of the Products:**

- Create a competitive community
- Create a customer service-driven culture
- Create nursing and marketing teams
- Develop products to serve the community
- Meet budget expectations
- Train personnel to succeed
- Train to evaluate appropriate admissions

# DIRECTED IN-SERVICE TRAINING

AFFINITY HEALTH SERVICES IS A STATE-APPROVED  
PROVIDER OF DIRECTED IN-SERVICE TRAINING.

Skilled Nursing Facilities must have a clear understanding of the Centers for Medicare and Medicaid Services' (CMS) guidance for successful survey outcomes.

As an approved Directed In-service Provider, we will work with you to develop a staff training program that assists you in your return to substantial compliance. Along with providing your state-mandated Directed In-service Training, we can provide assistance with evaluating your citation for IDR potential, developing your plan of correction, and monitoring successful implementation.

Affinity will pay attention to your needs. We understand the sensitivity surrounding a Directed In-service need and offer a timely response to your inquiry and scheduling flexibility to meet your staff training needs.

# HR ADVISORY AND CONSULTING SERVICES

HUMAN RESOURCES IS THE KEY TO THE SUCCESS OF ANY BUSINESS.

Advisory and consulting support offered by Affinity Health Services will assist you and your team in recruiting, managing, retaining, and recognizing your most important business asset, *your human capital*.

Affinity will provide support in labor relations, recruitment/retention, strategy development, legal compliance, benefits administration, policy review and development, worker's compensation, and administrative services to enable a successful human resources program.

We recognize that each organization is unique in their approach to wage, benefits, and employee relations. With our diverse industry experience and business acumen, we offer a strategic approach individualized to assist you in meeting your strategic and operational goals.

## Comprehensive Services

- Evaluate your wage and benefit program offerings
- Review HR policies and procedures for gaps to meeting best practice standards
- Assess compliance with HR policy implementation as well as local, state, and federal labor laws
- Evaluate current recruitment and retention program and assist with implementing program improvements
- Provide general advisory support with questions related to personnel, personnel management, employee relations, and general HR items
- Provide training for key management staff on a variety of HR – related topics, i.e. implementing progressive discipline and/or coaching of employees, conducting thorough investigations, evaluating and documenting staff performance, effective interview techniques, supervisory skills, conflict resolution skills, interpersonal communication skills, and effective teamwork skills, etc.
- Provide onsite or offsite support with union contract negotiations
- Evaluate your Workplace Safety Program and Workers' Compensation Program
- Support the management of your benefits administration
- Evaluate your employee handbook for gaps in meeting best practice standards
- Assist with establishing, collecting, and monitoring key performance indicators related to HR functions
- Conduct compliance audits of HR functions
- Assist with performance improvement activities

# SR LIVING DEVELOPER / LENDING SERVICES

AFFINITY HEALTH SERVICES HAS DELIVERED MANAGEMENT  
AND CONSULTING SERVICES TO A VARIETY OF  
SENIOR LIVING PROVIDERS FOR MORE THAN 25 YEARS

Collectively, our team has over 300 years of experience working with nursing facilities, personal care/assisted living homes, memory care, independent living, and life plan communities.

We offer consulting services to developers, private investors, lenders, or owner/operators who seek the input of experienced consultants in evaluating the viability of your senior living project.

Our consultants bring a breadth of experience that proves invaluable to smart investing, design of a successful senior living community, and realization of your business objectives. Our partnership brings to your project a deep understanding of the current trends, future risks, and current and expected challenges.

Our team has worked successfully with independent owners, operators, not-for-profit governing boards, and officials of government – operated organizations to assess operations, identify opportunities for improved outcomes, assist with implementing operational best practices, and establish KPI metrics for ongoing monitoring.

Because of our intimate understanding of the senior living industry, we make reasonable and realistic operating assumptions, occupancy stabilization timeframes, competitive pricing strategies, and project performance expectations that are crucial to developers, lenders, and acquisition partners.

We are your trusted, full-service senior living partner offering you qualified advice on your investment.

- Due Diligence Assessments
- Project Analysis
- Strategic Planning
- Financial Modeling
- Financial Proforma Development
- Programming Development
- Market Positioning Analysis
- Campus Repositioning and Right-Sizing
- Assistance with Design Development
- Occupancy Development
- Project Start-Up Feasibility
- Financial and Regulatory Turn-Around Services



# AFFINITY AND YOU

AFFINITY HEALTH SERVICES, LLC HAS BEEN SERVING  
SENIOR LIVING PROVIDERS FOR MORE THAN 25 YEARS,  
PROVIDING STRATEGIC ADVISORY, CONSULTING, AND  
MANAGEMENT SERVICES ACROSS 15 STATES.

Affinity provides a continuum of services that includes both comprehensive management and consulting and advisory services to senior living communities with various organizational structures and governing philosophies. We customize our service plan based on the unique needs of each customer, providing responsible support in balancing resident care and financial performance.

At the heart of our team are conscientious, compassionate, and knowledgeable professionals who are passionate and dedicated to improving the lives of our seniors. We take great pride in the success of our contracted managed communities and consulting clients.

## YOUR SUCCESS IS OUR SUCCESS!

To learn how Affinity can help you meet your business goals,  
contact us today for your personalized consultation.

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