
Supporting Health for All Through Reinvestment (SHARE)

Overview and 2023 Changes

January 30, 2023



OHA Team

Transformation Center:

Rachel Burdon

Laura Kreger

Actuarial Team:

Will Clark-Shim

Rebecca Level

Agenda

- SHARE Initiative overview
- Overview of minor changes to SHARE Initiative and guidance for 2023
- General feedback on 2022 spending plans
- Time for questions and discussion

SHARE overview

- Started in 2020
- Implements legislative requirements from HB 4018 (2018) to address social determinants of health and equity (SDOH-E)
- The goals are to:
 - Safeguard public dollars by requiring that a portion of CCO profits are reinvested in their communities
 - Improve CCO member and community health by requiring reinvestments go towards upstream non-health care factors that impact health (for example, housing and food)

SHARE requirements

- 1: Spending must fall within social determinants of health and equity (SDOH-E) domains and include spending toward a statewide housing priority (details on next slide).
- 2: Spending priorities must align with community priorities from community health improvement plans (CHPs).
- 3: A portion of funds must go to SDOH-E partners.
- 4: CCOs must designate a role for their community advisory councils (CACs) related to SHARE Initiative spending decisions.

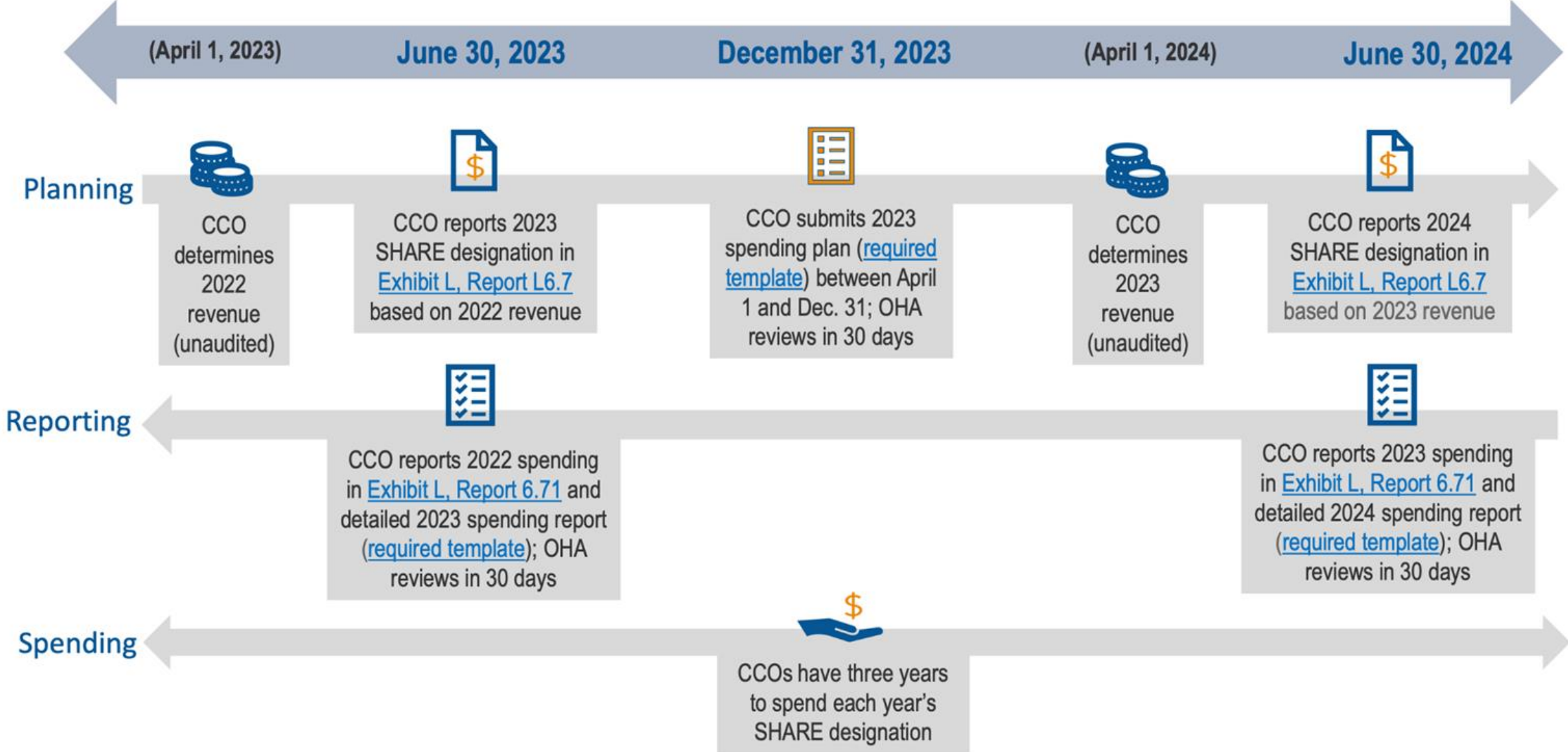
SHARE domains

SHARE Initiative spending must target at least one of four domains of SDOH-E:

- Economic stability
- Neighborhood and built environment
- Education
- Social and community health

A portion of a CCO's SHARE initiative spending must also be spent on **housing-related services and supports.**

Timeline of SHARE CCO activities



SHARE reporting

CCO deliverable	Description	Next due
SHARE Initiative Spend-Down Report Exhibit L, Report 6.71	Annual report of year-over-year spend-down of SHARE funds.	June 30; reporting on 2022 spending
SHARE Initiative Detailed Spending Report (Required template)	Annual report of detailed SHARE spending for the prior calendar year, using the template provided	June 30; reporting on 2022 spending
2023 SHARE Initiative Designation Exhibit L, Report L6.7	Annual report for CCO to identify its SHARE Initiative designation based on the prior year's financials (the portion of net income/reserves the CCO will contribute to the SHARE Initiative). This report also includes other related values, including: 1) annual risk-based capital prior to SHARE contribution; 2) annual pre-tax net income prior to SHARE contribution; and 3) dividends recorded.	June 30; based on 2022 financials
2023 SHARE Initiative Spending Plan (Required template)	Annual plan includes SDOH-E priorities, partner information, proposed budgets and other information as required by contract, using the template provided.	December 31³, for CCOs with a 2023 SHARE designation

Spending plan review process

- Panel of reviewers from HPA, PHD, HSD staff
- Review/scoring criteria based on [Oregon Administrative Rule](#) and CCO contract; [evaluation tool](#) (posted to website) outlines criteria
- OHA SMEs and leadership are consulted during review process as needed
- HPA leadership approves based on rule, contract and reviewers' feedback
- Within 30 days of CCO submission, OHA sends administrative notice of approval or corrections required
 - Administrative notice includes evaluation table with requirements and recommendations

Full SHARE guidance, templates on OHA website

Guidance

- [Change log of guidance updates](#) (updated 1/4/23)
- [2023 SHARE Initiative Guidance for CCOs](#)
- [2023 SHARE Initiative FAQ](#)
- [CCO memo: Changing SHARE designations](#) (9/9/22)

Reporting templates

- [2022 SHARE Initiative Designation Report in Exhibit L](#) (*Report L6.7 and L6.71*): Due June 30
- [2023 SHARE Initiative Detailed Spending Report Template](#): Due June 30
- [2023 SHARE Initiative Spending Plan Template](#): Due December 31 by participating CCOs
 - [2023 SHARE Initiative Spending Plan Evaluation Tool](#)

Supplemental resources

- [SHARE, HRS and ILOS comparison document](#)
- [Oregon's SUD 1115 demonstration waiver](#) (see Attachment F: Community Integration Services and Eligibility)
 - [Community integration services fact sheet for OHP members](#)
- [Oregon's 1115 Medicaid waiver, 2022-2027](#) (see Section 9: Health-related Social Needs)
- [Health and Housing: Introduction to Cross-Sector Collaboration](#) (National Academy for State Health Policy, 2021)
- [Health System Investments in Housing: A Development Guide](#) (Corporation for Supportive Housing, 2020)

<https://www.oregon.gov/oha/HPA/dsi-tc/Pages/SHARE.aspx>

SHARE Initiative: Changes in 2023

The minimum spending formula is now in effect.

- For 2022 financials and 2023 spending plans

Not eligible for SHARE spending

- Housing or employment supports for members with a substance use disorder (SUD) diagnosis and other qualifying social needs
 - Covered services in Oregon's SUD waiver, effective 2022
- Defined housing, food and case management benefits for transition populations
 - Covered benefits in Oregon's 1115 waiver, effective 2024

SHARE minimum spending formula and obligation

The 2023 SHARE obligation shall equal or exceed the greater of:

- **A percentage of average adjusted net income** for the prior three calendar years on a sliding scale based on the CCO's risk-based capital (RBC) percentage at the end of 2022 (but prior to the SHARE portion calculation):
 - 0% of adjusted net income at or below 300% RBC, grading up to 20% of adjusted net income at or above 500% RBC; or
- **10% of dividends** recorded or similar payments or both to shareholders, **including adjusted net income earned by capitated affiliates**

SHARE spending formula example

	CCO1	CCO2	CCO3
Adjusted Net Income	\$100	\$100	\$100
12/31/2022 RBC	250%	350%	350%
ANI SHARE Rate	0%	5%	5%
ANI SHARE Amount	\$0	\$5	\$5
Dividends paid	\$0	\$0	\$70
Dividend SHARE	\$0	\$0	\$7
Final SHARE	\$0	\$5	\$7

SHARE Initiative: Minor changes in 2023

New

- Project examples
- Appendices: timeline, eligibility checklist and definitions list
- SMARTIE goals required in partner agreements (previously SMART goals required - adding inclusive and equitable)*

Updates to reflect 2023 CCO contract

- Spending plans now due any time from April 1 to December 31
- Spend-down period three years (already implemented in 2022 through contract waiver memo)

**For SMARTIE goals technical assistance, a [webinar recording](#) and [slides](#) are available on the Transformation Center website.*

SHARE Initiative: Minor changes in 2023 (cont.)

Clarifications

- Strategies targeted exclusively at health care or access to health care are not included in the SDOH-E domains for eligible SHARE spending.
- Spending report template: updated columns to clarify what's being asked and accommodate spending from multiple years' plans.
- FAQ #21: Clarified that CACs must have a role in SHARE Initiative spending decisions (not just tracking progress).
- FAQ #28: Clarified steps CCO must take if changing their SHARE spending plan (partners, activities or dollar amounts) after it's been approved by OHA. (See [CCO memo: Changing SHARE designations](#) (9/9/22).)

Global feedback from 2022 plans: Strengths

- Good project summaries - easy to understand big picture
- Many innovative, upstream projects with clear SDOH and/or equity focus
- Great focus and building on last year's housing priority
- Several CCOs with robust partner engagement/partner-led initiatives
- OHA/ORPRN appreciates engagement from CCOs leading up to submission (TA, office hours, 1x1 consultation)

Global feedback from 2022 plans: Opportunities

- More detailed description of how partners/projects were selected (the process used)
- More robust decision-making role for CAC (involve earlier in process; provide role beyond CHA/CHP direction and receiving presentations)
- Start planning for 2023 now; start funding initiative/process earlier in year

Next steps: 2022 resubmissions and redactions

- **For CCOs with corrections:** resubmissions
- **For CCOs with approvals:** single PDF (including all attachments) ready for posting, with or without redaction request

Questions and discussion

- Do you need more explanation about the guidance updates?
- What questions do you have about SHARE planning, reporting, spending?
- What reflections do you have about your CCO's SHARE initiative work after two years?

Upcoming webinars

- **SHARE webinar: Nuts and bolts of grantmaking**
 - February 15, 11 a.m.-noon
 - [Register here](#)
- **Health-related services and Oregon's 2022-2027 Medicaid 1115 waiver**
 - February 28, 10-11 a.m. (rescheduled from February 1)
 - [Register here](#)
- **2022 SHARE Spending Plan Report and webinar (late spring 2023)**

For more information

- 2023 SHARE guidance and templates
 - <https://www.oregon.gov/oha/HPA/dsi-tc/Pages/SHARE.aspx>
- 1115 Medicaid Waiver and Substance Use Disorder Waiver information on the OHA website:
 - <https://www.oregon.gov/oha/hsd/medicaid-policy/pages/waiver-renewal.aspx>
 - <https://www.oregon.gov/oha/HSD/Medicaid-Policy/Pages/SUD-Waiver.aspx>
- Contacts:
 - Rachel Burdon at OHA (Rachel.E.Burdon@dhsoha.state.or.us)
 - Nancy Goff (nancy055@gmail.com) or Anne King (kinga@ohsu.edu) at the Oregon Rural Practice-Based Research Network (ORPRN, OHSU)

Reference

1115 Medicaid waiver: Housing benefit

Who is eligible?

- Members transitioning out of institutional care or congregate settings such as nursing facilities, large group homes, congregate residential settings, Institutions for Mental Diseases (IMDs), correctional facilities, and acute care hospitals;
- Homeless, at risk of homelessness, or transitioning out of an emergency shelter as defined by 24 CFR 91.5
- Youth transitioning out of the child welfare system including foster care

What are they eligible for?

- Housing supports and services (rental assistance or temporary housing up to 6 months, utility assistance up to 6 months, one time transition and moving costs, housing deposits and fees, medically necessary home modifications, pre-tenancy and tenancy support services, navigation and/or case management for housing)

1115 Medicaid waiver: Food benefit

Who is eligible?

- Members transitioning out of institutional care or congregate settings such as nursing facilities, large group homes, congregate residential settings, Institutions for Mental Diseases (IMDs), correctional facilities, and acute care hospitals;
- Homeless, at risk of homelessness, or transitioning out of an emergency shelter as defined by 24 CFR 91.5
- Youth transitioning out of the child welfare system including foster care

What are they eligible for?

- Food benefits to include nutrition and cooking education, fruit and vegetable prescriptions, meals or healthy food boxes for pregnant members, children, and YSHCN, medically tailored meal delivery, navigation and/or case management for community-based food resources

Substance Use Disorder (SUD) waiver benefits

Who is eligible:

- Members coming out of residential treatment that have OHP benefits, a substance use disorder diagnosis, and no longer need residential treatment

What are they eligible for:

- **Housing support services** for members that meet the above criteria and are also at risk of homelessness, have frequent emergency visits/hospitalizations, or residential instability.
- **Employment support services** for members that meet the above criteria and are also unemployed (or meet other criteria).