

OPERATING ENGINEERS TRUST FUND
OF WASHINGTON, D.C.
HEALTH AND WELFARE PROGRAM
LOCAL NO. 77
BOARD OF TRUSTEES MEETING

DECEMBER 3, 2024



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Sparks, MD 21152-9451
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Operating Engineers Local No. 77

Health & Welfare and Pension Funds

8400 Corporate Drive
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HEALTH & WELFARE

AGENDA

December 3, 2024

- I. CALL TO ORDER**
- II. MINUTES**
 - Regular meeting – August 19, 2024
- III. FINANCIAL REPORT**
 - Investment Performance Services
- IV. CONSULTANT’S REPORT**
 - Bolton – 3rd Quarter 2024
 - Medicare Advantage Renewal - 2025
 - Conifer Rate Change - 2025
- V. ATTORNEY’S REPORT**
- VI. ADMINISTRATIVE MANAGER’S REPORT**
 - Gain/Loss Reports – September 2024
- VII. PARTICIPANT APPEALS**
- VIII. OTHER FUND BUSINESS**
 - Greenlight Agreement Update
 - Summary Annual Report
 - Conifer 3rd Quarter Report
- IX. NEXT MEETING DATE AND LOCATION**
 - February 11, 2025
- X. ADJOURNMENT**

MINUTES



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MINUTES OF THE MEETING OF THE BOARD OF TRUSTEES OF THE OPERATING ENGINEERS LOCAL 77 HEALTH & WELFARE TRUST FUND MONDAY, AUGUST 19, 2024

The following Trustees were present:

UNION TRUSTEES

J. VanDyke
Steve Faulkner
B. Gilroy
Jose Ventura

EMPLOYER TRUSTEES

B. Mazzella

ALSO PRESENT:

R. Devlin – Bolton
C. Fuller – McChesney & Dale, P.C.
D. Jensen – Associated Administrators, LLC
J. Mink – Investment Performance Services, LLC (via zoom)
K. Phillips – Associated Administrators, LLC

I. CALL TO ORDER

The Chairman called the meeting to order. There was no quorum present. Actions will be ratified at the next Board of Trustees meeting.

II. MINUTES

The Trustees, each having previously received a copy of the minutes of the regular meeting held on May 15, 2024, waived the reading, and,

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

RESOLVED to approve the minutes of the regular meeting held on May 15, 2024 as written.

III. FINANCIAL REPORTS

Investment Performance Services

The Trustees welcomed Ms. Jennifer Mink from Investment Performance Services (IPS) to the meeting. Ms. Mink reviewed the investment performance analysis for the Second quarter 2024. The report indicated assets of \$37,894,278 as of June 30, 2024 compared to \$36,452,729 as of December 31 2023, producing a gain of \$1,441,549. The report further indicated the total return for the quarter ending June 30, 2024 was 1.3%. For domestic large cap equity the returns were 4.1%; for investment grade fixed income the returns were 0.6%; for short duration high yield fixed income the returns were 1.5%; and for real estate the returns were negative 0.7% for the quarter ending June 30, 2024.

Asset Allocation

Ms. Mink reviewed the current asset allocations. IPS recommends rebalancing closer to Policy by transferring \$750k from Vanguard Growth Index Fund (domestic large cap equity) to Chartwell Investment Partners (short duration high yield). Addendums will be sent to David Jensen to send to the Trustees for signature. IPS also recommends rescinding the balance of the withdrawal request the ARA Core Property Fund (real estate – core). A **MOTION** was made and seconded to approve both recommendations. The Motion passed unanimously.

The Trustees thanked Ms. Mink for her report and she was excused from the meeting.

IV. CONSULTANT’S REPORT

Bolton - Fourth Quarter Financial Update

The Trustees welcomed Mr. Ryan Devlin of Bolton Partners to the meeting. Mr. Devlin distributed a report comparing the projected benefit cost to the actual benefit cost for the period January 1, 2024 through June 30, 2024. Total revenue for the second quarter of 2024 was \$9,740,718. Disbursements were \$8,534,595, resulting in a surplus of \$1,206,123. Mr. Devlin stated the Fund currently has an estimated 22.3 net months in reserve.

Out of Network Discounter Analysis Update

Mr. Devlin stated the Fund currently has no out of network repricing. An analysis has been completed of three vendors A&S Financial Services, ClaimsBridge and Zelis. Each vendor was provided with Out-of-Network claims for the Fund for calendar years 2022 and 2023 for analysis. The decision was made to contract Zelis for Out-of-Network (OON) pricing with a discount cost of 64.6% with estimated OON Claim savings of \$554,410. Zelis is the only vendor who is currently connected to Associated Administrators for data sharing purposes.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

**RESOLVED to hire Zelis as Out-of-Network Claims Discounter
for Local 77 Health and Welfare Fund**

Short Term Disability

Mr. Devlin presented a cost analysis for Short-Term Disability benefits. Currently the STD per week benefit is \$250. To increase the benefit \$350 would have an annual expected cost of \$61,399.14. To increase the benefit to \$450 per week would have an annual expected cost of \$78,941.75.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

**RESOLVED to increase the Short-Term disability benefit to
\$450 per week, effective October 1, 2024**

IUOE International PBM

Mr. Devlin presented a study of prescription benefit manager cost savings for HCCCC vs. IOUE coalition. Total pricing for 2027 was \$3,947,621 – HCCCC and \$3,680,897 for IOUE. The trustees agreed that they would like to support the IOUE, and would like to change to their coalition.

The IUOE International has made the decision to change carriers from OptumRx to CVS, effective January 1, 2025. Local 77 currently uses CVS so there will be no disruption of services for members.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

RESOLVED to transfer from the HCCCC coalition to the IUOE coalition, effective January 1, 2025

Anti-Obesity Drugs – GLP1 update

Mr. Devlin gave an update of the ongoing debate of whether or not to cover GLP-1 drugs.

He stated GLP-1 drugs are here to stay. While they are not for everyone, they do offer a range of obesity management solutions. If any plan considers covering these drugs, they should develop compliance guardrails. At this time, Local 77 Health and Welfare Plans do not cover GLP-1 Anti-Obesity drugs.

V. ATTORNEY’S REPORT

The Fund Attorney Chuck Fuller presented two memos for Local 77 Health and Welfare Fund.

- Breach of Fiduciary Duty to Monitor Pharmacy Benefit Managers – the Trustees should consider reviewing the PBM contract and practices annually. The Plan should be reviewed to make sure there is not conflict between the terms of the Plan and the PBM contract.
- Final Rule to Protect Privacy of Reproductive Health Information – The purpose of the Amendments is to restrict the circumstances in which HIPAA regulated entities may disclose an individual’s reproductive health information for the purpose of an investigation or proceeding against persons for seeking, obtaining, providing, or facilitating lawful reproductive health care, including abortion.

VI. ADMINISTRATIVE MANAGER’S REPORT

Gain/Loss Reports

Mr. Jensen presented the Administrative Manager’s Report for the period January 1, 2024 through June 30, 2024. Such report indicated total contributions of \$8,043,500, self-payments of \$5,904, COBRA income of \$10,054, net reciprocity income of \$464,116, retiree self-pay income of \$372,562, prescription subsidy of \$4,981, liquidated damages of \$2,460, miscellaneous income of \$19, interest income of \$56,796, interest on investments in the American Core Realty account of \$51,774, interest on investments in the Wedge fixed Capital Management account of \$162,390,

interest on investments in the Wedge LG Capital Management account of \$1,029, dividend on investments in the Wedge LG Capital Management account of \$20,002, interest on investments in the Chartwell Investment account of \$326,726, interest on investments in the Vanguard account of \$0, a loss in investments in the American Realty account of \$26,073, a loss in investments in the Boyd Watterson account of \$182,536, a gain in investments in the Wedge LG Capital Management account of \$313,928, a gain on investments in the Vanguard account of \$487,251, a gain on the investment in the Chartwell account of \$16,707, a loss in the Wedge fixed income account of \$69,005. There were expenses totaling \$8,626,279 for the period, producing a net gain for the period of \$1,206,128.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

RESOLVED to accept the Administrative Manager's Report for the period January 1, 2024 through June 30, 2024 as presented.

VII. OTHER FUND BUSINESS

The Conifer Health Solutions Plan Performance Report for the 2nd Quarter 2024 was presented for the Trustees review.

VIII. PARTICIPANT/PROVIDER APPEALS

Participant Appeal #RX24/133-8996

Mr. Fuller presented an appeal from the provider. The provider, Debora Vasquez, MD, is appealing on behalf of the participant's spouse for coverage of Saxenda, which is an injectable prescription drug used for weight loss. It is noted that weight loss medications are not covered under the Plan.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

RESOLVED to deny the appeal to cover the drug Saxenda.

Participant Appeal #RX24/132-9367

The provider, Sandra Salsberg, MD, is appealing on behalf of the participant's 6-year old son for coverage of Omnipod 5, which is an automated insulin delivery system. It is noted that CVS/Caremark denied a request for coverage of Omnipod 5 on May 17, 2024 because it is excluded from coverage.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

To send the appeal information to Conifer for medical review

Participant Appeal #M24/129-9373

The provider, Exact Sciences Laboratories, is appealing for additional payment on a claim for Cologuard test. The provider states that there should be no patient cost-sharing for this preventative service under the Affordable Care Act. As a grandfathered health plan, the Affordable Care Act's requirement for the provision of preventative health services without any cost sharing does not apply.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

RESOLVED to deny the appeal for the 100% coverage.

Participant Appeal #M24/136-3707

The provider, University of Virginia Health System on behalf of LabCorp, is appealing for payment of a laboratory claim for the participant's spouse that was denied. The provider states in summary that Non-Invasive Prenatal tests were necessary because the patient is of Advanced Maternal Age and has a higher risk of genetic abnormalities.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

RESOLVED to deny the appeal for the laboratory claim.

Participant Appeal #M24/137-5185

The provider, Jefferson Health, is appealing for payment of a fertility treatment claim for the participant's spouse that was denied. The provider's medical records show that the procedure was for a reversal of a tubal ligation. The claim was denied because this treatment is not a covered benefit.

Upon a motion made and seconded, the Trustees voted unanimous approval of the following resolution:

RESOLVED to deny the appeal for coverage of this procedure.

IX. NEXT MEETING DATE AND LOCATION

After discussion, the Trustees decided that the next meeting will be held December 3, 2024, beginning at 9:00 a.m. and will be held at the Landover Office of Associated Administrators, LLC.

X. ADJOURNMENT

There being no further business to come before the Trustees, the meeting was adjourned.

Respectfully submitted,

John Knowles - Chairman

FINANCIAL REPORT

CONSULTANT'S REPORT



Bolton

Operating Engineers Trust Fund of Washington, D.C. Health & Welfare Fund Local No. 77

Consultant's Report

Ryan Devlin, Senior Consultant

December 3, 2024

Projected vs. Actual

Operating Engineers Local 77 Trust Fund

Projected vs. Actual Results

For the Nine Months Ended September 30, 2024



	Projected Annual '24	Projected Monthly	Projected 1/24 - 9/24	Actual 1/24 - 9/24	Actual Monthly	Variance 1/24 - 9/24
Receipts						
Total Contributions	\$ 17,323,489	\$ 1,443,624	\$ 12,992,617	\$ 13,139,251	\$ 1,459,917	\$ 146,634
Investment Earnings (net)	1,431,926	119,327	1,073,945	2,050,430	227,826	976,485
Total Revenue	\$ 18,755,415	\$ 1,562,951	\$ 14,066,561	\$ 15,189,681	\$ 1,687,742	\$ 1,123,120
Disbursements						
Benefit Expense	\$ 16,845,322	\$ 1,403,777	\$ 12,633,991	\$ 12,189,726	\$ 1,354,414	\$ (444,265)
Administrative Expense	968,158	80,680	726,119	853,586	94,843	127,467
Total Disbursements	\$ 17,813,480	\$ 1,484,457	\$ 13,360,110	\$ 13,043,312	\$ 1,449,257	\$ (316,798)
Surplus/(Deficit)	\$ 941,935	\$ 78,495	\$ 706,451	\$ 2,146,369	\$ 238,485	\$ 1,439,918
Estimated net months in reserve	22.8					

2025 Medicare Advantage Renewal



2025 Incumbent Renewal and Market Analysis

PRODUCT: **Medicare Advantage with Prescription Drug Plan**

MAPD Incumbent: Aetna

	2024 Aetna Incumbent	Renegotiated Aetna Renewal	2025 Aetna Renewal	United HealthCare	CareFirst
Total Rate PMPM	\$228.90	\$236.90	\$237.90	\$452.56	DNQ
Annualized *	\$1,310,224	\$1,356,016	\$1,361,740	\$2,590,453	-
Annualized Change	-	\$45,792	\$51,516	\$1,280,230	-
% Change	-	3.49%	3.93%	97.71%	-

* Annualized amounts are based on 477 retirees

- Plans are quoted with robust formularies to minimize disruption.
- Please note that medications can change tiers between carriers and between plan years.

- LaborFirst was able to reduce the 2025 per member per month MAPD premium rate with Aetna by \$1.00 (annual savings of \$5,724).

CONIFER
HEALTH SOLUTIONS®

Date: November 1, 2024
To: Dave Jensen, Associated Administrators
From: Joe Sears
Subject: Conifer Rate Change, January 2025 – IUOE Local 77

Dear Dave,

The purpose of this memo is to advise that, per the Conifer contract with the Fund, the following rates will increase on January 1, 2025:

Per Member Per Month Pricing	1/1/2024	1/1/2025
Utilization Management	\$2.27	\$2.34
Personal Health Management	\$4.16	\$4.29

This increase is based on the Employment Cost Index (ECI) of 3.2% for Professional and Business Services published in Q3 2024.

Conifer values our partnership with you and the Trustees of the Operating Engineers Local 77 and appreciate your support of our program. We are happy to be working with you and the Fund again and look forward to our continued relationship in the next year.

Sincerely,

Joe Sears

Joe Sears
RVP, Population Health
Email: Joseph.Sears@ConiferHealth.com
Phone: (410) 200-1476

ATTORNEY'S REPORT

**AUGUST 19, 2024 AMENDMENT TO THE OPERATING
ENGINEERS TRUST FUND OF WASHINGTON, D.C.
(SHORT TERM DISABILITY BENEFIT)**

The following amendment to the Operating Engineers Trust Fund of Washington, D.C. is hereby adopted this 19th day of August, 2024 and is effective October 1, 2024.

The Schedule of Benefits is hereby amended effective October 1, 2024 to increase the Weekly Accident & Sickness Benefit to \$450.00 per week.

By resolution hereof, the undersigned Trustees hereby adopt this August 19, 2024 Amendment, effective as provided above and except as hereby amended, the terms of the Plan, as previously amended, remain in full force and effect.

Management Trustees

Union Trustees

**OPERATING ENGINEERS TRUST FUND OF WASHINGTON, D.C.
HEALTH & WELFARE FUND**

LOCAL NO. 77

911 Ridgebrook Road
Sparks, Maryland 21152-0977
877-850-0977

SUMMARY OF MATERIAL MODIFICATIONS

The Board of Trustees of the **OPERATING ENGINEERS TRUST FUND OF WASHINGTON, D.C.** "Fund" has adopted changes to the Plan, which are described in this notice. Please keep this notice for future reference.

Increase in Weekly Accident & Sickness Benefits.

The Trustees have increased the Weekly Accident & Sickness Benefit from \$250.00 per week to \$450.00 per week provided by the Plan. Effective October 1, 2024, the Plan will pay \$450.00 per week to active participants who are eligible to receive Weekly Accident & Sickness Benefits. All other provisions of the Weekly Accident & Sickness Benefit remain unchanged.

ADMINISTRATIVE MANAGER'S REPORT

OPERATING ENGINEERS TRUST FUND OF WASHINGTON D.C.
STATEMENT OF GAIN OR LOSS

2024	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVERAGE
INCOME														
CONTRIBUTIONS	1,595,484	957,855	1,452,265	1,431,814	1,250,465	1,355,618	1,355,767	1,272,450	1,525,498				12,197,216	1,355,246
CONTRI-SELF PAY	1,000	0	1,500	1,000	2,000	404	1,000	0	1,000				7,904	878
COBRA-SELF PAY	693	1,247	3,190	2,635	693	1,595	1,386	2,288	3,685				17,414	1,935
RECIPROCITY INCOME	69,827	66,001	87,623	119,792	64,707	56,164	58,607	139,072	53,281				715,076	79,453
RECIPROCITY PAYMENTS	(39,675)	(42,292)	(37,878)	(32,022)	(51,299)	(27,607)	(15,216)	(35,636)	(76,154)				(357,779)	(39,753)
RETIRED-SELF PAY	65,945	60,862	62,630	61,840	59,565	61,720	2,710	119,840	60,815				555,927	61,770
LIQUIDATED DAMAGES	0	2,220	240	0	0	0	0	0	0				2,460	273
INTEREST INCOME	8,203	8,672	9,635	10,574	10,226	9,486	3,561	4,211	4,914				69,482	7,720
INTER.INC-AMER.CORE REALTY	0	0	26,197	0	0	25,577	0	0	26,023				77,797	8,644
INT ON DELINQUENCY	52	461	8	0	13	35	0	0	0				569	63
WASHINGTON MERC DIVIDEND	0	0	0	0	24	0	0	0	0				24	3
WEDGE LG CAP - INTEREST INCOME	204	174	159	194	147	152	244	280	190				1,743	194
WEDGE LG CAP - DIVIDEND INCOME	3,823	2,318	3,877	2,909	2,318	4,758	2,928	2,437	5,576				30,942	3,438
WEDGE FIXED- INTEREST ON INVEST.	14,455	37,437	25,481	45,600	21,068	18,348	16,789	36,108	41,137				256,423	28,491
CHART - INTEREST ON INVESTM.	39,936	42,710	71,626	46,733	43,905	81,817	36,984	45,227	70,320				479,257	53,251
VANGUARD - INTEREST ON INVESTMENT	0	0	0	0	0	0	0	0	2,517				2,517	280
WEDGE LG CAP - GAIN & LOSS	59,900	138,605	140,284	(136,518)	104,004	7,653	87,466	27,796	8,794				437,984	48,665
WEDGE FIXED - GAIN & LOSS	14,394	(128,504)	47,620	(169,924)	101,960	65,450	221,797	108,974	116,163				377,929	41,992
AMER CORE REALTY - GAIN & LOSS	0	50,635	(68,618)	22,840	0	(30,930)	0	0	(18,793)				(44,865)	(4,985)
VANGUARD - GAIN & LOSS	53,622	170,520	34,837	(110,955)	161,971	177,257	(49,140)	58,245	48,207				544,563	60,507
CHART - GAIN & LOSS	(16,683)	(23,386)	41,103	(78,709)	50,636	43,747	80,593	65,506	38,555				201,360	22,373
BOYD WATTERSON - GAIN & LOSS	0	(66,090)	(90,518)	0	0	(25,928)	0	0	(85,780)				(268,315)	(29,813)
RETIREE DRUG SUBSIDY INTERIM PAYMENT	0	0	4,981	0	0	0	16,937	0	0				21,918	2,435
*MISC.INCOME	0	2	0	0	17	0	0	0	1,018				1,037	115
TOTAL INCOME	1,871,178	1,279,446	1,816,243	1,217,802	1,822,421	1,825,316	1,822,413	1,846,796	1,826,967				15,328,583	1,703,176
EXPENSES														
ADMIN.FEE	43,808	43,808	43,808	43,808	43,808	43,808	43,808	45,122	45,122				396,900	44,100
ACTUARIAL FEES	6,300	0	0	6,300	0	0	0	0	0				12,600	1,400
AUDITING	(3,100)	0	0	0	12,850	0	1,500	0	2,050				13,300	1,478
BANK CHARGES	0	0	0	0	0	0	0	0	0				0	0
BENEFITS PAID	778,480	973,039	992,327	751,148	1,369,252	1,263,098	502,874	1,011,436	1,715,397				9,357,051	1,039,672
PRESCRIPT BEN PAID	309,505	316,385	18,600	405,952	275,541	118,210	369,629	335,200	71,289				2,220,310	246,701
FIDUC.RESPONSIB.INSUR.	0	0	0	2,848	0	0	0	0	0				2,848	316
INVEST COUNSEL FEE	11,781	29,870	8,258	12,237	15,444	8,096	12,670	15,667	7,975				121,996	13,555
INVEST CUSTODIAN FEE	0	0	0	1,447	0	0	1,450	0	0				2,897	322
INV PERF EVAL FEE	0	0	4,557	0	0	0	4,715	0	4,737				14,009	1,557
LEGAL FEES	0	0	0	0	0	0	0	11,147	9,519				20,666	2,296
MEETING EXPENSE	102	0	201	0	0	128	0	0	0				431	48
PAYROLL AUDIT FEE	0	8,033	1,125	1,476	0	0	2,115	0	0				12,749	1,417
POSTAGE	1,175	0	2,045	0	1,417	0	1,185	0	0				5,821	647
CARE FIRST FEE	15,732	15,252	15,768	15,443	14,879	15,964	15,095	15,939	15,634				139,706	15,523
CONIFER CASE MANAGEMENT	18,736	20,221	19,931	21,268	19,969	21,028	21,423	20,263	19,193				182,032	20,226
HEALTHCARE COST MANAGEMENT	0	0	0	0	0	0	0	500	500				1,000	111
PRINT & STATIONERY	0	0	2,215	0	3,260	0	1,878	3,005	0				10,358	1,151
REGISTRATION FEE	0	0	1,148	0	0	0	0	0	0				1,148	128
TELEPHONE EXP	0	0	0	0	294	0	106	0	154				554	62
TRAVEL EXP	0	0	0	0	0	0	0	0	0				0	0
HIPAA	358	290	284	354	273	340	336	310	338				2,883	320
SWIFTMD MONTHLY MEMBERSHIP FEE	3,459	3,447	3,474	3,465	3,435	3,408	3,414	3,411	3,417				30,930	3,437
OFFICE SUPPLIES & EXP.	0	0	0	0	0	0	0	0	0				0	0
TRUSTEE EXPENSES	0	554	0	0	0	0	0	0	0				554	62
DUES & SUBSCRIPTIONS	843	0	0	0	0	0	0	0	913				1,755	195
DENTAL INSURANCE	54,225	58,348	55,763	75,695	52,343	54,209	48,521	71,420	45,563				516,086	57,343
VISION BENEFITS PAID	9,867	9,903	10,819	12,856	11,915	8,275	12,054	10,707	9,881				96,277	10,697
TAX RETURN FORM 720(PCORI)	0	0	0	0	0	0	11,421	0	0				11,421	1,269
**MISC.EXPENSE	0	0	0	0	0	0	0	0	5,928				5,928	659
TOTAL EXPENSE	1,251,270	1,479,149	1,180,321	1,354,295	1,824,680	1,536,564	1,054,195	1,544,128	1,957,609				13,182,210	1,464,690
GAIN/LOSS	619,908	(199,703)	635,922	(136,493)	(2,258)	288,752	768,219	302,668	(130,642)				2,146,373	238,486

*Misc. Income Feb, May, Sep: Litigation Proceeds

**Misc Expense Sep Part D Advisors

OE Loc 77 Trust Fund of Wash. DC
Balance Sheet
September 30, 2024

ASSETS

Current Assets		
Cash Basis Accounts Receivable	\$	1,675.76
PNC - Cash General 5501371443		1,260,782.32
H&W Cash 20-46-002-6809064		741,608.15
PNC - 5501371451 Benefit Acc.		548,025.02
Interest Receivable		189,354.14
Dividend Receivable		1,071.62
Prepaid Insurance		949.33
Prepaid exp.		<u>912.50</u>
Total Current Assets		2,744,378.84
Property and Equipment		
Accum.Depreciation		(1,558.33)
Property & Equipment		<u>1,558.33</u>
Total Property and Equipment		0.00
Other Assets		
Due from Broker		59,810.75
VANGUARD		1,565,521.80
Vanguard - Market Value		608,140.30
Wedge - MM		53,350.65
Wedge - Govt.Bonds		9,701,542.92
WEDGE Gov.Bonds -Market Value		51,463.65
Wedge - Corp.Bonds		3,937,807.43
WEDGE Corp.Bonds-Market Value		(116,737.48)
WEDGE LG CAP-MM		45,802.02
WEDGE LG CAP-EQUITIES		2,080,327.54
WEDGE LG CAP-Market Value		567,094.91
American Core Realty		2,870,963.39
BOYD WATTERSON STATE GOV.FUND		2,914,586.00
CHART - MM - 4782656		520,388.97
CHART - Corp.Bonds - 4782656		12,862,765.24
CHART - Corp.Bonds- Mark.Val.		<u>82,757.28</u>
Total Other Assets		<u>37,805,585.37</u>
Total Assets	\$	<u><u>40,549,964.21</u></u>

LIABILITIES AND CAPITAL

Current Liabilities		
Contractors Deposits	\$ 3,011.57	
Due to Check-Off Dues	<u>158,992.93</u>	
Total Current Liabilities		162,004.50
Long-Term Liabilities	<u></u>	
Total Long-Term Liabilities		<u>0.00</u>
Total Liabilities		162,004.50
Capital		
Retained Earnings	3,601,548.71	
Equity - Retained Earnings	36,593,427.68	
Net Income	<u>192,983.32</u>	
Total Capital		<u>40,387,959.71</u>
Total Liabilities & Capital		<u><u>\$ 40,549,964.21</u></u>

OE Loc 77 Trust Fund of Wash. DC
Income Statement
For the Nine Months Ending September 30, 2024

	Current Month		Year to Date	
Revenues				
Contributions - Pavers	\$ 497,700.60	27.24	\$ 2,323,454.19	17.31
ER Contributions	1,027,797.13	56.26	8,083,745.13	60.23
Self-Pay Contributions	1,000.00	0.05	7,904.00	0.06
Cobra Self-Pay EE	3,685.10	0.20	17,413.98	0.13
Reciprocity Income	53,281.23	2.92	530,747.43	3.95
Reciprocity Payments	(76,154.36)	(4.17)	(287,195.98)	(2.14)
Retired Self-Pay	60,815.00	3.33	555,926.62	4.14
Interest Income	4,914.14	0.27	69,481.92	0.52
Interest American Core Realty	26,022.94	1.42	77,796.87	0.58
VANGUARD	2,516.95	0.14	2,516.95	0.02
Interest Income-Wedge LG CAP	190.31	0.01	1,742.81	0.01
Dividend - Washington Merc	0.00	0.00	24.20	0.00
Dividend Income-Wedge LG CAP	5,576.06	0.31	30,942.23	0.23
Interest on Delinquency	0.00	0.00	48.72	0.00
G/L on Invest. Vanguard	48,206.98	2.64	544,562.91	4.06
WEDGE(PNC) - Int. on Inv	41,137.19	2.25	256,423.52	1.91
CHART - Inter. on Investm.	70,319.88	3.85	479,257.24	3.57
Retiree Drug Subsidy	0.00	0.00	21,917.89	0.16
Realized Gain/Loss - CHART	(1,038.01)	(0.06)	(65,986.31)	(0.49)
Unrealized Gain/Loss - CHART	39,593.07	2.17	267,346.77	1.99
Realized G/L- Wedge LG CAP	11,293.54	0.62	278,079.42	2.07
Unrealized G/L- Wedge LG CAP	(2,499.16)	(0.14)	159,904.81	1.19
Unrealized Gain/loss WEDGE	100,865.41	5.52	459,631.87	3.42
Realized Gain/Loss WEDGE-001	15,297.37	0.84	(81,702.92)	(0.61)
Unrealiz.Gain/Loss-Amer.Core R	(7,862.72)	(0.43)	(155,230.92)	(1.16)
Realiz.Gain/Loss Amer. Core Re	(10,930.26)	(0.60)	110,365.43	0.82
Realiz.Gain/Loss Boyd Watterso	(85,779.54)	(4.70)	(268,315.17)	(2.00)
Litigation Proceeds	1,018.10	0.06	1,037.35	0.01
Total Revenues	<u>1,826,966.95</u>	<u>100.00</u>	<u>13,421,840.96</u>	<u>100.00</u>
Cost of Sales				
Total Cost of Sales	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
Gross Profit	<u>1,826,966.95</u>	<u>100.00</u>	<u>13,421,840.96</u>	<u>100.00</u>
Expenses				
Actuarial Fee	0.00	0.00	6,300.00	0.05
Administration Fee	45,122.00	2.47	396,900.00	2.96
Audit Fee	2,050.00	0.11	13,300.00	0.10
Benefits Paid	544,190.17	29.79	4,069,343.83	30.32
Prescription Benefits Paid	71,288.69	3.90	2,210,320.83	16.47
CVS - Admin fee	0.00	0.00	9,989.13	0.07
Vision Benefits Paid - claims	9,879.49	0.54	77,916.74	0.58
Vision Benefits Paid-admin fee	1.54	0.00	8,492.33	0.06
Inv.Performance Eval.Fee	4,736.78	0.26	14,008.74	0.10
Invest.Mngmnt Fee	7,974.70	0.44	80,345.49	0.60

	Current Month		Year to Date	
Invest.Custodian Fee	0.00	0.00	2,897.10	0.02
Legal Fees	9,519.00	0.52	20,666.27	0.15
Meeting Exp.	0.00	0.00	329.21	0.00
Postage Exp.	0.00	0.00	4,646.57	0.03
Printing & Stationary Exp.	0.00	0.00	10,146.12	0.08
Payroll Audit Fee	0.00	0.00	12,748.50	0.09
Registration Fee	0.00	0.00	1,147.50	0.01
Fiduciary Resp.Insurance	0.00	0.00	2,876.34	0.02
Case Mngmnt	19,192.54	1.05	163,295.66	1.22
Part D Advisors Expenses	5,927.83	0.32	5,927.83	0.04
Healthcare Cost Management	500.00	0.03	1,000.00	0.01
Telephone Exp.	153.56	0.01	553.66	0.00
HIPAA Charges	338.31	0.02	1,950.90	0.01
Trustee Exp.	0.00	0.00	554.37	0.00
IFEBP - Membership Dues	0.00	0.00	842.50	0.01
Dental Insurance - admin fee	5,876.25	0.32	52,908.75	0.39
Dental Insurance - claims	39,686.95	2.17	463,177.55	3.45
SwiftMD Monthly Membership fee	3,417.00	0.19	34,389.00	0.26
CareFirst - flexlink - admin	11,906.75	0.65	118,009.89	0.88
CareFirst - flexlink - claims	1,062,003.41	58.13	4,302,580.93	32.06
Care First - network lease fee	3,727.62	0.20	33,052.86	0.25
PCORI fee	0.00	0.00	11,421.34	0.09
Labor First Limited Liability	<u>109,203.70</u>	<u>5.98</u>	<u>1,096,817.70</u>	<u>8.17</u>
Total Expenses	<u>1,956,696.29</u>	<u>107.10</u>	<u>13,228,857.64</u>	<u>98.56</u>
Net Income	<u>(\$ 129,729.34)</u>	<u>(7.10)</u>	<u>\$ 192,983.32</u>	<u>1.44</u>

OE Loc 77 Trust Fund of Wash. DC
GENERAL JOURNAL
For the Period From Sep 1, 2024 to Sep 30, 2024

Date	Account ID	Reference	Trans Description	Debit Amt	Credit Amt
9/4/24	1260	TO BENEFIT1	Transfer from H&W Cash Benefit Acct. Check Run 9/3/24	71,429.66	
9/4/24	1120	TO BENEFIT1	Transfer from H&W Cash Benefit Acct. Check Run 9/3/24		71,429.66
9/4/24	1120	TRANSFDDA1	Transferred from Cash General to H&W Cash for dep. 08/30/24	242,378.14	
9/4/24	1110	TRANSFDDA1	Transferred from Cash General to H&W Cash for dep. 08/30/24		242,378.14
9/6/24	1260	A&S1	Transfer from H&W Cash Benefit Acct. Check Run 9/6/24	250.00	
9/6/24	1120	A&S1	Transfer from H&W Cash Benefit Acct. Check Run 9/6/24		250.00
9/6/24	1120	TRANSFDDA2	Transferred from Cash General to H&W Cash for dep. 09/04/24; checks issued 09/06/24	169,403.62	
9/6/24	1110	TRANSFDDA2	Transferred from Cash General to H&W Cash for dep. 09/04/24; checks issued 09/06/24		169,403.62
9/10/24	5150	941 WH Taxes Paid	A&S Tax W/H	224.04	
9/10/24	1260	941 WH Taxes Paid	A&S Tax W/H		224.04
9/10/24	5150	945 DB&Med Bckup WH	A&S DB & Medical Backup WH	579.64	
9/10/24	1260	945 DB&Med Bckup WH	A&S DB & Medical Backup WH		579.64
9/11/24	1260	TO BENEFIT2	Transfer from H&W Cash Benefit Acct. Check Run 9/11/24	51,992.80	
9/11/24	1120	TO BENEFIT2	Transfer from H&W Cash Benefit Acct. Check Run 9/11/24		51,992.80
9/11/24	1120	TRANSFDDA3	Transferred from Cash General to H&W Cash for dep. 09/06/24; checks issued 09/09/24	83,730.72	
9/11/24	1110	TRANSFDDA3	Transferred from Cash General to H&W Cash for dep. 09/06/24; checks issued 09/09/24		83,730.72
9/13/24	1260	A&S2	Transfer from H&W Cash Benefit Acct. Check Run 9/13/24	250.00	
9/13/24	1120	A&S2	Transfer from H&W Cash Benefit Acct. Check Run 9/13/24		250.00
9/18/24	1260	TO BENEFIT3	Transfer from H&W Cash Benefit Acct. Check Run 9/18/24	248,908.34	
9/18/24	1120	TO BENEFIT3	Transfer from H&W Cash Benefit Acct. Check Run 9/18/24		248,908.34
9/18/24	1120	TRANSFDDA4	Transferred from Cash General to H&W Cash for dep. 09/10/24-09/16/24; checks issued 09/13/24;09/18/24	143,296.99	
9/18/24	1110	TRANSFDDA4	Transferred from Cash General to H&W Cash for dep. 09/10/24-09/16/24; checks issued 09/13/24;09/18/24		143,296.99
9/20/24	1260	A&S3	Transfer from H&W Cash Benefit Acct. Check Run 9/13/24	857.13	
9/20/24	1120	A&S3	Transfer from H&W Cash Benefit Acct. Check Run 9/13/24		857.13
9/24/24	1120	TRANSFDDA5	Transferred from Cash General to H&W Cash for dep. 09/17/24-09/20/24; checks issued 09/20/24	262,350.27	
9/24/24	1110	TRANSFDDA5	Transferred from Cash General to H&W Cash for dep. 09/17/24-09/20/24; checks issued 09/20/24		262,350.27
9/25/24	1260	TO BENEFIT4	Transfer from H&W Cash Benefit Acct. Check Run 9/25/24	172,615.86	
9/25/24	1120	TO BENEFIT4	Transfer from H&W Cash Benefit Acct. Check Run 9/25/24		172,615.86
9/27/24	1120	TRANSFDDA6	Transferred from Cash General to H&W Cash for dep. 09/23/24-09/25/24; checks issued 09/27/24	238,178.13	
9/27/24	1110	TRANSFDDA6	Transferred from Cash General to H&W Cash for dep. 09/23/24-09/25/24; checks issued 09/27/24		238,178.13
9/30/24	5150	A&S Net	A & S Net	1,253.30	
9/30/24	1260	A&S Net	A & S Net		1,253.30
9/30/24	1895	AMER.CORE REALTY	American Core Realty - Interest Income 09/24	26,022.94	
9/30/24	4635	AMER.CORE REALTY	American Core Realty - Interest Income 09/24		26,022.94
9/30/24	5370	AMER.CORE REALTY	American Core Realty - Investment Mngmnt Fee 09/24	7,974.70	
9/30/24	1895	AMER.CORE REALTY	American Core Realty - Investment Mngmnt Fee 09/24		7,974.70
9/30/24	1895	AMER.CORE REALTY	American Core Realty - Realized Gain 09/24		10,930.26
9/30/24	4885	AMER.CORE REALTY	American Core Realty - Realized Gain 09/24	10,930.26	
9/30/24	1895	AMER.CORE REALTY	American Core Realty - Unrealized Loss 09/24		7,862.72
9/30/24	4880	AMER.CORE REALTY	American Core Realty - Unrealized Loss 09/24	7,862.72	
9/30/24	1895	AMER.CORE REALTY	American Core Realty - Redemption Payable 09/24		20,951.90
9/30/24	1405	AMER.CORE REALTY	American Core Realty - Redemption Payable 09/24	20,951.90	
9/30/24	1896	BOYD WATTERSON GOV.	Boyd Watterson Government - Loss on Investment 09/24		85,779.54
9/30/24	4886	BOYD WATTERSON GOV.	Boyd Watterson Government - Loss on Investment 09/24	85,779.54	
9/30/24	1896	BOYD WATTERSON GOV.	Boyd Watterson Government - to Broker 09/24		38,858.85
9/30/24	1405	BOYD WATTERSON GOV.	Boyd Watterson Government - to Broker 09/24	38,858.85	
9/30/24	1260	Benefits Paid	Benefits Paid		545,676.37
9/30/24	5150	Benefits Paid	Benefits Paid	545,676.37	
9/30/24	1260	Benefits Paid	Sep Voids	729.71	
9/30/24	5150	Benefits Paid	Sep Voids		729.71
9/30/24	1915	CHART	Chart - Corp.Bonds - Purchases 09/24	986,250.10	
9/30/24	1910	CHART	Chart - Corp.Bonds - Purchases 09/24		986,250.10
9/30/24	1910	CHART	Chart - Corp.Bonds - Sales Proceeds 09/24	179,250.00	
9/30/24	1915	CHART	Chart - Corp.Bonds - Sales at Cost 09/24		180,288.01
9/30/24	4810	CHART	Chart - Corp.Bonds - Realized Loss 09/24	1,038.01	
9/30/24	1916	CHART	Chart - Corp.Bonds - MV - Unrealized Gain 09/24	39,593.07	
9/30/24	4820	CHART	Chart - Corp.Bonds - MV - Unrealized Gain 09/24		39,593.07
9/30/24	1910	CHART	Chart - MM - Interest Income 09/24	70,319.88	
9/30/24	4730	CHART	Chart - MM - Interest Income 09/24		2,627.45
9/30/24	4730	CHART	Chart - Corp.Bonds - MM - Interest Income 09/24		67,692.43
9/30/24	1120	INTEREST INCOME	Interest Income	4,914.14	
9/30/24	4630	INTEREST INCOME	Interest Income		4,914.14
9/30/24	1855	VANGUARD	Vanguard - Income Dividend 09/24	2,516.95	
9/30/24	4636	VANGUARD	Vanguard - Income Dividend 09/24		2,516.95
9/30/24	1856	VANGUARD	Vanguard - Gain on Investment 09/24	48,206.98	
9/30/24	4696	VANGUARD	Vanguard - Gain on Investment 09/24		48,206.98
9/30/24	1870	WEDGE	Wedge - Gov.Bonds - Purchases 09/24	145,549.27	
9/30/24	1865	WEDGE	Wedge - Gov.Bonds - Purchases 09/24		145,549.27
9/30/24	1865	WEDGE	Wedge - Gov.Bonds - Sales Proceeds 09/24	259,106.84	
9/30/24	1870	WEDGE	Wedge - Gov.Bonds - Sales at Cost 09/24		247,642.99
9/30/24	4875	WEDGE	Wedge - Gov.- Realized Gain 09/24		11,463.85
9/30/24	1865	WEDGE	Wedge - Gov.Bonds - Return of Principal 09/24	106,558.22	
9/30/24	1870	WEDGE	Wedge - Gov.Bonds - Return of Principal 08/24		104,840.25
9/30/24	4875	WEDGE	Wedge - Gov.Bonds - Return of Principal - Realized Gain 09/24		1,717.97
9/30/24	1871	WEDGE	Wedge - Gov.Bonds - MV - Unrealized Gain 09/24	73,711.41	
9/30/24	4860	WEDGE	Wedge - Gov.Bonds - MV - Unrealized Gain 09/24		73,711.41
9/30/24	1875	WEDGE	Wedge - Corp.Bonds - Purchases 09/24	315,765.45	

Date	Account ID	Reference	Trans Description	Debit Amt	Credit Amt
9/30/24	1865	WEDGE	Wedge - Corp.Bonds - Purchases 09/24		315,765.45
9/30/24	1865	WEDGE	Wedge - Corp.Bonds - Sales Proceeds 09/24	66,694.55	
9/30/24	1875	WEDGE	Wedge - Corp.Bonds - Sales at Cost 09/24		64,579.00
9/30/24	4875	WEDGE	Wedge - Corp.Bonds - Realized 09/24		2,115.55
9/30/24	1876	WEDGE	Wedge - Corp.Bonds - MV - Unrealized Gain 09/24	27,154.00	
9/30/24	4860	WEDGE	Wedge - Gov.Bonds - MV - Unrealized Gain 09/24		27,154.00
9/30/24	1865	WEDGE	Wedge - MM - Interest Income 09/24	41,137.19	
9/30/24	4720	WEDGE	Wedge - MM - Interest Income 09/24		259.01
9/30/24	4720	WEDGE	Wedge - MM - Gov.Bonds - Interest Income 09/24		31,251.72
9/30/24	4720	WEDGE	Wedge - Corp.Bonds - MM - Interest Income 09/24		9,626.46
9/30/24	1878	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - Purchases 09/24	145,458.94	
9/30/24	1877	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - Purchases 09/24		145,458.94
9/30/24	1877	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - Sales Proceeds 09/24	157,875.56	
9/30/24	1878	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - Sales at Cost 09/24		146,582.02
9/30/24	4830	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - Realized Gain 09/24		11,293.54
9/30/24	1879	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - MV - Unrealized Loss 09/24		2,499.16
9/30/24	4835	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - MV - Unrealized Loss 09/24	2,499.16	
9/30/24	1877	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - MM - Interest Income 09/24	190.31	
9/30/24	4646	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - MM - Interest Income 09/24		190.31
9/30/24	1877	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - MM - Dividend Income 09/24	5,576.06	
9/30/24	4656	WEDGE LG CAP	Wedge LG Cap - Corp.Bonds - MM - Dividend Income 09/24		5,576.06
Total				5,111,851.72	5,111,851.72

OE Loc 77 Trust Fund of Wash. DC
NON-PAVERS CONTRIBUTIONS
For the Period From Sep 1, 2024 to Sep 30, 2024

Account ID	Account Description	Date	Reference	Customer Name	Credit Amt	Balance
4510	ER Contributions	9/4/24	07/24	AMERICAN COMBUSTION INDUSTRIES	1,887.50	
4510	ER Contributions	9/4/24	07/24	JOHN DRIGGS CO	896.88	
4510	ER Contributions	9/4/24	07/24	CMR CRANE & RIGGING, LLC	30,512.50	
4510	ER Contributions	9/4/24	07/24	S & J SERVICE, INC.	7,547.20	
4510	ER Contributions	9/4/24	07/24	WILLIAMS EQUIPMENT CO	10,276.56	
4510	ER Contributions	9/5/24	07/24SPLIT	MCVAC	6,343.75	
4510	ER Contributions	9/5/24	07/24SPLIT	MCVAC	1,201.90	
4510	ER Contributions	9/5/24	07/24SPLIT	DYNAMIC CONCEPTS, INC	15,775.74	
4510	ER Contributions	9/5/24	07/24SPLIT	TITAN CRANE INC	1,000.00	
4510	ER Contributions	9/5/24	07/24SPLIT	CONSTRUCTION SUPPORT SERVICES	2,006.25	
4510	ER Contributions	9/6/24	07/24	J. FLETCHER CREAMER & SON, INC	1,420.80	
4510	ER Contributions	9/6/24	08/24	HARDSCAPES CONSTRUCTION	2,278.14	
4510	ER Contributions	9/6/24	07/24SPLIT	MIGHTY FOUR ENTERPRISE	897.90	
4510	ER Contributions	9/6/24	07/24SPLIT	MIGHTY FOUR ENTERPRISE	2,252.80	
4510	ER Contributions	9/6/24	07/24SPLIT	MICHELS TRENCHLESS CROSSI	1,218.75	
4510	ER Contributions	9/9/24	08/24	OPER ENGS APPR FUND	5,000.00	
4510	ER Contributions	9/9/24	07/24	PAUL MERRIT EXCAVATING	2,865.62	
4510	ER Contributions	9/9/24	07/24	CS SERVICES, LLC	1,678.13	
4510	ER Contributions	9/9/24	08/24	SCHNABEL FOUNDATION CORP	4,181.25	
4510	ER Contributions	9/9/24	08/24	Norair Engineering Associates,	3,698.44	
4510	ER Contributions	9/12/24	07/24SPLIT	SHELLY FOUNDATION , INC	420.00	
4510	ER Contributions	9/12/24	08/24SPLIT	WOLFE CRANE SERVICES	2,743.75	
4510	ER Contributions	9/12/24	08/24SPLIT	CHRISTMAN MID-ATLANTIC CONSTRUCTORS	2,593.75	
4510	ER Contributions	9/12/24	08/24SPLIT	PETILLO INC	2,273.44	
4510	ER Contributions	9/12/24	07/24SPLIT	CELTIC DEMOLITION	30,612.50	
4510	ER Contributions	9/12/24	07/24SPLIT	KIRILA EARTHWORKS,INC	3,000.00	
4510	ER Contributions	9/13/24	08/24	DJB CONTRACTING, INC.	1,042.75	
4510	ER Contributions	9/13/24	08/24	HUTCHINSON INTERNATIONAL CORP.	1,128.13	
4510	ER Contributions	9/13/24	08/24	CLARK CONSTRUCTION GRP	66,928.48	
4510	ER Contributions	9/13/24	07/24	A&F SITEWORKS LLC	500.00	
4510	ER Contributions	9/13/24	07/24	NEW YORK GEOMATICS INC	2,253.60	
4510	ER Contributions	9/13/24	08/24SPLIT	DELTA RAILROAD CONSTRUCTION	6,168.75	
4510	ER Contributions	9/13/24	08/24SPLIT	MIDWEST MOLE,INC	4,065.63	
4510	ER Contributions	9/13/24	09/24SPLIT	PETILLO INC	2,100.00	
4510	ER Contributions	9/16/24	08/24	ANCHOR CONSTRUCTION CORP.	70,453.70	
4510	ER Contributions	9/16/24	08/24	WMATA 6-KIEWIT INFRASTRUC	1,450.01	
4510	ER Contributions	9/16/24	08/24	GOETTLE EQUIPMENT CO	2,050.00	
4510	ER Contributions	9/16/24	08/24	BAY CRANE MID-ATLANTIC LLC	3,480.75	
4510	ER Contributions	9/16/24	08/24	BAY CRANE MID-ATLANTIC LLC	49,193.75	
4510	ER Contributions	9/16/24	08/24	AIW, INC	7,625.00	
4510	ER Contributions	9/16/24	08/24	INTER UNION LOCAL 77	8,437.50	
4510	ER Contributions	9/16/24	08/24	INTER UNION LOCAL 77	1,093.75	
4510	ER Contributions	9/16/24	08/24	CRANE SERVICE CO	901.88	
4510	ER Contributions	9/16/24	08/24	CRANE SERVICE CO	105,843.75	
4510	ER Contributions	9/16/24	08/24	RYAN INCORPORATED CENTRAL	2,237.50	
4510	ER Contributions	9/16/24	08/24	APPELLATION CONSTRUCTION	136.00	
4510	ER Contributions	9/16/24	08/24	VECTOR SERVICES	26,046.88	
4510	ER Contributions	9/16/24	06/24-08/24	BAY CRANE MID-ATLANTIC LLC	1,000.00	
4510	ER Contributions	9/16/24	06/24-08/24	BAY CRANE MID-ATLANTIC LLC	1,000.00	
4510	ER Contributions	9/16/24	06/24-08/24	BAY CRANE MID-ATLANTIC LLC	1,250.00	
4510	ER Contributions	9/16/24	08/24	AMERICAN COMBUSTION INDUSTRIES	2,506.25	
4510	ER Contributions	9/16/24	08/24	INDEPENDENT EXCAVATING,INC	79,689.13	
4510	ER Contributions	9/18/24	07/24	CBNA-HALMAR CLEAN RIVERS JV	750.00	
4510	ER Contributions	9/18/24	07/24	CBNA-HALMAR CLEAN RIVERS JV	5,212.50	
4510	ER Contributions	9/18/24	07/24	CBNA-HALMAR CLEAN RIVERS JV	7,450.00	
4510	ER Contributions	9/18/24	08/24	MAXIM CRANE WORKS	1,337.50	
4510	ER Contributions	9/18/24	08/24	SIN NEBT-JV	3,968.75	
4510	ER Contributions	9/18/24	08/24	W O GRUBB EQUIPMENT RENTAL	82,253.12	
4510	ER Contributions	9/18/24	08/24	W O GRUBB EQUIPMENT RENTAL	3,573.38	
4510	ER Contributions	9/18/24	08/24	MILLER PIPELINE CORP.	47,415.63	
4510	ER Contributions	9/19/24	05/24-07/24SPLIT	MICHELS CORP	856.80	

Account ID	Account Description	Date	Reference	Customer Name	Credit Amt	Balance
4510	ER Contributions	9/19/24	05/24-07/24SPLIT	MICHELS CORP	238.00	
4510	ER Contributions	9/19/24	05/24-07/24SPLIT	MICHELS CORP	9,078.00	
4510	ER Contributions	9/19/24	05/24-07/24SPLIT	MICHELS CORP	306.00	
4510	ER Contributions	9/19/24	05/24-07/24SPLIT	MICHELS CORP	1,020.00	
4510	ER Contributions	9/19/24	08/24SPLIT	CONTRACTORS RENTAL	5,364.18	
4510	ER Contributions	9/19/24	08/24SPLIT	WOLFE CRANE SERVICES	1,987.50	
4510	ER Contributions	9/19/24	08/24SPLIT	SR CONSTRUCTION LLC	1,711.56	
4510	ER Contributions	9/20/24	08/24	Riggs Distler	993.75	
4510	ER Contributions	9/20/24	08/24	KELLER NORTH AMERICA	9,043.75	
4510	ER Contributions	9/20/24	08/24	EAST WEST ERECTION SERVIC	5,821.88	
4510	ER Contributions	9/20/24	08/24SPLIT	KELLER NORTH AMERICA	3,321.88	
4510	ER Contributions	9/20/24	08/24SPLIT	KELLER NORTH AMERICA	18,492.19	
4510	ER Contributions	9/20/24	08/24SPLIT	SOUTHERN MD CRANE RENTAL	6,484.38	
4510	ER Contributions	9/20/24	08/24SPLIT	BADGER DAYLIGHTING CORP.	20,414.75	
4510	ER Contributions	9/20/24	08/24	TRAYLOR SHEA JV	37,755.00	
4510	ER Contributions	9/20/24	08/24	LEONARDO'S GRADAL RENTAL, LLC	2,515.64	
4510	ER Contributions	9/20/24	08/24SPLIT	FLAT IRON	6,190.71	
4510	ER Contributions	9/23/24	08/24	WILLIAMS EQUIPMENT CO	11,114.06	
4510	ER Contributions	9/23/24	08/24	BRAYMAN CONSTRUCTION CO	3,603.13	
4510	ER Contributions	9/23/24	08/24	B & M CRANE	3,717.19	
4510	ER Contributions	9/23/24	8/24	GRUMPY'S CONCRETE PUMPING	6,417.00	
4510	ER Contributions	9/24/24	08/24	BERKEL & COMPANY	16,750.01	
4510	ER Contributions	9/24/24	08/24SPLIT	MICHELS CORP	5,256.40	
4510	ER Contributions	9/24/24	08/24SPLIT	MICHELS CORP	612.00	
4510	ER Contributions	9/24/24	08/24SPLIT	MICHELS CORP	1,364.76	
4510	ER Contributions	9/24/24	08/24SPLIT	MICHELS CORP	655.08	
4510	ER Contributions	9/24/24	09/24SPLIT	PETILLO INC	2,051.56	
4510	ER Contributions	9/24/24	07/24SPLIT	METRO CRANE & RIGGING LLC	14,593.44	
4510	ER Contributions	9/25/24	08/24	MALCOM DRILLING	2,450.00	
4510	ER Contributions	9/25/24	08/24	J. FLETCHER CREAMER & SON, INC	2,377.60	
4510	ER Contributions	9/26/24	08/24	SKODA CONTRACTING CO	3,673.60	
4510	ER Contributions	9/27/24	07/24;08/24	DRILL TECH	1,915.63	
4510	ER Contributions	9/27/24	07/24;08/24	DRILL TECH	1,403.13	
4510	ER Contributions	9/27/24	08/24	DIGMASTER	8,331.25	
4510	ER Contributions	9/27/24	08/24SPLIT	LOCKED AND LOADED TRANSPORT LLC	1,100.00	
4510	ER Contributions	9/27/24	08/24SPLIT	TITAN CRANE INC	1,000.00	
4510	ER Contributions	9/27/24	07/24;05/24	DONEGAL CONSTRUCTION CORP	16.60	
4510	ER Contributions	9/27/24	07/24;05/24	DONEGAL CONSTRUCTION CORP	15.58	
4510	ER Contributions	9/27/24	08/24SPLIT	DYNAMIC CONCEPTS, INC	12,203.20	
4510	ER Contributions	9/27/24	08/24SPLIT	KIRILA EARTHWORKS,INC	3,781.25	
4510	ER Contributions	9/27/24	08/24SPLIT	SECA UNDERGROUND CORPORATION	2,009.38	
4510	ER Contributions	9/27/24	08/24SPLIT	JOSEPH B FAY	1,115.63	
4510	ER Contributions	9/27/24	09/24SPLIT	PETILLO INC	2,400.00	
4510	ER Contributions	9/29/24	08/24	HOLCIM-MAR, INC	1,080.00	
4510	ER Contributions	9/29/24	08/24	HOLCIM-MAR, INC	9,360.00	
4510	ER Contributions	9/30/24	08/24	WILLIAMS EQUIPMENT CO	11,114.06	
4510	ER Contributions	9/30/24	08/24	Casper Colosimo & Son, Inc.	2,467.20	
4510	ER Contributions	9/30/24	08/24	S & J SERVICE, INC.	10,073.60	
4510	ER Contributions	9/30/24	08/24SPLIT	SHELLY FOUNDATION , INC	1,560.00	
4510	ER Contributions	9/30/24	08/24SPLIT	MIGHTY FOUR ENTERPRISE	5,491.20	
4510	ER Contributions				1,027,797.13	1,027,797.13
		9/30/24				1,027,797.13

OE Loc 77 Trust Fund of Wash. DC
PAVERS CONTRIBUTIONS
For the Period From Sep 1, 2024 to Sep 30, 2024

Account ID	Account Description	Date	Reference	Customer Name	Credit Amt	Balance
4500	Contributions - Pavers	9/4/24	07/24	RUSSELL PAVING CO., INC.	3,000.00	
4500	Contributions - Pavers	9/4/24	07/24	FORT MYER	108,552.22	
4500	Contributions - Pavers	9/4/24	07/24	FORT MYER	29,325.39	
4500	Contributions - Pavers	9/4/24	07/24	FT Myer Construction	1,546.91	
4500	Contributions - Pavers	9/19/24	07/24SPLIT	BELTWAY PAVING OF SOUTNER	10,079.69	
4500	Contributions - Pavers	9/20/24	08/24	EUROVIA ATLANTIC COAST	1,812.50	
4500	Contributions - Pavers	9/20/24	08/24	EUROVIA ATLANTIC COAST	8,584.72	
4500	Contributions - Pavers	9/23/24	08/24	FORT MYER	6,250.00	
4500	Contributions - Pavers	9/24/24	08/24	FORT MYER	137,789.89	
4500	Contributions - Pavers	9/24/24	08/24	FORT MYER	37,847.31	
4500	Contributions - Pavers	9/24/24	08/24	FT Myer Construction	1,175.02	
4500	Contributions - Pavers	9/24/24	08/24	CIVIL CONSTRUCTION, LLC	2,568.75	
4500	Contributions - Pavers	9/27/24	08/24	CAPITAL PAVING OF DC	18,168.75	
4500	Contributions - Pavers	9/27/24	08/24	CAPITAL PAVING OF DC	112,616.63	
4500	Contributions - Pavers	9/30/24	08/24SPLIT	BELTWAY PAVING OF SOUTNER	18,382.82	
4500	Contributions - Pavers				497,700.60	497,700.60
		9/30/24				497,700.60

OE Loc 77 Trust Fund of Wash. DC
SELF-PAY CONTRIBUTIONS
For the Period From Sep 1, 2024 to Sep 30, 2024

Account ID	Account Description	Date	Reference	Customer Name	Credit Amt	Balance
4530	Self-Pay Contributions	9/17/24	09/24;10/24	TONI HARRISON	500.00	
4530	Self-Pay Contributions	9/17/24	09/24;10/24	TONI HARRISON	500.00	
4530	Self-Pay Contributions				1,000.00	1,000.00
		9/30/24				1,000.00

OE Loc 77 Trust Fund of Wash. DC
RETIREE SELF-PAYMENTS
For the Period From Sep 1, 2024 to Sep 30, 2024

Account ID	Account Description	Date	Reference	Customer Name	Credit Amt	Balance
4580	Retired Self-Pay	9/6/24	07/24-09/24	CRISSIE YOW	240.00	
4580	Retired Self-Pay	9/6/24	09/24	OE PENSION TRUST FUND	58,455.00	
4580	Retired Self-Pay	9/9/24	07/24-09/24	MADELINE AHLQUIST	240.00	
4580	Retired Self-Pay	9/10/24	08/24;09;24	WANDA HUDSON	160.00	
4580	Retired Self-Pay	9/17/24	10/24-03/25	INGRID E HERSHEY	480.00	
4580	Retired Self-Pay	9/17/24	09/24	NORMAN L BOWIE	160.00	
4580	Retired Self-Pay	9/24/24	01/25-03/25	RENEE J. FISCUS	240.00	
4580	Retired Self-Pay	9/24/24	10/24-12/24	REBA JEARLINE DENNISON	240.00	
4580	Retired Self-Pay	9/24/24	10/24	FLORENCE M CURTIN	80.00	
4580	Retired Self-Pay	9/24/24	02/25	PAUL MCMAHAN	200.00	
4580	Retired Self-Pay	9/25/24	09/24	BETTY TILLEY	80.00	
4580	Retired Self-Pay	9/27/24	10/24-12/24	HELEN D ANGLIN	240.00	
4580	Retired Self-Pay				60,815.00	60,815.00
		9/30/24				60,815.00

OE Loc 77 Trust Fund of Wash. DC
COBRA SELF-PAYMENTS
For the Period From Sep 1, 2024 to Sep 30, 2024

Account ID	Account Description	Date	Reference	Customer Name	Credit Amt	Balance
4540	Cobra Self-Pay EE	9/4/24	10/24	WAYNE M LYMAN, JR	346.62	
4540	Cobra Self-Pay EE	9/10/24	09/24	CHARLES J YOW JR	346.62	
4540	Cobra Self-Pay EE	9/10/24	09/24	JUSTIN FOSTER	902.00	
4540	Cobra Self-Pay EE	9/10/24	08/24	ANDRES ALVAREZ	346.62	
4540	Cobra Self-Pay EE	9/10/24	08/24-10/24	GEORGE JOHNSTON	1,050.00	
4540	Cobra Self-Pay EE	9/11/24	09/24	SAMUEL KIRILA	346.62	
4540	Cobra Self-Pay EE	9/27/24	11/24	WAYNE M LYMAN, JR	346.62	
4540	Cobra Self-Pay EE				3,685.10	3,685.10
		9/30/24				3,685.10

OE Loc 77 Trust Fund of Wash. DC
RECIPROCITY INCOME
For the Period From Sep 1, 2024 to Sep 30, 2024

Account ID	Account Description	Date	Reference	Customer Name	Credit Amt	Balance
4550	Reciprocity Income	9/11/24	07/24	IUOE LOCAL 841	650.03	
4550	Reciprocity Income	9/11/24	07/24	OE Local 37	9,700.13	
4550	Reciprocity Income	9/11/24	07/24	OE Local 37	196.42	
4550	Reciprocity Income	9/13/24	07/24	OE Local 4	3,174.75	
4550	Reciprocity Income	9/16/24	07/24	Local 132	875.60	
4550	Reciprocity Income	9/16/24	05/24-07/24	LOC.18 - OHIO OPERATING E	6,256.06	
4550	Reciprocity Income	9/20/24	07/24	IUOE Pipe Line H&W Fund	11,816.81	
4550	Reciprocity Income	9/23/24	07/24	IUOE Local 324	3,095.10	
4550	Reciprocity Income	9/23/24	05/24;07/24	IUOE LOCAL 181,320	2,429.75	
4550	Reciprocity Income	9/23/24	07/24	OE LOCAL 3	312.80	
4550	Reciprocity Income	9/27/24	07/24	TENNESSEE VALUE OE HEALTH FUND	4,290.24	
4550	Reciprocity Income	9/30/24	07/24	SOUTHERN OPERATORS HEALTH F	1,572.00	
4550	Reciprocity Income	9/30/24	07/24	OE Local 147	4,096.03	
4550	Reciprocity Income	9/30/24	04/24-06/24	OE Local 147	4,815.51	
4550	Reciprocity Income				53,281.23	53,281.23
		9/30/24				53,281.23

OE Loc 77 Trust Fund of Wash. DC
RECIPROCITY EXPENSE
For the Period From Sep 1, 2024 to Sep 30, 2024

Account ID	Account Description	Date	Reference	Vendor Name	Debit Amt	Balance
4560	Reciprocity Payments	9/18/24	9366	IUOE Loc.132 - H&W Fund	3,375.01	
4560	Reciprocity Payments	9/18/24	9367	IUOE Loc.147 - H&W Fund	9,203.15	
4560	Reciprocity Payments	9/18/24	9368	Loc.18 - Ohio Operat.Engineers	7,119.76	
4560	Reciprocity Payments	9/18/24	9369	IUOE Local 181	2,390.63	
4560	Reciprocity Payments	9/18/24	9370	IUOE Local 234 Benefit Fund	13,867.31	
4560	Reciprocity Payments	9/18/24	9371	OE Loc.37 - H&W Fund	24,383.12	
4560	Reciprocity Payments	9/18/24	9372	IUOE Local 49	2,340.05	
4560	Reciprocity Payments	9/18/24	9373	OE Loc.66 Welf.Fund	950.01	
4560	Reciprocity Payments	9/18/24	9374	SOUTHERN OPERATORS H & W FUND	2,409.38	
4560	Reciprocity Payments	9/18/24	9375	Local 926	396.88	
4560	Reciprocity Payments	9/18/24	9376	IUOE & Pipe Line Employers H&W	9,719.06	
4560	Reciprocity Payments				76,154.36	76,154.36
		9/30/24				76,154.36

OE Loc 77 Trust Fund of Wash. DC
CHECK REGISTER
For the Period From Sep 1, 2024 to Sep 30, 2024

Check #	Date	Payee	Amount
CareFirst8/24-30/24	9/5/24	CareFirst Blue Cross Blue Shield	223,024.56
Delta8/24-8/30/24	9/5/24	Delta Dental of Pennsylvania	7,606.40
9358	9/6/24	AA, LLC	45,613.87
9359	9/6/24	NCAS	3,727.62
9360	9/6/24	OE Annuity Fund	19,808.50
Delta 8/31-9/6/24	9/12/24	Delta Dental of Pennsylvania	11,041.10
CareFirst8/31-9/6/24	9/12/24	CareFirst Blue Cross Blue Shield	542,132.57
9361	9/13/24	Conifer Value-Based Care, LLC	19,192.54
9362	9/13/24	VSP VISION CARE, INC	9,881.03
9363	9/13/24	OE Apprenticeship Fund	7,630.98
9364	9/13/24	OE Annuity Fund	23,802.63
3Q24 Prof. Svcs.	9/16/24	Investment Performance Services, LLC	4,736.78
Delta 9/7-9/13/24	9/18/24	Delta Dental of Pennsylvania	9,984.05
CareFirst 9/7-13/24	9/18/24	CareFirst Blue Cross Blue Shield	60,199.56
9365	9/18/24	OE Loc.77 Check Off Dues	197,732.37
9366	9/18/24	IUOE Loc.132 - H&W Fund	3,375.01
9367	9/18/24	IUOE Loc.147 - H&W Fund	9,203.15
9368	9/18/24	Loc.18 - Ohio Operat.Engineers	7,119.76
9369	9/18/24	IUOE Local 181	2,390.63
9370	9/18/24	IUOE Local 234 Benefit Fund	13,867.31
9371	9/18/24	OE Loc.37 - H&W Fund	24,383.12
9372	9/18/24	IUOE Local 49	2,340.05
9373	9/18/24	OE Loc.66 Welf.Fund	950.01
9374	9/18/24	SOUTHERN OPERATORS H & W FUND	2,409.38
9375	9/18/24	Local 926	396.88
9376	9/18/24	IUOE & Pipe Line Employers H&W Fund	9,719.06
9377	9/20/24	Green Light	500.00
9378	9/20/24	Telemedicine Mngmnt, Inc.	3,417.00
CVS 9/16-9/23/24	9/26/24	CVS Caremark	71,288.69
LaborFirst10/24	9/26/24	Labor First Limited Liability	109,203.70
CareFirst9/14-20/24	9/26/24	CareFirst Blue Cross Blue Shield	236,646.72
Delta 9/14-20/24;9/2	9/26/24	Delta Dental of Pennsylvania	16,931.65
9379	9/27/24	PART D ADVISORS, INC.	5,927.83
9380	9/27/24	Calibre CPA Group, PLLC	2,050.00
9381	9/27/24	IFEBP	912.50
9382	9/27/24	OE Apprenticeship Fund	229.60
9383	9/27/24	OE Loc 77 Pension Fund	2,095.10
9384	9/27/24	OE Annuity Fund	15,787.50
9385	9/27/24	CareFirst Blue Cross Blue Shield	11,906.75
9386	9/27/24	McChesney & Dale, P.C.	9,519.00
Total			<u>1,748,684.96</u>

PARTICIPANT APPEALS

NAME:
REGARDING:

SS#:

Operating Engineers Local No. 77 Trust Fund of Washington, D.C. Health and Welfare Program

EMPLOYER: Capitol Paving of DC

STATUS: Active

ISSUE: Prescription – Excluded Drug

#Rx24/155-9486

FUND RULE:

"Prescription Drug Benefit"

Exclusions

The following drugs/supplies are excluded under your prescription benefit:

16. Diabetic glucometers; [...]

(Operating Engineers Trust Fund of Washington, D.C. Health and Welfare Program Local No. 77 SPD, Page 107, #16)

SUMMARY: Appeal Received: October 2, 2024

The **provider**, Apoorva Ravindranath Waikar, MD, is appealing on behalf of the participant's 14-year old son for coverage of Omnipod 5, which is an automated insulin delivery system. It is noted that CVS/Caremark denied a request for coverage of Omnipod 5 on September 24, 2024 because it is excluded from coverage.

Dr. Waikar states in the appeal that the participant's son is already established on the "hybrid closed loop insulin pump therapy" with Omnipod 5 and abruptly changing therapy could cause several issues with his diabetic care. Included with the appeal were office notes dated March 1, 2024 indicating the participant's son was diagnosed with Type 1 diabetes in June 2023, has a Dexcom G6 continuous glucose monitor, and is using Omnipod 5 insulin pump cartridges.

After the appeal was received, the Fund office contacted CVS/Caremark. CVS/Caremark advised that they do not have a history of any paid claims for Omnipod 5. CVS/Caremark further confirmed that diabetic glucometers are not covered under the Plan, effective October 1, 2019.

ACTION: Approved ☐

Denied ☐

Tabled ☐

COMMENTS:

NAME:

SS#:

Operating Engineers Local No. 77 Trust Fund of Washington, D.C. Health and Welfare Program

EMPLOYER: Clark Construction Corp

LOCAL: 77

STATUS: Active

ISSUE: Prescription – Prior Authorization

#Rx24/142-7335

FUND RULE:

SUMMARY: Appeal Received: July 10, 2024

The **provider**, Gastro Health, is appealing on behalf of the participant for coverage of Stelara, which is a prescription drug that is used to treat Crohn's Disease.

Stelara requires a Prior Authorization under the Plan. It was noted that a Prior Authorization for Stelara SQ 90 mg syringe every four weeks was denied by CVS/Caremark on July 2, 2024 because it did not meet its criteria for coverage. CVS/Caremark stated, **"Current plan approved criteria does not allow coverage of the requested drug if the prescribed dosing frequency for the requested drug is more frequent than the Food and Drug Administration's (FDA's) recommended dosing frequency for the patient's diagnosis."**

Gastro Health states in the appeal that it was medically necessary for the participant to be switched to Stelara after developing antibody formation to Remicade. Included with the appeal were treatment notes dated April 16, 2024, indicating the participant was seen on that date for Crohn's Disease, and was prescribed Stelara at that time.

After the appeal was received, the documentation was sent to Conifer Health Solutions ("Conifer") for review. Conifer advised the Fund office that Stelara is **medically necessary** in this case.

ACTION:

Approved

☐

Denied

☐

Tabled

☐

COMMENTS:

NAME:

SS#:

Operating Engineers Local No. 77 Trust Fund of Washington, D.C. Health and Welfare Program

EMPLOYER: Clark-Kiewit III J.V.

LOCAL: 77

STATUS: Retired, November 1, 2007

ISSUE: Hospital/Medical – Late Claim Filing

#M24/138-9329

FUND RULE:

"Claims Filing and Appeals Information and Procedures

Important Note: You must file all claims within 365 days from the date of an event, except Weekly Accident and Sickness claims, which must be file within 60 days from your disability determination date or before you return to work, whichever is later.

An 'event' is defined as the accrual of charges for medical care, the date of injury, disease or illness, the date of disability, date of accident or sickness or date of death or injury which causes dismemberment."

(Operating Engineers Trust Fund of Washington, D.C. Health and Welfare Program Local No. 77 SPD, Page 111)

SUMMARY:

Date(s) of Service:	September 30, 2021
Received:	April 2, 2024 (915 days)
Denied:	April 17, 2024
Appeal Received:	July 1, 2024

The **provider**, Upper Chesapeake Emergency Medicine Phys, is appealing for secondary payment of a claim for Emergency Room Visit that was denied for untimely filing. The provider states that the claim was submitted within the payer limits.

Billing notes for the dates of service from September 30, 2021 were received with the appeal. Medicare paid the claim on October 29, 2021. The notes received indicate that the claim was originally filed on October 29, 2021 and March 18, 2024 to the Fund office at the correct Sparks, MD address. The Fund office does not have any record of receiving this claim prior to April 2, 2024.

Note: Delmarva Radiology, PA also submitted a claim for Radiologic Examination on this same date of service. That claim was received timely by the fund on November 8, 2021 and paid.

ACTION: **Approved** ☐ **Denied** ☐ **Tabled** ☐

COMMENTS:

NAME:
REGARDING:

SS#:

Operating Engineers Local No. 77 Trust Fund of Washington, D.C. Health and Welfare Program

EMPLOYER: Crane Rental Co

LOCAL: 77

STATUS: Retired, May 1, 2003

ISSUE: Hospital/Medical – Late Claim Filing

#M24/139-6710

FUND RULE:

"Claims Filing and Appeals Information and Procedures

Important Note: You must file all claims within 365 days from the date of an event, except Weekly Accident and Sickness claims, which must be file within 60 days from your disability determination date or before you return to work, whichever is later.

An 'event' is defined as the accrual of charges for medical care, the date of injury, disease or illness, the date of disability, date of accident or sickness or date of death or injury which causes dismemberment."

(Operating Engineers Trust Fund of Washington, D.C. Health and Welfare Program Local No. 77 SPD, Page 111)

SUMMARY:

Date(s) of Service: September 16, 2021
Received: April 4, 2024 (932 days)
Denied: April 11, 2024
Appeal Received: July 1, 2024

The **provider**, Upper Chesapeake Emergency Medicine Phys, is appealing for secondary payment of a claim for Emergency Room Visit that was denied for untimely filing. The provider states that the claim was submitted within the payer limits.

Billing notes for the dates of service from September 16, 2021 were received with the appeal. Medicare paid the claim on October 12, 2021. The notes received indicate that the claim was originally filed on October 12, 2021 and March 21, 2024 to the Fund office at the correct Sparks, MD address. The Fund office does not have any record of receiving this claim prior to April 4, 2024.

Note: Laurel Regional Hospital also submitted a claim for Emergency Services on the same date of service. That claim was received timely by the fund on July 25, 2022 and paid.

ACTION:

Approved

☐

Denied

☐

Tabled

☐

COMMENTS:

NAME:
REGARDING:

SS#:

Operating Engineers Local No. 77 Trust Fund of Washington, D.C. Health and Welfare Program

EMPLOYER: Extreme Steel Crane

LOCAL: 77

STATUS: Full Time

ISSUE: Hospital/Medical – Durable Medical Equipment

#M24/154-6333

FUND RULE:

"Exclusions and Limitations"

12. Durable Medical Equipment is covered up to certain limits. You must obtain prior authorization from Conifer Health Solutions in order to be covered, and it is only covered on an approved case by-case basis at the discretion of the Board of Trustees. Durable Medical Equipment includes (but is not limited to) handrails, ramps, telephones, air conditioners, humidifiers, hearing aids, eyeglasses, contact lenses, or contact lenses (except as may be covered under your vision benefit), walkers, commodes, or wheelchairs.

(Operating Engineers/Local 77 Health and Welfare SPD - October 2017 - Page 83

SUMMARY: Appeal Received: September 23, 2024

The **provider**, National Seating and Mobility, is appealing for approval of a 'Cubby Bed and Accessories' due to patient's diagnosis of "ASD requiring support, Global Development Delay, and G-Tube Feedings."

The treating physician, Dr. Louse Chamberlain, stated that patient has a relevant past medical history of 'short gut syndrome', which requires G-tube feedings. Dr. Chamberlain also noted that a Developmental Testing performed on the patient in 2023 resulted in a diagnosis of 'autism spectrum disorder,' which requires additional support and Global Developmental Delay. Patient lives with his parents in a home setting, which requires constant monitoring by the parents or by a home health nurse to ensure patient's safety and the maintenance of the G-tube site, as patient has a history of wandering and climbing. Dr. Chamberlain also pointed out that the Cubby Bed would provide a controlled environment that supports healthy behaviors, as a crib with rails is no longer an effective or safe option.

The UM nurse at Conifer Health Solutions has denied the request because "the requested device is more costly than alternative devices that would provide the same benefit.

ACTION:

Approved

☐

Denied

☐

Tabled

☐

COMMENTS:

OTHER FUND BUSINESS

**AMENDMENT 1
TO THE SOFTWARE AS A SERVICE AGREEMENT**

This Amendment 1, hereinafter referred to as (“Amendment”) entered into as of the 1st day of January 2024, by and between Green Light Cost Management, LLC, hereinafter referred to as (“Green Light”), and Operating Engineers Local 77 Health & Welfare Fund, hereinafter referred to as (“Client”), shall be effective as of the date a Party last signs this Amendment below (“Effective Date”). Green Light and Client may be referred individually as “Party” or together as “Parties”.

RECITALS:

WHEREAS, Green Light and Client previously entered into a Software as a Service Agreement (“SaaS Agreement”), with an effective date of January 1, 2023. The original SaaS Agreement between the Parties provided an initial contract term beginning on January 1, 2023, and ending on December 31, 2023 (“Initial Contract Term”);

WHEREAS, the SaaS Agreement between the Parties provided Client and Client’s Members access to Green Light’s hosted, internet-accessible, on-demand price comparison tool service for 500 items or services (as determined by the Departments) throughout the Initial Contract Term to comply with federal regulations, specifically adhering to the requirements set forth under the Transparency in Coverage rules and the No Surprises Act, for Plan year’s beginning on or after January 1, 2023;

WHEREAS, Green Light and Client desire to expand access to Green Light’s hosted, internet-accessible, on-demand price comparison tool service to include all items and services for Plan year’s beginning on or after January 1, 2024, to comply with federal regulations, specifically adhering to the requirements set forth under the Transparency in Coverage rules and the No Surprises Act. Additionally, the Parties desire to incorporate annual renewal term options into the original SaaS Agreement.

In consideration of the mutual agreements herein contained, the parties hereto agree as follows:

- 1. ADDITION OF RENEWAL OPTION TERMS AND SERVICE FEES.** Client shall have the option to extend the original SaaS Agreement for an additional three (3) annual contract terms, based on the service fees outlined below:

Renewal Term 1: September 1, 2024 - December 31, 2024
\$.75/Per Employee Per Month (PEPM)

Renewal Term 2: January 1, 2025 - December 31, 2025
\$.85/Per Employee Per Month (PEPM)

Renewal Term 3: January 1, 2026 - December 31, 2026
\$1.00/Per Employee Per Month (PEPM)

- 2. MINIMUM FEE REQUIREMENTS.** The pricing outlined in this Amendment is subject to the minimum fee requirements per network configuration, as is necessary to provide Client’s members with cost sharing estimates, as follows:

Minimum Monthly PEPM Fee (per network): \$1,000

INCORPORATION OF AMENDMENT INTO THE ORIGINAL SOFTWARE AS A SERVICE AGREEMENT. This Amendment shall be incorporated into the original Software as a Service Agreement between the parties and once executed by the parties, shall collectively contain the entire agreement and understandings by and between the parties hereto with respect to the matters referred to herein and representations, promises, agreements or understandings, whether written or oral, not herein contained shall be of no force or effect. This Amendment may be amended at any time by mutual agreement of the parties without additional consideration, provided that before any amendment shall become effective, it shall be reduced to writing and signed by each of the parties hereto.

NOW THEREFORE, the authorized representatives of Green Light and the Client do hereby affix their signatures to this Amendment 1, as of the dates identified below.

GREEN LIGHT COST MANAGEMENT, LLC
("Green Light")

BY: _____ DATE: _____

NAME: _____

TITLE: _____

OPERATING ENGINEERS LOCAL 77 HEALTH & WELFARE FUND
("Client")

BY: _____ DATE: _____

NAME: _____

TITLE: _____



Operating Engineers Local No. 77 Trust Fund of Washington, D.C. Health And Welfare Program

911 Ridgebrook Road
Sparks, Maryland 21152-9451
Telephone: (877) 850-0977
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SUMMARY ANNUAL REPORT

OPERATING ENGINEERS TRUST FUND OF WASHINGTON, D.C. AND VICINITY

This is a summary of the annual report for the Operating Engineers Trust Fund of Washington, D.C. and Vicinity, EIN 52-6038508, Plan No. 501, for the period January 1, 2023 through December 31, 2023. The annual report has been filed with the Employee Benefits Security Administration, U.S. Department of Labor as required under the Employee Retirement Income Security Act of 1974 (ERISA).

BASIC FINANCIAL STATEMENT

The value of Plan assets, after subtracting liabilities of the Plan, was \$39,558,419 as of December 31, 2023 compared to \$36,388,719 as of January 1, 2023. During the plan year the Plan experienced an increase in its net assets of \$3,169,700. This increase includes unrealized appreciation or depreciation in the value of Plan assets; that is, the difference between the value of the Plan's assets at the end of the year, and the value of the assets at the beginning of the year, or the cost of assets acquired during the year. During the plan year, the Plan had a total income of \$19,628,201. This income included employer contributions of \$16,669,193, employee contributions of \$811,480, realized gain of \$57,402 from the sale of assets, appreciation of assets of \$929,322, gains from investments of \$1,002,543, gains from investments of \$47,546 and other income of \$110,715. Plan expenses were \$16,458,501. These expenses included \$1,385,599 in administrative expenses and \$15,072,902 in benefits paid to participants and beneficiaries.

YOUR RIGHTS TO ADDITIONAL INFORMATION

You have the right to receive a copy of the full annual report, or any part thereof, on request. The items listed below are included in that report:

1. An accountant's report;
2. Assets held for investment;
3. Transactions in excess of 5 percent of the plan assets; and
4. Insurance information including sales commissions paid by insurance carriers.

To obtain a copy of the full annual report, or any part thereof, write or call the office of Associated Administrators, LLC, who is the Administrative Manager, 911 Ridgebrook Rd. Sparks, MD 21152, telephone (877) 850-0977. The charge to cover copying costs will be \$.25 per page for any part thereof.

You also have the right to receive from the Plan Administrator, on request and at no charge, a statement of the assets and liabilities of the Plan and accompanying notes, or a statement of income and expenses of the Plan and accompanying notes, or both. If you request a copy of the full annual report from the Plan Administrator, these two statements and accompanying notes will be included as part of that report. The charge to cover copying costs given above does not include a charge for the copying of these portions of the report because these portions are furnished without charge.

You also have the legally protected right to examine the annual report at the office of the Plan, Associated Administrators, LLC, 911 Ridgebrook Rd. Sparks, MD 21152 and at the U.S. Department of Labor in Washington, D.C., or to obtain a copy from the U.S. Department of Labor upon payment of copying costs. Requests to the Department of Labor should be addressed to: Public Disclosure Room, Suite N-1513, Frances Perkins Building, Employee Benefits Security Administration, U. S. Department of Labor, 200 Constitution Avenue NW, Washington, D.C. 20210.

BOARD OF TRUSTEES



Operating Engineers Local 77 Plan Performance Report

3rd Quarter 2024

Today's Agenda

1. Executive Summary

2. Population Overview

- a. Key Indicators
- b. Risk Stratification

3. Personal Health Management (PHM)

- a. Outreach
- b. Outcomes
- c. Cost Savings
- d. Case Studies
- e. Satisfaction Surveys

4. Utilization Management (UM)

5. Appendix

Executive Summary

Population Overview

- This report is based on paid claims data from January 1 through September 30, 2024 with historical data from January 1, 2022 through December 31, 2023. This report excludes Medicare Retiree plans.
- Total enrollment decreased slightly compared to the 2023 plan year. At the beginning of 2024, membership consisted of 1,231 employees and 3,021 total members; at the end of the third quarter these numbers were 1,205 and 2,965 respectively.
- Through September, total health care cost (medical & pharmacy) increased 15% compared to 2023. There were several high cost claimants during the second and third quarters of 2024.

Engagement

- 98% **engagement** for Q3 2024 is an increase from Q2 2024 and is consistently higher than Conifer's Book of Business average each quarter.
- PHNs were able to reach 70% of members identified for management, which is higher than Conifer's Book of Business average.

Results

- There was a **decrease in all modifiable Priority Risk and High Risk triggers** for engaged members quarter over quarter indicating improvements in health management and utilization of benefits.
- Medical Management savings ratio is 5.23:1 for Q3 2024 with the top categories including savings based on improved health related behaviors and averted readmission.

Satisfaction

- 100% **member satisfaction** in Q3 2024 with Personal Health Management program.
- Comments include: "My nurse is very knowledgeable of my medical condition and has been very helpful. I am very lucky to have her helping me. She is very kind and very professional. Thank you for assigning her to me."

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Monitoring Key Indicators

3-Year Review

- **Average enrollment** has remained steady throughout 2024 when compared to 2023.
- **Medical PMPM** has increased in the second and third quarters of 2024 due to multiple large claims. Overall, 2024 paid medical claims are up 17% compared to the 2023 plan year.
- **Rx PMPM** spiked in the second quarter but dropped in the third quarter; for the year, costs are 8% higher than 2023. Generic drugs represented 90% of total scripts and 14% of total Rx spend.
- **High-Cost Claimants** – there were 36 claimants utilizing \$50,000+ (Medical and Rx) thru the third quarter of 2024. These members represented 1.2% of membership and 53% of total paid claims.
 - There have been 7 claimants with paid claims over \$250,000 and 10 claimants between \$100,000 and \$249,999 thru September.
 - 6 of the 7 claimants over \$250,000 are currently active on the plan.

Metric	PY 2022	PY 2023	Thru Q3 2024
Number of Employees (avg)	1,202	1,223	1,225
Number of Members (avg)	3,009	3,038	3,009
Medical PMPM	\$294.17	\$261.44	\$306.87
RX PMPM	\$81.39	\$100.36	\$108.66
Total PMPM	\$375.56	\$361.80	\$415.53

General COC PMPM			
Hospital Related	\$171.25	\$149.80	\$193.15
Professional	\$116.56	\$104.99	\$106.49
Other	\$6.36	\$6.65	\$7.23
Rx	\$81.39	\$100.36	\$108.66
Total	\$375.56	\$361.80	\$415.53

Claimants over \$50,000*			
Number of Claimants	53	56	36
% of Population	1.8%	1.9%	1.2%
% of Total Paid	54.3%	54.8%	52.9%
Largest Claimant Cost	\$1,173,154	\$451,751	\$954,223

*Medical and Rx claims



Monitoring Key Indicators *(continued...)*

Members eligible at the end of each year and 9.30.2024

Predicted Trend	2022		2023		Q3 2024	
	#	%	#	%	#	%
Number of Members	3,008	n/a	2,977	n/a	2,965	n/a
Priority Risk	3	0.1%	9	0.3%	9	0.3%
High Risk	157	5.2%	166	5.6%	168	5.7%
Predicted to Spend \$5,000+ in next 12 Months	835	27.8%	657	22.1%	680	22.9%
~Prevalent Chronic Conditions*	337	40.4%	344	52.4%	332	48.8%
High Cost Cancers**	13	0.4%	15	0.5%	17	0.57%

- Priority Risk members continue to represent a small portion of the overall population and have remained steady thru the third quarter of 2024. The percentage of members considered High Risk increased in the third quarter of 2024 but is consistent with 2023.
- Of the participants predicted to spend over \$5,000 in the coming year, the main risk markers are screening & preventative care, cardiovascular risk, and metabolic disease. 49% of these members have chronic conditions.
- There were 17 high cost cancers on the plan at the end of the third quarter of 2024. Two new high cost cancer claimants were identified during the third quarter.

* Prevalent Chronic Conditions include Diabetes, Hypertension and Ischemic Heart Disease

** High Cost Cancer(s) include breast, soft tissue, lung, leukemia, colon, liver, lymphoma, brain/spinal cord, multiple myeloma, pancreatic and prostate

Identifying Cost Drivers by Category of Care (COC)

PMPM Year over Year Comparison

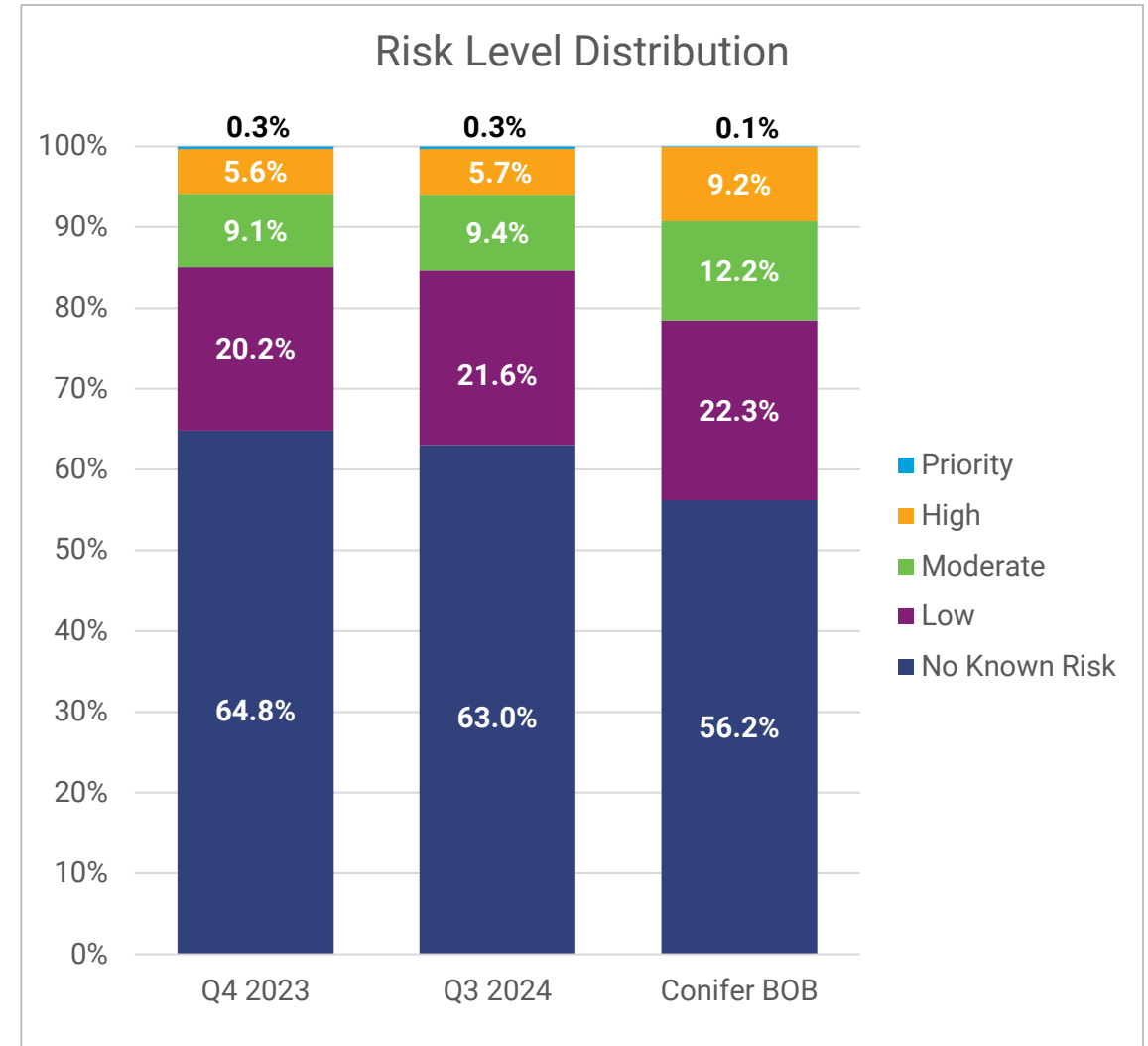
- **Overall, the key Medical cost drivers** increased 18% thru the third quarter when compared to 2023.
- **Inpatient Hospital** remains the highest cost driver and has increased 22% compared to 2023. Quarter over quarter, the second and third quarter claims were significantly higher than the first quarter of 2024.
- **Medicine** costs have increased 23% this year due to increases in costs related to infusions and injections.
- **Emergency Room** expenses have nearly doubled in 2024 due to increases in both average cost and demand. **Ambulance** expenses also increased significantly. Both of these categories are higher than similar health Funds within the Conifer book of business.

COC	2023	Thru Q3 2024	Δ
Inpatient Hospital	\$94.30	\$115.39	+22%
Facility	\$43.22	\$55.13	+28%
Medicine	\$30.25	\$37.06	+23%
Evaluation & Management	\$29.83	\$27.83	-7%
Emergency Room	\$12.28	\$22.63	+84%
Procedures	\$16.66	\$16.73	0
Outpatient Radiology	\$16.57	\$11.93	-28%
Outpatient Laboratory	\$5.62	\$5.62	0
Anesthesia	\$4.41	\$5.02	+14%
Ambulance	\$1.35	\$4.09	+203%
Other Outpatient Services	\$4.93	\$3.25	-34%
Outpatient Pathology	\$1.65	\$2.30	+39%
Undefined Services	\$0.08	\$0.06	-25%
Totals	\$261.15	\$307.04	+18%

Comparing Risk Stratification

Members eligible on 12.31.2023 and 9.30.2024

- **Overall**, 15% of your population is considered to be a moderate risk or higher. This is well below Conifer's Book of Business (BoB) of nearly 22%.
- **The Priority Risk** population has remained steady with 9 members at the end of 2023 and at the end of the third quarter. Examples of this category are readmission risks, newly identified cancer diagnoses, and high cost prescription drugs.
- Members considered **High Risk** has grown slightly through 2024, with 680 identified at the end of the third quarter. Examples of this category are members predicted to incur \$25,000, members with greater than \$25,000 in the past 6 months, members with a high number of provider or prescribing physician interaction, and major illnesses (e.g. cancer, renal failure, congestive heart failure).
- The percentage of **Moderate** and **Low Risk** members has increased slightly through September, indicating these members are using the plan benefits.
- The percentage of members with **No Known Risk** is significantly higher when compared to the Conifer BoB. "No Known Risk" members are participants that have some medical and pharmacy claims (but none that would stratify to a higher risk) or participants with no claims history. Any encouragement to members to see a Primary Care Physician would assist in lowering this number.



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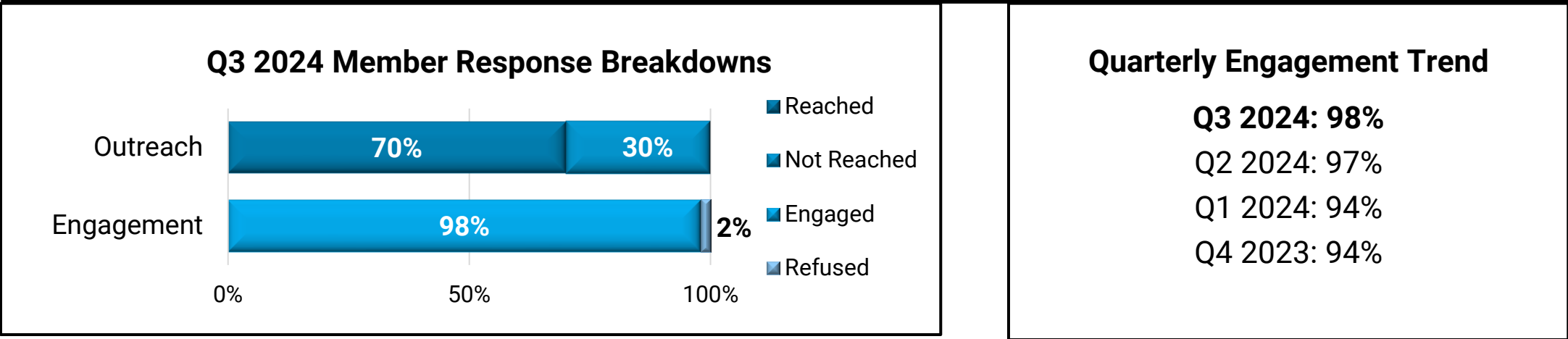
4. Utilization Management (UM)

5. Appendix

Targeting and Engaging Members

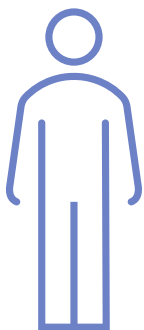
Q3 2024

	Total Population	Outreached	Not Reached	Reached	Refused	Engaged
Number of Unique Members	2,965	103	34	73	2	71
Number of Episodes	NA	118	35	83	2	81
Total Healthcare Costs last 12 months	\$13.9M	\$5.7M	\$2.5M	\$3.6M	\$6.6K	\$3.6M
Healthcare Costs/Member last 12 months	\$4.6M	\$55.3K	\$73.5K	\$49.3K	\$3.3K	\$50.7K
Average Risk Score	28.9	87.0	82.3	89.0	25.7	90.8



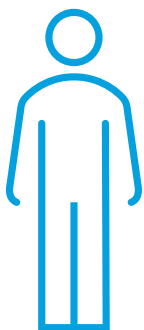
Comparing Outreach Members Who Do Not Engage

Q3 2024



**Not Reached:
34 members**

Utilization Risk Triggers	Primary Health Conditions	Average Health Care Costs	Outreach Results	Ongoing Focus
- Claims Utilization- GT \$25K in medical in prior 6 months - Predicted claims-\$25K and above - Unique Prescribing Provider Interactions-9+ in prior 12 months	- Hypertension - Hyperlipidemia - Diabetes - Obesity	\$73.5K per member in the last 12 months	6% unable to locate (i.e., bad number) 94% no response (i.e., no answer)	- Utilize providers, pharmacies, and online resources for contact information - Continue Introduction to PHM letters with PHN bio linked



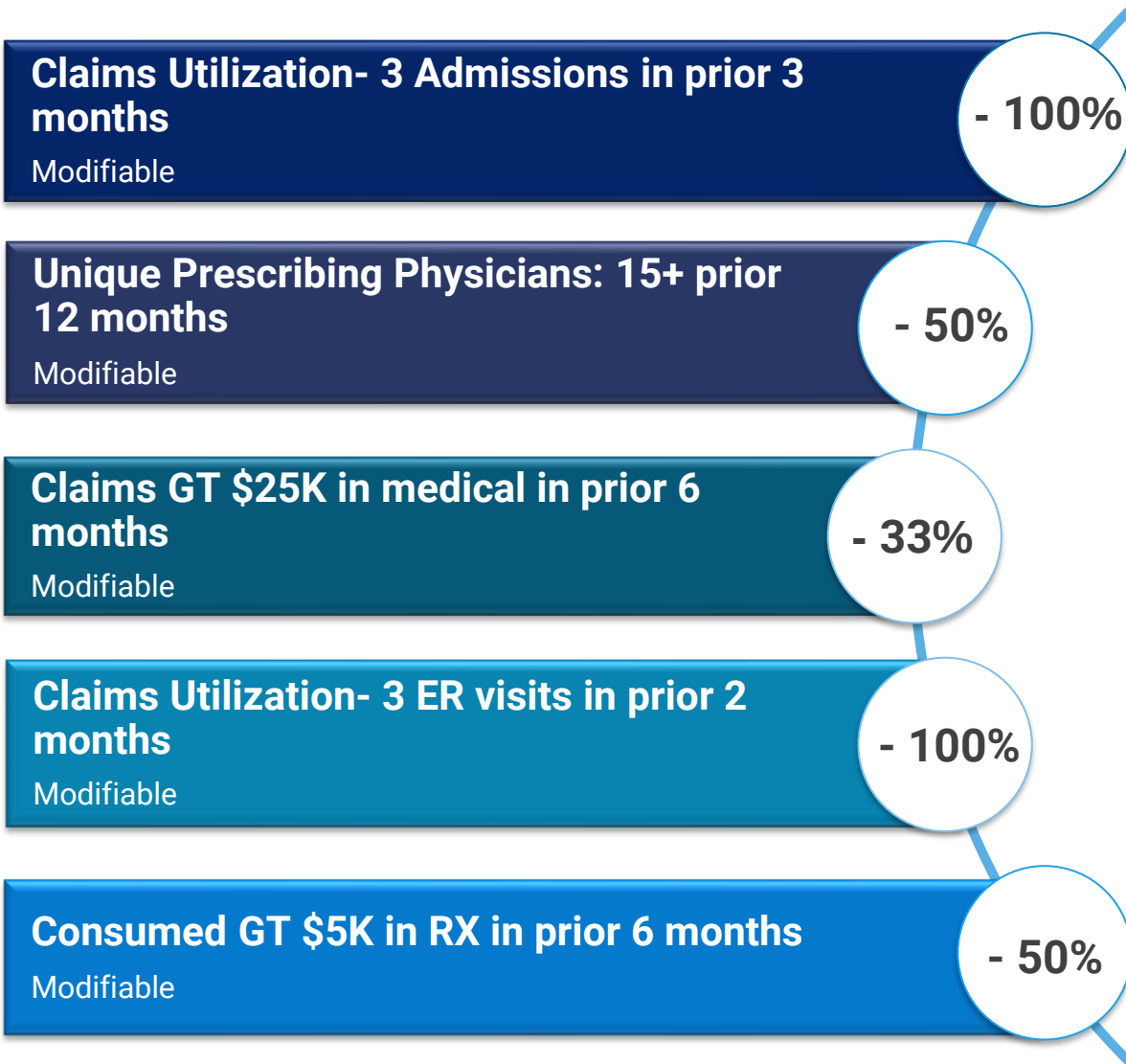
**Refused:
2 members**

Moderate Risk
Strat members*

Utilization Risk Triggers	Primary Health Conditions	Average Health Care Costs	Outreach Results	Ongoing Focus
- Predicted Costs between \$10,000-\$24,999 - Unique Prescribing Physicians-6-8 in the prior 12 months	- Hypertension - Hyperlipidemia	\$3.3K per member in the last 12 months	1 Member is Do Not Contact 1 Member hangs up phone before conversation.	Utilize risk strat to identify future needs as appropriate

Identifying the Most Prevalent High-Risk Triggers

Members Engaged Q3 2023 with High-Risk Triggers for Q3 2023 v. Q3 2024



Interventions Driving Change

- Education on benefits and IN providers
- Education of complex chronic and acute disease management
- Encourage provider and specialist adherence
- Coordination of prescription assistance programs
- Resource integration addressing social determinants of health

Observations and Next Steps

- Monitor adherence to providers and treatment plan
- Continue to assess risk triggers and provide needed education and resources to modify these triggers
- Gaps in care are identified and coordinated as needed for all members who are outreached

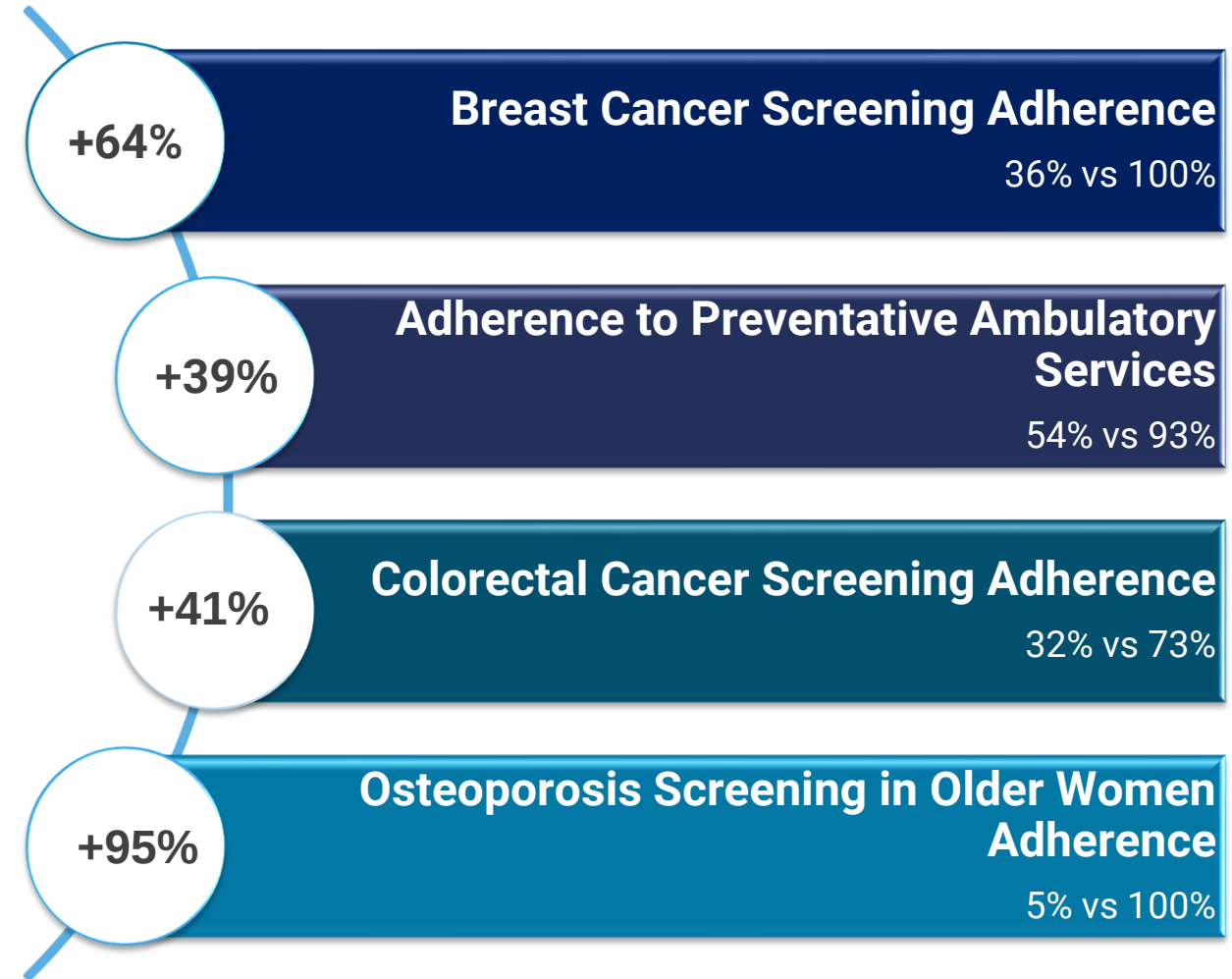
Monitoring Preventive Screening Adherence

Members Engaged Q3 2024 with Adherence as of Q3 2023 v. Q3 2024

Personal Health Nurse impacts compliance to preventive screenings while assisting members with chronic and acute health needs. There is still a potential to impact adherence with the overall population.

Recommendations:

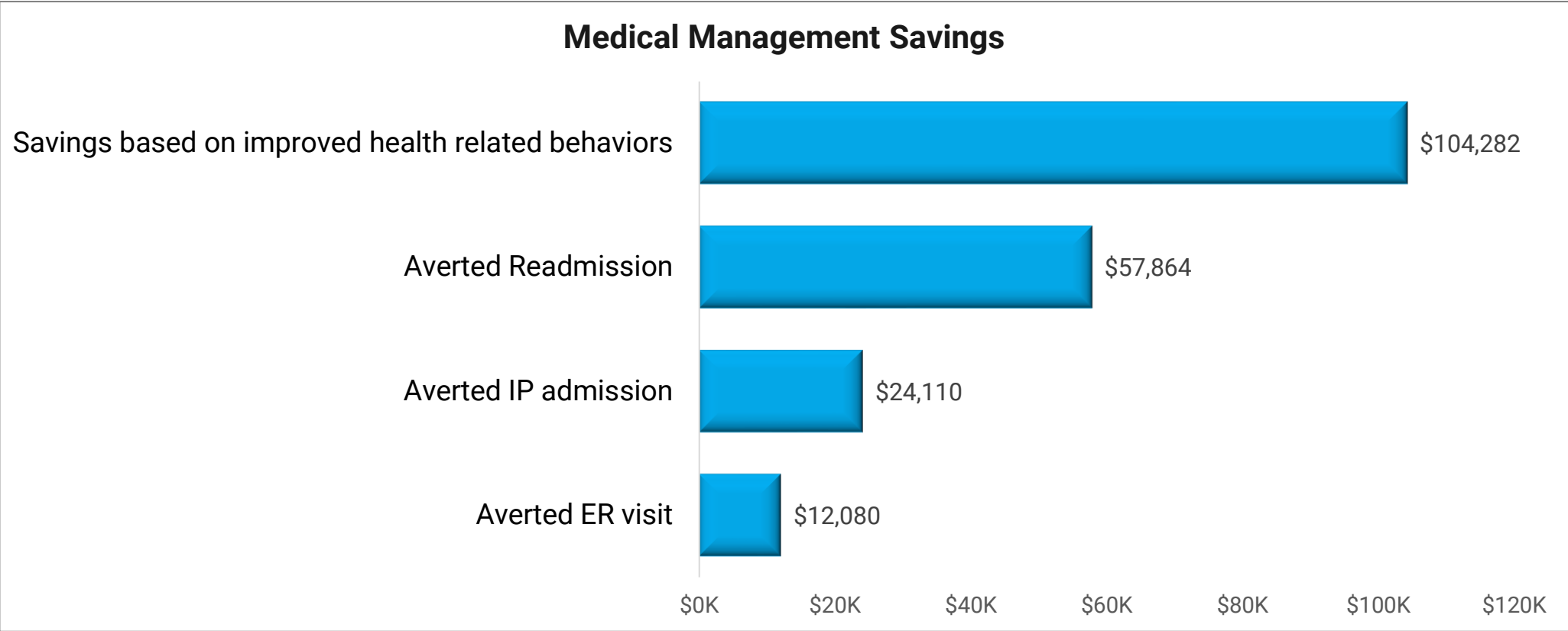
- Focus member education on the importance, benefits, and recommended frequency of preventive screenings
- Assess barriers to completion of recommended screenings and coordinate resources as needed
- Possibly send educational mailings to all members who are nonadherent to recommended screenings



Saving on Services while Helping Members

Q3 2024

Savings Ratio	5.23
Cost of medical management services	\$37,952
Savings from medical management services	\$198,336



Going the Distance Every Day

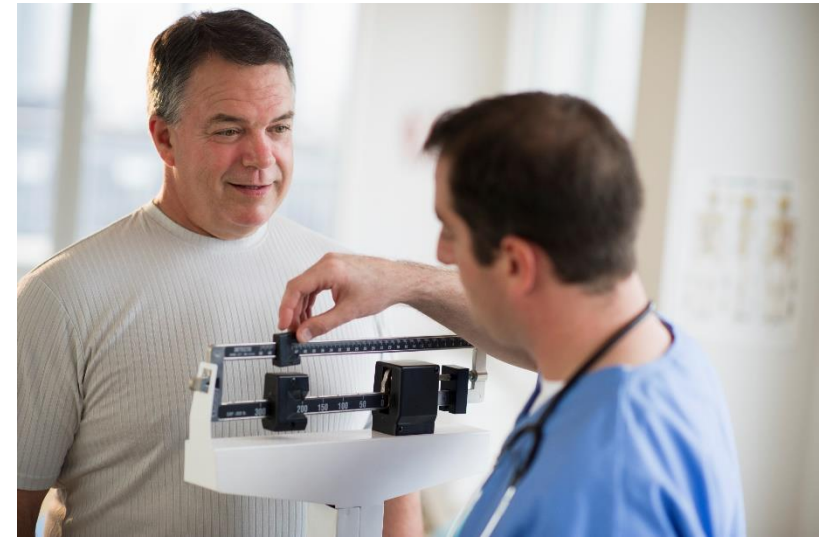
Preventing a readmission through collaboration.

Member Situation

- 46-year-old male
- Member had an inpatient stay for a GI bleed.
- The cause of the bleed was hemorrhoids however no post acute follow up plan to prevent readmission.
- Member was not established with a PCP or GI.

How a Conifer VBC Personal Health Nurse (PHN) Helped

- PHN coordinated with hospital provider and verified post discharge expectations.
- PHN found in network PCP for member and set up appointment for the member.
- PHN found in network GI specialist and set up appointment for the member.
- PHN communicated appointment dates and times to member.
- PHN educated on importance of follow up care and stressed adherence.



Member's Results

- Member was compliant with follow up care.
- Member is now established with a PCP.
- Member is now established with a GI specialist.
- Member has a treatment plan in place that will fix the cause of the GI bleed.

100% Member Satisfaction

Q3 2024



9% Survey Response Return Rate

“[My nurse] was GREAT!”

“[My nurse] is very knowledgeable of my medical condition and has been very helpful. I am very lucky to have her helping me. She is very kind and very professional. Thank you for assigning her to me.”

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Utilization Management

Q3 2024

Authorizations	Q1-Q2 2024	Q3 2024
Total UM Referrals	265	158
Inpatient Acute Care	63	37
Outpatient Surgery	41	22
Outpatient BH/SA: PHP/IOP/RTC	59	29
Home Health Care: Skilled Nursing, PT/OT, Infusions	11	10
Approvals	254	148
Partial Approvals	3	6
Denials	8	4

Savings Summary	Q1-Q2 2024	Q3 2024
Cost of UM services	\$50,213	\$24,097
Savings from UM services	\$99,375	\$13,627

Q3 2024 Adverse Determinations

- **Denials:**
 - DME (2)
 - Outpatient PT
 - Chiropractic care
- **Partial Approvals:**
 - Inpatient Admission
 - Can be provided at lower level (2)
 - Lack of information
 - Gastric Bypass Surgery
 - Continued Chiropractic care
 - Outpatient surgery

Working Together to Support Your Members



- Partnership to increase awareness and participation
- Chronic condition adherence
- Priority and high-risk member outreach
- Continue to engage members identified from Utilization file feed

- Possible Gaps in Care campaign targeting members without a PCP and/or members without claims utilization.
- Link Gaps in Care letter to Introduction Letters
- Conifer contributions to Newsletters

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Conifer Team Structure

Interaction

Regional VP, Client Delivery Population Health	Joe Sears	Operations <i>Weekly/Monthly/Quarterly</i>	Account Lead, escalation point; manage overall account performance
Manager, Population Health	Lindsey Luma	Daily	Direct oversight of clinical operations and PHN team; Only resourced through Client Delivery request
Director, Population Health	Allyson Pierce	Operations <i>Weekly/Monthly/Quarterly</i>	Operational oversight of PHN teams
Sr Director Clinical Operations	Michele Hamilton	Operations <i>Quarterly/As Needed</i>	Operational oversight of clinical operations
VP, Population Health	Justin Berry	Sr. Leadership <i>Quarterly/As Needed</i>	Executive Oversight for Client Delivery

Acronyms

Acronym	Expansion
A1C or HgbA1C	Hemoglobin A1c
ALOS	Average Length of Stay
BMI	Body Mass Index
BOB	Book of Business
CAD	Coronary Artery Disease
CHF	Congestive Heart Failure
COC	Category of Care
CMI	Case Mix Index
EBM	Evidence Based Medicine
ED	Emergency Department
EOS	Episode of Service
ER	Emergency Room
GT	Greater Than
ICD	International Classification of Diseases
IP	Inpatient
LDL	Low Density Lipids

Acronym	Expansion
LOS	Length of Stay
PEPM	Per Employee Per Month
PHM	Personal Health Management
PHN	Personal Health Nurse
UM	Utilization Management

Glossary of Terms

Term	Definition
Case Mix Index (CMI)	a means to measure the relative health of a population where each Episode of Care (EOC) for a patient is assigned an Episode Treatment Grouping (ETG) and each ETG is assigned a relative value or weight to calculate the rate by summing the relative values for the population and then dividing that number by the number of episodes encountered for the population
Eligible	the total unique members who are eligible for medical management
Engaged	the total unique reached members who agreed to engaged in medical management
Hemoglobin A1c (HgbA1C)	Diabetic Control Measurement
ICD-10	patient diagnosis or procedure codes (i.e., ICD-10-CM or ICD-10-PCS, respectively); the 10th revision of the International Statistical Classification of Diseases and Related Health Problems (ICD), a medical classification list by the World Health Organization (WHO)
Not Reached	the total unique members who a personal health nurse (PHN) attempted to reach by phone but were either unable to locate (UTL) because of a bad phone number or were unresponsive and did not pick up the phone
Outreached	the total unique members who a personal health nurse (PHN) attempted to reach by phone and were either reached or not reached
Pending	the total unique triggered members a personal health nurse (PHN) is still attempting to reach by phone
Reached	the total unique triggered members with whom a personal health nurse (PHN) has spoken on the phone and who either agreed to engaged in medical management or refused to participate at the given time

Glossary of Terms

Term	Definition
Refused	the total unique reached members who refused to participate in medical management at the given time
Targeted	the total unique members identified as “Priority” or “High” risk in Conifer’s proprietary “Risk Stratification” application



Cost Savings Definitions

Cost Savings Description	Definition
Averted ER Visit	Averted ER Visit category is appropriate when the Medical Management Nurse directly works with the member/member caregiver to address acute health issue(s) to avoid need for emergent care.
Averted IP admission	Medical Management Nurse directly works with member/member caregiver and healthcare team to address acute health issue(s) that would likely result in an inpatient admission without intervention.
Averted Readmission	Averted Readmission category is appropriate when the Medical Management Nurse directly works with member/member caregiver and healthcare team following an acute inpatient admission. MMN is actively involved in the Transitions of Care process. MMN works with healthcare team to ensure instructions are in place, and member safely transitions to home.
Savings based on improved health related behaviors	After engagement with PHN, member shows improvement in clinical and behavioral outcomes.



CONIFER

HEALTH SOLUTIONS®

Thank You