



Help at Home®

Care to Live Your Life.

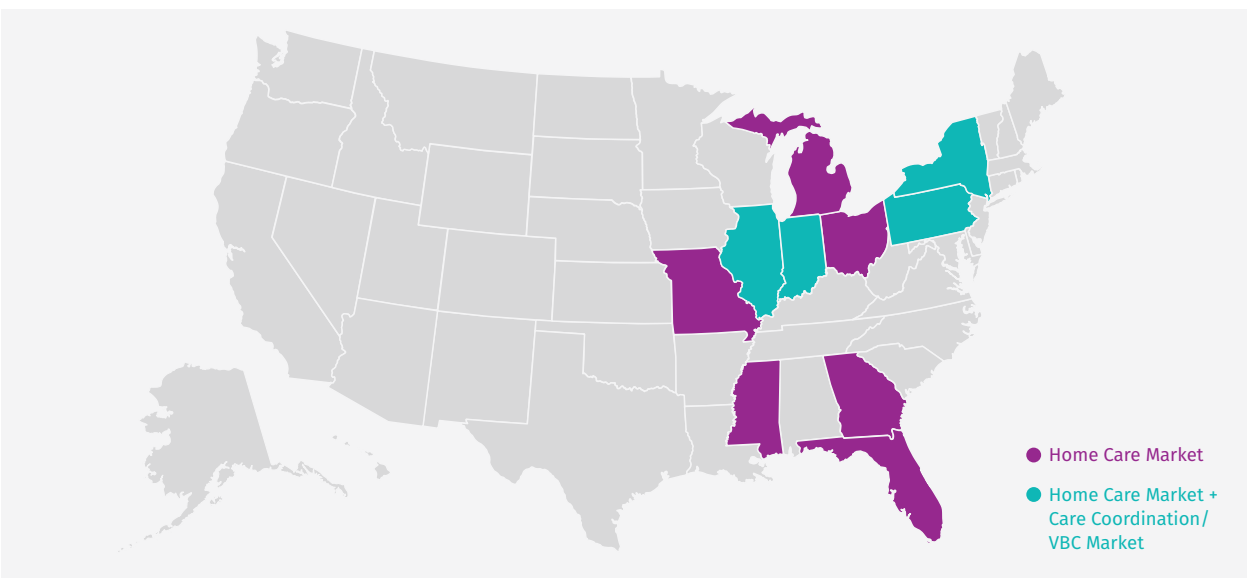
Culture of Caring and Compliance Report 2023

Help at Home is the largest national provider of high-quality, relationship-based, Home and Community-based Services (HCBS) for Medicaid-eligible seniors and people living with disabilities or complex long-term care needs. At its core, Help at Home is focused on caring. Caring for caregivers and providing supports that enable them to provide the very best care for clients, helping them to live as independently as possible in their own homes, the preferred care setting.

Help at Home has a deep-rooted history of caring. Since 1975, the company has provided in-home care for the most vulnerable populations. Today, with nearly 50 years of experience, it operates in 11 states across nearly 200 offices in urban, suburban and rural settings. The company is embedded in its communities with a deep, local presence that enables the delivery of in-home personal care at the local level that's supported by scale at the national level. This combination of local and national influence, coupled with a focus on driving innovation and a unique value-based home care model, creates high-quality, low-cost outcome care solutions that drive client satisfaction.

Our care workforce, which includes 50,000+ direct care workers and care support staff, provides over 72 million hours of in-home care to more than 70,000 clients per year. Over 97% of our clients are in historically underserved populations and over 80% are dually eligible for both Medicare and Medicaid benefits.

We're proud to have been named by Newsweek as **One of America's Best Companies for Parents and Families** and by Forbes as a **Best Employer** four times in the past few years.





Leading National Provider of High-quality, Relationship-based Home Care Services



#1

Home Care Provider



#1

Market Position in Core Markets



70k

Clients



50k+

Highly Professional Caregivers



72M

Home Care Hours Served Per Year



21 Hours

Average Hours per Week per Client Served



4 Years

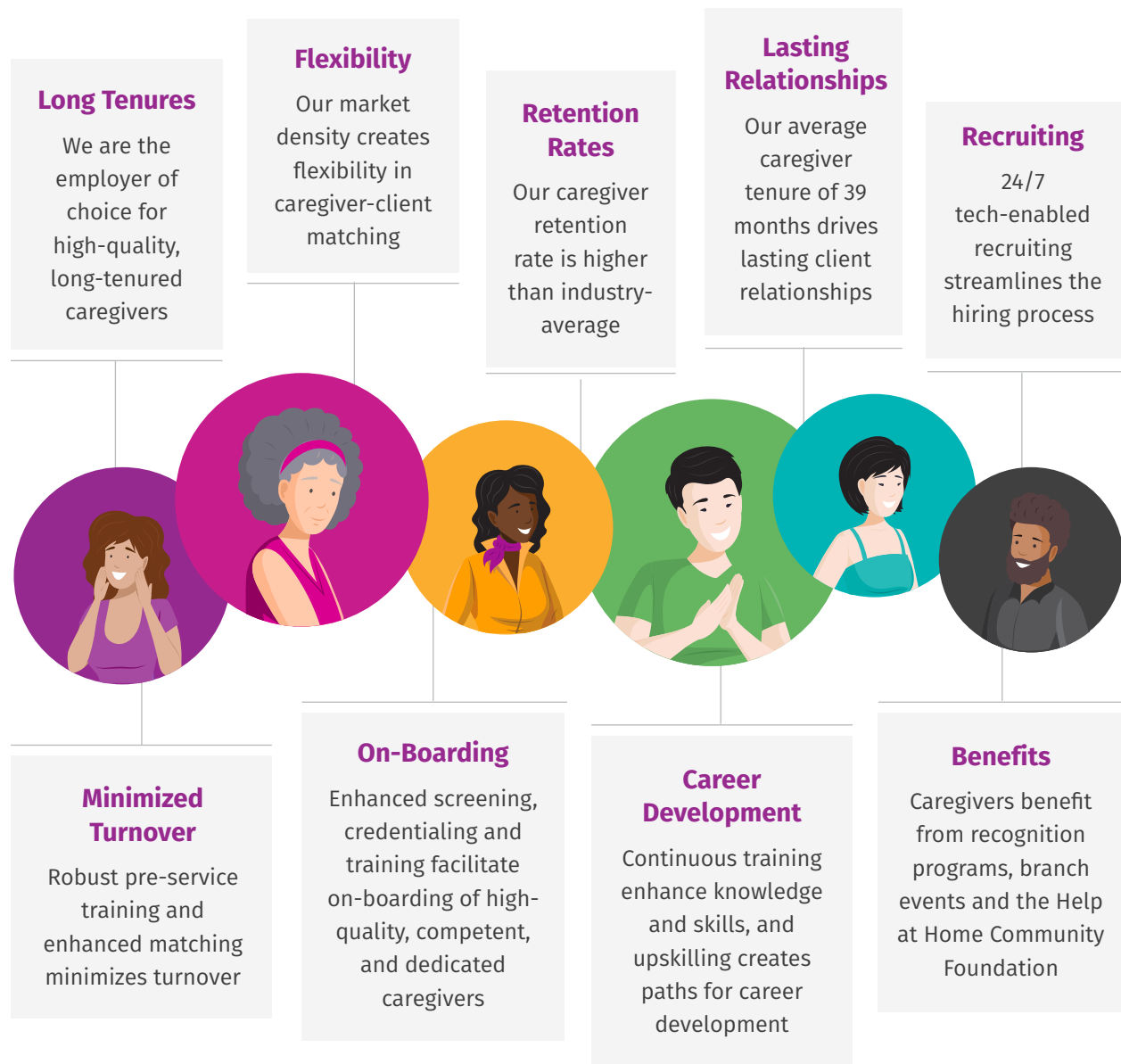
Average Caregiver/Client Relationship

A Culture of “Caring For Our Caregiver”

At nearly 50,000 and counting, caregivers are at the heart of everything we do. Caregivers are in the homes making a difference every day for our clients, which is why we continually focus on creating an environment that recognizes their work, provides them with career growth opportunities and builds a sense of belonging.

To that end, Help at Home has been investing in the areas of technology, process and enhancing our long-standing culture of caring, striving to become an employer and payer partner of choice positively impacting the home care industry.

As a result, our caregiver base has grown by almost 50% from 2020 to 2023, with a retention rate nearly double the industry average. The stability of our caregiver workforce and the ability to recruit and hire at scale has proved a driving force behind Help at Home’s growth.





Caregiver Screening

Help at Home is committed to hiring compassionate individuals to care for our clients. Candidates first undergo a rigorous screening process, with not all applicants advancing past this stage. Upon a successful screening, candidates then go through an interview process to assess their abilities and attitudes and ensure they are right for the role. In addition, all interviewed candidates must complete pre-boarding paperwork, criminal background checks, drug testing and/or tuberculosis testing where required.

Once hired, our employees undertake extensive pre-service training to ensure caregiver competency and empathy, with continuing education providing enhanced knowledge and skills.

Professionalizing the Caregiver Role

With our caregiver-first mentality, we provide comprehensive learning and training capabilities that are scalable and consistent across the company, yet are personalized to meet the unique learning style and mobile-first expectations for individuals depending on the role. We prioritize quarterly and annual training to offer upskilling opportunities and career pathways to help create meaningful careers for employees, not just jobs.

The benefits of helping to professionalize the caregiver role with the support of technology can be better operational efficiency, alleviating administrative burdens and thus eliminating stress which equals improved job satisfaction and more time to care for clients.



“Simplicity and ease of use are key for a successful learning platform.

Our learning management platform tracks both online and in-person training, giving employees more freedom to choose the training format that’s best for their situation. It’s about meeting our employees where they are, and we understand that a large portion of our user base is mobile-first. We’ve found that employees complete modules more quickly because it is more convenient.”

Learning and Develop Leadership



A Perfect Match

We work diligently to match client needs with the right caregiver skills and demographics to forge strong caregiver-client relationships. Paired with our low caregiver turnover rate, our client relationships last, on average, almost four years with caregivers spending 20 hours per week with each client. The focus on relationship-building – along with caregivers who are trained to listen and observe – magnifies the caregiver’s ability to be the eyes and ears for the client, making it more likely clients can avoid adverse incidents in their home.

Client Safety, Training and Satisfaction Satisfaction are the Foundation of our Quality Care-Centered Model

In the United States, home accidents cause more than 21 million medical visits and 18,000 deaths each year. Help at Home's unwavering commitment to ensure quality care sets the stage for positive client outcomes and lives well-lived.

To that end, we have established quality and safety protocols with the goal to protect the health and well-being of both our clients and caregivers. The path to the best care for our clients begins with our caregivers. We have cultivated a culture of caring for the caregiver to emphasize their role as valuable, meaningful members of the care team.

We have home care training modules focused on fall prevention, infection control and health and wellbeing - for both caregiver and client. Our caregivers are encouraged to understand how identifying home hazards and prevention methods can lessen the risks of injury, disability or even death. Trainings occur upon hire, during in-services and periodically throughout the year.





Training and Education

Training is delivered through webcasts, state Learning Management Systems, online courses and instructor-led sessions. All training is documented and tracked by a supervisor or member of management.



Client Safety

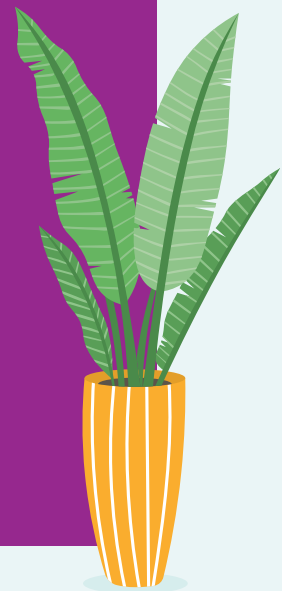
The safety and well-being of our clients is paramount, which is why Help at Home provides ongoing training for caregivers to help them to better adapt to their clients' physical, mental and behavioral conditions.

Falls are the leading cause of fatal injuries with one in four people aged 65 and older falling each year. To keep clients as safe as possible, our caregivers are encouraged to assess the home environment for fall risks, be cautious of hazards and assess the need for appropriate durable medical equipment in clients' homes. Caregivers also educate clients on how to prevent falls through wearing sensible footwear, gripping handrails, keeping areas free of clutter and leaving plenty of time to get from place to place.



Continuous Improvement

Help at Home leverages an incident management tracking system to monitor incidences within the home. The goal is to proactively monitor these incidents and identify trends to inform ongoing education and training needs and improvements. While the home care industry is not currently regulated for incident tracking, we do it because it is the right thing to do.



Connecting Home Care to Health Care; Advancing Value-Based Care in the Personal Care Industry

Help at Home's mission is to enable individuals to have Great Days and Meaningful Moments with independence and dignity at home. Because our caregivers are in clients' homes 20+ hours each week, they have unique insight into client health. They also have organic opportunities coupled with the company's innovative program that offers real-time tools to capture and analyze relevant data to improve satisfaction and quality while lowering cost of care by identifying and preventing incidents that avert client hospitalization or institutionalization.

Help at Home caregivers use an observation capture tool to report clients' physical, behavioral and social indicators. The data is collected, analyzed against assessment data points and made available to appropriate healthcare and payer partners. From there, adjustments and even intervention can be made.

The program drives outcomes, closes care gaps and averts medical crises, improving client quality of life while creating significant savings for our managed-care partners. As an example, through our care coordination program, we captured more than 750,000 observations in the first year with 44,000 alert-triggered actions that resulted in 1,300 proactive activations of the broader health care ecosystem, positively impacting Social Determinants of Health (SDoH) and health equity issues. Those included things like scheduling pulmonology appointments when breathing and mobility declined; activating community mental health resources with increased agitation or mood changes; and connecting to food program resources when food is lacking in the client home.

These interventions resulted in 90% of SDoH needs being addressed within 90 days and total cost of care reduction of 22% across the program.

Case Study

Our Innovative Program Is Designed for Impact

Challenge:

An at-risk provider with a population of 1,300 clients, 30% of whom were disconnected from PCP Care Plan

Our Program Engagement:

65%
Engagement
of Population

180k
Collected and
Shared Data Points

Our Program Impact:

- **22% Improvement** over PMPM benchmark within first 6 months
- **Above benchmark performance** in hypertension quality metrics
- **Increased** Annual Wellness Visit completion
- **Reconnection** to care plan cadence

Derrick's Story

Derrick is a 36-year-old chronic care individual. Through the care coordination program analysis, food scarcity in his home triggered an alert for a need for intervention.

Through the program, Derrick's caregiver triggered clinical intervention that included a case worker who connected him to food pantry resources as well as arranged transportation assistance. The alert also triggered a community health worker who accompanied him to help him access the resources he needed for future assistance. The clinical team now works with Derrick on education regarding his chronic disease, treatment plan and lifestyle management in which nutrition play a vital role to his health and well-being.

In the first four months of the program, Derrick's depression score (PHQ9) lowered by six points, his anxiety (GAD 7) lowered by seven points and his quality of life improved. The team helps Derrick to remain compliant through interventions and connected his primary care physician health visits as part of his care plan. Derrick's health has improved, as well as his access to transportation, enabling him to be involved social activities which he greatly enjoys.

Scan to learn how
our caregivers are
making a difference





We take a systematic approach to safety across our organization, including:

- ✓ Regularly assessing operations to focus on continuous improvement
- ✓ Reviewing safety practices across our organization
- ✓ Extensive pre-service training to ensure caregiver competency and empathy
- ✓ Continuing education for caregivers to enhance knowledge and skills
- ✓ Regular in-home supervisory visits to assess caregiver effectiveness and client satisfaction
- ✓ Supervisor and caregiver face-to-face reviews
- ✓ Technology enhancements (partially deployed) remotely monitoring visit initiation, completion and activity tracking
- ✓ Complaint tracking and resolution

We Take Pride in Our Code of Ethical Standards

We operate in an industry that is highly regulated at the federal, state and local levels. We strive to follow both the letter of the law, as well as the spirit of the law, within each of our states. Our commitment to compliance, integrity and values builds trust with our partners, ensures that we provide the highest quality of service to our clients and protects our brand.

Help at Home operates within all applicable federal and state laws and complies with rules and regulations through a well-defined and published Code of Ethical Standards. The Ethics, Compliance and HIPAA Privacy program is overseen by the Chief Ethics and Compliance Officer and a compliance committee. With the program:

- ✓ Our Code of Ethical Standards is routinely reviewed, updated and distributed annually companywide, with regular compliance auditing and monitoring to ensure adherence to appropriate ethical and legal standards in carrying out daily activities.
- ✓ Our training and education program addresses the various which address the various components of the ethics and compliance program and effectively communicate Help at Home's standards and procedures.
- ✓ Well-publicized use is made of an anonymous third-party Help at Home Ethics Help Line and website for employees to communicate with the Chief Ethics and Compliance Officer, ask questions or report potential violations. This promotes and fosters a culture of empowerment and encourages employees to "do the right thing."
- ✓ We have embedded Compliance, Integrity and Values in everything we do.

All employees and representatives of Help at Home are required to conduct themselves in a way that supports the highest standards of ethics and integrity and to follow the standards set forth in our Code of Ethical Standards and our policies and procedures without exception.



Help at Home is Committed to Community

As a company, we're committed to enriching the communities we serve. We do this through various company initiatives including the Help at Home Community Foundation and our employee Give Back time program. The Help at Home Community Foundation was launched in 2023 with the mission to support and enrich the lives of caregivers, clients, and communities.

Through the Help at Home Community Foundation, Help at Home has invested more than \$1M in its Support Fund to provide financial relief for associates and their dependents experiencing personal hardships or the effects of a qualified disaster. Donations made to the fund help to provide confidential, tax-free grants to associates when they face the unexpected. Also included in the Help at Home Community Foundation are areas of giving specifically for community outreach as well as continuing education for caregivers.



www.helpathome.com

