

**SCHEDULE H
(Form 990)**

Department of the Treasury
Internal Revenue Service

Hospitals

Complete if the organization answered "Yes" on Form 990, Part IV, question 20a.
Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public
Inspection

Name of the organization	SAINT JOSEPH REGIONAL MEDICAL CENTER- SOUTH BEND CAMPUS, INC.	Employer identification number	35-0868157
---------------------------------	--	---------------------------------------	-------------------

Part I Financial Assistance and Certain Other Community Benefits at Cost

	Yes	No
1a Did the organization have a financial assistance policy (FAP) during the tax year? If "No," skip to question 6a	<input checked="" type="checkbox"/>	
1b If "Yes," was it a written policy?	<input checked="" type="checkbox"/>	
2 If the organization had multiple hospital facilities, indicate which of the following best describes application of the FAP to its various hospital facilities during the tax year: <input checked="" type="checkbox"/> Applied uniformly to all hospital facilities <input type="checkbox"/> Applied uniformly to most hospital facilities <input type="checkbox"/> Generally tailored to individual hospital facilities		
3 Answer the following based on the financial assistance eligibility criteria that applied to the largest number of the organization's patients during the tax year.		
a Did the organization use federal poverty guidelines (FPG) as a factor in determining eligibility for providing <i>free</i> care? If "Yes," indicate which of the following was the FPG family income limit for eligibility for free care: <input type="checkbox"/> 100% <input type="checkbox"/> 150% <input checked="" type="checkbox"/> 200% <input type="checkbox"/> Other _____ %	<input checked="" type="checkbox"/>	
b Did the organization use FPG as a factor in determining eligibility for providing <i>discounted</i> care? If "Yes," indicate which of the following was the family income limit for eligibility for discounted care: <input type="checkbox"/> 200% <input type="checkbox"/> 250% <input type="checkbox"/> 300% <input type="checkbox"/> 350% <input checked="" type="checkbox"/> 400% <input type="checkbox"/> Other _____ %	<input checked="" type="checkbox"/>	
c If the organization used factors other than FPG in determining eligibility, describe in Part VI the criteria used for determining eligibility for free or discounted care. Include in the description whether the organization used an asset test or other threshold, regardless of income, as a factor in determining eligibility for free or discounted care.		
4 Did the organization's FAP that applied to the largest number of its patients during the tax year provide for free or discounted care to the "medically indigent"?	<input checked="" type="checkbox"/>	
5a Did the organization budget amounts for free or discounted care provided under its FAP during the tax year?	<input checked="" type="checkbox"/>	
b If "Yes," did the organization's financial assistance expenses exceed the budgeted amount?	<input checked="" type="checkbox"/>	
c If "Yes" to line 5b, as a result of budget considerations, was the organization unable to provide free or discounted care to a patient who was eligible for free or discounted care?		<input checked="" type="checkbox"/>
6a Did the organization prepare a community benefit report during the tax year?	<input checked="" type="checkbox"/>	
b If "Yes," did the organization make it available to the public?	<input checked="" type="checkbox"/>	

Complete the following table using the worksheets provided in the Schedule H instructions. Do not submit these worksheets with the Schedule H.

7 Financial Assistance and Certain Other Community Benefits at Cost

	(a) Number of activities or programs (optional)	(b) Persons served (optional)	(c) Total community benefit expense	(d) Direct offsetting revenue	(e) Net community benefit expense	(f) Percent of total expense
Financial Assistance and Means-Tested Government Programs						
a Financial assistance at cost (from Worksheet 1)			7195486.		7195486.	1.80%
b Medicaid (from Worksheet 3, column a)			90553571.	66442248.	24111323.	6.03%
c Costs of other means-tested government programs (from Worksheet 3, column b)						
d Total. Financial assistance and means-tested government programs			97749057.	66442248.	31306809.	7.83%
Other Benefits						
e Community health improvement services and community benefit operations (from Worksheet 4)	12	2,223	2685177.	852,039.	1833138.	.46%
f Health professions education (from Worksheet 5)	5	5	10135757.	4410125.	5725632.	1.43%
g Subsidized health services (from Worksheet 6)	6		5222788.	2994115.	2228673.	.56%
h Research (from Worksheet 7)						
i Cash and in-kind contributions for community benefit (from Worksheet 8)	5	1,950	26,915.	1,825.	25,090.	.01%
j Total. Other benefits	28	4,178	18070637.	8258104.	9812533.	2.46%
k Total. Add lines 7d and 7j	28	4,178	115819694	74700352.	41119342.	10.29%

Part V Facility Information (continued)

Section B. Facility Policies and Practices

(complete a separate Section B for each of the hospital facilities or facility reporting groups listed in Part V, Section A)

Name of hospital facility or letter of facility reporting group: SJRMCM - SOUTH BEND CAMPUS

Line number of hospital facility, or line numbers of hospital facilities in a facility reporting group (from Part V, Section A): 1

	Yes	No
Community Health Needs Assessment (CHNA)		
1 Was the hospital facility first licensed, registered, or similarly recognized by a state as a hospital facility in the current tax year or the immediately preceding tax year?		X
2 Was the hospital facility acquired or placed into service as a tax-exempt hospital in the current tax year or the immediately preceding tax year? If "Yes," provide details of the acquisition in Section C		X
3 During the tax year or either of the 2 immediately preceding tax years, did the hospital facility conduct a CHNA? If "No," skip to line 12	X	
If "Yes," indicate what the CHNA report describes (check all that apply):		
a <input checked="" type="checkbox"/> A definition of the community served by the hospital facility		
b <input checked="" type="checkbox"/> Demographics of the community		
c <input checked="" type="checkbox"/> Existing health care facilities and resources within the community that are available to respond to the health needs of the community		
d <input checked="" type="checkbox"/> How data was obtained		
e <input checked="" type="checkbox"/> The significant health needs of the community		
f <input checked="" type="checkbox"/> Primary and chronic disease needs and other health issues of uninsured persons, low-income persons, and minority groups		
g <input checked="" type="checkbox"/> The process for identifying and prioritizing community health needs and services to meet the community health needs		
h <input checked="" type="checkbox"/> The process for consulting with persons representing the community's interests		
i <input checked="" type="checkbox"/> The impact of any actions taken to address the significant health needs identified in the hospital facility's prior CHNA		
j <input type="checkbox"/> Other (describe in Section C)		
4 Indicate the tax year the hospital facility last conducted a CHNA: 20 <u>23</u>		
5 In conducting its most recent CHNA, did the hospital facility take into account input from persons who represent the broad interests of the community served by the hospital facility, including those with special knowledge of or expertise in public health? If "Yes," describe in Section C how the hospital facility took into account input from persons who represent the community, and identify the persons the hospital facility consulted	X	
6a Was the hospital facility's CHNA conducted with one or more other hospital facilities? If "Yes," list the other hospital facilities in Section C	X	
b Was the hospital facility's CHNA conducted with one or more organizations other than hospital facilities? If "Yes," list the other organizations in Section C	X	
7 Did the hospital facility make its CHNA report widely available to the public?	X	
If "Yes," indicate how the CHNA report was made widely available (check all that apply):		
a <input checked="" type="checkbox"/> Hospital facility's website (list url): <u>SEE SCHEDULE H, PART V, SECTION C</u>		
b <input type="checkbox"/> Other website (list url):		
c <input checked="" type="checkbox"/> Made a paper copy available for public inspection without charge at the hospital facility		
d <input checked="" type="checkbox"/> Other (describe in Section C)		
8 Did the hospital facility adopt an implementation strategy to meet the significant community health needs identified through its most recently conducted CHNA? If "No," skip to line 11	X	
9 Indicate the tax year the hospital facility last adopted an implementation strategy: 20 <u>23</u>		
10 Is the hospital facility's most recently adopted implementation strategy posted on a website?	X	
a If "Yes," list url: <u>SEE SCHEDULE H, PART V, SECTION C</u>		
b If "No," is the hospital facility's most recently adopted implementation strategy attached to this return?		
11 Describe in Section C how the hospital facility is addressing the significant needs identified in its most recently conducted CHNA and any such needs that are not being addressed together with the reasons why such needs are not being addressed.		
12a Did the organization incur an excise tax under section 4959 for the hospital facility's failure to conduct a CHNA as required by section 501(r)(3)?		X
b If "Yes" to line 12a, did the organization file Form 4720 to report the section 4959 excise tax?		
c If "Yes" to line 12b, what is the total amount of section 4959 excise tax the organization reported on Form 4720 for all of its hospital facilities? \$		

Part V Facility Information (continued)

Financial Assistance Policy (FAP)

Name of hospital facility or letter of facility reporting group: SJRMCM-SOUTH BEND CAMPUS

	Yes	No
Did the hospital facility have in place during the tax year a written FAP that:		
13 Explained eligibility criteria for financial assistance, and whether such assistance included free or discounted care?	X	
If "Yes," indicate the eligibility criteria explained in the FAP:		
a <input checked="" type="checkbox"/> FPG, with FPG family income limit for eligibility for free care of and FPG family income limit <u>200</u> % for eligibility for discounted care of <u>400</u> %		
b <input type="checkbox"/> Income level other than FPG (describe in Section C)		
c <input type="checkbox"/> Asset level		
d <input checked="" type="checkbox"/> Medical indigency		
e <input checked="" type="checkbox"/> Insurance status		
f <input checked="" type="checkbox"/> Underinsurance status		
g <input checked="" type="checkbox"/> Residency		
h <input checked="" type="checkbox"/> Other (describe in Section C)		
14 Explained the basis for calculating amounts charged to patients?	X	
15 Explained the method for applying for financial assistance?	X	
If "Yes," indicate how the hospital facility's FAP or FAP application form (including accompanying instructions) explained the method for applying for financial assistance (check all that apply):		
a <input checked="" type="checkbox"/> Described the information the hospital facility may require an individual to provide as part of their application		
b <input checked="" type="checkbox"/> Described the supporting documentation the hospital facility may require an individual to submit as part of their application		
c <input checked="" type="checkbox"/> Provided the contact information of hospital facility staff who can provide an individual with information about the FAP and FAP application process		
d <input type="checkbox"/> Provided the contact information of nonprofit organizations or government agencies that may be sources of assistance with FAP applications		
e <input type="checkbox"/> Other (describe in Section C)		
16 Was widely publicized within the community served by the hospital facility?	X	
If "Yes," indicate how the hospital facility publicized the policy (check all that apply):		
a <input checked="" type="checkbox"/> The FAP was widely available on a website (list url): <u>SEE PART V, PAGE 8</u>		
b <input checked="" type="checkbox"/> The FAP application form was widely available on a website (list url): <u>SEE PART V, PAGE 8</u>		
c <input checked="" type="checkbox"/> A plain language summary of the FAP was widely available on a website (list url): <u>SEE PART V, PAGE 8</u>		
d <input checked="" type="checkbox"/> The FAP was available upon request and without charge (in public locations in the hospital facility and by mail)		
e <input checked="" type="checkbox"/> The FAP application form was available upon request and without charge (in public locations in the hospital facility and by mail)		
f <input checked="" type="checkbox"/> A plain language summary of the FAP was available upon request and without charge (in public locations in the hospital facility and by mail)		
g <input checked="" type="checkbox"/> Individuals were notified about the FAP by being offered a paper copy of the plain language summary of the FAP, by receiving a conspicuous written notice about the FAP on their billing statements, and via conspicuous public displays or other measures reasonably calculated to attract patients' attention		
h <input checked="" type="checkbox"/> Notified members of the community who are most likely to require financial assistance about availability of the FAP		
i <input checked="" type="checkbox"/> The FAP, FAP application form, and plain language summary of the FAP were translated into the primary language(s) spoken by limited-English proficiency (LEP) populations		
j <input type="checkbox"/> Other (describe in Section C)		

Schedule H (Form 990) 2024

Part V Facility Information (continued)

Billing and Collections

Name of hospital facility or letter of facility reporting group: SJRMC-SOUTH BEND CAMPUS

	Yes	No
17 Did the hospital facility have in place during the tax year a separate billing and collections policy, or a written FAP that explained all of the actions the hospital facility or other authorized party may take upon nonpayment?	X	
18 Check all of the following actions against an individual that were permitted under the hospital facility's policies during the tax year before making reasonable efforts to determine the individual's eligibility under the facility's FAP:		
a <input type="checkbox"/> Reporting to credit agency(ies)		
b <input type="checkbox"/> Selling an individual's debt to another party		
c <input type="checkbox"/> Deferring, denying, or requiring a payment before providing medically necessary care due to nonpayment of a previous bill for care covered under the hospital facility's FAP		
d <input type="checkbox"/> Actions that require a legal or judicial process		
e <input type="checkbox"/> Other similar actions (describe in Section C)		
f <input checked="" type="checkbox"/> None of these actions or other similar actions were permitted		
19 Did the hospital facility or other authorized party perform any of the following actions during the tax year before making reasonable efforts to determine the individual's eligibility under the facility's FAP?		X
If "Yes," check all actions in which the hospital facility or a third party engaged:		
a <input type="checkbox"/> Reporting to credit agency(ies)		
b <input type="checkbox"/> Selling an individual's debt to another party		
c <input type="checkbox"/> Deferring, denying, or requiring a payment before providing medically necessary care due to nonpayment of a previous bill for care covered under the hospital facility's FAP		
d <input type="checkbox"/> Actions that require a legal or judicial process		
e <input type="checkbox"/> Other similar actions (describe in Section C)		
20 Indicate which efforts the hospital facility or other authorized party made before initiating any of the actions listed (whether or not checked) on line 19 (check all that apply):		
a <input checked="" type="checkbox"/> Provided a written notice about upcoming extraordinary collection actions (ECAs) and a plain language summary of the FAP at least 30 days before initiating those ECAs (if not, describe in Section C)		
b <input checked="" type="checkbox"/> Made a reasonable effort to orally notify individuals about the FAP and FAP application process (if not, describe in Section C)		
c <input checked="" type="checkbox"/> Processed incomplete and complete FAP applications (if not, describe in Section C)		
d <input checked="" type="checkbox"/> Made presumptive eligibility determinations (if not, describe in Section C)		
e <input type="checkbox"/> Other (describe in Section C)		
f <input type="checkbox"/> None of these efforts were made		

Policy Relating to Emergency Medical Care

21 Did the hospital facility have in place during the tax year a written policy relating to emergency medical care that required the hospital facility to provide, without discrimination, care for emergency medical conditions to individuals regardless of their eligibility under the hospital facility's FAP?	X	
If "No," indicate why:		
a <input type="checkbox"/> The hospital facility did not provide care for any emergency medical conditions		
b <input type="checkbox"/> The hospital facility's policy was not in writing		
c <input type="checkbox"/> The hospital facility limited who was eligible to receive care for emergency medical conditions (describe in Section C)		
d <input type="checkbox"/> Other (describe in Section C)		

Part V Facility Information *(continued)*

Charges to Individuals Eligible for Assistance Under the FAP (FAP-Eligible Individuals)

Name of hospital facility or letter of facility reporting group: SJRMC-SOUTH BEND CAMPUS

	Yes	No
22 Indicate how the hospital facility determined, during the tax year, the maximum amounts that can be charged to FAP-eligible individuals for emergency or other medically necessary care:		
a <input checked="" type="checkbox"/> The hospital facility used a look-back method based on claims allowed by Medicare fee-for-service during a prior 12-month period		
b <input type="checkbox"/> The hospital facility used a look-back method based on claims allowed by Medicare fee-for-service and all private health insurers that pay claims to the hospital facility during a prior 12-month period		
c <input type="checkbox"/> The hospital facility used a look-back method based on claims allowed by Medicaid, either alone or in combination with Medicare fee-for-service and all private health insurers that pay claims to the hospital facility during a prior 12-month period		
d <input type="checkbox"/> The hospital facility used a prospective Medicare or Medicaid method		
23 During the tax year, did the hospital facility charge any FAP-eligible individual to whom the hospital facility provided emergency or other medically necessary services more than the amounts generally billed to individuals who had insurance covering such care?	23	X
If "Yes," explain in Section C.		
24 During the tax year, did the hospital facility charge any FAP-eligible individual an amount equal to the gross charge for any service provided to that individual?	24	X
If "Yes," explain in Section C.		

Schedule H (Form 990) 2024

Part V Facility Information (continued)

Section C. Supplemental Information for Part V, Section B. Provide descriptions required for Part V, Section B, lines 2, 3j, 5, 6a, 6b, 7d, 11, 13b, 13h, 15e, 16j, 18e, 19e, 20a, 20b, 20c, 20d, 20e, 21c, 21d, 23, and 24. If applicable, provide separate descriptions for each hospital facility in a facility reporting group, designated by facility reporting group letter and hospital facility line number from Part V, Section A ("A, 1," "A, 4," "B, 2," "B, 3," etc.) and name of hospital facility.

SJRCM-SOUTH BEND CAMPUS:
PART V, SECTION B, LINE 3J: N/A

PART V, SECTION B, LINE 3E:
SAINT JOSEPH REGIONAL MEDICAL CENTER - SOUTH BEND (SJRCM-SOUTH BEND) INCLUDED IN ITS COMMUNITY HEALTH NEEDS ASSESSMENT (CHNA) WRITTEN REPORT A PRIORITIZED LIST AND DESCRIPTION OF THE COMMUNITY'S SIGNIFICANT HEALTH NEEDS, WHICH WERE IDENTIFIED THROUGH THE MOST RECENTLY CONDUCTED CHNA. THE FOLLOWING COMMUNITY HEALTH NEEDS WERE DEEMED SIGNIFICANT AND WERE PRIORITIZED THROUGH A COMMUNITY-INVOLVED SELECTION PROCESS:

1. ACCESS TO MENTAL HEALTH CARE
2. ACCESS/AFFORDABILITY OF MEDICATION
3. SAFE AND AFFORDABLE HOUSING
4. IMPROVING ACCESS TO WELLNESS RESOURCES (FRESH FOODS, NUTRITION CLASSES, GYMS, ETC.)
5. IMPROVING ACCESS TO HEALTH CARE

SJRCM-SOUTH BEND CAMPUS:
PART V, SECTION B, LINE 5: DURING THE MONTHS OF JULY THROUGH NOVEMBER OF 2023, SURVEYS WERE USED TO GATHER INPUT FOR THE CHNA FROM PEOPLE REPRESENTING THE COMMUNITY SERVED BY THE HOSPITAL. SURVEYS WERE DISTRIBUTED IN BOTH ONLINE AND PRINTED FORMATS, IN BOTH ENGLISH AND SPANISH, WHICH ENSURED A WIDE DISTRIBUTION OF THE SURVEY. THIS SURVEY WAS DELIVERED VIA INVITATION BASED ON A STRATIFIED RANDOM SAMPLING OF THE COMMUNITY-AT-LARGE USING A THIRD-PARTY DATABASE.

TO ENSURE THE SURVEY SAMPLE REFLECTED A WIDE VARIETY OF SOCIOECONOMIC LEVELS, AGE AND RACE/ETHNICITY, IT WAS OFFERED TO COMMUNITY GROUPS VIA ORGANIZATIONS SUCH AS THE MARSHALL COUNTY COUNCIL ON AGING (MCCOA), REAL SERVICES, THE CENTER FOR THE HOMELESS, UNITED WAY OF ST. JOSEPH AND MARSHALL COUNTIES, AND AT LOCAL FOOD PANTRIES. THESE GROUPS REPRESENT THE MEDICALLY UNDERSERVED, MINORITIES, LOW-INCOME INDIVIDUALS, ENTREPRENEUR GROUPS, HEALTH CARE WORKERS, ETC. THE SURVEY PARTICIPANTS WERE ASKED A SERIES OF QUESTIONS ABOUT TOPICS CRITICAL TO THE HEALTH OF THE COMMUNITY. A TOTAL OF 2,643 SURVEYS WERE COLLECTED, 1,544 OF WHICH WERE FOR ST. JOSEPH COUNTY.

THE COMMUNITY HEALTH ADVISORY COMMITTEE MET ON MARCH 15, 2024, TO DISCUSS HOW TO IMPROVE THE TOP FIVE IDENTIFIED NEEDS. MEMBERS OF THE COMMUNITY HEALTH ADVISORY COMMITTEE INCLUDED: YOUNG PROFESSIONALS, HEALTH EDUCATORS, PARKS DEPARTMENT EMPLOYEES, SENIORS, CLINICS, BUSINESS LEADERS, VETERANS, AND LATINO COMMUNITY LEADERS. THE FOCUS GROUPS WERE ASKED TO DISCUSS ISSUES THAT HAD BEEN IDENTIFIED AS IMPORTANT BY SAINT JOSEPH HEALTH SYSTEM.

SAINT JOSEPH HEALTH SYSTEM (SJHS) COMPLETED A COMPREHENSIVE CHNA THAT WAS ADOPTED BY THE BOARD OF DIRECTORS ON JUNE 14, 2024. SJHS PERFORMED THE CHNA IN COMPLIANCE WITH FEDERAL REQUIREMENTS FOR NOT-FOR-PROFIT HOSPITALS SET FORTH IN THE AFFORDABLE CARE ACT AND BY THE INTERNAL REVENUE SERVICE. THE ASSESSMENT TOOK INTO ACCOUNT INPUT FROM REPRESENTATIVES OF THE COMMUNITY, COMMUNITY MEMBERS, AND VARIOUS COMMUNITY ORGANIZATIONS.

Part V Facility Information (continued)

Section C. Supplemental Information for Part V, Section B. Provide descriptions required for Part V, Section B, lines 2, 3j, 5, 6a, 6b, 7d, 11, 13b, 13h, 15e, 16j, 18e, 19e, 20a, 20b, 20c, 20d, 20e, 21c, 21d, 23, and 24. If applicable, provide separate descriptions for each hospital facility in a facility reporting group, designated by facility reporting group letter and hospital facility line number from Part V, Section A ("A, 1," "A, 4," "B, 2," "B, 3," etc.) and name of hospital facility.

SJRCM-SOUTH BEND CAMPUS:

PART V, SECTION B, LINE 6A: THE CHNA WAS CONDUCTED IN COLLABORATION WITH SAINT JOSEPH REGIONAL MEDICAL CENTER - PLYMOUTH CAMPUS.

SJRCM-SOUTH BEND CAMPUS:

PART V, SECTION B, LINE 6B: THE CHNA WAS CONDUCTED WITH THE FOLLOWING COLLABORATING ORGANIZATIONS: BOYS AND GIRLS CLUBS OF ST. JOSEPH COUNTY, BOYS AND GIRLS CLUBS OF MARSHALL COUNTY, BOWEN CENTER, CENTER FOR THE HOMELESS, FOOD BANK OF NORTHERN INDIANA, MISHAWAKA PARKS DEPARTMENT, MARSHALL COUNTY BOARD OF HEALTH, MARSHALL COUNTY COUNCIL ON AGING, MARSHALL COUNTY ECONOMIC DEVELOPMENT CORPORATION, MARSHALL COUNTY HEALTH DEPARTMENT, OAKLAWN PSYCHIATRIC CENTER, PLYMOUTH SCHOOL BOARD, POOR HANDMAIDS, PURDUE EXTENSION, ST. JOSEPH COUNTY HEALTH DEPARTMENT, REAL SERVICES, UNITED RELIGIOUS COMMUNITY OF ST. JOSEPH COUNTY, UNITY GARDENS, UNITED WAY OF MARSHALL COUNTY, UNIVERSITY OF NOTRE DAME, AND YMCA OF GREATER MICHIANA.

SJRCM-SOUTH BEND CAMPUS:

PART V, SECTION B, LINE 7D: ALL COMMUNITY HEALTH ADVISORY BOARD MEMBERS RECEIVED A PRINTED OR E-MAILED COPY OF THE COMPLETE CHNA.

SJRCM-SOUTH BEND CAMPUS:

PART V, SECTION B, LINE 11: ON OCTOBER 28, 2024, THE BOARD APPROVED THE 2025-2027 THREE-YEAR IMPLEMENTATION STRATEGY BASED ON THE JUNE 2024 CHNA. THE PLAN WAS DEVELOPED TO ADDRESS TWO OF THE FIVE SIGNIFICANT NEEDS IDENTIFIED IN THE CHNA: IMPROVING ACCESS TO WELLNESS RESOURCES AND IMPROVING ACCESS TO HEALTH CARE. ACTIVITIES CONDUCTED TO ADDRESS THESE NEEDS IN FY25 INCLUDED:

TO IMPROVE ACCESS TO HEALTH CARE, SJRCM-SOUTH BEND INCREASED OUTREACH INITIATIVES TO THOSE MOST AT RISK FOR CHRONIC DISEASE WITH THE HIRING OF A NURSE AND COMMUNITY HEALTH WORKER (CHW) IN FY25. HEALTH SCREENINGS AND SERVICES WERE ADMINISTERED IN OUR SOUTH BEND AND PLYMOUTH COMMUNITIES VIA OUR MOBILE MEDICAL UNIT, WHICH PROVIDES MAMMOGRAPHY ON LOCATION AND SCREENED 1,037 WOMEN, AND OUR CLINICAL STAFF COMPLETED 106 FREE FLU SHOTS AND 53 BLOOD PRESSURE READINGS FOR VULNERABLE MEMBERS OF OUR COMMUNITY. ALL PATIENTS SERVED COMPLETED SOCIAL ASSESSMENTS AND WERE PROVIDED ASSISTANCE WITH IDENTIFIED NEEDS. ADDITIONALLY, ANOTHER CHW WAS HIRED TO FOCUS ON THE SOCIAL NEEDS OF POSTPARTUM MOMS AND BABIES. IN FY25, NEARLY 2,300 ENCOUNTERS WERE COMPLETED FOR PREGNANT AND POST-PARTUM MOMS AND BABIES IN AN EFFORT TO REDUCE HEALTH DISPARITIES AND INEQUITIES EXPERIENCED BY THIS PATIENT POPULATION IN OUR SERVICE AREA. SJRCM-SOUTH BEND ALSO BEGAN TO OFFER HEALTH SERVICES TO THOSE EXPERIENCING HOMELESSNESS IN THE WINTER OF 2025 IN COLLABORATION WITH LOCAL PARTNERS. IN ADDITION TO THE HEALTH SERVICES PROVIDED, COMMUNITY MEMBERS RECEIVED HYGIENE KITS, COLD WEATHER ITEMS, AND SOCIAL NEEDS ASSISTANCE. SJRCM-SOUTH BEND CONTINUED TO ASSIST INDIVIDUALS SEEKING SERVICES AT OUR FACILITIES WITH MEDICAID ENROLLMENT, OVER 2,260 INDIVIDUALS IN FY25, AND ACCESS TO HIGH-QUALITY CARE FOR ALL WAS ACHIEVED THROUGH TRINITY HEALTH'S HEALTH

Part V Facility Information (continued)

Section C. Supplemental Information for Part V, Section B. Provide descriptions required for Part V, Section B, lines 2, 3j, 5, 6a, 6b, 7d, 11, 13b, 13h, 15e, 16j, 18e, 19e, 20a, 20b, 20c, 20d, 20e, 21c, 21d, 23, and 24. If applicable, provide separate descriptions for each hospital facility in a facility reporting group, designated by facility reporting group letter and hospital facility line number from Part V, Section A ("A, 1," "A, 4," "B, 2," "B, 3," etc.) and name of hospital facility.

COMES FIRST INITIATIVE, WHICH ADVOCATED FOR PATIENT EXPERIENCE AND CARE OVER PROFITS WITH PAYOR SYSTEMS AT LARGE.

TO IMPROVE ACCESS TO WELLNESS RESOURCES (FRESH FOODS, NUTRITION CLASSES, GYMS, ETC.), SJRMC-SOUTH BEND'S DIABETES PREVENTION PROGRAM (DPP) CLASSES CONTINUED FOR COUNTY MEMBERS, VETERANS, VULNERABLE POPULATIONS, AND SAINT JOSEPH HEALTH SYSTEM EMPLOYEES, IN-PERSON AND VIRTUALLY, IN BOTH ENGLISH AND SPANISH. DPP GREW BY FOUR COHORTS DURING FY25, ENGAGING 53 INDIVIDUALS IN REDUCING THEIR RISK FOR CHRONIC DISEASE. FOOD INSECURITY WAS COMBATED IN OUR COMMUNITIES BY BRINGING FRESH PRODUCE, WHOLE GRAINS, AND REDUCED SODIUM TO OUR SERVICE AREA THROUGH MOBILE FOOD PANTRIES, SERVING OVER 1,700 INDIVIDUALS FROM 500 HOUSEHOLDS, IN COLLABORATION WITH THE FOOD BANK OF NORTHERN INDIANA. SJRMC-SOUTH BEND OFFERED ATTENDEES SALT-FREE SEASONING TO ENCOURAGE HEALTHY COOKING AND DECREASE SODIUM INTAKE FOR THOSE MOST AT RISK FOR CHRONIC DISEASE PREVALENCE AND CAN OPENERS TO THOSE WHO DID NOT OWN ONE AT HOME. SJRMC-SOUTH BEND CONTINUED TO REDUCE FOOD INSECURITY AMONG THE HOMELESS COMMUNITY BY MAKING AN IN-KIND DONATION OF FOOD TO THOSE SEEKING MEALS AT HOPE MINISTRIES. IN FY25, 1,800 MEALS WERE GIVEN TO THOSE IN NEED AS A RESULT OF THIS PARTNERSHIP. SENIOR FIT, A CARDIO AND BALANCE EXERCISE CLASS, WAS HELD TWICE PER WEEK IN ST. JOSEPH COUNTY, CREATING OVER 100 OPPORTUNITIES FOR SENIORS TO BE ACTIVE. SJRMC-SOUTH BEND ALSO HOSTED A YOUTH ENRICHMENT DAY FOR OVER 40 AT-RISK YOUTH, WHO LEARNED ABOUT THE DANGERS OF TOBACCO, THE BENEFITS OF EATING WELL, THE IMPORTANCE OF POSITIVITY, AND HOW TO HAVE FUN WHILE MOVING THEIR BODY.

ADDITIONALLY, BI-LINGUAL QR CODES AND WINDOW CLINGS LINKING THE COMMUNITY TO VARIOUS RESOURCES AND FREE PROGRAMS WERE DISTRIBUTED TO COMMUNITY ORGANIZATIONS AND PARTNERS AS WELL AS AT COMMUNITY EVENTS IN ST. JOSEPH COUNTY. TO FURTHER ADDRESS HEALTH DISPARITIES, THESE RESOURCE MATERIALS WERE DISTRIBUTED WITH PARTICULAR ATTENTION TO AREAS IN THE COUNTY WITH HIGH VISIBILITY FOR VULNERABLE POPULATIONS. IN FY25, 2,044 SEARCHES WERE MADE IN OUR SERVICE AREA; 32% OF SEARCHES WERE FOR HOUSING AND 30% WERE FOR FOOD. SJRMC-SOUTH BEND ACKNOWLEDGES CERTAIN DYNAMICS EXIST IN THIS SPACE THAT CAN BE CAUSAL IN AFFECTING OVERALL WELL-BEING IN OUR COMMUNITIES. ONE CAUSAL FACTOR IDENTIFIED IN FY25 WAS HOUSEHOLD INCOME. TO ADDRESS THIS, SJRMC-SOUTH BEND HELD AND/OR PARTICIPATED IN 58 JOB FAIRS OFFERING A LIVING WAGE FOR JOB SEEKERS WITH A MINIMUM OF A HIGH-SCHOOL DIPLOMA OR GED.

SAINT JOSEPH HEALTH SYSTEM ACKNOWLEDGES THE WIDE RANGE OF PRIORITY HEALTH AND SOCIAL ISSUES THAT EMERGED FROM THE CHNA PROCESS AND DETERMINED THAT IT COULD EFFECTIVELY FOCUS ON ONLY THOSE HEALTH NEEDS WHICH ARE THE MOST PRESSING, UNDER ADDRESSED AND WITHIN ITS ABILITY TO INFLUENCE. SAINT JOSEPH HEALTH SYSTEM DID NOT ADDRESS THE FOLLOWING NEEDS IN FY25:

SJRMC-SOUTH BEND DID NOT DIRECTLY ADDRESS ACCESS TO MENTAL HEALTH CARE BECAUSE SIMILAR CAUSES EXIST BETWEEN THIS NEED AND THE IMPROVING ACCESS TO HEALTH CARE NEED (I.E. LACK OF INSURANCE OR INADEQUATE INSURANCE, LOW INCOME, DECREASED RESOURCES AND PROVIDERS, ETC.). THE HOSPITAL DID, HOWEVER, CONTINUE TO SERVE ON THE BOARDS OF LEAD MENTAL HEALTH AGENCIES IN OUR SERVICE AREA, COLLABORATE IN HARM REDUCTION AND COMPREHENSIVE INTERVENTION INITIATIVES, AND EXPLORE HOW STRATEGIC FOCUS ON THE NEEDS OF IMPROVED ACCESS TO WELLNESS RESOURCES AND HEALTH CARE CAN CONTRIBUTE TO

Part V Facility Information (continued)

Section C. Supplemental Information for Part V, Section B. Provide descriptions required for Part V, Section B, lines 2, 3j, 5, 6a, 6b, 7d, 11, 13b, 13h, 15e, 16j, 18e, 19e, 20a, 20b, 20c, 20d, 20e, 21c, 21d, 23, and 24. If applicable, provide separate descriptions for each hospital facility in a facility reporting group, designated by facility reporting group letter and hospital facility line number from Part V, Section A ("A, 1," "A, 4," "B, 2," "B, 3," etc.) and name of hospital facility.

IMPROVED ACCESS FOR MENTAL HEALTH CARE AS WELL.

SJRMCSOUTH BEND DID NOT DIRECTLY ADDRESS ACCESS/AFFORDABILITY OF MEDICATION DUE TO COMPETING PRIORITIES. THE NEED FOR AFFORDABLE MEDICATION IS BEING ADDRESSED AT SISTER MAURA BRANNICK HEALTH CENTER, A LOW-COST HEALTH CLINIC IN ST. JOSEPH COUNTY OPERATED BY THE HOSPITAL. THIS CENTER PROVIDES PRIMARY HEALTH CARE SERVICES AND MEDICATIONS TO INDIVIDUALS WHO ARE UNINSURED OR UNDERINSURED AND WHO FALL BELOW 200% OF THE FEDERALLY DESIGNATED POVERTY LEVEL. THIS HEALTH CENTER ADDRESSES PREVENTION OF DISEASE AND ILLNESS AND FOCUSES ON THE OVERALL HEALTH AND WELL-BEING OF EACH PATIENT. IN ADDITION, THE CLINIC OFFERS SPECIALTY CARE TO OUR PATIENTS, PROVIDED BY VOLUNTEER PHYSICIANS.

SJRMCSOUTH BEND DID NOT SPECIFICALLY ADDRESS SAFE AND AFFORDABLE HOUSING DUE TO VARIOUS POLICY AND SYSTEM FACTORS THAT EXIST. IN FY25, OUR COMMUNITY HEALTH WORKER (CHW) PROGRAM CONTINUED TO WORK COLLABORATIVELY WITH OTHERS IN OUR SERVICE AREA TO ELEVATE THE VOICES OF THE UNHOUSED AND INADEQUATELY HOUSED AND TO REDUCE BARRIERS TO HEALTH AND WELL-BEING FOR ALL. ADDITIONALLY, SJRMCSOUTH BEND CONTINUED TO ADVOCATE FOR TOBACCO-FREE HOUSING AND ENGAGE IN WORK SURROUNDING LEAD PREVENTION, TESTING, AND REMEDIATION.

SJRMCSOUTH BEND CAMPUS:

PART V, SECTION B, LINE 13H: THE HOSPITAL RECOGNIZES THAT NOT ALL PATIENTS ARE ABLE TO PROVIDE COMPLETE FINANCIAL INFORMATION. THEREFORE, APPROVAL FOR FINANCIAL SUPPORT MAY BE DETERMINED BASED ON LIMITED AVAILABLE INFORMATION. WHEN SUCH APPROVAL IS GRANTED, IT IS CLASSIFIED AS "PRESUMPTIVE SUPPORT." EXAMPLES OF PRESUMPTIVE CASES INCLUDE: DECEASED PATIENTS WITH NO KNOWN ESTATE, HOMELESS PATIENTS, UNEMPLOYED PATIENTS, NON-COVERED MEDICALLY NECESSARY SERVICES PROVIDED TO PATIENTS QUALIFYING FOR PUBLIC ASSISTANCE PROGRAMS, PATIENT BANKRUPTCIES, AND MEMBERS OF RELIGIOUS ORGANIZATIONS WHO HAVE TAKEN A VOW OF POVERTY AND HAVE NO RESOURCES INDIVIDUALLY OR THROUGH THE RELIGIOUS ORDER.

FOR THE PURPOSE OF HELPING FINANCIALLY DISADVANTAGED PATIENTS, A THIRD-PARTY MAY BE UTILIZED TO CONDUCT A REVIEW OF PATIENT INFORMATION TO ASSESS FINANCIAL NEED. THIS REVIEW UTILIZES A HEALTH CARE INDUSTRY-RECOGNIZED, PREDICTIVE MODEL THAT IS BASED ON PUBLIC RECORD DATABASES. THESE PUBLIC RECORDS ENABLE THE HOSPITAL TO ASSESS WHETHER THE PATIENT IS CHARACTERISTIC OF OTHER PATIENTS WHO HAVE HISTORICALLY QUALIFIED FOR FINANCIAL ASSISTANCE UNDER THE TRADITIONAL APPLICATION PROCESS. IN CASES WHERE THERE IS AN ABSENCE OF INFORMATION PROVIDED DIRECTLY BY THE PATIENT, AND AFTER EFFORTS TO CONFIRM COVERAGE AVAILABILITY ARE EXHAUSTED, THE PREDICTIVE MODEL PROVIDES A SYSTEMATIC METHOD TO GRANT PRESUMPTIVE ELIGIBILITY TO FINANCIALLY DISADVANTAGED PATIENTS.

SJRMCSOUTH BEND CAMPUS

PART V, LINE 16A, FAP WEBSITE:

WWW.SJMED.COM/PATIENTS-VISITORS/BILLING-AND-ASSISTANCE/FINANCIAL-ASSISTANCE

SJRMCSOUTH BEND CAMPUS

Part V Facility Information *(continued)*

Section C. Supplemental Information for Part V, Section B. Provide descriptions required for Part V, Section B, lines 2, 3j, 5, 6a, 6b, 7d, 11, 13b, 13h, 15e, 16j, 18e, 19e, 20a, 20b, 20c, 20d, 20e, 21c, 21d, 23, and 24. If applicable, provide separate descriptions for each hospital facility in a facility reporting group, designated by facility reporting group letter and hospital facility line number from Part V, Section A ("A, 1," "A, 4," "B, 2," "B, 3," etc.) and name of hospital facility.

PART V, LINE 16B, FAP APPLICATION WEBSITE:

WWW.SJMED.COM/PATIENTS-VISITORS/BILLING-AND-ASSISTANCE/FINANCIAL-ASSISTANCE

SJRMCSOUTH BEND CAMPUS

PART V, LINE 16C, FAP PLAIN LANGUAGE SUMMARY WEBSITE:

WWW.SJMED.COM/PATIENTS-VISITORS/BILLING-AND-ASSISTANCE/FINANCIAL-ASSISTANCE

SJRMCSOUTH BEND - PART V, SECTION B, LINE 9:

AS PERMITTED IN THE FINAL SECTION 501(R) REGULATIONS, THE HOSPITAL'S IMPLEMENTATION STRATEGY WAS ADOPTED WITHIN 4 1/2 MONTHS AFTER THE FISCAL YEAR END THAT THE CHNA WAS COMPLETED AND MADE WIDELY AVAILABLE TO THE PUBLIC.

FORM 990 PART V, SECTION B, LINE 7A - HOSPITAL FACILITY'S WEBSITE URL:

WWW.SJMED.COM/CHNA

FORM 990 PART V, SECTION B, LINE 10 - HOSPITAL FACILITY'S WEBSITE URL:

WWW.SJMED.COM/CHNA

Part VI Supplemental Information

Provide the following information.

- 1 **Required descriptions.** Provide the descriptions required for Part I, lines 3c, 6a, and 7; Part II and Part III, lines 2, 3, 4, 8, and 9b.
- 2 **Needs assessment.** Describe how the organization assesses the health care needs of the communities it serves, in addition to any CHNAs reported in Part V, Section B.
- 3 **Patient education of eligibility for assistance.** Describe how the organization informs and educates patients and persons who may be billed for patient care about their eligibility for assistance under federal, state, or local government programs or under the organization's FAP.
- 4 **Community information.** Describe the community the organization serves, taking into account the geographic area and demographic constituents it serves.
- 5 **Promotion of community health.** Provide any other information important to describing how the organization's hospital facilities or other health care facilities further its exempt purpose by promoting the health of the community (for example, open medical staff, community board, use of surplus funds, etc.).
- 6 **Affiliated health care system.** If the organization is part of an affiliated health care system, describe the respective roles of the organization and its affiliates in promoting the health of the communities served.
- 7 **State filing of community benefit report.** If applicable, identify all states with which the organization, or a related organization, files a community benefit report.

PART I, LINE 3C:

IN ADDITION TO LOOKING AT A MULTIPLE OF THE FEDERAL POVERTY GUIDELINES, OTHER FACTORS ARE CONSIDERED SUCH AS THE PATIENT'S FINANCIAL STATUS AND/OR ABILITY TO PAY AS DETERMINED THROUGH THE ASSESSMENT PROCESS.

PART I, LINE 6A:

SJRMCSOUTH BEND PREPARES AN ANNUAL COMMUNITY BENEFIT REPORT, WHICH IT SUBMITS TO THE STATE OF INDIANA. IN ADDITION, SJRMCSOUTH BEND REPORTS ITS COMMUNITY BENEFIT INFORMATION AS PART OF THE CONSOLIDATED COMMUNITY BENEFIT INFORMATION REPORTED BY TRINITY HEALTH (EIN 35-1443425) IN ITS AUDITED FINANCIAL STATEMENTS, AVAILABLE AT WWW.TRINITYHEALTH.ORG.

IN ADDITION, SJRMCSOUTH BEND INCLUDES A COPY OF ITS MOST RECENTLY FILED SCHEDULE H ON TRINITY HEALTH'S WEBSITE AT WWW.TRINITYHEALTH.ORG/OUR-IMPACT/COMMUNITY-HEALTH-AND-WELL-BEING.

PART I, LINE 7:

THE BEST AVAILABLE DATA WAS USED TO CALCULATE THE COST AMOUNTS REPORTED IN ITEM 7. FOR CERTAIN CATEGORIES, PRIMARILY TOTAL CHARITY CARE AND MEANS-TESTED GOVERNMENT PROGRAMS, SPECIFIC COST-TO-CHARGE RATIOS WERE CALCULATED AND APPLIED TO THOSE CATEGORIES. THE COST-TO-CHARGE RATIO WAS DERIVED FROM WORKSHEET 2, RATIO OF PATIENT CARE COST-TO-CHARGES. IN OTHER CATEGORIES, THE BEST AVAILABLE DATA WAS DERIVED FROM THE HOSPITAL'S COST ACCOUNTING SYSTEM.

PART I, LN 7 COL(F):

THE FOLLOWING NUMBER, \$7,744,291, REPRESENTS THE AMOUNT OF BAD DEBT EXPENSE INCLUDED IN TOTAL FUNCTIONAL EXPENSES IN FORM 990, PART IX, LINE 25. PER IRS INSTRUCTIONS, THIS AMOUNT WAS EXCLUDED FROM THE DENOMINATOR WHEN CALCULATING THE PERCENT OF TOTAL EXPENSE FOR SCHEDULE H, PART I, LINE 7, COLUMN (F).

PART II, COMMUNITY BUILDING ACTIVITIES:

OVER THE COURSE OF THE PAST YEAR, KEY CONTRIBUTIONS BY SJRMCSOUTH BEND FOR COMMUNITY BUILDING ACTIVITIES INCLUDED COALITION BUILDING AND ECONOMIC DEVELOPMENT. MANY OF THE COMMUNITY BUILDING PROGRAMS AND ORGANIZATIONS SUPPORTED BY SJRMCSOUTH BEND AID LOW-INCOME OR VULNERABLE POPULATIONS AND/OR OFFER EDUCATION TO MEMBERS OF THE COMMUNITY WHO HELP THOSE

Part VI Supplemental Information (Continuation)

POPULATIONS.

COALITION BUILDING: STAFF HOURS WERE DEVOTED TO SERVICE ON THE FOLLOWING BOARDS: HONORING CHOICES, A NOT FOR PROFIT WHO AIDS THE COMMUNITY IN ADVANCE CARE PLANNING AND PROVIDES FREE RESOURCES AND GUIDANCE TO INDIVIDUALS AND FAMILIES; OAKLAWN PSYCHIATRIC CENTER, THE LEADING PROVIDER OF MENTAL HEALTH AND ADDICTION SERVICES IN ELKHART AND ST. JOSEPH COUNTIES; CASIE CENTER (CHILD ABUSE SERVICES, INVESTIGATION AND EDUCATION), A CHILD ADVOCACY CENTER SERVING THE NEEDS OF CHILDREN AND FAMILIES IN ST. JOSEPH COUNTY; ST. JOSEPH COUNTY CHAMBER OF COMMERCE, WHO OFFERS INFLUENCE, LEADERSHIP, ADVOCACY, PROGRAMS, RESOURCES AND EVENTS, ALL AIMED AT CREATING A PRO-BUSINESS CLIMATE; INDIANA HOSPITAL ASSOCIATION, WHO SEEKS TO PROVIDE INDIANA HOSPITALS WITH LEADERSHIP, REPRESENTATION, AND SUPPORT TO IMPROVE THE HEALTH OF INDIANA CITIZENS BY REPRESENTING THE COLLECTIVE INTERESTS OF OUR MEMBERS BEFORE POLICYMAKERS, LEGISLATORS, AND REGULATORS; CONNECTING HOSPITALS WITH THE BUSINESS COMMUNITY AND HEALTH CARE ORGANIZATIONS; COLLECTING, ANALYZING, AND DISTRIBUTING DATA TO HELP OUR MEMBERS AND POLICYMAKERS UNDERSTAND WHAT NEEDS TO BE DONE TO IMPROVE THE HEALTH OF THE COMMUNITIES THEY SERVE; AND PROVIDING OPPORTUNITIES FOR HOSPITALS TO SHARE IDEAS AND INFORMATION ON THE CHALLENGES EVERY HOSPITAL FACES, FROM PATIENT SAFETY TO REIMBURSEMENT.

ECONOMIC DEVELOPMENT: THE HOSPITAL PROVIDED SUPPORT FOR THE SOUTH BEND CHAMBER OF COMMERCE, WHICH PROMOTES BUSINESS GROWTH THROUGH RELATIONSHIPS, ADVOCACY AND ACCESS TO RESOURCES.

PART III, LINE 2:

METHODOLOGY USED FOR LINE 2 - ANY DISCOUNTS PROVIDED OR PAYMENTS MADE TO A PARTICULAR PATIENT ACCOUNT ARE APPLIED TO THAT PATIENT ACCOUNT PRIOR TO ANY BAD DEBT WRITE-OFF AND ARE THUS NOT INCLUDED IN BAD DEBT EXPENSE. AS A RESULT OF THE PAYMENT AND ADJUSTMENT ACTIVITY BEING POSTED TO BAD DEBT ACCOUNTS, WE ARE ABLE TO REPORT BAD DEBT EXPENSE NET OF THESE TRANSACTIONS.

PART III, LINE 3:

SJRMCSOUTH BEND USES A PREDICTIVE MODEL THAT INCORPORATES THREE DISTINCT VARIABLES IN COMBINATION TO PREDICT WHETHER A PATIENT QUALIFIES FOR FINANCIAL ASSISTANCE: (1) SOCIO-ECONOMIC SCORE, (2) ESTIMATED FEDERAL POVERTY LEVEL (FPL), AND (3) HOMEOWNERSHIP. BASED ON THE MODEL, CHARITY CARE CAN STILL BE EXTENDED TO PATIENTS EVEN IF THEY HAVE NOT RESPONDED TO FINANCIAL COUNSELING EFFORTS AND ALL OTHER FUNDING SOURCES HAVE BEEN EXHAUSTED. FOR FINANCIAL STATEMENT PURPOSES, SJRMCSOUTH BEND IS RECORDING AMOUNTS AS CHARITY CARE (INSTEAD OF BAD DEBT EXPENSE) BASED ON THE RESULTS OF THE PREDICTIVE MODEL. THEREFORE, SJRMCSOUTH BEND IS REPORTING ZERO ON LINE 3, SINCE THEORETICALLY ANY POTENTIAL CHARITY CARE SHOULD HAVE BEEN IDENTIFIED THROUGH THE PREDICTIVE MODEL.

PART III, LINE 4:

SJRMCSOUTH BEND IS INCLUDED IN THE CONSOLIDATED FINANCIAL STATEMENTS OF TRINITY HEALTH. THE FOLLOWING IS THE TEXT OF THE PATIENT ACCOUNTS RECEIVABLE, ESTIMATED RECEIVABLES FROM AND PAYABLES TO THIRD-PARTY PAYERS FOOTNOTE FROM PAGE 14 OF THOSE STATEMENTS: "AN UNCONDITIONAL RIGHT TO PAYMENT, SUBJECT ONLY TO THE PASSAGE OF TIME IS TREATED AS A RECEIVABLE. PATIENT ACCOUNTS RECEIVABLE, INCLUDING BILLED ACCOUNTS AND UNBILLED ACCOUNTS FOR WHICH THERE IS AN UNCONDITIONAL RIGHT TO PAYMENT, AND ESTIMATED AMOUNTS DUE FROM THIRD-PARTY PAYERS FOR RETROACTIVE ADJUSTMENTS,

Part VI Supplemental Information (Continuation)

ARE RECEIVABLES IF THE RIGHT TO CONSIDERATION IS UNCONDITIONAL AND ONLY THE PASSAGE OF TIME IS REQUIRED BEFORE PAYMENT OF THAT CONSIDERATION IS DUE. FOR PATIENT ACCOUNTS RECEIVABLE, THE ESTIMATED UNCOLLECTABLE AMOUNTS ARE GENERALLY CONSIDERED IMPLICIT PRICE CONCESSIONS THAT ARE A DIRECT REDUCTION TO PATIENT SERVICE REVENUE AND ACCOUNTS RECEIVABLE.

THE CORPORATION HAS AGREEMENTS WITH THIRD-PARTY PAYERS THAT PROVIDE FOR PAYMENTS TO THE CORPORATION'S HEALTH MINISTRIES AT AMOUNTS DIFFERENT FROM ESTABLISHED RATES. ESTIMATED RETROACTIVE ADJUSTMENTS UNDER REIMBURSEMENT AGREEMENTS WITH THIRD-PARTY PAYERS AND OTHER CHANGES IN ESTIMATES ARE INCLUDED IN NET PATIENT SERVICE REVENUE AND ESTIMATED RECEIVABLES FROM AND PAYABLES TO THIRD-PARTY PAYERS. RETROACTIVE ADJUSTMENTS ARE ACCRUED ON AN ESTIMATED BASIS IN THE PERIOD THE RELATED SERVICES ARE RENDERED AND ADJUSTED IN FUTURE PERIODS, AS FINAL SETTLEMENTS ARE DETERMINED. ESTIMATED RECEIVABLES FROM THIRD-PARTY PAYERS ALSO INCLUDES AMOUNTS RECEIVABLE UNDER STATE MEDICAID PROVIDER TAX PROGRAMS."

PART III, LINE 5:

TOTAL MEDICARE REVENUE REPORTED IN PART III, LINE 5 HAS BEEN REDUCED BY THE TWO PERCENT SEQUESTRATION REDUCTION.

PART III, LINE 8:

THE IRS COMMUNITY BENEFIT OBJECTIVES INCLUDE RELIEVING OR REDUCING THE BURDEN OF GOVERNMENT TO IMPROVE HEALTH. TREATING MEDICARE PATIENTS CREATES SHORTFALLS THAT MUST BE ABSORBED BY HOSPITALS, WHICH PROVIDE CARE REGARDLESS OF THIS SHORTFALL AND THEREBY RELIEVE THE FEDERAL GOVERNMENT OF THE BURDEN OF PAYING THE FULL COST FOR MEDICARE BENEFICIARIES. THEREFORE, THE HOSPITAL BELIEVES ANY MEDICARE SHORTFALL SHOULD BE CONSIDERED COMMUNITY BENEFIT. TRINITY HEALTH AND ITS HOSPITALS REPORT AS COMMUNITY IMPACT THE LOSS ON MEDICARE AND A HOST OF MANY OTHER EXPENSES DESIGNED TO SERVE PEOPLE EXPERIENCING POVERTY IN OUR COMMUNITIES. SEE SCHEDULE H, PART VI, LINE 5 FOR MORE INFORMATION.

PART III, LINE 8: COSTING METHODOLOGY FOR LINE 6 - MEDICARE COSTS WERE OBTAINED FROM THE FILED MEDICARE COST REPORT. THE COSTS ARE BASED ON MEDICARE ALLOWABLE COSTS AS REPORTED ON WORKSHEET B, COLUMN 26, WHICH EXCLUDE DIRECT MEDICAL EDUCATION COSTS. INPATIENT MEDICARE COSTS ARE CALCULATED BASED ON A COMBINATION OF ALLOWABLE COST PER DAY TIMES MEDICARE DAYS FOR ROUTINE SERVICES AND COST TO CHARGE RATIO TIMES MEDICARE CHARGES FOR ANCILLARY SERVICES. OUTPATIENT MEDICARE COSTS ARE CALCULATED BASED ON COST TO CHARGE RATIO TIMES MEDICARE CHARGES BY ANCILLARY DEPARTMENT.

PART III, LINE 9B:

THE HOSPITAL'S COLLECTION POLICY CONTAINS PROVISIONS ON THE COLLECTION PRACTICES TO BE FOLLOWED FOR PATIENTS WHO ARE KNOWN TO QUALIFY FOR FINANCIAL ASSISTANCE. CHARITY DISCOUNTS ARE APPLIED TO THE AMOUNTS THAT QUALIFY FOR FINANCIAL ASSISTANCE. THE HOSPITAL HAS IMPLEMENTED BILLING AND COLLECTION PRACTICES FOR PATIENT PAYMENT OBLIGATIONS THAT ARE FAIR, CONSISTENT AND COMPLIANT WITH STATE AND FEDERAL REGULATIONS.

PART VI, LINE 2:

NEEDS ASSESSMENT - SJRMC-SOUTH BEND ASSESSES THE HEALTH STATUS OF ITS COMMUNITY, IN PARTNERSHIP WITH COMMUNITY COALITIONS, AS PART OF THE NORMAL COURSE OF OPERATIONS AND IN THE CONTINUOUS EFFORTS TO IMPROVE PATIENT CARE AND THE HEALTH OF THE OVERALL COMMUNITY. TO ASSESS THE HEALTH OF THE COMMUNITY, THE HOSPITAL MAY USE PATIENT DATA, PUBLIC HEALTH DATA, ANNUAL

Part VI Supplemental Information (Continuation)

COUNTY HEALTH RANKINGS, MARKET STUDIES, AND GEOGRAPHICAL MAPS SHOWING AREAS OF HIGH UTILIZATION FOR EMERGENCY SERVICES AND INPATIENT CARE, WHICH MAY INDICATE POPULATIONS OF INDIVIDUALS WHO DO NOT HAVE ACCESS TO PREVENTATIVE SERVICES OR ARE UNINSURED.

PART VI, LINE 3:

PATIENT EDUCATION OF ELIGIBILITY FOR ASSISTANCE - SJRMC-SOUTH BEND COMMUNICATES EFFECTIVELY WITH PATIENTS REGARDING PATIENT PAYMENT OBLIGATIONS. FINANCIAL COUNSELING IS OFFERED TO PATIENTS ABOUT THEIR PAYMENT OBLIGATIONS AND HEALTH CARE BILLS. INFORMATION ON HOSPITAL-BASED FINANCIAL SUPPORT POLICIES, FEDERAL, STATE, AND LOCAL GOVERNMENT PROGRAMS, AND OTHER COMMUNITY-BASED CHARITABLE PROGRAMS THAT PROVIDE COVERAGE FOR SERVICES ARE MADE AVAILABLE TO PATIENTS DURING THE PRE-REGISTRATION AND REGISTRATION PROCESSES AND/OR THROUGH COMMUNICATIONS WITH PATIENTS SEEKING FINANCIAL ASSISTANCE.

FINANCIAL COUNSELORS MAKE AFFIRMATIVE EFFORTS TO HELP PATIENTS APPLY FOR PUBLIC AND PRIVATE PROGRAMS FOR WHICH THEY MAY QUALIFY AND THAT MAY ASSIST THEM IN OBTAINING AND PAYING FOR HEALTH CARE SERVICES. EVERY EFFORT IS MADE TO DETERMINE A PATIENT'S ELIGIBILITY FOR FINANCIAL SUPPORT PRIOR TO OR AT THE TIME OF ADMISSION OR SERVICE.

SJRMC-SOUTH BEND OFFERS FINANCIAL SUPPORT TO PATIENTS WITH LIMITED MEANS. NOTIFICATION ABOUT FINANCIAL ASSISTANCE AND GOVERNMENT PROGRAMS, INCLUDING CONTACT INFORMATION, IS AVAILABLE THROUGH PATIENT BROCHURES, MESSAGES ON PATIENT BILLS, POSTED NOTICES IN PUBLIC REGISTRATION AREAS INCLUDING EMERGENCY ROOMS, ADMITTING AND REGISTRATION DEPARTMENTS, AND OTHER PATIENT FINANCIAL SERVICES OFFICES. SUMMARIES OF HOSPITAL PROGRAMS ARE MADE AVAILABLE TO APPROPRIATE COMMUNITY HEALTH AND HUMAN SERVICES AGENCIES AND OTHER ORGANIZATIONS THAT ASSIST PEOPLE IN NEED. INFORMATION REGARDING FINANCIAL ASSISTANCE AND GOVERNMENT PROGRAMS IS ALSO AVAILABLE ON HOSPITAL WEBSITES. IN ADDITION TO ENGLISH, THIS INFORMATION IS ALSO AVAILABLE IN OTHER LANGUAGES AS REQUIRED BY INTERNAL REVENUE CODE SECTION 501(R), REFLECTING OTHER PRIMARY LANGUAGES SPOKEN BY THE POPULATION SERVICED BY OUR HOSPITAL.

PART VI, LINE 4:

COMMUNITY INFORMATION - SJRMC-SOUTH BEND SERVES APPROXIMATELY 984,000 PEOPLE IN A DIVERSE NINE-COUNTY HEALTH SYSTEM MARKET AREA IN INDIANA AND MICHIGAN AT TWO HOSPITAL CAMPUSES, ONE IN MISHAWAKA AND ONE IN PLYMOUTH. THE PRIMARY SERVICE AREA INCLUDES ST. JOSEPH AND MARSHALL COUNTIES IN INDIANA. THE SECONDARY AND TERTIARY SERVICE AREA ENCOMPASSES ELKHART, FULTON, LA PORTE, PULASKI, AND STARKE COUNTIES IN INDIANA AS WELL AS BERRIEN AND CASS COUNTIES IN MICHIGAN. THIS AREA HAS A COMBINED POPULATION OF APPROXIMATELY 328,000.

FOR PURPOSES OF THE CHNA, SJHS DEFINED THE COMMUNITY SERVED AS THE PRIMARY SERVICE AREA, ST. JOSEPH AND MARSHALL COUNTIES (WHICH ACCOUNTED FOR 77% OF HOSPITAL ADMISSIONS IN FY23) AND ELKHART COUNTY (WHICH ACCOUNTED FOR 9% OF HOSPITAL ADMISSIONS IN THE HEALTH SYSTEM IN FY23 AND THREE TIMES OR MORE OF ANY OTHER COUNTY IN THE SECONDARY SERVICE AREA). SURVEYED COUNTIES ARE SUBURBAN OR RURAL IN NATURE, EXCEPT FOR LIGHT INDUSTRY CENTERED IN THE TOWNS OF PLYMOUTH AND BREMEN, AND AN URBAN CITY-CENTER IN SOUTH BEND, THE FOURTH LARGEST CITY IN INDIANA. THE REGION OFFERS DIVERSITY, A STABLE ECONOMY, AND A FAMILY-FRIENDLY ENVIRONMENT, ALL WITHIN PROXIMITY OF CHICAGO.

Part VI Supplemental Information (Continuation)

THE PRIMARY SERVICE AREA HOUSES MISHAWAKA MEDICAL CENTER IN ST. JOSEPH COUNTY AND PLYMOUTH MEDICAL CENTER IN MARSHALL COUNTY AS WELL AS MEMORIAL HOSPITAL OF SOUTH BEND (BEACON). HOSPITALS LOCATED IN THE SECONDARY AND TERTIARY SERVICE AREAS INCLUDE ELKHART GENERAL HOSPITAL (BEACON) AND GOSHEN HOSPITAL TO THE EAST IN ELKHART COUNTY, WOODLAWN HOSPITAL IN ROCHESTER, STARKE MEMORIAL IN STARKE COUNTY AND PULASKI MEMORIAL IN WINAMAC. THERE ARE THREE CRITICAL ACCESS HOSPITALS (CAH) IN THIS AREA (COMMUNITY HOSPITAL OF BREMEN (BEACON), PULASKI MEMORIAL HOSPITAL AND WOODLAWN HOSPITAL). AT WHICH PRIMARY CARE PROFESSIONALS WITH PRESCRIPTIVE PRIVILEGES FURNISH OUTPATIENT PRIMARY CARE SERVICES.

AS IN MOST MIDWESTERN COMMUNITIES, THE SERVICE AREA POPULATION IS LARGELY MADE UP OF WHITE NON-HISPANIC INDIVIDUALS OF NORTHERN EUROPEAN DESCENT. MANY OF ST. JOSEPH COUNTY'S POPULATION DEMOGRAPHICS MIRROR THE DEMOGRAPHICS OF INDIANA. OVERALL, ST. JOSEPH COUNTY IS SLIGHTLY YOUNGER FROM THE PERSPECTIVE OF MEDIAN AGE AND OVERALL POPULATION. ST. JOSEPH COUNTY IS ALSO HOME TO A SLIGHTLY MORE DIVERSE POPULATION THAN THE STATE AS A WHOLE, AS IT HAS HIGHER PERCENTAGES OF AFRICAN AMERICAN RESIDENTS, 12% VERSUS 10% STATE-WIDE, AND HISPANIC RESIDENTS, 10% VERSUS 9% STATE-WIDE.

THE TOTAL POPULATION WITHIN THE SAINT JOSEPH HEALTH SYSTEM SERVICE AREA IS EXPECTED TO REMAIN FLAT THROUGH 2028. COMPARED TO THE STATE OF INDIANA, THERE IS A LOWER PROJECTED POPULATION GROWTH, A HIGHER MEDIAN AGE, AND A LOWER PERCENTAGE OF PEOPLE WITH A BACHELOR'S DEGREE OR HIGHER. THE POPULATION AGED SIXTY-FIVE AND OLDER IS EXPECTED TO GROW FROM 19 PERCENT TO 21 PERCENT OVER THE NEXT FIVE YEARS.

OUR REGION INCLUDES A VARIETY OF QUALITY EDUCATION OPPORTUNITIES, INCLUDING BOTH PUBLIC AND PRIVATE SCHOOLS FROM PRESCHOOL THROUGH HIGH SCHOOL. THOSE PURSUING A HIGHER LEVEL OF EDUCATION HAVE SEVERAL OPTIONS, INCLUDING THE UNIVERSITY OF NOTRE DAME, INDIANA UNIVERSITY SOUTH BEND, SAINT MARY'S COLLEGE, HOLY CROSS COLLEGE, ANCILLA COLLEGE, BETHEL COLLEGE, INDIANA TECH, AND IVY TECH STATE COLLEGE.

APPROXIMATELY 18 PERCENT OF THE POPULATION WITHIN THE SAINT JOSEPH HEALTH SYSTEM SERVICE AREA EARNS AN ANNUAL SALARY OF \$25,000 OR BELOW. HOUSEHOLD INCOME IS STABLE ACROSS THE PRIMARY SERVICE AREA, WITH AREAS OF HIGHEST AFFLUENCE IN THE GRANGER AND GRANGER/CLAY ZIP CODES. THE MEDIAN HOUSEHOLD INCOME IS \$58,599 FOR ST. JOSEPH COUNTY AND \$58,296 FOR MARSHALL COUNTY. THIS IS BELOW THE MEDIAN FOR INDIANA, ILLINOIS, MICHIGAN, AND OHIO, AS WELL AS THE U.S.

IN 2021, ACCORDING TO THE U.S. CENSUS BUREAU'S SMALL AREA INCOME AND POVERTY ESTIMATES (SAIPE), 8.6 PERCENT OF FAMILIES IN THE STATE OF INDIANA LIVED IN POVERTY. THIS IS DOWN FROM 12 PERCENT IN 2018 AND 15 PERCENT IN 2013. SJHS SERVES A LARGE MEDICAID POPULATION ACROSS MANY DELIVERY SITES, MOST OF WHICH ARE IN ST. JOSEPH COUNTY. [U.S. CENSUS BUREAU, SMALL AREA INCOME AND POVERTY ESTIMATES (SAIPE) PROGRAM, DECEMBER 2021]

ESTIMATES OF UNINSURED INDIVIDUALS ARE 8.8 PERCENT IN ST. JOSEPH COUNTY AND 12.9 PERCENT IN MARSHALL COUNTY, TOTALING AROUND 255,700 INDIVIDUALS COMBINED. THIS IS COMPARED TO A RATE OF 8.9 PERCENT FOR THE STATE OF INDIANA. THE SYSTEM SERVICE AREA INCLUDES SEVERAL MEDICALLY UNDERSERVED

Part VI Supplemental Information (Continuation)

AREAS (MUA) AND MEDICALLY UNDERSERVED POPULATIONS (MUP). [U.S. CENSUS BUREAU/SMALL AREA HEALTH INSURANCE (SAHIE) PROGRAM/ MARCH 2021]

IN ST. JOSEPH COUNTY, AS OF SEPTEMBER 2023, THE CURRENT UNEMPLOYMENT RATE OF 3.9 PERCENT IS SLIGHTLY HIGHER THAN THE INDIANA RATE OF 3.3 PERCENT AND THE NATIONAL AVERAGE OF 3.6 PERCENT. EDUCATION, HEALTH CARE, AND GOVERNMENT ARE THE MAJOR EMPLOYERS IN THE LOCAL ECONOMY. IN MARSHALL COUNTY, THE CURRENT UNEMPLOYMENT RATE OF 3.2 PERCENT IS LOWER THAN THE INDIANA RATE AND LOWER THAN THE NATIONAL AVERAGE. HEALTH CARE, MANUFACTURING, SERVICE, AND FARMING ARE THE MAJOR EMPLOYERS IN THE LOCAL ECONOMY.

PART VI, LINE 5:

OTHER INFORMATION - SJRMC-SOUTH BEND EXTENDS MEDICAL STAFF PRIVILEGES TO ALL QUALIFIED PHYSICIANS, ENSURING HIGH QUALITY AND EASILY ACCESSIBLE CARE IS AVAILABLE IN A VARIETY OF PRIMARY AND SPECIALTY CARE AREAS.

SJRCM-SOUTH BEND HAS A STATE-OF-THE-ART MEDICAL CENTER THAT UTILIZES THE LATEST TECHNOLOGY, ELECTRONIC MEDICAL RECORDS, FULLY INTEGRATED MEDICAL TEAMS AND HIGHLY TRAINED STAFF TO PROVIDE CARE. RESIDENCY PROGRAMS IN FAMILY PRACTICE, PODIATRY, AND PHARMACY, AS WELL AS CLINICAL EDUCATION FOR NURSES AND ANCILLARY STAFF, PROVIDE ONGOING EDUCATION AND A "LABORATORY FOR LEARNING." SEVERAL NURSING SCHOOLS UTILIZE SJRMC-SOUTH BEND FOR THE CLINICAL COMPONENT OF THEIR NURSING EDUCATION. PARTICIPATING IN BOTH AN INTERNAL AND EXTERNAL "INTERNAL REVIEW BOARD", SJRMC-SOUTH BEND IS A CERTIFIED "BABY-FRIENDLY" HOSPITAL. BABY-FRIENDLY HOSPITALS ARE RECOGNIZED FOR ENCOURAGING AND SUPPORTING BREASTFEEDING AND MOTHER/BABY BONDING, WHICH IS KNOWN TO PROVIDE HEALTH BENEFITS FOR INFANTS AND MOTHERS.

SJRCM-SOUTH BEND PARTICIPATES IN MEDICARE, MEDICAID, TRICARE AND OTHER GOVERNMENT-SPONSORED HEALTH CARE PROGRAMS. FINANCIAL ASSISTANCE IS PROVIDED TO ALL WHO MEET THE ELIGIBILITY REQUIREMENTS OF THE POLICY. SJRMC-SOUTH BEND SPONSORS MULTIPLE SAFETY NET CLINICS THAT PROVIDE CARE FOR INDIVIDUALS WHO ARE UNINSURED AND UNDERINSURED. STAFFED PRIMARILY BY A MID-LEVEL PRACTITIONER IN A COLLABORATIVE AGREEMENT WITH LOCAL DOCTORS, THESE CLINICS SEE A HIGHLY DIVERSE POPULATION AND OFFER SPECIALIZED CARE FOR CHRONIC DISEASE MANAGEMENT, COUMADIN MANAGEMENT, SMOKING CESSATION, HIV/AIDS, AND SUBSTANCE ABUSE.

ADDITIONALLY, SJRMC-SOUTH BEND'S FORENSIC DEPARTMENT, LOCATED IN THE EMERGENCY DEPARTMENT, REMAINS A LEADING PROVIDER FOR VICTIMS OF ABUSE IN NORTHERN INDIANA. A STAFF OF 18 IS AVAILABLE 365 DAYS PER YEAR, 24 HOURS A DAY. PROVIDING CARE SINCE 2018, THE FORENSICS DEPARTMENT SERVED 2,646 PATIENTS IN FY25, UP FROM 2,179 IN THE PRIOR FISCAL YEAR. PATIENTS CAME FROM 18 DIFFERENT COUNTIES, IN EIGHT STATES, INCLUDING INDIANA. SJRMC IS THE ONLY HOSPITAL IN THE AREA TO PROVIDE THIS SERVICE AT THIS CAPACITY AND COLLABORATES WITH MANY PARTNER ORGANIZATIONS, INCLUDING CHILD ADVOCACY CENTERS, TO ENSURE THE SAFETY OF AND JUSTICE FOR ALL VICTIMS.

SJRCM-SOUTH BEND ADVOCATES FOR VARIOUS HEALTH-RELATED ISSUES INCLUDING IMPROVED PUBLIC HEALTH INFRASTRUCTURE, EXPANDED ACCESS TO CARE, PROTECTED ACCESS TO PHARMACEUTICALS FOR LOW-INCOME INDIVIDUALS, AND INCREASING THE CIGARETTE TAX TO REDUCE SMOKING RATES AND SUPPORT HEALTH CARE FOR LOW-INCOME INDIVIDUALS IN INDIANA. SJRMC-SOUTH BEND CONTINUES TO BE A LEADER IN FOUNDING AND FUNDING PROGRAMS THAT IMPACT THE HEALTH OF ITS COMMUNITIES, SUCH AS PROVIDING LOCAL SCHOOLS WITH NURSES, HEALTH AIDES,

Part VI Supplemental Information (Continuation)

AND ATHLETIC TRAINERS.

AS A FAITH-BASED HEALTH INSTITUTION, SJRMC-SOUTH BEND OFFERS PATIENTS, THEIR FAMILIES, AND THE BROADER COMMUNITY THE OPPORTUNITY TO ADDRESS THE SPIRITUAL NEEDS THAT ARISE AS ONE EXPERIENCES ILLNESS, CHRONIC HEALTH CONDITIONS, OR THE DYING PROCESS. THIS EXPERIENCE OF FAITH, THE PRESENCE OF A REFLECTION/PRAYER ROOM, AND ACCESS TO CHAPLAIN SERVICES AFFORD EVERYONE THE CERTITUDE THAT THE WHOLE PERSON AND HIS/HER CARE ARE ADDRESSED.

SJRMC-SOUTH BEND AND SJRMC-PLYMOUTH ARE THE LEAD AGENCIES FOR LOCAL TOBACCO CONTROL IN OUR COUNTIES. IN ST. JOSEPH COUNTY, THE SMOKE FREE ST. JOE COALITION IS COMPRISED OF A VARIETY OF PROFESSIONALS AND COMMUNITY MEMBERS. WE HAVE REPRESENTATION FROM THE AFRICAN AMERICAN, LATINO AND CAUCASIAN COMMUNITIES. FORMAL COALITION POSITIONS ARE HELD BY MEMBERS OF THE FOLLOWING AGENCIES: HEALTHLINC, ANTHEM, AND THE UNIVERSITY OF NOTRE DAME. WE CURRENTLY HAVE 140 COALITION PARTNERS AND 2,000+ COMMUNITY SUPPORTERS. SMOKE FREE ST. JOE COALITION MEETINGS ARE HELD EVERY MONTH AND INCLUDE AN EDUCATIONAL COMPONENT PERTAINING TO COALITION NEEDS AND INPUT FROM COALITION PARTNERS. ADVOCACY EFFORTS FOR FY25 CONTINUED TO INCLUDE SMOKE-FREE WORKPLACES, TOBACCO-FREE SCHOOLS, AND TOBACCO/VAPING EDUCATION AND CESSATION, ESPECIALLY AMONG THE YOUTH POPULATION. IN FY25, THE COALITION CONDUCTED OUTREACH TO 14,144 INDIVIDUALS AT LOCAL COMMUNITY EVENTS, PROVIDED TOBACCO/VAPING PREVENTION EDUCATION TO 4,880 YOUTH AND ADULTS AT LOCAL ORGANIZATIONS, AND RECEIVED 66 TOBACCO CESSATION REFERRALS THROUGH SJRMC-SOUTH BEND'S ELECTRONIC MEDICAL RECORD, EPIC, FOR COURAGE TO QUIT AND THE INDIANA TOBACCO QUITLINE. TWELVE PARTICIPANTS ATTENDED COURAGE TO QUIT TOBACCO CESSATION PROGRAM SESSIONS. THIS PROGRAM OFFERED FREE VIA IN-PERSON AND VIRTUAL SESSIONS

SCREENING FOR SOCIAL INFLUENCERS OF HEALTH (SIOH) FOR ALL SJRMC-SOUTH BEND PATIENTS OCCURS ANNUALLY DURING A REGULAR ROUTINE OFFICE VISIT. THE SIOH SCREENING IS EMBEDDED INTO OUR ELECTRONIC HEALTH RECORD, AS WELL AS FINDHELP.ORG, A SOCIAL NEED RESOURCE DIRECTORY. IF RESOURCES ARE NEEDED, THEY WERE MADE AVAILABLE TO THE PATIENT THROUGH THE END OF VISIT SUMMARY. CLINICAL STAFF CAN ALSO REFER PATIENTS TO OUR COMMUNITY HEALTH WORKER (CHW) PROGRAM. SJRMC-SOUTH BEND HAS ESTABLISHED RELATIONSHIPS WITH THE AGENCY ON AGING CENTER AND FOOD BANKS TO HELP ASSIST WITH NEEDS. IN FY25, 73% OF ALL PATIENTS WERE SCREENED FOR SIOH AND 33% PRESENTED WITH AT LEAST ONE NEED. THE TOP THREE IDENTIFIED NEEDS WERE FINANCIAL INSECURITY, FOOD ACCESS, AND SOCIAL ISOLATION.

IN ADDITION TO WORKING WITH PATIENTS OF SJRMC-SOUTH BEND, OUR CHW'S RECEIVE AND RESPOND TO REFERRALS FROM COMMUNITY PARTNERS TO HELP ADDRESS THE SIOH NEEDS FACED IN OUR SERVICE AREA. IN FY25, CHW'S HAD 1,113 NEW PATIENTS AND COMPLETED 2,230 ENCOUNTERS FOCUSED ON CONNECTING PATIENTS TO COMMUNITY RESOURCES. CHW'S CONTINUE TO EMPHASIZE HEALTH EDUCATION AS A STRATEGY TO REDUCE EMERGENCY DEPARTMENT VISITS AND HOSPITAL READMISSIONS.

IN FY25, TRINITY HEALTH ASSESSED THE TOTAL IMPACT ITS HOSPITALS HAVE ON COMMUNITY HEALTH. THIS ASSESSMENT INCLUDES TRADITIONAL COMMUNITY BENEFIT AS REPORTED IN PART I, COMMUNITY BUILDING AS REPORTED IN PART II, THE SHORTFALL ON MEDICARE SERVICES AS REPORTED IN PART III, AS WELL AS EXPENSES THAT ARE EXCLUDED FROM THE PART I COMMUNITY BENEFIT CALCULATION BECAUSE THEY ARE OFFSET BY EXTERNAL FUNDING. ALSO INCLUDED ARE ALL COMMUNITY HEALTH WORKERS, INCLUDING THOSE OPERATING IN OUR CLINICALLY

Part VI Supplemental Information (Continuation)

INTEGRATED NETWORKS. OUR GOAL IN SHARING THE COMMUNITY IMPACT IS TO DEMONSTRATE HOW OUR CATHOLIC NOT-FOR-PROFIT HEALTH SYSTEM MAKES A DIFFERENCE IN THE COMMUNITIES WE SERVE - FOCUSING ON IMPACTING PEOPLE EXPERIENCING POVERTY - THROUGH FINANCIAL INVESTMENTS.

IN FY25, SAINT JOSEPH HEALTH SYSTEM'S COMMUNITY IMPACT TOTALED \$92 MILLION.

PART VI, LINE 6:

SJRMC-SOUTH BEND IS A MEMBER OF TRINITY HEALTH, ONE OF THE LARGEST CATHOLIC HEALTH CARE DELIVERY SYSTEMS IN THE COUNTRY. TRINITY HEALTH'S COMMUNITY HEALTH & WELL-BEING (CHWB) STRATEGY PROMOTES OPTIMAL HEALTH FOR PEOPLE EXPERIENCING POVERTY AND OTHER VULNERABILITIES IN THE COMMUNITIES WE SERVE - EMPHASIZING THE NECESSITY TO INTEGRATE CLINICAL AND SOCIAL CARE.

TRINITY HEALTH CHWB TEAMS LEAD THE DEVELOPMENT AND IMPLEMENTATION OF TRIENNIAL COMMUNITY HEALTH NEEDS ASSESSMENTS (CHNA) AND IMPLEMENTATION STRATEGIES WITH INTENTIONAL FOCUS ON ENGAGING COMMUNITIES AND RESIDENTS EXPERIENCING POVERTY AND OTHER VULNERABILITIES. TO FURTHER OUR COMMITMENT TO ACHIEVING HEALTH EQUITY AND THE COMMON GOOD, THE CHNA AND IMPLEMENTATION STRATEGIES FOSTER COLLECTIVE ACTION TO EQUITABLY ALLOCATE RESOURCES FROM THE HOSPITAL AND OTHER SOURCES TO ADDRESS THESE NEEDS IN COMMUNITIES MOST IMPACTED.

TRINITY HEALTH AND ITS MEMBER HOSPITALS ARE COMMITTED TO THE DELIVERY OF PEOPLE-CENTERED CARE AND SERVING AS A COMPASSIONATE AND TRANSFORMING HEALING PRESENCE WITHIN THE COMMUNITIES WE SERVE. AS A NOT-FOR-PROFIT HEALTH SYSTEM, TRINITY HEALTH REINVESTS ITS PROFITS BACK INTO THE COMMUNITIES AND IS COMMITTED TO ADDRESSING THE UNIQUE NEEDS OF EACH COMMUNITY. IN FISCAL YEAR 2025 (FY25), TRINITY HEALTH CONTRIBUTED NEARLY \$1.4 BILLION IN IRS-DEFINED COMMUNITY BENEFIT SPENDING TO AID THOSE WHO ARE EXPERIENCING POVERTY AND OTHER VULNERABILITIES, AND TO IMPROVE THE HEALTH STATUS OF THE COMMUNITIES IN WHICH WE SERVE. TRINITY HEALTH FURTHERED ITS COMMITMENT THROUGH AN ADDITIONAL \$1.5 BILLION IN PROGRAMS AND INITIATIVES THAT IMPACT OUR COMMUNITIES - YIELDING A TOTAL COMMUNITY IMPACT OF \$2.9 BILLION IN FY25.

TRINITY HEALTH'S COMMUNITY INVESTING PROGRAM FINISHED FY25 WITH MORE THAN \$68 MILLION COMMITTED TO BUILDING VITAL COMMUNITY RESOURCES. THESE FUNDS, IN COLLABORATION WITH 30 PARTNERS, WERE PAIRED WITH OTHER RESOURCES TO GENERATE MORE THAN \$1.1 BILLION IN INVESTMENTS THAT SERVED COMMUNITIES WITHIN TRINITY HEALTH'S SERVICE AREAS. BETWEEN 2018 AND APRIL 2025, THESE INVESTMENTS HAVE BEEN INSTRUMENTAL IN CREATING MUCH-NEEDED COMMUNITY RESOURCES FOR THE PEOPLE THAT WE SERVE, NOTABLY:

- SUPPORTED THE CREATION OF 15,700 UNITS OF AFFORDABLE HOUSING OVER THE LAST EIGHT YEARS (INCLUDING APPROXIMATELY 380 SUPPORTIVE HOUSING BEDS).
- CREATED OR RETAINED AT LEAST 1,300 CHILDCARE SLOTS; 7,600 K-HIGH SCHOOL EDUCATION SLOTS; AND 2,400 EARLY CHILDHOOD EDUCATION SLOTS.
- DEVELOPED AT LEAST 9.3 MILLION SQUARE FEET OF GENERAL REAL ESTATE OVER THE LAST EIGHT YEARS.
- SINCE 2014, 920 STUDENTS HAVE RECEIVED \$2.65 MILLION IN SCHOLARSHIPS THROUGH THE FRESNO STATE AND BOISE STATE SCHOLARSHIPS FUNDS.
- APPROXIMATELY 12,900 FULL- AND PART-TIME POSITIONS HAVE BEEN EITHER CREATED OR MAINTAINED THROUGH PARTNER LENDING.

Part VI Supplemental Information (Continuation)

IN FY25, OVER ONE MILLION PATIENTS SYSTEM-WIDE WERE SCREENED FOR HEALTH-RELATED SOCIAL NEEDS AT THEIR DOCTOR'S OFFICE. OF THOSE SCREENED, 27.4% IDENTIFIED AT LEAST ONE NEED AND MOST OFTEN IDENTIFIED FOOD ACCESS, FINANCIAL INSECURITY AND SOCIAL ISOLATION. AN ADDITIONAL 137,000 PATIENTS WERE SCREENED FOR SOCIAL NEEDS DURING AN IN-PATIENT HOSPITAL STAY WHERE TOP NEEDS INCLUDED FOOD ACCESS, TRANSPORTATION AND HOUSING.

TRINITY HEALTH'S ELECTRONIC HEALTH RECORD (EPIC) INCLUDES A STANDARD SCREENING TOOL FOR PATIENT SOCIAL NEEDS, AND AN INTEGRATED COMMUNITY RESOURCE DIRECTORY THROUGH FINDHELP TO CONNECT PATIENTS TO FREE AND REDUCED COST SUPPORT PROGRAMS. THE COMMUNITY RESOURCE DIRECTORY YIELDED OVER 118,000 SEARCHES, AN INCREASE OF 34% OVER THE PRIOR YEAR. TOP SEARCHES INCLUDED HOUSING, FOOD ACCESS AND HEALTH CARE.

BY COMBINING THEIR LIVED EXPERIENCE AND CONNECTIONS TO THE COMMUNITY WITH EFFECTIVE TRAINING AND INCLUSION IN THE CARE TEAM, COMMUNITY HEALTH WORKERS (CHW) PROVIDE PATIENT-CENTERED AND CULTURALLY RESPONSIVE INTERVENTIONS. CHW'S HAVE MANY COMPETENCIES, INCLUDING PATIENT OUTREACH AND ENGAGEMENT, CONDUCTING ASSESSMENTS, RESOURCE CONNECTION, HEALTH AND SOCIAL SERVICES SYSTEM NAVIGATION, GOAL-SETTING AND PROBLEM-SOLVING THROUGH ONGOING EDUCATION, ADVOCACY AND SUPPORT. IN FY25, TRINITY HEALTH'S 162 CHW'S SUCCESSFULLY ADDRESSED OVER 16,300 SOCIAL NEEDS. ONE SOCIAL NEED (SUCH AS ADDRESSING HOUSING OR FOOD NEEDS) CAN OFTEN TAKE MONTHS, OR EVEN A YEAR TO RESOLVE.

WITH FUNDING THROUGH THE CENTERS FOR DISEASE CONTROL AND PREVENTION, TRINITY HEALTH WORKED WITH 23 PARTNERS AND 47 CERTIFIED LIFESTYLE COACHES NATIONWIDE TO DELIVER THE NATIONAL DIABETES PREVENTION PROGRAM, AN EVIDENCE-BASED, 12-MONTH LIFESTYLE CHANGE PROGRAM. THE GOAL OF THE PROGRAM IS TO LOSE A PERCENTAGE OF BASELINE WEIGHT, ATTEND SESSIONS REGULARLY, AND ENGAGE IN 150 MINUTES OF PHYSICAL ACTIVITY A WEEK. GROUP SESSIONS ARE FACILITATED BY A CDC CERTIFIED LIFESTYLE COACH AND OFFERED IN-PERSON, REMOTELY, OR VIRTUALLY AT A SELF-PACED RATE. ALL PARTICIPANTS ARE REGULARLY SCREENED FOR HEALTH-RELATED SOCIAL NEEDS AND ARE REFERRED TO A CHW TO ADDRESS IDENTIFIED NEEDS. IN FY25, TRINITY HEALTH CONDUCTED FOCUSED OUTREACH WITH NEARLY 165,000 ELIGIBLE PARTICIPANTS AND ENROLLED 1,074 PARTICIPANTS INTO THE LIFESTYLE CHANGE PROGRAM.

FOR MORE INFORMATION ABOUT TRINITY HEALTH, VISIT WWW.TRINITY-HEALTH.ORG.

PART VI, LINE 7, LIST OF STATES RECEIVING COMMUNITY BENEFIT REPORT:
IN

