BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT

2026 Board Officers:
Commissioner Leininger (Chair)
Commissioner Shaffer (Vice-Chair)

BOARD OF HEALTH Meeting
Agenda for November 12, 2026 at 9:00 AM

1. Call to Order
    a. Opening ceremonies – Pledge Allegiance to the Flag of the United States of America
    b. Roll Call
    c. Approval of the Agenda*
    d. Approval of the Minutes from September 24, 2026*

2. Public Comment - For the purpose of public participation during public hearings or during the public comment portion of a meeting, every speaker prior to the beginning of the meeting is requested but not required to provide the Board with his or her name, address and subject to be discussed. Speakers are requested to provide comments that are civil and respectful. Each speaker will be allowed to speak for no more than three (3) minutes at each public comment opportunity.

3. Health Officer's Report – pg 7

4. Medical Director's Report – pg 9

5. Departmental Reports
    a. Environmental Health – pg 11
    b. Area Agency on Aging – pg 22
    c. Personal Health & Disease Prevention – pg 32
    d. Health Education & Promotion – pg 38

6. Financial Reports
    a. Approve Payments - pg 41
    b. Review Preliminary Financials - pg 44

7. Committee Reports – pg 48
    a. Finance Committee – Did not meet.
    b. Program, Policy, and Appeals Committee – Approve minutes from the November 4, 2026 meeting.

8. Unfinished Business
    a. None

9. New Business
    a. HSA Funding Policy – pg 49
    b. Financial Control Policy – pg 52
    c. Training Proposal – pg 83

10. Public Comment

11. Commissioner Comments

12. Adjournment – Next meeting: December 10, 2026

Board of Health Training:

Upcoming Meeting Dates:

- November 2, 2026 @ 9:00 AM – Finance Committee (Hoffmaster, Houtz, & Collins)
- November 4, 2026 @ 8:30 AM - PPA Committee (Leininger, Stoll, & Shaffer)
- November 12, 2026 @ 9:00 AM – Full Board Meeting
- December 2, 2026 @ 8:30 AM - PPA Committee (Leininger, Stoll, & Shaffer)
- December 7, 2026 @ 9:00 AM – Finance Committee (Hoffmaster, Houtz, & Collins)
- December 10, 2026 @ 9:00 AM – Full Board Meeting
- January 28, 2027 @ 9:00 AM – Full Board Meeting

2026 Board Education Schedule:

- February 27, 2026 – Regional Epidemiologist
- March 27, 2026 – Audit Presentation (during the meeting)
- April 24, 2026 – MMRMA Risk Management
- May 22, 2026 – AAA Multi-Year Plan
- September 25, 2026 – New BHSJ website
- November 12, 2026 – Measles

September 24, 2026 – Board of Health Meeting Minutes

The Branch-Hillsdale-St. Joseph Community Health Agency Board of Health meeting was called to order by Chair, Brent Leininger at 9:00 AM with the Pledge of Allegiance to the Flag of the United States. Roll call was completed as follows: Jared Hoffmaster, Jon Houtz, Brent Leininger, Rick Shaffer, Tim Stoll, and Kevin Collins. No members were absent.

Also present from BHSJ: Rebecca Burns, Dr. Luparello, Theresa Fisher, Laura Sutter, and Joe Frazier.

Mr. Hoffmaster moved to approve the agenda, with support from Mr. Stoll. The motion passed.

Mr. Houtz moved to approve the minutes from the August 27, 2026 meeting with support from Mr. Shaffer. The motion passed.

Public Comment: No public comment was given.

Rebecca Burns reviewed the monthly Health Officer's Report with the following items included: Health Officer Evaluation, PA 152 & Agency Employee Health Insurance for 2027, Essential Local Public Health Services (ELPHS) Funding Cuts, AAA Multi-Year Plan RFP, Mobile Unit, Website Redesign, Community Health Improvement Plan, Emergency Response, Seasonal Vaccines, Staffing Update, Coldwater Office, Hillsdale Office, Sturgis Office, and Three Rivers Office.

Dr. Luparello reviewed the Medical Director's monthly report. This month's educational report was titled, "Rabies".

Departmental Reports:

- Health Education & Promotion
- Environmental Health
- Area Agency on Aging
- Personal Health & Disease Prevention

Financial Reports/Expenditures

- Mr. Hoffmaster moved to approve the expenditures for August with support from Mr. Stoll. The motion passed.

- Mr. Shaffer moved to place the financials for August on file with support from Mr. Stoll. The motion passed.

Committee Reports:

- Finance Committee – Did not meet.
- Program, Policy, & Appeals Committee – Mr. Shaffer moved to approve the minutes from the September 16, 2026 Program, Policy, and Appeals Committee meeting, with support from Mr. Stoll. The motion passed

Unfinished Business:

- There was no unfinished business.

New Business:

- Mr. Stoll moved to approve the 2026-2031 Community Health Improvement Plan, as presented, with support from Mr. Collins. The motion passed.
- Mr. Hoffmaster moved to proceed with Scenario 2 for the agency's 2027 employee health insurance program, and authorize the agency to:
    1. Continue offering the three existing health insurance plan options for employees for the 2027 plan year;
    2. Continue the agency's contribution toward employee health insurance premiums, whereby the agency will pay 80% of the premium cost of Plan Option 1, regardless of which of the three health insurance plan options an employee selects. The employee will be responsible for any remaining premium cost associated with the plan selected;
    3. Provide an employer contribution to employee Health Savings Accounts (HSAs) for employees enrolled in the HAS-qualified health plan, in the following annual amounts:
        i. $1,000 for employee-only coverage;
        ii. $1,700 for two-person coverage; and
        iii. $2,000 for family coverage;
    4. Authorize the HSA contributions to be administered in accordance with an HSA Contribution Policy to be drafted by the Program, Policy, and Appeals Committee;
    5. Continue dental and vision coverage, with the agency paying 80% of the cost of dental and vision coverage and employees responsible for the remaining 20%; and
    6. Continue all other ancillary employee benefit coverages, with the agency paying 100% of the cost of those coverages.

    The motion received support from Mr. Stoll and the motion passed.
- Mr. Stoll moved to adopt PA 152 for Public Employer Contributions to Health Care, with support from Mr. Collins. The motion passed.
- Mr. Shaffer moved that the Board of Health enter closed session pursuant to Section 8(1)(a) of the Michigan Open Meetings Act, MCL 15.268(1)(a) to consider the periodic personnel evaluation of the Health Officer, at the Health Officer's request for a closed hearing. The motion received support Mr. Stoll. A roll call vote was taken and the motion passed 6-0 (Mr. Hoffmaster, yes; Mr. Leininger, yes; Mr. Houtz, yes; Mr. Shaffer, yes; Mr. Collins, yes; Mr. Stoll, yes).
- The Board took a short recess and entered closed session at 10:24 AM.
- The Board returned to open session at 10:42 AM

- Mr. Stoll moved to approve the minutes of the September 24, 2026 closed session, as read to the members prior to leaving closed session. The motion received support from Mr. Shaffer and passed.
- Mr. Stoll moved to accept the Health Officer's annual personnel evaluation as excellent with support from Mr. Hoffmaster. The motion passed.

Public Comment: No public comment was given.

With no further business, Mr. Shaffer moved to adjourned the meeting with support from Mr. Hoffmaster. The motion passed and the meeting was adjourned at 10:46 AM.

Respectfully Submitted by:
Theresa Fisher,
Administrative Services Director
Secretary to the Board of Health

Public Comment

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Health Officer's Report to the Board of Health for November 12, 2026
Prepared by: Rebecca A. Burns, M.P.H., R.S.

Agency Updates

Agency Employee Health Insurance: The agency is currently in the "open enrollment" period for health insurance.

Essential Local Public Health Services (ELPHS) Funding Cuts: The total dollar amount of the reduction to the agency is $15435.00. By program the amounts are $6255.00 from EGLE, $3242.00 from MDARD, and $5938.00 from Communicable Disease. The first budget amendment of the year will consider these funding reductions.

Rural Health Transformation Program (RHTP) Grants: The agency was asked to submit applications for two RHTP grants. One referred to as Care Closer to Home that was offered directly to our AAA IIIC division and the other referred to as Workforce that was offered to BHSJCHA. These grants may be renewable up to 5 years. The AAA IIIC grant was funded at $166,667.00. The workplan for this grant adds a Community Health Worker. The BHSJCHA grant was funded at $195,454.00. This workplan adds a Health Educator and provides training funds to prepare some staff for leadership positions including bringing on Theresa's replacement 4 months prior to her departure.

Program Audits (WIC, Immunizations, & KOHA): Several agency programs are currently undergoing or will soon be undergoing financial and/or program audits. These oversight audits do take significant staff time.

Environmental Health Program Fee Schedule: I have asked Joe to work on a proposed updated fee schedule for EH services. And we plan to bring that to Finance Committee in December.

Mobile Unit: The mobile unit is now "owned" by VanBuren/Cass District Health Department.

Emergency Response: In my last report I explained our response to a mercury spill and that event is now closed. This month, we have been responding to two cases of measles in Hillsdale county. The two cases of measles that we have are displayed on the MDHHS Measles Dashboard which is at: https://www.michigan.gov/mdhhs/adult-child-serv/childrenfamilies/immunizations/measlesupdates We aren't considered "outbreak" status as that would be 3 cases with the same exposure. Once identified, our staff implemented our emergency plan for measles. We have forwarded information to Providers and held Provider calls, ramped up social media messages, held an MMR vaccination clinic on a Saturday in Hillsdale and have 2 MMR vaccination clinics schedule for next week. In addition, some of our nurses have traveled out to homes to provide MMR vaccination and testing for measles. Although our two cases of measles are in Hillsdale county, we are seeing increased activity in testing and vaccination for measles throughout the jurisdiction.

Seasonal Vaccines: The agency continues to have seasonal vaccines; flu, RSV, and COVID available. We are beginning a radio campaign to encourage vaccination.

Staffing Update: The agency is currently seeking a part-time clinic clerk for St. Joseph county, a part-time AAA IIIC Program Specialist in Branch county, and a Community Health Educator in Branch county.

Coldwater Office: The Branch County Maintenance Supervisor reviewed the interior of the ductwork with a camera and shared with us that the interior of the ducts were generally clean and recommended that his staff clean the returns. It is these ceiling mounted areas where dust collects and those certainly needed cleaning. Therefore, we have determined there is not a need to hire a company to provide duct cleaning. The county staff have already cleaned the returns and diffusers.

Hillsdale Office: The concrete sidewalk in front of the MSUE entrance is scheduled to be torn out and replaced on November 11th and 12th. Brick tuck pointing on the exterior wall to the left of the MSUE entrance is scheduled to be done on November 13th. We will be preparing a request for bid process for the roof soon.

Sturgis: Nothing at this time.

Three Rivers Office: The reconstruction is nearly complete. Carpet is being installed on November 5th. Office furniture to replace damaged desks, bookcases is scheduled to arrive on November 9th. Still remaining is baseboard trim, some final drywall and paint touch ups, replacement of the exterior west end door, and final plumbing hook-ups including the water heater and recirculating pump which are being replaced. The gable end exterior that is identical to what we had is no longer available so we are getting new product on both gable ends to match. This will likely be the final item.

MEDICAL DIRECTOR'S REPORT

October 2026

1. Watching numbers of communicable diseases.
2. Director and Administrator meetings, in person and zoom.
3. Meetings via zoom and teleconference with several associations.
4. Continuing treatment of multiple patients.
5. Continued telephone conversations with area providers.
6. Vaccination and Tuberculosis subcommittees for the Michigan Association of Public Health and Preventive Medicine Physicians.
7. Continuous review of policies.
8. Participation in health fair conversations.
9. Measles preparation.

STAYING HEALTHY OVER THE HOLIDAYS

The holiday season brings many gatherings with family, friends and co-workers. During this time illnesses like COVID-19, Respiratory Syncytial Virus (RSV), influenza (flu) and norovirus can be more prevalent. People gathered for celebrations for Thanksgiving and other holidays should share tips to stay healthy.

Respiratory Illnesses and How They Spread

Respiratory illnesses like the flu, RSV and COVID-19 spread via droplets in the air when individuals breathe, talk, cough or sneeze. The droplets can even live on surfaces. Touching contaminated surfaces and then touching your face can also spread the infection. Droplets spread fastest indoors, where most of our holiday celebrations take place in the fall and winter in our communities. Poor airflow, long visits, and travel influence respiratory illness spread. We are also vulnerable because viruses can spread before symptoms start. Some individuals don't know that they are ill when they arrive for holiday gatherings.

Gastrointestinal Illnesses

Norovirus is highly contagious. Symptoms include vomiting, diarrhea, nausea, and stomach pain. Viral particles can cause infection and infected individuals shed billions of viral particles in vomit and stool. Norovirus is the leading cause of foodborne illness in the United States. It lives on surfaces and can survive heat and cold. Only handwashing with soap and water kills the virus; hand sanitizer doesn't kill the virus. You often hear about norovirus on cruise ships.

Other germs can cause gastrointestinal illness. Bacteria grow quickly between 40 and 140 degrees F, so keeping foods at appropriate temperatures is important. Safe cooking temperatures and using a food thermometer is essential. Don't leave perishable food out for more than two hours and store leftovers within two hours.

What Can We Do To Stay Healthy During the Holidays?

Get vaccinated

Stay home when ill. If you have a sore throat, fever, cough, vomiting or diarrhea, stay home.

Improve the air quality – open windows, use portable air purifiers, run that exhaust fan

Wash your hands with soap and water for 20 seconds, especially before eating and preparing food, using the bathroom, changing diapers and after coughing or sneezing.

Follow food safety rules.

Mask in crowded spaces if you elect to

Test for illness prior to gathering

Protect High-Risk Individuals

If you have older adults, young children, pregnant individuals or those with chronic illnesses at your family gatherings, protect them. Encourage vaccination and add a mask if needed.

Branch-Hillsdale-St. Joseph Community Health Agency
Environmental Public Health Services
Report for the November 12, 2026 Board of Health Meeting
Prepared by Joseph Frazier R.E.H.S. , Director of Environmental Health

Food Program Updates

Over the past month, staff have attended several trainings and a professional seminar. These training opportunities focused on foodborne illness investigations and conducting plan reviews for new and remodeled food facilities throughout our tri-county area. Both topics support our ongoing goal of cross-training all Food Program staff.

The seminar, held in Allegan County, provided our newer staff with an opportunity to meet and network with other sanitarians who perform similar services. These connections allow staff to gain additional knowledge, share experiences, and learn different perspectives on emerging issues. The next SWMEHA seminar will be hosted at our Branch County location, giving us an opportunity to showcase our office and facilities.

Across the tri-county area, several food facilities have recently opened or undergone changes in ownership:

- **Scooter's Coffee** – New facility, Branch County
- **Yum-Yum Sushi** – New facility, Branch County
- **Vara Juice** – New facility, Branch County
- **Best Western Plus** – Change of ownership, Branch County
- **Subway #21409** – Change of ownership, Hillsdale County
- **Countryside Montessori** – New facility, Hillsdale County
- **Uptown Crust Pizza** – New facility, St. Joseph County

Wells, Septic, Pools, Vector, and Campgrounds

Staff across the Well, Septic, Campground, and Pool programs have been very active over the past month. In August alone, staff throughout the tri-county area issued and inspected **108 well permits and 51 septic permits**.

Our agency also had the opportunity to co-host an EGLE soils training in Branch County. The training was open to local health department staff throughout Lower Michigan, with 25 sanitarians in attendance. We were able to secure a location where EGLE soils staff could demonstrate common soil profiles and indicators of high water tables. This was an especially valuable opportunity, as sanitarians from across the state were able to observe and discuss these examples together.

Both of our new staff members, AJ and Sophia, have hit the ground running and are making great progress. We have provided them with opportunities to participate in soils training and shadow more experienced staff. I believe these experiences will help them continue to develop their skills and become well-rounded sanitarians.

EH Service Statistics Report

BRANCH - HILLSDALE - ST. JOSEPH COMMUNITY HEALTH AGENCY

ENVIRONMENTAL HEALTH SERVICE REPORT 2025/2026

	SEPT				YTD 2025/2026				YTD 2024/2025			
	BR	HD	SJ	TOTAL	BR	HD	SJ	TOTAL	BR	HD	SJ	TOTAL
WELL/SEWAGE SYSTEM EVAL.	-	-	-	-	5	9	2	16	2	7	28	37
CHANGE OF USE EVALUATIONS - FIELD	2	7	2	11	42	54	39	135	31	79	64	174
CHANGE OF USE EVALUATIONS - OFFICE	12	6	15	33	83	46	131	260	76	32	86	194
ON-SITE SEWAGE DISPOSAL												
PERMITS NEW CONSTRUCTION	5	7	7	19	52	72	80	204	73	94	101	268
REPAIR/REPLACEMENT	9	3	20	32	86	49	125	260	66	72	108	246
VACANT LAND EVALUATION	2	4	1	7	14	23	16	53	12	21	12	45
PERMITS DENIED	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	16	14	28	58	150	139	221	517	151	187	221	559
SEWAGE PERMITS INSPECTED	13	9	13	35	112	97	174	383	94	114	161	369
WELL PERMITS ISSUED	16	15	33	64	169	172	220	561	182	156	205	543
WELL PERMITS INSPECTED	22	5	17	44	156	170	160	486	166	112	207	485
FOOD SERVICE INSPECTION												
PERMANENT	21	23	27	71	254	254	391	899	276	261	398	935
NEW OWNER / NEW ESTABLISHMENT	5	2	2	9	20	13	20	53	9	7	23	39
FOLLOW-UP INSPECTION	-	-	1	1	6	6	8	20	3	6	11	20
TEMPORARY	5	3	5	13	67	28	71	166	70	30	79	179
STFU, MOBILE	7	8	14	29	45	36	112	64	36	42	99	64
PLAN REVIEW APPLICATIONS	-	1	-	1	7	13	9	39	12	7	11	21
FOOD RELATED COMPLAINTS	1	-	1	2	18	6	13	37	12	1	8	21
FOODBORNE ILLNESS INVESTIGATED	-	-	-	-	3	1	2	6	3	1	5	9
FOOD CLASSES												
MANAGEMENT CERTIFICATION CLASS	-	-	-	-	-	-	-	5	-	5	5	10
CAMPGROUND INSPECTION	10	5	8	23	32	7	12	51	32	16	21	69
NON-COMM WATER SUPPLY INSP.	-	1	6	7	10	38	46	104	18	21	34	73
SWIMMING POOL INSPECTION	1	1	1	3	22	13	16	51	22	15	20	57
PROPOSED SUBDIVISION REVIEW	-	-	-	-	-	-	-	-	-	-	-	-
SEPTIC TANK CLEANER	-	-	4	4	8	-	4	12	12	6	19	37
DHS LICENSED FACILITY INSP.	1	-	1	2	5	24	30	59	14	25	33	72
COMPLAINT INVESTIGATIONS	-	1	-	1	27	51	14	92	37	52	23	112
LONG TERM MONITORING	-	-	-	-	3	1	16	22	-	-	11	11
BODY ART FACILITY INSPECTIONS	-	-	-	-	3	1	10	14	5	5	13	23

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT

570 Marshall Road
Coldwater, MI 49036
(517) 279 - 9561ext. 106

20 Care Drive
Hillsdale, MI 49242
(517) 437 - 7395 ext. 311

1110 Hill Street
Three Rivers, MI 49093
(269) 273 - 2161 ext. 233

Inspection Type Count By County

For Date Range: 09/01/2026 - 09/30/2026

County	Inspection Type / Reason	Count
Branch County		
Food Safety		
	Non Foodborne Illness Complaint - Initial	6
	Pre-Opening - Pre-Opening	5
	Required-Please Select Proper Inspection Type - Please Select an Inspection Type	1
	Risk Based Inspection - Routine	21
	STFU Inspection - Routine	7
	Temporary Food Inspection - Routine	5
	Total # of Food Safety inspections - Branch County	**45**
Hillsdale County		
Food Safety		
	Pre-Opening - Pre-Opening	2
	Progress Note - New Inspection Reason	4
	Risk Based Inspection - Routine	23
	STFU Inspection - Routine	8
	Temporary Food Inspection - Routine	3
	Total # of Food Safety inspections - Hillsdale County	**40**
St. Joseph County		
Food Safety		
	Non Foodborne Illness Complaint - Initial	1
	Plan Review Activity - Initial	1
	Pre-Opening - Pre-Opening	2

Inspection Type Count By County

For Date Range: 09/01/2026 - 09/30/2026

County	Inspection Type / Reason	Count
	Risk Based Inspection - Follow-up	1
	Risk Based Inspection - Routine	27
	STFU Inspection - Routine	14
	Temporary Food Inspection - Routine	5
	Total # of Food Safety inspections - St. Joseph County	**51**
	Total # of inspections - All counties	**136**

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT

570 Marshall Road
Coldwater, MI 49036
(517) 279 – 9561ext. 106

20 Care Drive
Hillsdale, MI 49242
(517) 437 – 7395 ext. 331

1110 Hill Street
Three Rivers, MI 49093
(269) 273 – 2161 ext. 233

Food Establishment Inspection Report by Facility Name

For Date Range: 09/01/2026 - 09/30/2026 and Food Program

Name	Location	Date	Inspection Type/Reason	# of P	# of Pf	CDI	# of C
American Legion Post 360	Reading	09/23/2026	Risk Based Inspection - Routine	1	0	1	0
Angel's Concessions	Sturgis	09/03/2026	STFU Inspection - Routine	0	0	0	1
Applebees #8393	Coldwater	09/16/2026	Risk Based Inspection - Routine	0	1	1	0
Arbys #6059	Coldwater	09/09/2026	Risk Based Inspection - Routine	0	1	1	1
Armstrong Park	Three Rivers	09/18/2026	Risk Based Inspection - Routine	1	1	2	0
Arrowhead Kettle Co	Coldwater	09/21/2026	STFU Inspection - Routine	0	0	0	0
Arrowhead Kettle Co	Coldwater	09/29/2026	STFU Inspection - Routine	0	0	0	0
Artic Shaved Ice	Coldwater	09/21/2026	Temporary Food Inspection - Routine	0	0	0	0
Barnyard Eats	Sherwood	09/14/2026	STFU Inspection - Routine	0	0	0	0
BEACH CONCESSIONS #88	Hillsdale	09/25/2026	STFU Inspection - Routine	0	0	0	0
BEACH CONCESSIONS #90	Hillsdale	09/25/2026	STFU Inspection - Routine	0	0	0	0
BEACH CONCESSIONS #92	Hillsdale	09/25/2026	STFU Inspection - Routine	0	0	0	0
Ben's Soft Pretzels trailer	Shipshawana	09/29/2026	STFU Inspection - Routine	0	0	0	0
Best Western Plus	Coldwater	09/08/2026	Pre-Opening - Pre-Opening	1	1	2	1

Name	Location	Date	Inspection Type/Reason	# of P	# of Pf	CDI	# of C
Big Pines Brewing	Hillsdale	09/18/2026	Risk Based Inspection - Routine	0	0	0	0
Biggby Coffee #254	Coldwater	09/21/2026	Temporary Food Inspection - Routine	0	0	0	0
Branch Inter School District	Coldwater	09/02/2026	Risk Based Inspection - Routine	0	0	0	0
Branch ISD Bronson Head Start	Bronson	09/09/2026	Risk Based Inspection - Routine	0	0	0	0
Branch ISD Girard Head Start	Coldwater	09/01/2026	Risk Based Inspection - Routine	0	0	0	1
Branch ISD Lincoln Learning Center	Coldwater	09/14/2026	Risk Based Inspection - Routine	0	0	0	0
Buffalo Wild Wings	Coldwater	09/11/2026	Risk Based Inspection - Routine	0	0	0	0
Burger King #1419	Hillsdale	09/25/2026	Risk Based Inspection - Routine	0	0	0	0
Burnside Senior Center	Coldwater	10/02/2026	Risk Based Inspection - Routine	0	0	0	0
BURR OAK GRANGE #1350	Burr Oak	09/08/2026	Risk Based Inspection - Routine	0	0	0	0
Burr Oak Missionary Church	Burr Oak	09/08/2026	Risk Based Inspection - Routine	0	0	0	0
BURR OAK SCHOOL	Centreville	09/03/2026	Risk Based Inspection - Routine	0	1	1	0
Burr Oak United Methodist Kitchen	Burr Oak	09/03/2026	Risk Based Inspection - Routine	0	0	0	0
Camden United Methodist Church	Camden	09/24/2026	Risk Based Inspection - Routine	0	0	0	0
CAMDEN-FRONTIER SCHOOL	Camden	09/24/2026	Risk Based Inspection - Routine	0	0	0	0
Charlies Pride Barbecue	Coldwater	09/15/2026	STFU Inspection - Routine	0	0	0	0
CHECKER RECORDS	HILLSDALE	09/01/2026	Risk Based Inspection - Routine	0	0	0	0
Chicago Street Pub Inc	Coldwater	09/24/2026	Risk Based Inspection - Routine	0	1	1	0
Chief's Arrowhead Hots	Coldwater	09/21/2026	STFU Inspection - Routine	0	0	0	0
Class of Waldron	Waldron	10/09/2026	Temporary Food Inspection - Routine	0	0	0	0
Coldwater Broadway Grille	Coldwater	09/23/2026	Non Foodborne Illness Complaint - Initial	0	2	1	1
Coldwater Burger King #4652	Coldwater	09/24/2026	Non Foodborne Illness Complaint - Initial	0	0	0	0
Commercial Sports Bar	Coldwater	09/09/2026	Non Foodborne Illness Complaint - Initial	0	0	0	0
CONGRESS SCHOOL	STURGIS	09/11/2026	Risk Based Inspection - Routine	0	0	0	0
Countryside Montessori School	Hillsdale	09/11/2026	Pre-Opening - Pre-Opening	0	0	0	0

Name	Location	Date	Inspection Type/Reason	# of P	# of Pf	CDI	# of C
Cowboy Up	Mendon	09/10/2026	Risk Based Inspection - Routine	0	0	0	0
Dairy Queen	Quincy	09/04/2026	Risk Based Inspection - Routine	0	0	0	0
EASTWOOD SCHOOL	Sturgis	09/25/2026	Risk Based Inspection - Routine	0	0	0	1
El Guerrero LLC	Bronson	09/08/2026	Required-Please Select Proper Inspection Type - Please Select an Inspection Type	0	0	0	0
El Taco Loco II	Coldwater	09/29/2026	Temporary Food Inspection - Routine	0	0	0	0
FIRST UNITED METHODIST CHURCH OF STURGIS	Sturgis	09/21/2026	Risk Based Inspection - Routine	0	0	0	0
Frankie's	Three Rivers	09/09/2026	Risk Based Inspection - Routine	0	1	0	2
Frozen Sunshine	Quincy	09/15/2026	Temporary Food Inspection - Routine	0	0	0	0
GINOLFI'S	North Adams	09/04/2026	Risk Based Inspection - Routine	0	0	0	0
Grambys Homestyle Restaurant	Sturgis	09/18/2026	Risk Based Inspection - Routine	1	1	1	0
Grill Cheese Festival	Colon	09/28/2026	Temporary Food Inspection - Routine	0	0	0	0
Hillsdale County ISD - YAP	Hillsdale	09/23/2026	Risk Based Inspection - Routine	0	0	0	0
Hillsdale Dairy Queen	Hillsdale	09/25/2026	Risk Based Inspection - Routine	0	0	0	0
Hillsdale Exchange Club	Hillsdale	09/25/2026	Temporary Food Inspection - Routine	0	0	0	0
HILLSDALE HIGH SCHOOL	Hillsdale	09/23/2026	Risk Based Inspection - Routine	0	0	0	0
HILLSDALE HOSPITAL	HILLSDALE	09/04/2026	Risk Based Inspection - Routine	0	0	0	0
Hungry Howies	Coldwater	09/22/2026	Risk Based Inspection - Routine	0	0	0	0
Jefferson Elementary School	Coldwater	09/09/2026	Risk Based Inspection - Routine	1	0	0	0
Jerolene Elementary	Sturgis	09/17/2026	Risk Based Inspection - Routine	0	0	0	0
JILLY BEANS	Hillsdale	09/01/2026	Risk Based Inspection - Routine	0	0	0	0
Kate's Diner I	Centreville	09/28/2026	STFU Inspection - Routine	0	0	0	0
Kate's Pizza	Centreville	09/28/2026	STFU Inspection - Routine	0	0	0	0
Katie's Ice Cream	Myakka City	09/28/2026	STFU Inspection - Routine	0	0	0	0
Katie's Pizza	Myakka City	09/28/2026	STFU Inspection - Routine	0	0	0	0
Katie's Strawberry Shortcakes	Myakka City	09/28/2026	STFU Inspection - Routine	0	0	0	0

Name	Location	Date	Inspection Type/Reason	# of P	# of Pf	CDI	# of C
Kernal Poppers	White Pigeon	09/18/2026	STFU Inspection - Routine	0	0	0	0
Kick N Kafe	Coldwater	09/10/2026	Non Foodborne Illness Complaint - Initial	0	0	0	0
LAKE AREA CHRISTIAN SCHOOL--fixed	STURGIS	09/11/2026	Risk Based Inspection - Routine	0	0	0	0
Lake View Church	Camden	09/04/2026	Risk Based Inspection - Routine	0	0	0	0
Lakeland Elementary	Coldwater	09/11/2026	Risk Based Inspection - Routine	0	0	0	0
LIFESONG COMMUNITY CHURCH	OSSEO	09/14/2026	Risk Based Inspection - Routine	0	0	0	0
Lil' Brews and Blessings LLC (2)	Centreville	09/18/2026	STFU Inspection - Routine	0	0	0	0
Lincoln Elementary School	Coldwater	09/14/2026	Risk Based Inspection - Routine	0	1	1	1
Litchfield Historical Society	Litchfield	09/22/2026	Temporary Food Inspection - Routine	0	0	0	0
Little Caesars - Three Rivers	Three Rivers	09/09/2026	Non Foodborne Illness Complaint - Initial	0	0	0	0
Magic Bunny BBQ	Colon	09/05/2026	STFU Inspection - Routine	1	0	1	0
Mamaw's Dirty Sodas		09/14/2026	STFU Inspection - Routine	0	0	0	0
Mancinos of Coldwater	Coldwater	09/09/2026	Non Foodborne Illness Complaint - Initial	0	0	0	0
Max Larsen Elementary School	Coldwater	09/11/2026	Risk Based Inspection - Routine	0	0	0	0
Michindoh Conference Center	Hillsdale	09/15/2026	Progress Note - New Inspection Reason	0	0	0	0
Mr Gyros	Coldwater	10/02/2026	Risk Based Inspection - Routine	0	0	0	0
My Guys Frys	Sturgis	09/30/2026	STFU Inspection - Routine	0	0	0	0
Nottawa Christian School	Sturgis	09/25/2026	Temporary Food Inspection - Routine	0	0	0	0
Olde Time Waffle cone	Constantine	09/12/2026	STFU Inspection - Routine	0	0	0	0
Pam's Sugar Shack	Mendon	09/17/2026	Risk Based Inspection - Routine	0	0	0	0
Pansophia Academy	Coldwater	09/01/2026	Risk Based Inspection - Routine	0	0	0	0
Pigeon Inn	White Pigeon	09/17/2026	Risk Based Inspection - Routine	0	1	1	1
PIPER'S GRINDERS GALORE	Constantine	09/30/2026	Risk Based Inspection - Routine	1	0	1	1
Pleasant Street 2025 LLC (Corner Cafe)	Sturgis	09/24/2026	Risk Based Inspection - Routine	0	0	0	0
Ponderosa Steakhouse	Coldwater	09/16/2026	Non Foodborne Illness Complaint - Initial	0	0	0	1

Name	Location	Date	Inspection Type/Reason	# of P	# of Pf	CDI	# of C
PREMIERE THEATRE/UNITED ENTERTAINMENT	Hillsdale	09/11/2026	Progress Note - New Inspection Reason	0	0	0	0
PREMIERE THEATRE/UNITED ENTERTAINMENT	Hillsdale	09/25/2026	Risk Based Inspection - Routine	0	1	1	1
Quality Inn & Suites	Coldwater	09/04/2026	Risk Based Inspection - Routine	0	1	1	0
Ray's Tavern	Reading	09/23/2026	Risk Based Inspection - Routine	0	0	0	0
READING UNITED METHODIST CHURCH	READING	09/23/2026	Risk Based Inspection - Routine	0	0	0	0
Salem Church	Waldron	09/04/2026	Risk Based Inspection - Routine	0	0	0	0
Scooter's Coffee	Coldwater	09/10/2026	Pre-Opening - Pre-Opening	0	0	0	0
Side Street Beer Bar	Coldwater	09/04/2026	Temporary Food Inspection - Routine	0	0	0	0
SOMERSET CONGREGATIONAL CHURCH	SOMERSET	09/01/2026	Progress Note - New Inspection Reason	0	0	0	0
Spangler's Stockyard Restaurant	Hillsdale	09/01/2026	Progress Note - New Inspection Reason	0	0	0	0
Spangler's Stockyard Restaurant	Hillsdale	09/29/2026	Risk Based Inspection - Routine	0	0	0	0
SPECIAL ED'S DONUTS	Somerset Center	09/14/2026	STFU Inspection - Routine	0	0	0	0
St Charles School	Coldwater	09/15/2026	Risk Based Inspection - Routine	0	0	0	0
ST PAUL'S LUTHERAN CHURCH	HILLSDALE	09/02/2026	Risk Based Inspection - Routine	0	0	0	0
Starbucks Coffee Sturgis	Sturgis	10/01/2026	Risk Based Inspection - Routine	0	0	0	0
STREET DOGS	Hillsdale	09/18/2026	STFU Inspection - Routine	0	0	0	0
STURGES-YOUNG CENTER FOR THE ARTS	Sturgis	09/11/2026	Risk Based Inspection - Routine	0	0	0	0
Sturgis Central Commons	Sturgis	09/17/2026	Risk Based Inspection - Routine	0	0	0	0
STURGIS HIGH SCHOOL	Sturgis	09/01/2026	Plan Review Activity - Initial	0	0	0	0
STURGIS MIDDLE SCHOOL	STURGIS	09/11/2026	Risk Based Inspection - Routine	0	1	1	1
Subway #19719	Coldwater	09/11/2026	Risk Based Inspection - Routine	0	0	0	0
Subway #21409	Jonesville	09/25/2026	Pre-Opening - Pre-Opening	0	1	0	0
Subway #34903	Sturgis	10/01/2026	Pre-Opening - Pre-Opening	0	1	1	0
Swifts Sips	Quincy	09/21/2026	STFU Inspection - Routine	0	0	0	0
Taco Bell #33023	Three Rivers	09/29/2026	Risk Based Inspection - Routine	0	0	0	1
Tasty Twist of Coldwater	Coldwater	09/22/2026	Risk Based Inspection - Routine	0	0	0	1

Name	Location	Date	Inspection Type/Reason	# of P	# of Pf	CDI	# of C
The Coney Cart	Osseo	09/08/2026	STFU Inspection - Routine	0	0	0	0
The Donut Hut	Hillsdale	09/29/2026	Risk Based Inspection - Routine	0	0	0	0
Three Rivers 9th St umc	Three Rivers	09/09/2026	Risk Based Inspection - Routine	0	0	0	1
THREE RIVERS PIZZA HUT	THREE RIVERS	09/29/2026	Risk Based Inspection - Routine	0	0	0	1
Timber's Eats & Treats	Hillsdale	09/11/2026	STFU Inspection - Routine	0	0	0	0
Tokyo Li Inc	Three Rivers	09/11/2026	Risk Based Inspection - Follow-up	0	0	0	0
TOMAHAWK TAVERN	White Pigeon	09/17/2026	Risk Based Inspection - Routine	0	0	0	0
Uptown Crust Pizza and Bistro	Sturgis	09/04/2026	Pre-Opening - Pre-Opening	1	0	1	1
Vara Juice	Coldwater	09/28/2026	Pre-Opening - Pre-Opening	0	0	0	0
Vel's	Three Rivers	09/14/2026	Temporary Food Inspection - Routine	0	0	0	0
WALL SCHOOL	STURGIS	09/25/2026	Risk Based Inspection - Routine	0	0	0	1
Welton Foods Pizza Trailer	Centreville	09/18/2026	STFU Inspection - Routine	0	0	0	0
Wendy's #4405	Hillsdale	09/17/2026	Risk Based Inspection - Routine	0	0	0	2
WENZEL SCHOOL	STURGIS	09/11/2026	Risk Based Inspection - Routine	0	0	0	0
White Oaks Golf Club	Hillsdale	09/02/2026	Risk Based Inspection - Routine	0	0	0	0
White Pigeon Train Depot	White Pigeon	09/14/2026	Temporary Food Inspection - Routine	0	0	0	0
Wieners and Tacos on the Fly II	Hillsdale	09/14/2026	STFU Inspection - Routine	0	0	0	0
WIZ BBQ	Three Rivers	09/08/2026	Temporary Food Inspection - Routine	0	0	0	0
Woodin Family Concession	Battlecreek	09/08/2026	STFU Inspection - Routine	0	0	0	0
Yum Yum Sushi Hibachi	Coldwater	09/17/2026	Pre-Opening - Pre-Opening	0	0	0	0
Yum Yum Sushi Hibachi	Coldwater	09/25/2026	Pre-Opening - Pre-Opening	0	0	0	2
				8	**17**	**20**	**24**

Food Inspection Codes

P-This indicates a priority violation which is a violation that includes a quantifiable measure to show control of hazards such as cooking, cooling, reheating and handwashing. It is in general terms a violation that can potentially lead directly to a foodborne illness.

Pf-This is a priority foundation violation which is a violation that supports a priority violation. For example, the lack of soap or towels at a handwash sink is a Pf. This supports the priority violation of not washing hands.

C- This is a core violation. This is an item that usually relates to general sanitation, operation controls and maintenance of facilities and equipment. Not cleaning floors is an example of a core violation.

CDI- This indicates a violation was observed during the inspection and was brought to the attention of the person in charge. At that time, the violation was corrected while the inspector was present at the facility.

Area Agency on Aging (IIIC)
Branch-St. Joseph

November 12, 2026
Director's Report

Enclosure:

1. ACLS Bureau Correspondence: dated 9/30/26, AAA assessment observation report w. StJoe Transit Authority. No findings.
2. ACLS Bureau Correspondence: dated 10/8/26, FY27-29 Multi-Year Area Plan and FY27 Annual Implementation Plan approval letter. No Special Conditions.
3. Services to Victims of Elder Abuse 4th quarter programmatic report

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Updates:

1. **Services to Victims of Elder Abuse Program Updates:**
   - 4th Q program report is enclosed. It was another record year – 120 individuals served! A few highlights from the data:
     - 60 individuals served in each county; primarily white females, aged 60 or older
     - Most reported victimizations: identity theft/fraud/financial crime and elder abuse or neglect, many cases had multiple victimizations
     - Most direct support types: individual advocacy, interventions with person or institutions, crisis intervention, relocation assistance, transportation, and referrals to other services. We also helped with 25 personal protection orders.
   - The "PREVNT" grant for FY2027 is taking shape! Our team recently met with the ACLS Bureau for orientation about grant administration and next steps.
   - *Congrats to the team!!!* We were awarded the MDHHS Division of Victim Services (DVS) "Underserved Victims of Crime" grant! This is our traditional "VOCA grant" that was re-bid statewide after DVS shifted funding and consolidated multiple grant categories. They also implemented cuts across many/all grantees due to declining federal funding. We came out ok and will make the adjustments and enhancements as planned. This is the first re-bid of this grant since we were originally awarded in 2018. Grantees were told it was a highly competitive grant cycle. Funds requested came in almost four times more than the amount available!

2. **MI Options Updates:** We have a three-month contract with CareWell Services to carry on MIOptions activities... By January 2027, however, we will be extended 4 different, direct contracts with the ACLS Bureau to continue SHIP, MIPPA (health insurance counseling) and Person-Centered Options Counseling. The funding will be significantly less but we have planned for this and have already adjusted.

3. **Staffing Update –** We have our part-time Program Specialist position open which supports the business side of AAA functions. And, we have one part-time Community Health Worker position in development… The CHW position is new to AAA and will work in the MIOptions program and with the new Rural Health Transformation Aging project. RHTP's goal is to support individuals who are transitioning home after a stay in the hospital. We'll build on existing successful programs, including our own in Health Promotion. We'll also work on collaboration and leveraging strengths among our community hospitals & health partners!

STATE OF MICHIGAN
DEPARTMENT OF HEALTH AND HUMAN SERVICES
LANSING

GRETCHEN WHITMER
GOVERNOR

Amy Epkey
ACTING DIRECTOR

September 30, 2026

Rebecca Burns
Health Officer
Branch-St. Joseph Area Agency on Aging
570 N. Marshall Road
Coldwater, MI 49036

Dear Ms. Burns:

The Michigan Department of Health and Human Services, State Unit on Aging (SUA), has a responsibility to review the assessment process used by Branch St- Joseph Area Agency on Aging (Region IIIC AAA) as they monitor the performance of agencies awarded funds under the Older Americans Act and from the Michigan Legislature. The intent of the SUA's review is to ensure the assessment process complies with the SUA's *Operating Standards for Area Agencies on Aging* and *Operating Standards for Service Programs*.

On May 29, 2026, SUA staff monitored the Region IIIC's assessment of the St. Joseph County Transportation Authority. The SUA observed Region IIIC's use of the assessment tool, contracting standards, service definitions, minimum standards, and established assessment procedures. The SUA found the assessment to be compliant with all applicable Operating Standards.

We appreciate the time and cooperation provided by your staff. If you have questions, please contact Aging Network Support (ANS) Section Regional Aging Representative, Ashley Ellsworth, at ellswortha2@michigan.gov or 517-294-9680

Sincerely,

Scott Werner, Director
Operations & Aging Network Support Division

SW:ae

c: Laura Sutter, AAA Director, Region IIIC AAA
Brent Leininger, Board Member, Region IIIC AAA
Shannon Skowronski, Manager, ANS Section
Ashley Ellsworth, Regional Aging Representative, ANS Section

STATE OF MICHIGAN
DEPARTMENT OF HEALTH AND HUMAN SERVICES
LANSING

GRETCHEN WHITMER
GOVERNOR

AMY EPKEY
ACTING DIRECTOR

October 8, 2026

Rebecca Burns
Health Officer
Branch-St. Joseph Area Agency on Aging
570 N. Marshall Road
Coldwater, MI 49036

Dear Ms. Burns:

On September 18, 2026, the Commission on Services to the Aging approved the Fiscal Year (FY) 2027-2029 Multi-Year Plan (MYP) and FY 2027 Annual Implementation Plan (AIP) for Branch-St. Joseph Area Agency on Aging (Region IIIC AAA).

The following general conditions were placed on each FY 2027 AIP. They are not considered time-specific until further instructions are issued.

General Conditions

1. The FY 2027 budget and planned services summary form will be revised as necessary to reflect the final federal and state allotments, and to reflect carry-over amounts and transfers. Budget revisions will be accepted until August 1, 2027.

2. The Area Agency on Aging (AAA) grant budget must reflect amounts in the FY 2027 Estimated Cost Allocation Worksheet established by the Michigan Department of Health and Human Services, Bureau of Aging, Community Living, and Supports (ACLS Bureau).

3. The AAA will work with the ACLS Bureau to implement recommendations and resolve compliance issues identified through program and fiscal monitoring and assessment efforts and audit findings.

4. The AAA will maintain and update a plan that adequately addresses the needs of older adults in the event of disaster.

5. The AAA will provide accurate information and referrals from agency to agency to ensure information or assistance received is consistent with the mission of the AAA, and as specified by the ACLS Bureau's *Operating Standards for AAAs*.

6. The AAA will comply with all indicators of compliance as identified in the *Operating Standards for AAAs.*

7. The AAA will provide the ACLS Bureau, within specified time frames and format, all records, reports, documents, and other information as may be requested, pertinent to AAA operations and implementation of the AIP. Exceptions to specified time frames may be requested when circumstances warrant.

Special Conditions

None

Supplemental Documents Approved for FY 2027

None

Regional Service Definitions Approved

None

Direct Service Provision Approved

Respite Care
Friendly Reassurance

If you have questions regarding your FY 2027-2029 MYP, please contact Aging Network Support (ANS) Section Regional Aging Representative, Ashley Ellsworth, at ellswortha2@michigan.gov or 517-294-9680.

Sincerely,

Scott Werner

Scott Werner, Director
Operations & Aging Network Support Division

SW:ae

c: Brent Leininger, Board Chair, Region IIIC AAA
Laura Sutter, AAA Director, Region IIIC AAA
Scott Wamsley, Director, Bureau of Aging, Community Living, and Supports
State Unit on Aging

Area Agency on Aging (IIIC) Branch-St. Joseph

570 Marshall Road, Coldwater, MI 49036
www.bhsj.org/aaa

Services to Victims of Elder Abuse Grant
FY25-26 4th Quarter Report (St. Joseph County)

07/01/26 to 09/30/26

***Types of Victimization & Services Provided are based on number of occurences**

***Demographic Info is new clients only; all other categories include continuing clients**

Office: (517) 278-2538 Toll Free (888) 615-8009

For additional information or questions please contact:

Toni Laughlin Ph: (517) 617-5592 Email: laughlint@bhsj.org
Wendy Nowicke Ph: (269) 501-2869 Email:nowickew@bhsj.org

Demographics - New Clients	Total	Previous Qtr. Totals	YTD
Black/African-American	1	0	1
Hispanic/Latino	1	0	1
Caucasian/Non-Latino	8	27	35
Female	2	19	21
Male	2	8	10
Vulnerable: Age 18-59	1	4	5
Elderly: Age 60 and Older	9	23	32
New Clients Total	**10**	**27**	**37**
Continuing Clients	**9**	**14**	**23**
Total Clients Served	**19**	**41**	**60**

Types of Victimization	Total	Previous Qtr. Totals	YTD
Arson	0	0	0
Bullying (Verbal, Cyber or Physical)	1	6	7
Domestic or Family Violence	2	7	9
Elder Abuse or Neglect	17	37	54
Identity Theft/Fraud/Financial Crime	7	24	31
Physical Assault	2	4	6
Robbery/Burglary	0	0	0
Sexual Assault	0	6	6
Survivors of Homicide	0	0	0
Multiple Victimizations	19	32	51

Special Classification	Total	Previous Qtr. Totals	YTD
Deaf/Hard of Hearing	10	21	31
Disability	19	40	59
Homeless	5	8	13
LGBTQ	0	0	0
Veteran	3	3	6

Direct Services	Total	Previous Qtr. Totals	YTD
Crime Victims Compensation	0	0	0
Information about Criminal Justice	23	101	124
Referral to Other Services	82	123	205
Referral to Other Victim Services	0	5	5
Victim Notification	17	24	41

Services to Victims of Elder Abuse Grant
FY25-26 4th Quarter Report (St. Joseph County)
Continued

Personal Advocacy	Total	Previous Qtr. Totals	YTD
Child/Dependent Assistance	0	0	0
Emergency Medical Care	0	1	1
Individual Advocacy	141	194	335
Intervention with Person or Institutions	85	162	247
Law Enforcement Interview	2	6	8
Transportation	11	47	58

Emotional Support or Safety Services	Total	Previous Qtr. Totals	YTD
Crisis Intervention	140	137	277
Emergency Financial Assistance	3	4	7

Shelter/Housing Services	Total	Previous Qtr. Totals	YTD
Relocation Assistance	36	44	80
Transitional Housing	0	0	0

Criminal Justice Assistance	Total	Previous Qtr. Totals	YTD
Criminal Advocacy	0	0	0
Law Enforcement Interview	0	4	4
Notification of Criminal Justice Event	8	20	28
Other Emergency Assistance	0	0	0
Personal Protective Order	3	2	5
Prosecution Interview	0	0	0
Restitution Assistance	0	56	56
Victim Impact Statement	3	2	5

Area Agency on Aging (IIIC) Branch-St. Joseph

Services to Victims of Elder Abuse Grant
FY25-26 4th Quarter Report (Branch County)

07/01/26 - 09/30/26

***Types of Victimization & Services Provided are based on number of occurences**

***Demographic Info is new clients only; all other categories include continuing clients**

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Wendy Nowicke Ph: (269) 501-2869 Email:nowickew@bhsj.org

Demographics - New Clients	Total	Previous Qtr. Totals	YTD
Black/African-American	0	0	0
Hispanic/Latino	0	0	0
Caucasian/Non-Latino	4	29	33
Female	4	23	27
Male	0	8	8
Vulnerable: Age 18-59	1	3	4
Elderly: Age 60 and Older	3	28	31
New Clients Total	**4**	**31**	**35**
Continuing Clients	**12**	**13**	**25**
Total Clients Served	**16**	**44**	**60**

Types of Victimization	Total	Previous Qtr. Totals	YTD
Arson	0	0	0
Bullying (Verbal, Cyber or Physical)	6	12	18
Domestic or Family Violence	6	8	14
Elder Abuse or Neglect	13	38	51
Identity Theft/Fraud/Financial Crime	7	36	43
Physical Assault	2	1	3
Robbery/Burglary	4	10	14
Sexual Assault	0	0	0
Survivors of Homicide	0	0	0
Multiple Victimizations	15	40	55

Special Classification	Total	Previous Qtr. Totals	YTD
Deaf/Hard of Hearing	8	24	32
Disability	16	44	60
Homeless	2	4	6
LGBTQ	0	1	1
Veteran	1	9	10

Direct Services	Total	Previous Qtr. Totals	YTD
Crime Victims Compensation	3	3	6
Information about Criminal Justice	6	30	36
Referral to Other Services	30	112	142
Referral to Other Victim Services	1	3	4
Victim Notification	5	5	10

Services to Victims of Elder Abuse Grant
FY24-25 4th Quarter Report (Branch County)
Continued

Personal Advocacy	Total	Previous Qtr. Totals	YTD
Child/Dependent Assistance	0	0	0
Emergency Medical Care	0	0	0
Individual Advocacy	111	86	197
Intervention with Person or Institutions	8	168	176
Law Enforcement Interview	4	8	12
Transportation	11	39	50

Emotional Support or Safety Services	Total	Previous Qtr. Totals	YTD
Crisis Intervention	13	76	89
Emergency Financial Assistance	3	9	12

Shelter/Housing Services	Total	Previous Qtr. Totals	YTD
Relocation Assistance	23	46	69
Transitional Housing	0	0	0

Criminal Justice Assistance	Total	Previous Qtr. Totals	YTD
Criminal Advocacy	0	5	5
Law Enforcement Interview	1	8	9
Notification of Criminal Justice Event	5	6	11
Other Emergency Assistance	8	12	20
Personal Protective Order	16	4	20
Prosecution Interview	0	0	0
Restitution Assistance	0	0	0
Victim Impact Statement	1	0	1

Area Agency on Aging (IIIC) Branch-St. Joseph

570 Marshall Road, Coldwater, MI 49036
www.bhsj.org/aaa

Services to Victims of Elder Abuse Grant
FY25-26 4th Quarter Report (Both Counties)

07/01/26 - 09/30/26

***Types of Victimization & Services Provided are based on number of occurences**

***Demographic Info is new clients only; all other categories include continuing clients**

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For additional information or questions please contact:

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Wendy Nowicke Ph: (269) 501-2869 Email:nowickew@bhsj.org

Demographics - New Clients	Total	Previous Qtr. Totals	YTD
Black/African-American	1	0	1
Hispanic/Latino	1	0	1
Caucasian/Non-Latino	12	56	68
Female	6	42	48
Male	2	16	18
Vulnerable: Age 18-59	2	7	9
Elderly: Age 60 and Older	12	51	63
New Clients Total	**14**	**58**	**72**
Continuing Clients	**21**	**27**	**48**
Total Clients Served	**35**	**85**	**120**

Types of Victimization	Total	Previous Qtr. Totals	YTD
Arson	0	0	0
Bullying (Verbal, Cyber or Physical)	7	18	25
Domestic or Family Violence	8	15	23
Elder Abuse or Neglect	30	75	105
Identity Theft/Fraud/Financial Crime	14	60	74
Physical Assault	4	5	9
Robbery/Burglary	4	10	14
Sexual Assault	0	6	6
Survivors of Homicide	0	0	0
Multiple Victimizations	34	72	106

Special Classification	Total	Previous Qtr. Totals	YTD
Deaf/Hard of Hearing	18	44	62
Disability	35	84	119
Homeless	7	12	19
LGBTQ	0	1	1
Veteran	4	12	16

Direct Services	Total	Previous Qtr. Totals	YTD
Crime Victims Compensation	3	3	6
Information about Criminal Justice	29	131	160
Referral to Other Services	112	235	347
Referral to Other Victim Services	1	8	9
Victim Notification	22	29	51

Services to Victims of Elder Abuse Grant
FY24-25 4th Quarter Report (Both Counties)
Continued

Personal Advocacy	Total	Previous Qtr. Totals	YTD
Child/Dependent Assistance	0	0	0
Emergency Medical Care	0	1	1
Individual Advocacy	252	280	532
Intervention with Person or Institutions	93	218	311
Law Enforcement Interview	6	14	20
Transportation	22	86	108

Emotional Support or Safety Services		Previous Qtr. Totals	YTD
Crisis Intervention	153	215	368
Emergency Financial Assistance	6	13	19

Shelter/Housing Services	Total	Previous Qtr. Totals	YTD
Relocation Assistance	59	90	149
Transitional Housing	0	0	0

Criminal Justice Assistance	Total	Previous Qtr. Totals	YTD
Criminal Advocacy	0	5	5
Law Enforcement Interview	1	12	13
Notification of Criminal Justice Event	13	26	39
Other Emergency Assistance	8	12	20
Personal Protective Order	19	6	25
Prosecution Interview	0	2	2
Restitution Assistance	0	59	59
Victim Impact Statement	4	4	8

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT
www.bhsj.org

Personal Health and Disease Prevention: November 12, 2026
Heidi Hazel, BSN, RN

Communicable Disease:
Data from our regional epi's.

Here is a link to the Respiratory Illness Dashboard: Respiratory Illness Dashboard. Influenza, COVID-19, and RSV activity is increasing but remains low in Michigan.

Influenza: Updated respiratory virus guidance documents was shared out with Providers and Long-Term Care facilities.

Here are the 2026-2027 vaccine recommendations for respiratory viruses:

- Influenza: 2026-2027 Influenza Vaccine Recommendations
- COVID-19: 2026-2027 COVID-19 Vaccine Recommendations
- RSV: 2026-2027 Respiratory Syncytial Virus (RSV) Vaccine Recommendations

Measles: As of October 15th, there have been 4,410 confirmed measles cases in the United States for 2026. There have been 17 confirmed cases in Michigan. Indiana has reported 50 cases for 2026 with 7 cases in LaGrange County. We have received lots of calls for the MMR vaccine after an exposure at a wedding. States reporting the highest case counts include Pennsylvania (208) and Wisconsin (76).

Rabies: Currently 1 skunk and 57 bats (2 in Barry and 3 in Calhoun). **2026 Rabies Positive Animals in Michigan.**

Ebola: As of October 19th, there have been 8,787 confirmed cases and 4,242 deaths. Kenya had a confirmed imported case on October 6th and is now reporting 8 total cases.

Immunizations/STD/HIV:
Staff attended the Immunization Coordinators Meeting in Lansing, which included updates from the Michigan Department of Health and Human Services (MDHHS), Epidemiology, and Vaccine-Preventable Diseases. The meeting also provided updates on the Vaccines for Children (VFC) Program, including school and childcare immunization requirements and related guidance.

Staff also attended the State of Michigan HIV & STI Conference in Muskegon. The conference focused on innovative approaches to HIV and STI prevention and care, strategies to improve quality of services, and strengthening public health infrastructure. Attendees also had opportunities to share ideas, learn from experts, and network with colleagues in the field.

Staff also participated in Project Connect in St. Joseph County, providing immunizations to attendees. A total of five vaccines were administered, helping increase access to immunization services within the community.

Women, Infant, and Children (WIC):

During September and October, our agency has focused on preparing for upcoming Michigan WIC program changes while continuing chart audits related to the WIC Management Evaluation (ME) and Corrective Action Plan (CAP). Staff are preparing for the November 1, 2026, transition from Similac to Enfamil as Michigan WIC's contracted infant formula brand. Preparation includes reviewing state guidance, familiarizing staff with comparable formulas, and ensuring staff are prepared to address participant questions and support a smooth transition for WIC families. Health Education and Promotion's social media messaging has also been shared to help disseminate information to participants, and the state is using the MIWIC platform to communicate the upcoming change directly to WIC families.

Children's Special Health Care Services (CSHCS), Hearing/Vision and KOHA:

CSHCS: Children's Special Health Care Services (CSHCS) covers diagnostic evaluations for individuals whose symptoms or medical history indicate a potential qualifying condition. This benefit allows families to access specialist evaluations and obtain a diagnosis without the financial burden of paying for the evaluation out of pocket. Treatment is not covered under the diagnostic benefit unless the individual receives a qualifying diagnosis and completes the required enrollment process.

This benefit has been especially valuable for families who may otherwise be unable to afford specialty care. The number of diagnostic evaluations has increased, largely through word-of-mouth referrals to underinsured families who may not have pursued a specialist evaluation without this assistance.

Hearing/Vision: The current focus is on coordinating with schools to complete required screenings for kindergarten and Head Start students in accordance with fall deadlines. Kindergarten screenings must be completed by November 1, while Head Start screenings are due within 45 days of the child's first day of school.

KOHA: Our Registered Dental Hygienist (RDH) is also currently providing services in the schools and will begin utilizing our electronic medical record (EMR) system to complete and maintain documentation electronically.

Branch - Hillsdale - St. Joseph Community Health Agency
Personal Health and Disease Prevention

*FYTD=Fiscal Year To Date	Sep-26				FYTD 2025-2026 (Oct-Sept)				FYTD 2024-2025 (Oct-Sept)			
Confirmed & Probable Case Totals	**BR**	**HD**	**SJ**	**Total**	**BR**	**HD**	**SJ**	**Total**	**BR**	**HD**	**SJ**	**Total**
Anaplasmosis	0	-	-		-	-	3	**3**	-	-	-	**-**
Animal Bite/Rabies potential exposure	-	1	3	**3**	6	24	30	**60**	5	31	4	**40**
Babesiosis	-	-	-		-	-	1	**1**	-	-	-	**-**
Blastomycosis	-	-	-		-	-	-	**-**	-	-	-	**-**
Brucellosis	-	-	-		-	-	-	**-**	-	-	-	**-**
Campylobacter	3	1	1		10	14	1	**25**	8	8	8	**24**
Chicken Pox	-	-	-		4	-	4	**8**	-	-	-	**-**
Chlamydia	11	3	15		58	32	118	**208**	61	54	127	**242**
Coccidioidomycosis	-	-	-		-	-	-	**-**	-	-	-	**-**
CPO	-	-	-		-	-	-	**-**	-	-	-	**-**
CRE Carbapenem Resistant Enterobac.	-	-	-		1	-	-	**1**	-	-	-	**-**
Cryptosporidiosis	1	1	-	**2**	3	5	1	**9**	1	3	-	**4**
Cyclosporiasis	-	-	-	**-**	14	44	38	**96**	-	-	-	**-**
Giardiasis	2	-	-	**2**	3	-	-	**3**	1	-	1	**2**
Gonorrhea	-	1	4	**5**	10	3	39	**52**	6	10	40	**56**
H. Influenzae Disease - Inv.	-	-	-	**-**	1	3	-	**4**	-	1	2	**3**
Hepatitis B - Acute	-	-	-	**-**	-	-	-	**-**	-	-	2	**2**
Hepatitis B - Chronic	1	-	-	**1**	1	-	1	**2**	1	1	1	**3**
Hepatitis C - Acute	-	-	-	**-**	-	-	1	**1**	-	-	1	**1**
Hepatitis C - Chronic	1	-	1	**2**	2	5	14	**21**	1	4	8	**13**
Hepatitis C Unknown	-	-	-	**-**	-	-	-	**-**	1	-	-	**1**
Histoplasmosis	-	-	-	**-**	2	-	1	**3**	1	-	3	**4**
Influenza	-	1	4	**5**	309	72	565	**946**	543	114	663	**1,320**
Kawasaki	-	-	-	**-**	5	-	-	**5**	-	-	-	**-**
Latent Tuberculosis	1	-	-	**1**	13	3	1	**17**	10	2	7	**19**
Legionellosis	-	-	1	**1**	7	1	5	**13**	7	1	5	**13**
Listeriosis	-	-	-	**-**	-	-	-	**-**	-	-	-	**-**
Lyme Disease	-	4	1	**5**	-	9	3	**12**	6	10	12	**28**
Measles	-	-	-	**-**	-	-	-	**-**	-	-	-	**-**
Menengitis - Aseptic	-	-	-	**-**	-	-	-	**-**	-	2	-	**2**
Menengitis - Bacterial	-	1	-	**1**	-	1	-	**1**	1	1	-	**2**
Meningococcal Disease	-	-	-	**-**	-	-	-	**-**	-	-	-	**-**
Mumps	-	-	-	**-**	-	-	-	**-**	-	-	-	**-**
Mycobacterium - Other	-	-	-	**-**	2	1	2	**5**	5	3	1	**9**
Norovirus	-	-	-	**-**	-	-	1	**1**	16	1	-	**17**
Novel Coronavirus	2	3	8	**13**	215	382	230	**827**	334	536	279	**1,149**
Pertussis	-	-	-	**-**	2	2	2	**6**	7	14	7	**28**
Salmonellosis	1	-	-	**1**	7	5	4	**16**	5	1	7	**13**
Shiga Toxin-prod. (STEC)	-	1	-	**1**	6	35	4	**45**	6	34	4	**44**
Shigellosis	-	-	-	**-**	1	-	-	**1**	-	-	1	**1**
Shingles	-	-	-	**-**	-	1	1	**2**	1	-	1	**2**
Staphylococcus Aureus Infect.	-	-	-	**-**	-	-	-	**-**	-	-	-	**-**
Strep Invasive Gp A	-	-	-	**-**	1	1	1	**3**	8	-	5	**13**

Branch - Hillsdale - St. Joseph Community Health Agency
Personal Health and Disease Prevention

	Sep-26					YTD 2025-2026					YTD 2024-2025				
	BR	HD	ST	TR	Total	BR	HD	ST	TR	Total	BR	HD	ST	TR	Total
CHILD IMMUNIZATIONS															
# Vaccines Given CHA	110	179	160	4	**453**	892	1,238	842	392	**3,364**	2,116	1,723	704	1,639	**6,182**
All VFC Doses Given					**-**	4,655	2,303	-	4,847	**11,805**	6,626	3,832	-	6,291	**16,906**
Waivers	26	36	19	31	**112**	198	302	155	154	**809**	178	193	78	181	**630**
ADULT IMMUNIZATIONS															
# Vaccines Given	58	14	12	3	**87**	646	139	161	290	**1,236**	535	170	**135**	257	**1,097**
All AVP Doses Given					**-**	445	99	-	251	**795**	998	387	**14**	688	**2,087**
TRAVEL VACCINATIONS															
Branch Office						-	-	-	-	**-**	-	-	-	-	-
COMMUNICABLE DISEASE															
TB Tests Done	6	3	2	-	**11**	67	53	5	27	**152**	53	97	**2**	24	**176**
					-										
STD treatments	3	2	-	2	**7**	9	11	21	49	**90**	11	15	-	85	**111**
HIV Testing	2	6	1	10	**19**	5	35	27	65	**132**	4	22	-	84	**110**
ENROLLMENTS															
Medicaid & Michild	3	-	-	-	**3**	15	1	1	-	**17**	14	4	-	-	**18**
REFERRAL SERVICE															
MCDC Referrals	16	13	14	20	**63**	83	55	276	285	**699**	44	57	149	225	**475**
MIHP referrals	-	-	30	22	**52**	19	-	316	366	**701**	5	-	368	463	**836**
Hearing Screens															
Pre-school	65	101	-	160	**326**	778	378	-	688	**1,844**	787	410	-	550	**1,747**
School Age	450	228	-	173	**851**	1,585	979	-	1,966	**4,530**	1,767	1,511	**619**	1,985	**5,882**
Vision Screens															
Pre-school	78	106	-	174	**358**	943	393	-	712	**2,048**	812	386	-	396	**1,594**
School Age	807	258	-	527	**1,592**	3,595	2,525	154	4,399	**10,673**	2,662	2,299	-	3,980	**8,941**
Children's Special Health Care Services															
Diagnostics	3	1	-	-	**4**	9	11	-	-	**20**	8	3	-	-	**11**
Assessments-Renewal	31	18	-	32	**81**	239	265	-	304	**808**	235	276	-	339	**850**
Assessments-New	7	7	-	6	**20**	51	172	-	87	**310**	49	87	-	**63**	**199**
					4,039					40,033					47,852
Leads completed	18	18	10	9	**55**	225	122	80	107	**534**					**(157)**
Leads >3.5	0	2	2	0	4	17	29	14	6	66					

2025 - 2026 Caseload [1] Management Report

LA #: 12

Name: Branch-Hillsdale-St. Joseph Community Health

State Participation/Enrollment Ratio [2]:

Mar-26	Apr-26	May-26	Jun-26	Jul-26	Curr Year P/E Ratio (last 12 months)
96.0%	96.2%	96.6%	96.2%	96.2%	96.2%

Months	Enrollment [3]	Initial Participation [4]	Closeout Participation [5]	% Change in Participtation [6]	Participation/ Enrollment Ratio[2]
Oct / 2024	4,449	4,160	4,195		93.50%
Nov / 2024	4,450	4,161	4,211	0.38%	93.51%
Dec / 2024	4,441	4,138	4,191	-0.47%	93.18%
Jan / 2025	4,461	4,153	4,198	0.17%	93.10%
Feb / 2025	4,373	4,079	4,127	-1.69%	93.28%
Mar / 2025	4,326	4,060	4,106	-0.51%	93.85%
Apr / 2025	4,332	4,099	4,122	0.39%	94.62%
May / 2025	4,304	4,015	4,062	-1.46%	93.29%
Jun / 2025	4,278	4,012	4,044	-0.44%	93.78%
Jul / 2025	4,277	4,073	4,091	1.16%	95.23%
Aug / 2025	4,246	4,027	4,048	-1.05%	94.84%
Sep / 2025	4,238	4,028	4,058	0.25%	95.04%
Oct / 2025	4,223	4,049	4,060	0.05%	95.88%
Nov / 2025	4,176	3,976	4,009	-1.26%	95.21%
Dec / 2025	4,099	3,901	3,930	-1.97%	95.17%
Jan / 2026	4,120	3,899	3,932	0.05%	94.64%
Feb / 2026	4,092	3,862	3,905	-0.69%	94.38%
Mar / 2026	4,112	3,884	3,901	-0.10%	94.46%
Apr / 2026	4,043	3,835	3,865	-0.92%	94.86%
May / 2026	4,043	3,826	3,849	-0.41%	94.63%
Jun / 2026	4,094	3,835	3,863	0.36%	93.67%
Jul / 2026	4,067	3,822	3,868	0.13%	93.98%
Aug / 2026	4,105	3,835	(est[7]) 3,934		93.42%
Sep / 2026	0	0	(est[7]) 3,979		
Total (Year to date)	45,174	42,724	39,182		
Curr Year Avg	4,107	3,884	3,918	-0.48%	94.23%
Months with Count	11	11	10	10	11
Average to Base %[8]		93.3%	94.14%		
Last yrs Base % [9]		105.5%	106.46%		
Last yrs Average	4,348	4,084	4,121		93.92%

Estimated average participation for current year to date: **3,925**

Actual average monthly participation current year to date [10]: **3,918**

Funding Allocation Information

Total Funding Allocation: $908,156

Assigned Funding Participation Count [11]:

Current Yr Base: 4,162

Previous Yr Base: 3,871

Date Generated: 09/14/2026

[1] **Caseload**: The term used to refer to the number of clients being served in a given time. This is comprised of both enrollment and participation.
[2] **Participation/Enrollment Ratio**: The number of clients participating divided by the number enrolled.
[3] **Enrollment**: Number of clients certified to receive benefits in the given month. Final counts available for the month that just ended.
[4] **Initial Participation**: Number of clients receiving benefits at the beginning of the month. Comparison between this and the closeout participation is indicative of the number of participants added over the course of the month. This can be used to inform staff of participation numbers at the start of the month and enable them to proactively improve participation before it is finalized.
[5] **Closeout Participation**: Final number of clients who received benefits for the given month. Finalized approx. 5 weeks after the month ends.
[6] **% Change in Participation**: The % difference in closeout participation when compared to the previous month.
[7] **est**: It is the estimated participation for the given month. This is available prior to the closeout participation being available. It is a calculated value based on prior months' participation. **NOTE:Last two non 0 values are "Estimates"**
[8] **Average to Base %**: Compares the current year average participation to the current year base.
[9] **Last yrs Base %**: Compares last year's average participation to the last year base.
[10] **Actual Avg. Part. For current year to date**: It is an average that includes the participation counts for all months in the current year where participation has been finalized.
[11] **Assigned Funding Participant Count**: The value used in the calculation to determine the funding allocated to the local agency for the fiscal year. For additional details, refer to your agency's annual funding allocation letter.

OCTOBER - BOARD OF HEALTH REPORT

HEALTH EDUCATION AND PROMOTION

Included in This Month's Report:

1. **HEP Update**
2. **Community Health Worker (CHW) Update**
3. **Community Events**
4. **Social Media Update**

1. Health Education & Promotion Department Update:

The Office of Highway Safety Planning grant has concluded for 2025-2026. During the fiscal year we distributed 985 buggy driver's manuals, 744 reflective tape packets, 250 Buggy Driver's Education books, 6 blinking lights, and 323 surveys were returned to us from the community. We had the opportunity to present to the Michigan Driver's Education and Safety Teachers Association, several community groups, and the human service networks. Crashes were slightly lower with than the previous year.

The Hillsdale County Opioid Committee's Recovery Resources webpage is on the county's website. We are working to begin the marketing campaign to increase community awareness.

Savannah and Lauren have begun working with our collaborative partners across the three counties including Substance Abuse Task Forces, Child Abuse Prevention, Early Childhood, Better Birth Outcomes.

We are in the process of interviewing for the Health Education position that is part of our Rural Health Transformation funding.

There were 15 media stories in since the last Board of Health meeting that mentioned the agency. We have issued 4 press releases since the September Board of Health meeting.

2. Community Health Worker Program:

We continue to receive referrals from multiple agencies across the jurisdiction. In September, we have 35 active clients and held 40 appointments. Lisa participated in the Area Agency on Aging's Elder Justice Symposium. Lisa attended the Michigan Community Health Worker Annual Conference on October 7th where she connected with Community Health Workers and partner organizations from across the state.

The greatest needs requested were assistance with preparing for Open Enrollment, housing or homelessness, food insecurity, financial insecurity, and insurance insecurity. We have been assisting residents in preparation of the changes coming from MDHHS related to Medicaid eligibility and booking appointments to assist individuals with open enrollment.

3. Community Events:

We have supported, participated, or will be participating in the following events:

9/25 – Friendship Friday (St. Joseph County)
9/26 – Insight Health Fair (Branch County)
9/28 – Coach Eby Dinner (Branch County)
10/2 – Project Connect (St. Joseph County)
10/16 – Perennial Park Health Fair (Hillsdale County)

OCTOBER - BOARD OF HEALTH REPORT

HEALTH EDUCATION AND PROMOTION

10/22 – Sturgis Head Start Family Fun Night (St. Joseph County)
10/23 – Friendship Friday (St. Joseph County)
10/26 – Coach Eby Dinner (Branch County)
10/30 – King's Kupboard (Hillsdale County)
11/10 – Hillsdale County Project Connect (Hillsdale County)
11/16 – Presentation for Camden Frontier Schools (Hillsdale County)
11/18 – King's Kupboard (Hillsdale County)

Social Media Update

Social Media continues to spread our message to the community. In September, we covered the following topics:

- Healthy Aging Month
- Child Passenger Safety Month
- Food Safety Month
- Safe Sleep Month
- Ready for Kindergarten Clinics
- Septic Smart Week
- PFAS Awareness Week
- Hispanic Heritage Month
- National Preparedness Month - Ready.gov/EP

Additionally, we support ongoing messaging of the following:

- WIC Monthly Social Media Toolkit
- MDHHS Safe Sleep Toolkit
- Medicaid Navigation Assistance/New HMP Requirements
- Firearm safety/gun locks
- BHSJ Nursing Nest

OCTOBER - BOARD OF HEALTH REPORT

HEALTH EDUCATION AND PROMOTION

Social Media Data (As of September 1st, 2026)								
	# of Followers Facebook & Instagram	**Instagram Reach**	**YouTube Views Amount of times content was played or displayed**	**Next Door Impressions Total count of all views and related interactions.**	**Facebook Views Amount of times content was played or displayed.**	**Video # and Topic**	**Agency Mentions in Local Media**	**Boosted Activities # and Topic**
September	*4,551*	1,808 ***(Down 46.3%)***	*221*	*2,749*	92,327 ***(down 11.2%)***	**Videos shared (3):** Car seat safety, Food safety, and flu vaccine information	*5*	0
TOTAL TO DATE Since 10/1/22	***15 NEW followers since last report***	*43,863*	*1,688*	*21,895*	*1,841,047*	*457*	*597*	*56*

Branch-Hillsdale-St Joseph Community Health Agency

Check/Voucher Register - Check Register for BOH

00103 - Cash - Accounts Payable

From 9/1/2026 Through 9/30/2026

Payee	Check Amount	Check Number	Effective Date
Accident Fund	3,255.00	26.09.18 P.01	9/18/2026
ACD.NET	144.85	26.09.18 A.01	9/18/2026
Aflac Group Insurance	1,445.22	26.09.25 R.01	9/25/2026
Alert Medical Alarms	199.65	55284	9/18/2026
Amazon Capital Services, Inc	2,054.09	26.09.04 P.01	9/4/2026
Amazon Capital Services, Inc	12,698.25	26.09.18 P.02	9/18/2026
Amy Lelli	340.00	55271	9/4/2026
Angela Shedd	1,682.78	26.09.04 A.01	9/4/2026
Angela Shedd	1,992.63	26.09.18 A.02	9/18/2026
Angela Shedd	2,342.35	26.09.30 A.01	9/30/2026
Barbara Krzyzanski	105.00	26.09.04 A.02	9/4/2026
Barbara P. Foley	46.16	55282	9/11/2026
Barbara P. Foley	46.16	55299	9/25/2026
Beacon Properties Administration	4,533.45	26.09.30 A.02	9/30/2026
Beth Ann's Embroidery	154.00	55272	9/4/2026
Branch Area Transit Authority	1,769.17	26.09.18 A.03	9/18/2026
Branch County Comm Network	500.00	55301	9/30/2026
Branch County Commission	28,172.26	26.09.18 A.04	9/18/2026
Branch County Complex	10,550.07	26.09.04 A.03	9/4/2026
Branch County Complex	5,694.28	26.09.30 A.03	9/30/2026
Branch County Sheriff Department	40.00	55302	9/30/2026
Candy Cox	73.15	55285	9/18/2026
Card Services Center	3,107.64	26.09.04 P.04	9/4/2026
Card Services Center	1,780.48	26.09.30 P.02	9/30/2026
Center for Information Management, Inc	1,500.00	26.09.18 A.05	9/18/2026
Century Bank - Hillsdale Maintenance	2,000.00	26.09.30 A.04	9/30/2026
Century Bank - Three Rivers Maintenance	2,000.00	26.09.30 A.05	9/30/2026
Century EFTPS	29,183.09	26.09.11 R.01	9/11/2026
Century EFTPS	31,359.26	26.09.25 R.02	9/25/2026
Century Mastercard	2,732.80	26.09.04 P.06	9/4/2026
Century Mastercard	728.11	26.09.30 P.03	9/30/2026
Century MERS	45,344.03	26.09.04 A.04	9/4/2026
Century State/Michigan State Treasury	10,679.42	26.09.25 R.03	9/25/2026
Chadwick Decker	40.00	55273	9/4/2026
Charter Communications	150.00	26.09.04 P.07	9/4/2026
Charter Communications	150.00	26.09.30 P.04	9/30/2026
Cintas Corporation Loc 351	97.48	26.09.04 P.08	9/4/2026
City Of Coldwater	60.00	26.09.30 A.06	9/30/2026
City Of Three Rivers	255.00	26.09.30 A.07	9/30/2026
City Of Three Rivers	101.82	55286	9/18/2026
City Of Three Rivers	106.93	55287	9/18/2026
Clean Earth Environmental Contracting Services	777.00	55303	9/30/2026
CLIAwaived Inc.	2,730.00	26.09.04 A.05	9/4/2026
ConnectAmerica	95.00	26.09.18 A.06	9/18/2026
Cribs for Kids, Inc.	5,949.30	55288	9/18/2026
Crossroads Home Care Inc.	976.11	26.09.18 A.07	9/18/2026
Current Office Solutions	6,594.00	26.09.04 A.06	9/4/2026
Current Office Solutions	567.00	26.09.18 A.08	9/18/2026
Dale Cross	21.00	55289	9/18/2026
Dale W. Hubbard, Inc. Service Group	256.95	55304	9/30/2026
David Huntley	50.00	55305	9/30/2026

Payee	Check Amount	Check Number	Effective Date
DELTA DENTAL	4,604.54	26.09.30 A.08	9/30/2026
DiningRD	4,604.92	26.09.04 A.07	9/4/2026
DL Gallivan Office Solutions	902.11	55274	9/4/2026
DL Gallivan Office Solutions	869.79	55306	9/30/2026
Dr. Karen M. Luparello	4,606.25	26.09.04 A.08	9/4/2026
Dr. Karen M. Luparello	4,606.25	26.09.30 A.09	9/30/2026
Employee Services, LLC	3,050.00	55275	9/4/2026
Empower	5,059.00	26.09.11 R.02	9/11/2026
Empower	8,099.09	26.09.11 R.03	9/11/2026
Empower	5,059.00	26.09.25 R.04	9/25/2026
Empower	8,243.82	26.09.25 R.05	9/25/2026
Eurotrol U.S.B.V.	278.00	55276	9/4/2026
FedEx	72.10	26.09.04 P.09	9/4/2026
FedEx	47.97	26.09.18 P.03	9/18/2026
FedEx	6.00	26.09.30 P.05	9/30/2026
Frontier	374.89	26.09.04 P.10	9/4/2026
Frontier	388.74	26.09.30 P.06	9/30/2026
GDI Services Inc.	3,505.41	26.09.30 A.10	9/30/2026
Glaxo-Smithkline Financial Inc.	14,117.57	26.09.18 A.09	9/18/2026
GT INDEPENDENCE	12,628.68	26.09.18 A.10	9/18/2026
Health Equity	3,962.58	26.09.11 PR.01	9/11/2026
Health Equity	3,962.58	26.09.25 PR.01	9/25/2026
Hedgerow Software US, Inc.	13,000.00	26.09.30 A.11	9/30/2026
Helping Angels Home Care LLC	3,513.68	26.09.18 A.11	9/18/2026
Hillsdale Board Of Public Utilities	1,805.58	26.09.04 P.11	9/4/2026
Hillsdale Board Of Public Utilities	2,133.75	26.09.30 P.07	9/30/2026
Hillsdale County Treasurer	3,714.76	26.09.04 A.09	9/4/2026
Home Roots Companion & Home Care Services LLC	180.88	26.09.18 A.12	9/18/2026
HomeJoy of Kalamzoo	3,787.53	26.09.18 A.13	9/18/2026
Hospital Network Healthcare Services	64.75	26.09.18 A.14	9/18/2026
Indiana MI Power Company	890.75	26.09.04 P.12	9/4/2026
Indiana MI Power Company	75.33	26.09.30 P.08	9/30/2026
Indiana State Tax	212.60	26.09.25 R.06	9/25/2026
Inspiration Studio Designs	3,375.00	55277	9/4/2026
Jessariah Manifold	425.00	55290	9/18/2026
Laboratory Corporation of America	56.60	26.09.18 A.15	9/18/2026
Lajoy Fl, LLC	1,529.92	26.09.18 A.16	9/18/2026
Legal Services Of S.Central MI	1,060.00	26.09.18 A.17	9/18/2026
Lisa Redmond	26.50	26.09.30 A.12	9/30/2026
Maplecrest, LLC	1,361.80	26.09.30 A.13	9/30/2026
Martha & Jeremy Frew	35.00	55278	9/4/2026
Mary Kushion Consulting, LLC	1,440.00	55291	9/18/2026
McKesson Medical-Surgical Gov. Solutions LLC	2,433.80	26.09.04 P.13	9/4/2026
Medical Care Alert	238.05	26.09.18 A.18	9/18/2026
Melvin Graber	345.00	55307	9/30/2026
Merck Sharp & Dohme LLC	26,700.74	55292	9/18/2026
Michigan Gas	43.69	26.09.04 P.14	9/4/2026
Michigan Gas	47.14	26.09.30 P.09	9/30/2026
Michigan State Disbursement Unit	190.11	55283	9/11/2026
Michigan State Disbursement Unit	190.11	55300	9/25/2026
Midwest Communications	800.00	55293	9/18/2026

Payee	Check Amount	Check Number	Effective Date
Mulder's Moving & Storage	4,550.00	55308	9/30/2026
Nationwide	50.00	26.09.11 R.04	9/11/2026
Nationwide	50.00	26.09.25 R.07	9/25/2026
Ohio State Tax	100.95	26.09.25 R.08	9/25/2026
PFIZER INC	3,077.31	55294	9/18/2026
PFIZER INC	6,693.69	55309	9/30/2026
Pitney Bowes Inc.	483.30	26.09.18 P.04	9/18/2026
Principal Life Insurance Company	2,129.91	26.09.30 P.10	9/30/2026
ProAssurance Indemnity Company, Inc	795.00	26.09.18 P.05	9/18/2026
Prompt Care Express PC	160.00	55295	9/18/2026
R&S Northeast LLC	346.60	26.09.04 A.10	9/4/2026
Republic Waste Services	145.52	26.09.04 P.15	9/4/2026
Richard Clark	2,468.56	26.09.30 A.14	9/30/2026
Riley Pumpkin Farm	770.00	26.09.30 A.15	9/30/2026
Riley Pumpkin Farm	3,120.00	260922 A.01	9/22/2026
ROSE PEST SOLUTIONS	89.00	26.09.04 A.11	9/4/2026
ROSE PEST SOLUTIONS	89.00	26.09.30 A.16	9/30/2026
Sanofi Pasteur Inc.	228.23	26.09.04 P.16	9/4/2026
Sanofi Pasteur Inc.	22,157.08	26.09.18 P.06	9/18/2026
School Health	4,199.99	55279	9/4/2026
Semco Energy	57.78	26.09.04 P.17	9/4/2026
Semco Energy	59.42	26.09.30 P.11	9/30/2026
Sermon on the Mount Publishing	909.75	55310	9/30/2026
Shaffmasters U-Stor-n-Lock	150.00	26.09.30 A.17	9/30/2026
Shred It	113.67	26.09.04 P.18	9/4/2026
Shred It	114.87	26.09.30 P.12	9/30/2026
Smilemakers	44.96	26.09.18 A.19	9/18/2026
St Joseph County COA	41,478.56	26.09.18 A.20	9/18/2026
St Joseph County Transit Authority	2,493.15	26.09.18 A.21	9/18/2026
Staples	302.83	26.09.04 P.19	9/4/2026
State of Mich EGLE	1,365.00	55296	9/18/2026
State of Mich EGLE	17.00	55297	9/18/2026
State Of Michigan	532.00	55311	9/30/2026
State of Michigan-Dept	23.00	55280	9/4/2026
State of Michigan-Dept	11.50	55298	9/18/2026
State of Michigan-Dept	11.50	55312	9/30/2026
Stephanie Koppel	367.50	26.09.04 A.12	9/4/2026
Stephanie Koppel	367.50	26.09.18 A.22	9/18/2026
Stephanie Koppel	367.50	26.09.30 A.18	9/30/2026
Stratus Video, LLC	3,542.10	26.09.18 A.23	9/18/2026
TelNet Worldwide	1,769.31	26.09.18 A.24	9/18/2026
Verdant Commercial Capital	1,322.75	26.09.18 P.07	9/18/2026
Verizon	1,771.46	26.09.04 P.20	9/4/2026
VRI INC.	27.00	26.09.18 A.25	9/18/2026
Western Michigan Health Insurance Pool Trust	58,808.40	26.09.30 P.13	9/30/2026
Wickard's Plumbing LLC	3,925.00	55281	9/4/2026
Report Total	557,615.95		

Branch-Hillsdale-St Joseph Community Health Agency
Balance Sheet - Unposted Transactions Included In Report
As of 9/30/2026

Preliminary

	Current Period Balance
Assets	
Cash on Hand	10,991.95
Cash with County Treasurer	3,100,262.80
Community Foundation Grant	309,955.94
Cash HD Building Maintenance	80,888.97
Cash TR Building Maintenance	105,635.19
Accounts Receivable	53,761.17
Due from Dental DAPP	1,275.67
Due from State	209,692.48
Due from Other Funding Sources	327,570.74
Prepaid Expenses	151,894.25
Biologic Inventory	159,942.33
Total Assets	4,511,871.49
Liabilities	
Accounts Payable	154,185.20
Payroll Liabilites	147,628.29
Deferred Revenue	82,143.35
Unavailable Revenue	(23,948.90)
Biologics	159,942.33
Total Liabilities	519,950.27
Net Assets	
Operation Fund Balance	396,105.85
Restricted Fund Balance	453,583.12
Designated Fund Balance	3,142,232.25
Total Net Assets	3,991,921.22
Total Liabilities and Net Assets	4,511,871.49

BHSJ Community Health Agency
Schedule of Cash Receipts and Disbursements
October 1, 2025 thru
September 30, 2026

Plus: Cash Receipts	$628,471.27
Less: Cash Disbursements For Payroll/AP	$ (772,650.24)
10/31/2025 Cash Balance	**$ 3,970,394.32**
Plus: Cash Receipts	$633,432.70
Less: Cash Disbursements For Payroll/AP	$ (663,990.11)
11/30/2025 Cash Balance	**$ 3,939,836.91**
Plus: Cash Receipts	$620,491.36
Less: Cash Disbursements For Payroll/AP	$ (639,361.22)
12/31/2025 Cash Balance	**$ 3,920,967.05**
Plus: Cash Receipts	$847,544.81
Less: Cash Disbursements For Payroll/AP	$ (894,796.16)
1/31/2026 Cash Balance	**$ 3,873,715.70**
Plus: Cash Receipts	$572,212.52
Less: Cash Disbursements For Payroll/AP	$ (635,104.49)
2/28/2026 Cash Balance	**$ 3,810,823.73**
Plus: Cash Receipts	$559,290.93
Less: Cash Disbursements For Payroll/AP	$ (668,377.59)
3/31/2026 Cash Balance	**$ 3,701,737.07**
Plus: Cash Receipts	$1,040,050.49
Less: Cash Disbursements For Payroll/AP	$ (876,171.90)
4/30/2026 Cash Balance	**$ 3,865,615.66**
Plus: Cash Receipts	$569,720.22
Less: Cash Disbursements For Payroll/AP	$ (559,942.49)
5/31/2026 Cash Balance	**$ 3,875,393.39**
Plus: Cash Receipts	$515,433.73
Less: Cash Disbursements For Payroll/AP	$ (744,301.68)
6/30/2026 Cash Balance	**$ 3,646,525.44**
Plus: Cash Receipts	$794,164.80
Less: Cash Disbursements For Payroll/AP	$ (790,551.90)
7/31/2026 Cash Balance	**$ 3,650,138.34**
Plus: Cash Receipts	$689,664.34
Less: Cash Disbursements For Payroll/AP	$ (722,326.59)
8/31/2026 Cash Balance	**$ 3,617,476.09**
Plus: Cash Receipts	$559,541.72
Less: Cash Disbursements For Payroll/AP	$ (766,799.07)
9/30/2026 Cash Balance	**$ 3,410,218.74**

Preliminary

12 Month Grants should be 100% expended.

	Current Month	Year to Date	Total Budget - Final	% Total Expended
332 HIV Prevention Program finished over budget	3,286.10	24,181.34	21,905.76	110.39%
255 Community Health Direction Program finished over budget	16,560.63	174,110.51	160,500.00	108.48%
326 Vision (ELPHS) Program finished over budget - there was an error in our budget spreadsheet, which will be corrected for the new	11,960.26	119,283.30	112,087.11	106.42%
138 Immunization IAP Program finished over budget. There was an error in our budget spreadsheet, which will be corrected for the new year.	169,347.63	1,199,666.93	1,140,310.00	105.21%
341 Infectious Disease Program finished over budget due to increased staff time.	51,693.68	448,385.86	427,126.41	104.98%
102 EH San Training Jurisdictional Sharing Program finished slightly over budget.	18,369.21	23,442.02	22,836.07	102.65%
325 CSHCS Must fully expend budget for 325 before using 112; therefore, they must be evaluated together. They are within budget at 96.79%.	33,902.98	227,587.00	222,409.00	102.33%
120 PH&DP Special Projects Grant completed and ended slighlty over budget in attempt to maximize full grant.	613.36	15,226.63	15,010.60	101.44%
025 PH Workforce & Infastructure	6,386.88	233,379.40	233,242.23	100.06%
329 MCH Enabling Children	7,867.42	94,409.00	94,409.00	100.00%
024 MERS Pension Underfunded Liability	-	26,088.93	26,089.00	100.00%
032 Emergency Preparedness	16,411.85	178,140.08	178,424.61	99.84%
275 Medical Marijuana SJ	-	7,386.48	7,410.53	99.68%
230 Medical Marijuana HD	(3.59)	10,987.77	11,046.72	99.47%
327 Hearing (ELPHS)	11,068.70	108,742.27	109,545.34	99.27%
345 Lead Testing	2,840.89	36,364.31	36,653.22	99.21%
109 WIC	96,331.35	1,133,807.16	1,150,390.82	98.56%
021 Dental Clinic - Three Rivers	4,533.45	54,549.48	55,582.20	98.14%
012 Area Agency on Aging	165,760.03	1,496,785.31	1,533,407.13	97.61%
101 Workforce Development	1,561.83	47,366.88	48,541.42	97.58%
704 Food Service	49,235.06	535,066.98	549,764.82	97.33%
605 General EH Services	2,431.17	20,946.75	21,552.19	97.19%
212 Medical Marijuana BR	-	18,193.26	18,888.48	96.32%
745 Type II Water	21,834.08	214,165.88	223,414.33	95.86%
721 Drinking Water Supply	44,192.08	453,557.95	480,083.38	94.47%

Branch-Hillsdale-St Joseph Community Health Agency
Statement of Revenues and Expenditures - Final - Expense By Program - Summary FY25-26 Unposted Transactions Included In Report
From 9/1/2026 - 9/30/2026

Preliminary

		Current Month	Year to Date	Total Budget - Final	% Total Expended
714	Onsite Sewage Disposal	39,939.99	497,460.49	527,151.25	94.37%
108	WIC Breastfeeding	8,745.14	114,627.10	122,031.29	93.93%
014	VOCA	17,117.72	192,785.60	205,743.00	93.70%
717	EGLE Swiming Pools	1,002.97	17,472.66	18,698.36	93.44%
405	Grant Writing	404.93	6,634.51	7,548.96	87.89%
112	CSHCS Medicaid Outreach	(6,520.70)	113,624.03	130,103.26	87.33%
331	STD	14,701.04	148,750.00	171,341.79	86.81%
029	Dental Clinic - Hillsdale	818.21	10,321.58	12,000.00	86.01%
207	MCRH Community Health Workers	8,126.07	105,059.70	122,430.67	85.81%
202	Oral Health	9,256.60	70,979.12	83,280.64	85.23%
010	Agency Support	(35,656.61)	259,106.31	304,955.00	84.97%
107	Medicaid Outreach	1,226.62	12,655.72	15,157.22	83.50%
286	HEP Special Projects	-	6,143.01	7,422.75	82.76%
018	Senior Medicare Patrol	4,329.62	12,024.12	15,000.00	80.16%
035	Vector Borne Disease Surveillance	507.89	27,868.99	35,971.04	77.48%
338	Immunization Vaccine Handling	6,709.64	71,083.69	92,383.76	76.94%
106	MI Options	14,698.68	172,421.99	225,082.00	76.60%
715	EGLE Long-Term Monitoring	890.73	2,957.22	4,061.30	72.81%
008	Salary & Fringe Payoff	6,720.49	53,018.22	80,000.00	66.27%
205	OHSP Grant	8,667.85	64,310.86	107,011.75	60.10%
720	EH- Complaints	127.01	9,157.56	15,250.13	60.05%
716	EGLE Campgrounds	2,343.96	8,934.48	18,092.85	49.38%
723	PFAS Response - White Pigeon	-	1,278.66	2,706.20	47.25%
015	Local Expenses - Unallowable by Grants	4,636.19	23,506.35	50,544.34	46.51%
722	PFAS Response	-	943.05	2,157.14	43.72%
719	Body Art	124.41	2,286.84	6,135.41	37.27%
724	PFAS - Westside Landfill	-	812.64	2,820.00	28.82%
096	CSHCS Donations SJ	-	10,031.25	41,360.84	24.25%
718	EGLE Septage	163.86	974.67	5,352.73	18.21%
287	HEP Special Projects II	669.24	3,900.77	27,989.45	13.94%
097	CSHCS Donations BR HD	-	1,140.65	22,826.00	5.00%
023	Capital Expenditures	-	-	53,000.00	0.00%
999	Insurance Claims	5,224.57	51,427.28	-	0.00%
	Total Expense	851,161.17	8,975,520.60	9,436,239.50	95.12%

The Agency is currently 4.88% under budget.

November 4, 2026 – Board of Health
Program, Policy, & Appeals Committee Meeting Minutes

The Branch-Hillsdale-St. Joseph Community Health Agency Board of Health, Program, Policy, & Appeals Committee meeting was called to order by Tim Stoll at 8:32 AM. Roll call was completed as follows: Tim Stoll, and Brent Leininger. Rick Shaffer was absent.

Also present from BHSJ were Rebecca Burns and Theresa Fisher.

Mr. Leininger moved to approve the agenda as presented, with support from Mr. Stoll. The motion passed.

Public Comment

No public comments were given.

New Business

- Mr. Leininger moved to recommend that the Board approve the HSA Contributions Policy, with support from Mr. Stoll. The motion passed.
- Mr. Leininger moved to recommend that the Board approve the Fiscal Controls Policy, with support from Mr. Stoll. The motion passed.

Public Comment

No public comments were given.

Mr. Leininger moved to adjourn the meeting, with support from Mr. Stoll. The motion passed, and the meeting adjourned at 8:54 AM.

Respectfully Submitted by:

Theresa Fisher,
Administrative Services Director
Secretary to the Board of Health

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT

2026 Board Officers:
Commissioner Leininger (Chair)
Commissioner Shaffer (Vice-Chair)

Program: Administration	**Effective Date:** 11/12/2026
Subject: HSA Employer Contribution Policy	**Revised Date:**

Purpose: The purpose of this policy is to establish consistent procedures for employer contributions to Health Savings Accounts (HSAs) for eligible employees enrolled in an employer-sponsored High Deductible Health Plan (HDHP) that is HSA-qualified.

The policy is intended to provide eligible employees with employer-funded contributions toward their HSAs while establishing clear requirements regarding eligibility, timing, and administration of the contributions.

Policy Statement: The Agency will make contributions to an eligible employee's HSA in accordance with this policy and the terms of the Agency's adopted health insurance plan.

Employer HSA contributions are intended to be provided as a benefit to eligible employees and are subject to applicable federal and state laws, Internal Revenue Service (IRS) requirements, and the rules of the HSA administrator.

Nothing in this policy shall be interpreted to require the Agency to make an HSA contribution that is prohibited by applicable law or that would cause an employee or the Agency to violate applicable HSA eligibility requirements.

ELIGIBILITY
To be eligible for an employer HSA contribution, an employee must:

1. Be an employee of the Agency;
2. Be enrolled in an Agency-sponsored HSA-qualified High Deductible Health Plan;
3. Be eligible to establish and/or contribute to an HSA under applicable federal law;
4. Have an HSA established with the Agency's designated HSA administrator or another administrator approved by the Agency; and
5. Satisfy any applicable waiting period established by this policy.

An employee who is not enrolled in an HSA-qualified HDHP is not eligible for an employer HSA contribution.

Eligibility for an employer HSA contribution does not guarantee that the employee's HSA provider will accept a contribution. Employees are responsible for ensuring that their HSA is properly established and that they are eligible to receive HSA contributions.

ANNUAL EMPLOYER CONTRIBUTION

The Agency may contribute an amount specified by the Board of Health each calendar year to the HSA of each eligible employee, subject to the terms and conditions of this policy.

The annual contribution amount may be changed by action of the Board of Health or as otherwise authorized by applicable Agency policy.

TIMING OF ANNUAL CONTRIBUTION
For employees who are eligible for the full annual contribution at the beginning of the calendar year, the Agency will make the annual HSA contribution within the first ten days of the calendar year.

The contribution will be deposited directly into the employee's HSA through the Agency's designated HSA administrator or other approved process.

NEW EMPLOYEES
An employee who begins employment during the calendar year and becomes eligible for an HSA contribution will receive the applicable employer HSA contribution after completing two full months of employment, provided the employee remains eligible under this policy.

For purposes of this policy, the two-month waiting period begins on the employee's first day of employment.

The contribution will be made within the first ten days following completion of the two-month waiting period.

MID-YEAR EMPLOYMENT
An employee hired during the calendar year will receive a prorated annual employer contribution based on the employee's date of eligibility and the number of months remaining in the calendar year, unless otherwise determined by the Board of Health.

If the employee becomes eligible after the beginning of a calendar month, the Agency will use the employee's first full month of eligibility when determining the prorated contribution.

EMPLOYEE TERMINATION OR LOSS OF ELIGIBILITY
An employee must remain eligible for an employer HSA contribution at the time the contribution is made, unless otherwise required by applicable law.

If an employee terminates employment, transfers to a position or status that is not eligible for the HSA-qualified HDHP, or otherwise loses eligibility before a scheduled contribution is made, the Agency will not be required to make a contribution that has not yet been made.

Employer contributions that have already been deposited into an employee's HSA generally become the employee's property and will not be recovered by the Agency solely because the employee subsequently terminates employment or loses eligibility, except to the extent recovery or correction is permitted or required by applicable law.

CHANGES IN HEALTH PLAN COVERAGE
An employee who ceases to be enrolled in an HSA-qualified HDHP is no longer eligible for additional employer HSA contributions for periods after the loss of eligibility.

Employees are responsible for notifying Human Resources of any change in coverage or circumstances that may affect their eligibility to receive or make contributions to an HSA.

HSA CONTRIBUTION LIMITS
Employer contributions will be administered in accordance with applicable annual HSA contribution limits established by the Internal Revenue Service.

Employees are ultimately responsible for monitoring their individual HSA contribution limits and for determining whether they are eligible to make or receive HSA contributions under federal law.

The Agency will not be responsible for any tax liability, penalty, or other consequence resulting from an employee's failure to satisfy individual HSA eligibility requirements or contribution limits, except to the extent caused by the Agency's error or failure to comply with applicable law.

EMPLOYEE RESPONSIBILITY
Employees are responsible for:

1. **Maintaining an HSA that is eligible to receive employer contributions;**
2. **Providing accurate HSA information to the Agency or its designated HSA administrator;**
3. **Notifying Human Resources of changes that may affect HSA eligibility;**
4. **Monitoring their total HSA contributions for the calendar year; and**
5. **Consulting a qualified tax professional regarding individual tax consequences or HSA eligibility questions, when appropriate.**

ADMINISTRATIVE ERRORS
If the Agency determines that an HSA contribution was made in error, the Agency will take reasonable corrective action consistent with applicable law and IRS guidance.

Corrective action may include requesting the HSA administrator to return or correct an erroneous contribution, adjusting a future contribution, or taking another action permitted by applicable law.

The Agency will not automatically recover an erroneous contribution from an employee's wages unless such recovery is permitted by applicable law and the employee has been appropriately notified.

NO CASH SUBSTITUTE
An employer HSA contribution is available only to an employee who satisfies the eligibility requirements of this policy.

An employee may not elect to receive the employer contribution as additional wages, cash compensation, or another benefit in lieu of the HSA contribution.

Program: Administration	**Effective Date:** 8/22/2024
Subject: Financial Controls Policy	Last Updated: ~~11/13/2025~~11/12/2026

Purpose: To establish controls to mitigate key areas of risk.

Policy Statement: The Branch-Hillsdale-St. Joseph Community Health Agency will maintain accounting controls with segregation of duties, where feasible with current staffing levels, to mitigate key areas of risk. When duties cannot be segregated, compensating controls will be used.

Implementing Procedure:

I. **Introduction**

This document describes all accounting policies and procedures currently in use at Branch-Hillsdale-St. Joseph Community Health Agency and to ensure that the financial statements conform to generally accepted accounting principles; assets are safeguarded; guidelines of grantors and donors are complied with; and finances are managed with accuracy, efficiency, and transparency.

All Branch-Hillsdale-St. Joseph Community Health Agency's staff with a role in the management of fiscal and accounting operations are expected to comply with the policies and procedures detailed herein.

These policies will be reviewed annually and revised as needed by the staff and approved by the Admin Service Director, the Health Officer, and the Board of Health.

II. **Division of Responsibilities**

The following is a list of personnel who have fiscal and accounting responsibilities:

A. Board of Health
   1. Reviews and approves the annual budget
   2. Reviews annual and periodic financial statements and information
   3. Establish and review the salary scale
   4. Reviews the Health Officers performance annually and establishes the salary
   5. Reviews and approves all non-budgeted expenditures over $5,000
   6. Reviews and approves all capital expenditures

B. Health Officer
   1. Co-Signs all issued checks

~~Reviewed Date:~~ Updated: ~~11/13/2025~~11/12/2026 and approved by BOH

2. Reviews and approves all grant submissions
3. Is on-site signatory for all bank accounts
4. Reviews and approves all non-capital contracts and leases
5. Sees that an appropriate budget is developed annually
~~5.~~6. Reviews and monitors all building maintenance requests

C. Administrative Services Director
1. Reviews and approves all financial reports
2. ~~Assists~~ Consults with the Health Officer regarding priorities and resource allocation for the development of the ~~in developing an~~ annual budget
3. Reviews and co-signs all issued checks
4. ~~Approves all program expenditures~~Authorizes expenditures for programs under their oversight
5. Reviews and approves all journal entries and bank statements
6. Reviews and approves all monthly/quarterly grant expenditure reports in ~~Egrams~~EGrAMS
7. Reviews and maintains internal accounting controls and procedures
8. Oversees expense allocations
9. Monitors grant reporting and appropriate release of temporarily restricted funds
10. Monitors and makes recommendations for asset retirement and replacement
~~10.~~11. Provides backup Authorized Official coverage in the State of Michigan's EGrAMS system to ensure continuity of grant administration
~~11.~~12. Serves as the FOIA Coordinator
~~12.~~13. ~~Reviews and monitors~~Assists Health Officer with ~~all~~ building maintenance requests

D. Division Directors
1. Authorizes expenditures for assigned programs and ensures all expenditures remain within the approved budget.

~~D.~~E. Accountant
1. Overall responsibility for data entry into accounting system and integrity of accounting data
~~1.~~2. Approves all program expenditures
~~2.~~3. Monitors program budgets
~~3.~~4. Reviews payroll
~~4.~~5. Reviews and manages cash flow
~~5.~~6. Develops the annual and amended program budgets
~~6.~~7. Receives and opens accounting department mail
~~7.~~8. Monitors grant reporting
~~8.~~9. Oversees expense allocation
~~9.~~10. Prepares monthly and year-end financial reporting
~~10.~~11. Enters grant budgets in ~~Egrams~~EGrAMS
~~11.~~12. Enters grant expenditure reporting in ~~Egrams~~EGrAMS
~~12.~~13. Reconcile bank accounts
~~13.~~14. Is an authorized co-signer for all checks

~~E.~~F. HR Specialist
1. Reviews payroll and is responsible for all personnel files

~~F.~~G. Fiscal Support Specialist

1. Processes payroll
2. Enters accounts payable invoices
3. Prints & mails checks
4. Receipts cash & checks

~~G.~~H. Administrative Support Clerk
1. Creates purchase orders
2. Makes bank deposits

III. Postion Vacancy

In the event of a vacancy in any of the positions outlined above, certain duties and responsibilities may need to be reassigned to ensure continuity of operations. The agency will evaluate each vacancy individually to determine the most appropriate reassignment of responsibilities, taking into consideration staff capacity, operational needs, risk mitigation, internal controls, and the maintenance of appropriate segregation of duties. Any temporary or permanent reassignment of duties will be structured to maintain accountability and compliance with applicable policies and requirements.

~~III.~~IV. Chart of Accounts and General Ledger

Branch Hillsdale St Joseph Community Health Agency has designated a Chart of Accounts specific to its operational needs and the needs of its financial statements. The Chart of Accounts is structured so that financial statements can be shown by natural classification (expense type) as well as by functional classification (program vs. fundraising vs. administration). The Admin Service Director is responsible for maintaining the Chart of Accounts and revising as necessary. The Chart of Accounts is attached to this policy as addendum A. The general ledger is automated and maintained using our accounting software. All input and balancing is the responsibility of the accountant with final approval by the Admin Service Director. The Admin Service Director should review the general ledger on a periodic basis for any unusual transactions**.**

~~IV.~~V. Cash Receipts

Cash receipts generally arise from
1. Contracts and grants
2. Fee for service
3. Immunization billing
4. Intergovernmental transfer

The principal steps in the cash receipts process are detailed in the agency's Collection of Money Policy which is attached as addendum B.

~~V.~~VI. Inter-Account Bank Transfers

The Accountant monitors the balances in the bank accounts to determine when there is a shortage or excess in the account. The Accountant recommends to the Administrative Services Director when a transfer should be made to maximize the potential for earning interest. The Accountant is directed in writing when to make a transfer and in what amount. A copy of the transfer is given to the Administrative Services Director.

~~VI.~~VII. Funds Disbursements & Expense Allocations

Funds disbursements are generally made for:
1. Payments to vendors for goods or services
2. Staff training and development

3. Memberships and subscriptions
4. Meeting expenses
5. Employee reimbursements
6. Marketing/promotional materials

Checks are processed bi-weekly. Invoices submitted to the Fiscal Support Specialist by Wednesday of the payable week will be processed and paid that Friday. Checks can be prepared manually within one day, but this should be limited to emergency situations.

Requests for cash disbursements are generally submitted in the following ways:

1. Original Invoice
2. Purchase request (submitted on approved form and signed by Director)
3. Employee training request form (submitted on approved training form and signed by the Director)

All invoices must have the account and program codes written on them, and be approved by the division Director, the Administrative Services Director, or the Health Officer.

Every employee reimbursement or purchase request must be documented on the approved training form with itemized receipts attached.

Other expenditures must include a receipt from the vendor detailing all goods or services purchased/provided.

The Accountant reviews all requests for payment and:

1. Verifies expenditures and amounts
2. Approves for payment if in accordance with budget
3. Provides or verifies appropriate allocation information, including general ledger account code, program code, or distribution code
4. Provides date of payment, taking into account cash flow projections
5. Returns to the Fiscal Support Specialist for completion

The Fiscal Support Specialist processes all payments and:

1. Enters them into the Accounts Payable module of the accounting system
2. Prints checks according to allocation and payment date provided by the Accountant
3. Submits check listing, voucher, and documentation to Administrative Services Director or Health Officer for approval
4. Stamps invoice paid
5. Mails checks and/or processes bank transfers
6. Scans all invoices and backup documentation into Docuphase
7. Runs accounts payable aging report at the end of each month to assure timely payment of all invoices.

Expense Allocations
Expenses that benefit more than one cost center will be distributed following the agency's Cost Allocation Plan which is attached as addendum C.

~~VII.~~VIII. Credit Card Policy and Charges

All staff members who are authorized to carry/use an organization credit card will be held personally responsible in the event that any charge is deemed personal or unauthorized. Unauthorized use of the credit card includes: personal expenditures of any kind; expenditures

which have not been properly authorized; meals, entertainment, gifts, or other expenditures which are prohibited by budgets, laws, and regulations, and the entities from which Branch-Hillsdale-St. Joseph Community Health Agency receives funds.

The receipts for all credit card charges will be given to the Fiscal Support Specialist within (2) weeks of the purchase along with proper documentation. The Fiscal Support Specialist will verify all credit card charges with the monthly statements. A copy of all charges will be attached to the monthly credit card statement and submitted to the Accountant for review and approval.

Additional information can be found in the agency's Credit Card Policy which are attached as addendum D.

~~VIII.~~IX. Accruals

To ensure a timely close of the general ledger to produce financial statements, the Branch-Hillsdale-St. Joseph Community Health Agency may book accrual entries. Some accrual entries will be made as recurring or reversing entries.

~~IX.~~X. Bank Account Reconciliations

Accountant

1. Receives all bank statements
2. Reviews all bank statements for unusual balances and/or transactions
3. Reconciles the statement ensuring that the dates and amounts shown in the accounting system match the bank statement.
4. Investigates any rejected items
5. Compares cleared checks with the accounting record, including amount, payee, and sequential check numbers
6. Verify that voided checks, if returned, are appropriately defaced and filed
7. Investigate any checks that have been outstanding for more than 6 months
8. Attach the completed bank statement to the reconciliation report, along with any other documentation and provide it to the Administrative Services Director.

Administrative Services Director

1. Reviews, approves, and signs bank reconciliation reports

~~X.~~XI. Petty Cash Fund

Petty cash funds are maintained by the organization for miscellaneous or unexpected purchases that do not exceed $20.

1. There is a petty cash fund located in the Coldwater, Three Rivers, and Hillsdale offices.
2. Each petty cash fund will not exceed $100 and is to be kept in a locked cabinet at all times.
3. The Accountant oversees the petty cash fund
4. All disbursements made from the petty cash fund are acknowledged in writing by the receiving party
5. Receipts for items purchased with petty cash must be included with the petty cash reconciliation form when funds are replenished
6. No checks will be cashed by the petty cash fund

Additional information can be found in the Petty Cash Policy which is addendum E.

~~XI.~~XII. Property and Equipment

Property and equipment include items such as office furniture, computer hardware and software, and leasehold improvements. It is the Branch-Hillsdale-St. Joseph Community Health Agency's policy to capitalize items which have a unit cost greater than $5,000. Items purchased with a value or cost less than $5,000 will be expensed in the period purchased. A fixed asset log will be maintained by the Accountant, including date of purchase, asset description, purchase/donation information, cost/fair market value, donor/funding source, identification number, and life of asset.

1. The log will be reviewed by the Administrative Services Director
2. Annually, a physical inspection and inventory will be taken of all fixed assets and reconciled to the general ledger balances
3. The Admin Services Director shall be informed in writing of any change in status or condition of any property or equipment
4. Depreciation is recorded annually. Depreciation is computed following IRS guidelines over the estimated useful life of the related asset. Any impaired assets discovered during the inventory will be written down to their actual value.

~~XII.~~XIII. Personnel Records

All personnel files contain the following documents:

1. An application and resume
2. Status change form that indicates date of hire, position, and pay rate.
3. Authorization for payroll deductions
4. W-4 withholding authorizations
5. Termination data where applicable
6. Signed confidentiality agreement collected annually
7. Signed acknowledgement of receipt of Personnel Policy Manual at every change to the manual
8. Emergency Contact Card
9. I-9 form with allowable forms of identification
10. Signed receipt of Financial Controls Policy collected annually
11. Other forms deemed appropriate by the Administrative Services Director

Personnel files will be kept in a secure, locked room and accessed only by authorized personnel.

~~XIII.~~XIV. Payroll Processing

Staff Members:

1. Timesheets are to be completed by all staff using the EWS system, and submitted bi-weekly.
2. Timesheets are to be kept on a daily basis and should accurately reflect the amount of time an employee actually worked in each cost center.

Supervisors:

1. Review and approve submitted timesheets in the EWS system. Supervisors should be looking for accuracy in the following:
   a) Ensure correct number of hours claimed in payroll
   b) Any requested paid-time off is entered correctly
   c) All mileage has description, and that mileage cost center matches cost centers in hours worked

d) Holidays are entered correctly
e) Emergency preparedness meetings are coded correctly
f) Training reimbursements are entered correctly & documentation matches
g) Any utility time off is entered correctly
h) Staff are reporting in the cost centers they are working in

2. Email Fiscal Support Specialist if an employee works an amount of hours that differs from the amount they are budgeted to work.

Fiscal Support Specialist

1. Review timesheets for errors including: incorrect amount of hours, cost centers not matching, etc.
2. Process payroll
3. The payroll will be compared to the previous payroll for accuracy. Any changes to add/remove employees, change employee benefits/deductions, or wage increases must have a copy of the official documentation and approval of the changes.
4. Prior to the payroll checks being finalized, the payroll is reviewed and approved by the Accountant or the Administrative Services Director.
5. Payroll checks are distributed on the Friday following the end of the pay period, by direct deposit. If the designated pay date is a holiday, the deposit will happen the day before.
6. All employees will receive an email which includes their pay stub
7. Prepare all payroll accounts payable
8. Prepare and File all federal and state payroll reports
9. Prepare all W-2 statements (issued to employees prior to January 31st of the following calendar year).

Accountant

1. Review payroll to ensure accuracy before the payroll is finalized and checks run
2. Review payroll expenditures and allocations monthly
3. Reconcile payroll account

Administrative Services Director

1. Review payroll to ensure accuracy before the payroll is finalized and checks run if Accountant is not available
2. Review payroll expenditures and allocations monthly
3. Review and sign all federal and state payroll reports

~~XIV.~~XV. Accounts Payable

Administrative Support Clerk

1. Collects and keeps all W-9 forms and liability insurance information.
2. Reaches out to vendors to collect updated information when needed, to ensure documentation is kept current
3. Collects packing slips and verifies orders have been received, before forwarding information to Fiscal Support Specialist for payment.

Fiscal Support Specialist

1. Reviews all invoices to ensure proper documentation is attached.
2. Prior to the accounts payable checks being finalized, the invoices are reviewed and approved by the Accountant or the Administrative Services Director.

3. Accounts Payable invoices are processed every other Friday and on the last day of the month. Direct deposit is the preferred method of payment, but some accounts are set up requiring checks to be written, direct pull from account, and payable online. If the designated pay date is a holiday, the transfers/checks will happen the day before.
4. Prepare all payroll accounts payable
5. Prepare and File all federal and state payroll reports
6. Prepare all 1099 statements (issued to vendors prior to January 31st of the following calendar year).

Accountant

1. Review accounts payable invoices to ensure accuracy in amounts and account numbers before the accounts payable run is finalized and checks run
2. Reconcile accounts payable account
3. Reconcile all liability accounts

Administrative Services Director

4. Review accounts payable invoices to ensure accuracy before the accounts payable run is finalized and checks run if Accountant is not available
5. Review expenditures and allocations monthly
6. Review and sign all reports

~~XV.~~XVI. End of Month and Fiscal Year-End Close

1. The Administrative Services Director will review and sign off on all month- and year-end journal entries. They will be printed, filed, and scanned for audit trail purposes.
2. At the end of each month and fiscal year end, the Administrative Services Director will review all balance sheet accounts including verification of the following balances: cash accounts match the bank reconciliations, fixed assets accounts reflect all purchases, write-downs and retirements, accounts receivable and payable accounts match outstanding amounts due and owed.
3. The income and expense accounts review will include reconciliation to amounts received and expended and verification that payroll expenses match the payroll reports including federal and state payroll tax filings.
4. Once the final monthly and fiscal year-end financial statements are run, reviewed, and approved by the Administrative Services Director, no more entries or adjustments will be made into that month or year's ledgers.
5. All other appropriate government filings including those required by the state tax board and attorney general's office will be completed and filed with the appropriate agency.

~~XVI.~~XVII. Financial Reports

The Accountant will prepare the monthly and annual financial reports for distribution to the Administrative Service Director. The reports will include:

- Balance sheet
- Cash receipts and disbursements report
- Statement of income and expenses report that include budget versus actual expenses broken out by each program with an established budget

- An expense by summary for each program, along with an explanation for any grant program that is over budget
- Any other requested reports

Periodic and annual financial reports will be submitted to the Board of Health for review and approval.

~~XVII.~~XVIII. Fiscal Policy Statements

1. All capital expenditures which exceed five thousand dollars ($5,000) will be capitalized.
2. Employee or public personal checks will not be cashed through the petty cash fund.
3. No salary advances will be made under any circumstances.
4. Reimbursements will be paid upon complete expense reporting and approval using the official Branch-Hillsdale-St. Joseph Community Health Agency form.
5. Any donated item with a value exceeding ($50) will be recorded and a letter acknowledging the donation will be sent to the donor within two weeks of the receipt of the donation.
6. All volunteer time shall be recorded as in-kind donations.
7. The Health Officer, the Administrative Services Director, and Accountant are authorized to exercise all banking function for the Branch-Hillsdale-St. Joseph Community Health Agency, including, but not limited to, opening/closing accounts, endorsing checks and orders for the payment of money or otherwise withdraw or transfer funds, enter into written lease for the purpose of renting, maintaining, accessing, and terminating a safe deposit box, assigning/removing staff access to and from bank accounts.
8. The Health Officer, the Administrative Services Director, and Accountant are signatories on Branch-Hillsdale-St. Joseph Community Health Agency's bank accounts.
9. Bank statements will be reconciled monthly by the Accountant and reviewed by the Administrative Services Director
10. Accounting and personnel records will be kept in locked locations in the finance or HR office and only parties with financial and/or HR responsibility will have access to them.
11. As needed, the Board of Health may review accounting and personnel records.

Financial Controls Policy Sign Off sheet

By signing below, I attest that I have read and understand the Fiscal Controls Policy, the Petty Cash Policy, the Collection of Money policy, and the Credit Card procedures dated ~~August 22~~November 12, ~~2024~~2026. I have been provided a copy of the policies and agree to the terms of said policies.

_____

Signature Date

Printed Name

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT
www.bhsj.org

Addendum A

Chart of Accounts

Branch-Hillsdale-St Joseph Community Health Agency

Chart Of Accounts List - Active GL Codes

GL - 1

Account Code	Account Title	Status	Account Type
00100	Cash on Hand	A	CSH
00101	Cash with County treasurer	A	CSH
00103	Cash - Accounts Payable	A	CSH
00104	Community Foundation Grant	A	CSH
00105	Cash - Dependant Care Plan 7151	A	CSH
00106	Cash - Flagstar Savings 1420	A	CSH
00107	Cash - Fed Tax Payable 6337	A	CSH
00108	MERS 9060	A	CSH
00109	Cash - MI Tax Ck 3637	A	CSH
00110	Cash on Hand from Interest	A	CSH
00120	HD Maint 0190	A	CSH
00121	TR Maint 0204	A	CSH
00130	Depository HD 6817	A	CSH
00199	Capital Improvements	A	CSH
00400	Petty Cash	A	CSH
00412	Imprest Cash - BR, HD, SJ	A	CSH
00430	Imprest Cash - HD	A	CSH
00475	Imprest Cash - SJ	A	CSH
00700	Cash - Payroll	A	CSH
04002	A/R Medicaid (Straight)	A	ARO
04003	A/R Medicare	A	ARO
04006	A/R Blue Cross Medicaid	A	ARO
04009	A/R Mclaren - Medicaid	A	ARO
04010	A/R Meridian - Medicaid	A	ARO
04011	A/R Priority Health - Medicaid	A	ARO
04012	A/R Aetna - Medicaid	A	ARO
04013	A/R United Health Care - Medicaid	A	ARO
04014	A/R Molina - Medicaid	A	ARO
05002	A/R Aetna - Commercial	A	ARO
05006	A/R Aetna Affordable Health - Commercial	A	ARO
05010	A/R ASR Health Benefits - Commercial	A	ARO
05014	A/R BCBS - Commercial	A	ARO
05018	Blue Care Network - Commercial	A	ARO
05022	A/R Blue Cross Federal - Commercial	A	ARO
05026	A/R Cigna - Commercial	A	ARO
05034	A/R Health Alliance Plan - Commercial	A	ARO
05038	Humana - Commercial	A	ARO
05042	McLaren Health Plan - Commercial	A	ARO
05046	Medicare Plus Blue	A	ARO
05050	Priority Health - Commercial	A	ARO
05054	Priority Health Medicare - Commercial	A	ARO
05060	Private Pay - Voucher Billing	A	ARO
05062	Tricare for Life - Commercial	A	ARO
05066	United Health Care - Commercial	A	ARO
05068	UMR - Commercial	A	ARO
07800	Due from State	A	ARO
08104	Due from Other Funding Sources	A	ARO
08112	Due from County - BR	A	ARO
08130	Due from County - HD	A	ARO
08175	Due from County - SJ	A	ARO
08510	Due from Dental DAPP	A	ARO
12800	Prepaid Expenses	A	OA
12960	Biologic Inventory	A	OA
20200	Accounts Payable - Vendors	A	AP
20202	Accts Payable - Inv File	A	OL

Account Code	Account Title	Status	Account Type
22801	FICA Withholding	A	OL
22802	State MI Withholding	A	OL
22803	MERS Withholding	A	OL
22804	MERS Withholding Non-Taxed	A	OL
22808	State IN Withholding	A	OL
22809	OH State Tax Withholding	A	OL
22901	Federal Withholding	A	OL
23101	Roth 457	A	OL
23102	Deferred Comp (MERS)	A	OL
23103	Deferred Comp (Nationwide)	A	OL
23104	Health Care Savings Acct	A	OL
23105	Aflac-NonTaxed	A	OL
23106	Aflac-Taxed	A	OL
23107	Basic Flex Plan	A	OL
23108	Health Insurance OL for AP	A	OL
23109	HSA Liability	A	OL
23110	COBRA Liability	A	OL
23180	Misc Deduction	A	OL
24100	State Surcharge Food	A	OL
24200	MERS Pension Liability	A	OL
25700	Accrued Salaries	A	OL
33900	Deferred Rev	A	OL
33901	Inventory	A	OL
33904	Deferred Revenue - Vouchers in Transit	A	OL
33912	Deferred Revenue-BR	A	OL
33930	Deferred Revenue-HD	A	OL
33975	Deferred Revenue-SJ	A	OL
33999	Unavailable Revenue	A	OL
34000	Unearned Revenue	A	OL
38300	Restricted Fund Balance	A	NAE
38400	Designated Fund Balance	A	NAE
39000	Operating Fund Balance	A	NAE
39001	Adjustments to Fund Balance	A	NAE
45100	Food Surcharge Rev	A	REV
45101	Food Service License Fee Rev	A	REV
45102	Food Citations Rev	A	REV
45200	Septic & Lot Eval Rev	A	REV
45201	Septic Haulers Fee Rev	A	REV
45210	Comm Sewage Permit Revenue	A	REV
45300	Campground Fee Rev	A	REV
45301	MDEQ Campground Inspection Rev	A	REV
45400	Public Well/Pump Fee Rev	A	REV
45401	Private Well/Pump Rev	A	REV
45500	Pool Inspection Fee Rev	A	REV
45501	MDEQ Pool Inspection Rev	A	REV
45510	State Campground Fund	A	REV
45511	State Swimming Pool Fund	A	REV
45600	Loan Evaluations Rev	A	REV
45710	Body Art Fee Rev	A	REV
45711	MDEQ Body Art Rev	A	REV
45730	Disint/Reint Permit Rev	A	REV
45800	Fees Rev	A	REV
51619	Fed-Title XIX Rev	A	REV
51700	AASA Rev	A	REV
51705	ARP Revenue	A	REV
51710	AASA TCM	A	REV

Account Code	Account Title	Status	Account Type
51750	VOCA Grant Rev	A	REV
51751	Crime Victim Sustainability Revenue	A	REV
55505	ELPHS (Essential LPHS) Rev	A	REV
55510	LBS Care Coord Rev	A	REV
55515	Lead Rev	A	REV
55520	MCH Block Grant Rev	A	REV
55530	Non Community Source Water Assessment	A	REV
55540	MDEQ Noncommunity Water Supply	A	REV
55541	RTCR Revenue	A	REV
55542	Op Assist Rev	A	REV
55543	Local Assistance	A	REV
55545	Nurse Education Rev	A	REV
55550	State Agreement Rev	A	REV
55551	State General Fund	A	REV
55553	State NWD	A	REV
55555	State Immunizations rev	A	REV
55556	Tuberculosis Control	A	REV
55557	Medicaid Cost Based Reimbursement	A	REV
55559	State Agreement CARES Rev	A	REV
55565	PH Workforce & Infrastructure	A	REV
55568	Region 2 Prevent Revenue	A	REV
55580	Emerging Threats Rev	A	REV
55588	Community Engagement Revenue	A	REV
55590	Medical Marijuana Rev	A	REV
55593	Rural Health Transformation Revenue	A	REV
55594	Mich Center for Rural Health Rev	A	REV
55595	OHSP Revenue	A	REV
55596	No Wrong Door Revenue	A	REV
55630	AAAAM DCW Help Rev	A	REV
55635	AAAAM Caregiver Resource Rev	A	REV
55775	MMAP Rev	A	REV
55776	MMC-Medicaid/Medicare Counseling	A	REV
55777	Caregiver Resource Center	A	REV
55780	Home Help Respite Revenue	A	REV
58501	Grant Matching Requirement	A	REV
58521	Local Appr Rev - BR	A	REV
58523	Local Appr Rev - HD	A	REV
58524	Local Appr Rev - SJ	A	REV
58525	Local Appr Rev - All	A	REV
58526	Local Appr-Designated Fund	A	REV
58565	Local Grant Revenue	A	REV
58580	Use of Fund Balance Rev	A	REV
58590	AAA Local Appr	A	REV
58640	CHW Revenue	A	REV
62602	Aetna Medicaid	A	REV
62604	BCBS Medicaid	A	REV
62606	Coventry Care Medicaid Rev	A	REV
62608	Medicaid Revenue	A	REV
62610	Molina Medicaid	A	REV
62612	Priority Medicaid	A	REV
62614	United Medicaid	A	REV
62616	McLaren Medicaid	A	REV
62617	Meridian Medicaid	A	REV
62620	BC Medicare Rev	A	REV
62622	Flu Shots Medicare/Medicaid Rev	A	REV

Account Code	Account Title	Status	Account Type
62624	Medicare Revenue	A	REV
62626	Flu Blue Cross Blue Shield Rev	A	REV
62628	Flu Immz Revenue comm	A	REV
62629	COVID Immz Rev Medicare/Medicaid	A	REV
62630	BCBS Revenue	A	REV
62632	Cigna Revenue	A	REV
62634	Humana Revenue	A	REV
62636	Mclaren Health Revenue	A	REV
62638	Meridian Health Revenue	A	REV
62640	Priority Health Rev	A	REV
62642	TriCare Rev	A	REV
62643	TriCare Rev Adj	A	REV
62644	Cofinity Rev	A	REV
62645	Immz Rev Other Insurance	A	REV
62646	United Health Revenue	A	REV
62650	COVID Immz Commercial	A	REV
62660	CHW Billing Rev	A	REV
62690	Offset A/R Adjustment	A	REV
62710	FIA Lic Insp Fee Rev	A	REV
62720	Food Classes Fee Rev	A	REV
62730	MDEQ Long Term Monitoring Rev	A	REV
62740	MDEQ Septage Insp Rev	A	REV
62820	Lead Medicaid Rev	A	REV
62830	VFC Visits Rev	A	REV
62840	WIC Varnish	A	REV
62850	TB Skin Test Rev	A	REV
66410	Interest Rev	A	REV
66420	Misc Checking Rev	A	REV
66708	Rent - Mobile Unit Revenue	A	REV
66710	Rent - CAPA Rev	A	REV
66730	VA Rev	A	REV
66731	M3C/Priority	A	REV
67110	Misc Rev	A	REV
67130	Misc Revenue - Billing (needs coded)	A	REV
67150	Misc Rev - Dental	A	REV
67160	MMRMA Excess Dist Rev	A	REV
67510	Donations Rev	A	REV
67512	CSHCS Donations	A	REV
67520	Community Foundation Revenue	A	REV
67530	Community Stabilization Fund	A	REV
67550	MALPH Grant	A	REV
69600	Off-Set for Sal/Fringe Rev	A	REV
69602	Salary/Fringe Payoff Offset Rev	A	REV
69604	MERS Forfeiture Rev	A	REV
69606	MERS Surplus Revenue	A	REV
69701	Prior Year A/R Rev	A	REV
69750	Prior Year Rev	A	REV
70200	Salaries Regular Exp	A	EXP
70202	Salaries OT Exp	A	EXP
70210	Salaries Sick Exp	A	EXP
70212	Salaries Vac/Per Exp	A	EXP
70214	Salaries Holiday Exp	A	EXP
70216	Salaries in Lieu of Benefits Exp	A	EXP
70218	Longevity Exp	A	EXP
70222	Bonus Pay	A	EXP
71440	FICA Exp	A	EXP

Account Code	Account Title	Status	Account Type
71442	Retirement Exp	A	EXP
71444	Health Ins Exp from payroll	A	EXP
71450	Worker's Comp Exp	A	EXP
71452	LSA Insurance Exp	A	EXP
71454	Unemployment Exp	A	EXP
71456	Third Party Disability	A	EXP
72600	Postage and Freight	A	EXP
72602	Office Supplies Exp	A	EXP
72606	Immunizations Disbursed	A	EXP
74502	Computer Supplies Exp	A	EXP
79000	Lab Fees Patients Exp	A	EXP
79002	Medical Supplies Exp	A	EXP
79004	Drugs Exp	A	EXP
80120	IGT Payment DAPP Exp	A	EXP
80130	Legal Fee Exp	A	EXP
80200	Medical Waste Disposal Exp	A	EXP
80202	Electronic Fee Exp	A	EXP
80300	Audit Exp	A	EXP
80400	MD Contracts Exp	A	EXP
80500	Consulting Fee Exp	A	EXP
82501	Dental Cleaning Exp	A	EXP
83008	MMAP SMP Exp	A	EXP
83009	MIOpt SHIP/MIPPA	A	EXP
83010	St. ANS-Pers Exp	A	EXP
83012	State Access-Case Coord Exp	A	EXP
83014	State Alter Homemaking	A	EXP
83015	State Alter Personal Care	A	EXP
83018	VA HCBS CM-POS Exp	A	EXP
83022	State CG Support Respite Exp	A	EXP
83023	State CG Support - Transportation	A	EXP
83024	State Congregate Meals Exp	A	EXP
83025	State IH POS/PC	A	EXP
83026	State Home Delivered Meals Exp	A	EXP
83027	State-IH POS/HM	A	EXP
83028	State In-Home Homemaking	A	EXP
83029	State-IH - Respite	A	EXP
83030	State Merit Adult Day Exp	A	EXP
83031	State In-Home Personal Care	A	EXP
83032	State Merit Respite In Home Exp	A	EXP
83034	State Respite Adult Day Care Exp	A	EXP
83036	State Respite - IH Exp	A	EXP
83040	Title III C-1 Congregate Meals	A	EXP
83042	Title III C-2 Home Delivered Meals Exp	A	EXP
83048	Title III B Case Coord Exp	A	EXP
83050	Title III B Chore Service Exp	A	EXP
83052	Title III B CLPS POS Exp	A	EXP
83053	Title IIIB-Unmet Needs	A	EXP
83054	Title IIIB Homemaking	A	EXP
83055	Title IIIB Personal Care	A	EXP
83056	Title IIIB - Health Promo - EB	A	EXP
83058	Title III B Legal Services Exp	A	EXP
83060	Title III B LT Ombudsman Exp	A	EXP
83062	Title III B Transportation Exp	A	EXP
83064	Title III D Health Promo EB	A	EXP
83065	Title IIIE Caregiver Support	A	EXP
83066	Title III E Caregiver Est Exp	A	EXP

Account Code	Account Title	Status	Account Type
83067	Title IIIE Caregiver Training	A	EXP
83068	Title III E Caregiver IH Resp Exp	A	EXP
83070	Title III E Case Coord & Supp Exp	A	EXP
83072	Title III E Transportation Exp	A	EXP
83078	NSIP Congregate Meals Exp	A	EXP
83080	NSIP Home Delivered Meals Exp	A	EXP
83086	CMS Core Exp	A	EXP
83087	St In Home Med Mgmt (POS)	A	EXP
83088	St CG Support Adult Day Exp	A	EXP
83089	St In Home PERS (POS)	A	EXP
83090	State Merit CG Transportation	A	EXP
83094	Title III B Friendly Reassurance Exp	A	EXP
83097	Title III E Home Del Meals	A	EXP
83098	MMAP-SMP Ii Expense	A	EXP
83100	FFCRA - Title III - Cong	A	EXP
83126	St in Home Services DCW	A	EXP
83132	AAAAM DCW Help Expense	A	EXP
83133	AAA NWD Exp	A	EXP
83142	AASA Covid Immz Support	A	EXP
83145	Region 2 Prevent	A	EXP
83146	Caregiver Resources	A	EXP
83159	ARP - Title III B Home Delivered Meals	A	EXP
83160	ARP Title IIIB DCW	A	EXP
83169	ARP Title IIIC1 Cong	A	EXP
83170	ARP Title IIIC2 HDM	A	EXP
83171	ARP Title IIID DP/HP	A	EXP
83172	ARP Title IIIE Caregiver EST	A	EXP
83200	M3C PH - POS PC	A	EXP
83201	M3C PH - POS FI Enroll	A	EXP
83202	M3C PH - POS FI Monthly	A	EXP
83203	M3C PH - POS Chore	A	EXP
83204	M3C PH - POS ECLS	A	EXP
83205	M3C PH - POS PDN Rn	A	EXP
83206	M3C PH - POS PDN Lpn	A	EXP
83207	M3C PH - POS Respite	A	EXP
83208	M3C PH - POS HDM	A	EXP
83209	M3C PH - POS FI Workmans Comp	A	EXP
83250	MiOpt SHIP BR	A	EXP
83251	MiOpt SHIP SJ	A	EXP
83252	MiOpt MIPPA BR	A	EXP
83253	MiOpt MIPPA SJ	A	EXP
83300	State Respite, IH POS	A	EXP
83301	State Respite OH POS (day)	A	EXP
83302	State Respite OH POS (night)	A	EXP
83303	State Respite OH (day)	A	EXP
83304	State Respite OH (night)	A	EXP
84900	Telecommunications Exp	A	EXP
84950	Translation Services	A	EXP
85900	Travel Exp	A	EXP
85905	Gas/Fuel/Maintenance	A	EXP
89900	Printing and Binding Exp	A	EXP
90100	Advertising Exp	A	EXP
91001	Prof Liability Insurance Exp	A	EXP
93100	Hardware/Software Maintenance Exp	A	EXP
93120	Computer/Hardware Expense	A	EXP
93700	Repair & Maitenance Exp	A	EXP

Account Code	Account Title	Status	Account Type
93812	Bldg Exp - BR	A	EXP
93830	Bldg Exp - HD	A	EXP
93875	Bldg Exp - TR	A	EXP
93897	Bldg Exp - Sturgis	A	EXP
93902	Rent Exp	A	EXP
93912	Rent Exp BR	A	EXP
93930	Rent Exp HD	A	EXP
93975	Rent Exp Sturgis	A	EXP
94000	Equip Rent and Lease Exp	A	EXP
94020	Employee Training Exp	A	EXP
94025	Food Class Exp.	A	EXP
94030	Lic and Membership, Subscription Exp	A	EXP
94040	Checking Exp	A	EXP
94041	Credit Card Fees	A	EXP
94050	Other Exp	A	EXP
94054	Other Supplies Local	A	EXP
94056	Client Assist - Other	A	EXP
94057	Client Assist - Rent	A	EXP
94058	CSHCS Donation Expenses	A	EXP
95402	Space Costs Exp	A	EXP
95404	Indirect Exp	A	EXP
95406	Community Health Services Exp	A	EXP
95408	Prevention Services Exp	A	EXP
95409	Allocation Unallowable Expenses	A	EXP
95410	Allocation Exp	A	EXP

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Addendum B

Collection of Money Policy

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT
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Program: Administration	**Effective Date:** 7/1/2012
Subject: Collection of Money	Last Updated: 8/22/2024

Purpose: To control the amounts of funds on hand in all offices, and provide a procedure to assure all cash and check are properly safeguarded and deposited on a timely basis.

Policy Statement: The Branch-Hillsdale-St. Joseph Community Health Agency will properly safeguard and deposit all cash and checks to have all monthly revenues recognized in the month they were received.

Implementing Procedure:

1. Each employee collecting monies on behalf of the Branch-Hillsdale-St. Joseph Community Health Agency is responsible for recording all cash collected and receipts issued on the Cash Receipt Log (CRL). All receipts used must be accounted for. CRLs are county and division specific. If an employee leaves work before the end of the day, they must complete the entire process as outlined below. The employee collecting cash for the rest of the day must start a new CRL.

   The employee is responsible for maintaining a copy of all verified CRLs with a copy of the receipt after the money has been given to the designated office personnel within the Agency for deposit.

2. For each day monies are collected and receipts issued, a CRL must be prepared and placed in a secured/locked place until given to the designated office personnel (Coldwater, Fiscal Support Specialist; Hillsdale, Clinic Administrative Assistant; Three Rivers, Clinic Administrative Assistant). There will be a note on the CRL if the date of service is different than the day payment was received. This should be an exception since payment is required on day of service.
   a. <u>Immunizations & Other Services - Clerk Technician</u>
      Client activities are created by the Public Health Nurse in Nightingale Notes at the time of the service. After the client receives the service, the Clerk Technician will use Nightingale Notes to create a receipt and post the payment to the system. Two copies of the receipt are printed, one for the client, and one to put with the CRL.

      At the end of the employees shift, a CRL should be filled out. The CRL must include client ID, client name, and the receipt number. All receipts should be accounted for. The Clerk Tech will print a report from Nightingale Note to verify all receipts are listed on the

CRL.

All private pay clients are to pay the day of service. If a donation is received on a different day, a notation of the date of service will be made in the "other" column. Separate receipts will be issued for every client, even if they are in the same family, or if one person is paying for multiple client services.

b. Clinic Administrative Assistants

Clinic CRLs should be provided to the Clinic Administrative Assistant and reviewed together to ensure the correct amount of money is included. Funds should be deposited weekly. If less than $100 in total has been collected, the funds may be held until the next weekly deposit. A deposit must be done at the end of each month, regardless of the amount of funds collected.

Three Rivers and Hillsdale Clinic Administrative Assistants will take their funds directly to the bank and deposit them, then send a copy of the deposit slip and the CRL to accounting.

Coldwater Clinic Administrative Assistant will take the funds directly to the Fiscal Support Specialist, and review them together to ensure the correct amount of money is included. The Fiscal Support Specialist will include the funds in the weekly deposit.

c. Environmental Health Administrative Assistants

All receipts will be created in the EH Hedgerow software at the time of receipt. Each week, a CRL report must be run from the EH Hedgerow software, and reconciled with the cash/checks. Funds should be deposited weekly. If less than $100 in total has been collected, the funds may be held until the next weekly deposit. A deposit must be done at the end of each month, regardless of the amount of funds collected.

Three Rivers and Hillsdale EH Administrative Assistants will take their funds directly to the bank and deposit them, then send a copy of the deposit slip and the CRL to accounting.

Coldwater EH Administrative Assistant will take the funds directly to the Fiscal Support Specialist. The CRL must be review together with the Fiscal Support Specialist to ensure the correct amount of money is included. The Fiscal Support Specialist will include the funds in the weekly deposit.

d. Fiscal Support Specialist / Biller

All money collected through medical billing will be coded and received in by the Fiscal Support Specialist/Biller. Posting reports will be pulled from Nightingale Notes and attached to the check. This information will be placed in the safe for the Fiscal Support Specialist to receipt in and will be included in the next weekly deposit.

e. Fiscal Support Specialist

The Fiscal Support Specialist will review all incoming CRLs with the staff member delivering the CRL, to ensure the correct amount of money is included.

Receipts for all monies collected/deposited will be created and returned to the staff member who provided the funds to accounting. A deposit will be compiled weekly, consisting of all monies collected during the week.

f. Administrative Support Clerk
The Fiscal Support Specialist will provide the funds to be deposited to the Administrative Support Clerk. They will review the amount enclosed together, to ensure the correct amount of money is included. The Support Specialist will take the deposit to the courthouse to be deposited and return the deposit receipt to the Fiscal Support Specialist.

General Rules for Collection of Money:

1. Whenever a CRL changes hands, it must be reviewed by both the provider and the receiver together. This will ensure that there are no questions regarding the amount of money being transferred/deposited is the same as the amount of money received.
2. DO NOT use white out or erase when you make a mistake. Draw a line through the error and put the correct information above/next to the lined out area, or line out the entire row and re-enter the information on the next line.
3. If a receipt is VOIDed, put the receipt # on the CRL and write VOID in the Name column and include the receipt with the rest of the receipts.
4. Total each column on the CRL
5. Complete the Grand Totals for the day at the top of the page for "one sheet" day, or summarize all the information for "multiple sheets" day.
6. Keep receipts in order by number.

Procedure for Collection of Money Sign Off sheet

By signing below, I attest that I have read and understand the Collection of Money policy dated August 22, 2024. I have been provided a copy of the policy and agree to the terms of said policy.

_____ _____

Signature Date

_____

Print Name

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Addendum C

Cost Allocation Plan

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT
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Program: Administrative Services	**Effective Date:** 8/24/2023
Subject: Cost Allocation Plan	**Last Updated:** 02/26/2026

Purpose: The purpose of this policy is to establish a consistent and compliant methodology for allocating costs to programs and funding sources. The Agency is committed to ensuring that all costs charged to Federal, State, and Local awards are reasonable, necessary, allowable, and properly allocated in accordance with Title 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, and other applicable regulations.

This policy ensures that costs are assigned to benefiting programs based on a documented cost allocation methodology that reflects a beneficial and causal relationship between the expense incurred and the program(s) served.

Policy Statement: The Branch-Hillsdale-St. Joseph Community Health Agency is committed to full compliance with Title 2 CFR Part 200, including Subpart E – Cost Principles.

The Agency incurs both direct and indirect costs in the course of operations:

- Direct costs are those that can be specifically identified with a particular program, grant, activity, or employee.
- Indirect costs are those that benefit multiple programs or activities and cannot be readily assigned to a single cost objective without disproportionate effort.

All costs, whether direct or indirect, shall be:

- Necessary and reasonable for the performance of the award
- Allowable under applicable Federal, State, and Local regulations
- Allocated based on a documented methodology that ensures equitable distribution among benefiting programs
- Treated consistently across all funding sources

Indirect costs will be accumulated in an indirect cost pool and allocated to benefiting programs using a rational and consistently applied distribution base that reflects relative benefit received. Costs treated as indirect will not be charged directly to programs, and costs charged directly will not be included in the indirect cost pool.

Reviewed Date: 11/12/2026 BOH

Unallowable costs, as defined under 2 CFR Part 200 or other applicable regulations, will be identified and excluded from any allocation to programs.

The Agency will maintain documentation supporting the methodology and calculations used in its cost allocation plan.

Scope: This policy applies to all costs incurred by the Agency, regardless of funding source.

Responsible Party: Administrative Services

Implementing Procedure:

1. **Salaries and Fringes**:
   a. Employees record actual time worked into an electronic timekeeping system. Time entries must be approved by the employee's supervisor. Salaries and related fringe benefits are allocated to programs based on actual time worked in each program during the payroll period, in accordance with 2 CFR 200.430.
   b. If an employee is on leave (sick/vacation), that time is distributed based on the other days worked during that payroll. If an employee is on leave for an entire pay period, that leave time is distributed based on the allocation from the immediately preceding payroll period.
   c. The monthly LSA expense is allocated based on the most recent budgeted Full-Time Equivalent FTE allocation in effect at the time of the charge.

2. **Supplies and Materials:**
   a. Supplies and materials that directly benefit a specific program are charged directly to that program as indicated on the purchase requisition.
   b. Shared supplies that benefit multiple programs are allocated based on documented historical usage or another reasonable and consistently applied methodology.
   c. Printing and copy expenses are allocated through the indirect cost pool unless specifically identifiable to a single program. Postage is allocated based on actual usage reports generated from the postage meters.

3. **Travel**
   a. All travel expenses are entered into the electronic timekeeping system and charged directly to the program in which the travel was incurred. Travel must comply with Agency travel policy and applicable Federal and State regulations.

4. **Communications**
   a. Communication expenses are allocated based on the current approved budgeted FTE allocation in effect at the time the expense is recorded.

5. **Space/Facility Costs**
   a. Space-related costs (e.g., rent, utilities, maintenance) are allocated based on the square footage of occupied space and the FTE(s) assigned to that space.
   b. If a room is used exclusively by one program, 100% of the associated space cost is allocated to that program.
   c. Common areas (e.g., conference rooms, break rooms, hallways) that cannot be specifically assigned to a program or FTE are included in the indirect cost pool.

6. All Others

a. Items/services (supplies, training expenses, etc.) that directly benefit a program are charged to that program.
b. The following costs are allocated through indirect unless specifically attributable to a single program:
    i. Miscellaneous shared supplies
    ii. Audit and legal expenses
    iii. Insurance
c. Program-support functional areas are allocated as follows:
    i. Personal Health and Disease Prevention costs are allocated based on each benefiting program's percentage of total salary and fringe within the allocation base.
    ii. Health Education and Promotion costs are allocated using the same salary/fringe percentage methodology.
    iii. Environmental Health costs are allocated using the same salary/fringe percentage methodology.
d. Any cost that cannot be directly assigned to a specific program, employee, or established allocation base will be coded to Administration and distributed through the indirect cost pool.

7. Indirect Costs

a. Indirect costs are accumulated in an indirect cost pool.
b. The indirect cost pool is distributed across all benefiting programs based on each program's percentage of total salaries and fringes benefits, which serves as the approved allocation base.
c. Costs treated as indirect will not be charged directly to programs.

8. **Reconciliation of Budget-Based Allocations**

Allocations based on budget FTE or salary spreads are reconciled to actual values twice annually.

a. March 31 (mid-year review)
b. September 30 (fiscal year-end)

Adjustments are made as necessary to ensure that final allocations reflect actual activity and comply with 2 CFR Part 200 requirements for accuracy and allowability.

Prepared By: Theresa Fisher
Approved By: Board of Health
Approval Date: 2/26/2026
Revision Number: 2026.02.26

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Addendum D

Credit Card Procedure

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT
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Program: Administrative Services	**Effective Date:** 03/06/2013
Subject: Credit Card Policy	**Update:** 11/13/2025

Purpose: To allow for approved purchases with a charge card at approved locations.

Policy Statement: Employees who present a completed material requisition, with supervisor's signature, RU, account number, and completed tax-exempt form may utilize a Credit Card to complete the transaction.

Scope: Costs that cannot be easily purchased in another way.

Responsible Party: Administrative Services & Clerks

Implementing Procedure:
Source Documentation: Completed Material Requisition (with supervisor's approval, RU and Account number to be charged), and a completed tax-exempt form.

The Credit Card will be kept in the safe until signed out and returned to the safe when card is returned.

The sign out sheet should be filled out with the initials of the employee handing out the card, the date the card is signed out, and the signature of the employee using the card. When the card is returned the amount of the purchase, the date the card is returned and the employee's initials who received the card back should complete the line item.

Right after a purchase has been made; scan the receipt and Material Requisition form and email to the Accounts Payable department. This will be needed to meet the invoice deadline. Send the original Material Requisition and receipt to the Administrative Support Clerk who will create a purchase order and will return to Accounts Payable for payment.

At the beginning of each month, the Administrative Assistants in Three Rivers and Hillsdale will be required to scan the credit card sign-out sheet and email it to Accounts payable to confirm all items have been accounted for.

If the card should become lost or stolen report this to the Administrative Services Director and Fiscal Support Specialist as soon as possible.

~~Updated~~ Reviewed Date: ~~11/13/2025~~11/12/2026 BOH

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Addendum E

Petty Cash Policy

BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY | YOUR LOCAL HEALTH DEPARTMENT
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Program: Administration	**Effective Date:** 10/3/2018
Subject: Petty Cash	Last Updated: 8/22/2024

Purpose: To provide staff with a way to make small purchases when the requisition system or credit card isn't a viable option

Policy Statement: The purchase requisition process should always be used when purchasing supplies if possible. Sometimes various situations occur throughout the course of operations and the need for supplies cannot wait for the purchase requisition process to be completed. When the purchase requisition process cannot be completed, purchases totaling less than $20 may be completed using the petty cash procedures.

Implementing Procedure:

1. Employees who need to utilize the petty cash procedure should first obtain approval from their division director to make a purchase. Once the purchase has been made, the receipt must be signed and coded (with general ledger and program codes) by the division director as documentation that the purchase was approved.

2. The employee should then bring the signed and coded receipt to the petty cash clerk for reimbursement (clerks listed below):
    a. Coldwater – Candy Cox, Clinic Administrative Assistant
    b. Hillsdale – Jolene Hurst, Clinic Administrative Assistant
    c. Three Rivers – Dale Cross, Clinic Administrative Assistant

3. The petty cash clerk will complete a petty cash request form with the following information:
    a. Date of reimbursement
    b. General ledger & program code (account / RU)
    c. Amount of reimbursement
    d. Description of supplies that were purchased
    e. Who approved, issued and received the payment

4. The clerk and person receiving the reimbursement must both sign and date that the payment was both issued and received. The per-transaction limit for petty cash is $20 (unless approval is obtained from the Director of Administrative Services to exceed that limit).

5. The petty cash clerks should routinely complete a reconciliation form and submit to accounting to replenish disbursed funds.

Reviewed Date: BOH reviewed 11/12/2026

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Temporary Overlap for Director Succession and Knowledge Transfer

Submitted by: Rebecca Burns, Health Officer
Proposed Start Date: January 4, 2027
Proposed End Date: April 30, 2027
Funding Source: Workforce Grant

Purpose

To request Board of Health approval to utilize workforce grant funding to support a temporary overlap between the agency's current Director and their successor, allowing for comprehensive training, knowledge transfer, and continuity of essential administrative and operational functions.

Background and Rationale

The agency's current Director is scheduled to retire at the end of April 2027. This position provides critical leadership and oversight in several areas essential to the agency's daily operations, including accounting, human resources, information technology, buildings, and maintenance.

Given the breadth of responsibilities associated with this position, a structured transition period is important to preserve institutional knowledge, maintain operational stability, and ensure the incoming Director is adequately prepared to assume the role.

The agency's recently executed workforce grant provides an opportunity to address this succession need while advancing the grant's broader workforce development objectives.

Proposed Plan

It is proposed that the agency fund the incoming Director's salary and applicable employment costs through the workforce grant for the period beginning January 4, 2027, through April 30, 2027, subject to grant eligibility and approval of the revised workplan and budget.

During this approximately four-month transition period, the incoming Director would work alongside the current Director to receive intensive, hands-on training and participate in a structured transfer of knowledge and responsibilities.

Training and transition activities would include:

- **Accounting and financial operations:** Familiarization with agency financial processes, budget development and monitoring, reporting requirements, and internal controls.
- **Human resources:** Review of personnel policies, employee benefits, payroll coordination, labor and employment practices, and related administrative responsibilities.

- **Information technology:** Review of technology systems, vendor relationships, access management, cybersecurity responsibilities, and ongoing technology needs.
- **Buildings and maintenance:** Orientation to agency facilities, maintenance schedules, vendor contracts, equipment, and outstanding facility projects.
- **Agency operations and institutional knowledge:** Review of key procedures, reporting deadlines, contractual obligations, ongoing projects, and relationships necessary for effective administration.

A structured transition plan would be developed to establish training priorities, document essential processes, and assess the incoming Director's readiness to independently assume the position.

Financial Considerations

The proposed temporary overlap would be funded through the agency's workforce grant, contingent upon approval of the revised grant workplan and confirmation that the proposed expenditures are allowable. The workforce grant is intended to fully cover the salary and applicable employment costs associated with the incoming Director's temporary transition position during the January 4, 2027, through April 30, 2027, period.

This approach would allow the agency to address a significant succession planning need while limiting the impact on its existing operating budget.

Expected Benefits

The proposed transition period is expected to:

- Preserve critical institutional knowledge before the current Director's retirement.
- Reduce the risk of disruption to essential administrative and operational functions.
- Provide comprehensive, hands-on training for the incoming Director.
- Strengthen leadership continuity and long-term organizational stability.
- Support the agency's workforce development and succession planning goals.
- Reduce the likelihood of costly errors, delays, or gaps in service resulting from an abbreviated transition.

Recommendation

The Health Officer recommends that the Board of Health approve the proposed temporary overlap between the current Director and the incoming Director from January 4, 2027, through April 30, 2027, with the incoming Director's salary and applicable employment costs funded through the workforce grant, contingent upon grant approval and confirmation of funding eligibility.

Proposed Board Action

Motion: To approve the proposed temporary overlap between the current Director and the incoming Director for the period of January 4, 2027, through April 30, 2027, utilizing workforce grant funds for the incoming Director's salary and applicable employment costs, contingent upon approval of the revised grant workplan and budget and confirmation that the expenditures are allowable under the grant. The Health Officer is authorized to take the necessary steps to implement the transition plan consistent with grant requirements and agency policies.

Public Comment

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