FMS Vendor Transition for Self-Directed Services

Community HealthChoices
June 28, 2021
Today’s topic: Announcing the new CHC FMS Vendor

Presented by your CHC MCOs
- Amerihealth Caritas
- Keystone
- PHW
- UPMC
Self Direction and FMS

• Self-Directed Services Option for CHC Participants
  – CHC Participant employs the direct care workers instead of a caregiver agency
  – Empowers Participant to make decisions regarding who provides services and how services are provided. Participant can recruit, hire, train and supervise the individuals who furnish their services (PAS & Respite) with payroll and other supports provided.
  – Self-direction promotes personal choice and control and can include engaging family and other loved ones in providing care and support

• Financial Management Services (FMS)—Effectively the Participant’s “HR Department”
  – Manage Employee Onboarding
  – Manage Payroll & payroll verification processes
  – Reporting and FWA compliance responsibilities
• Goals for the transition:
  – Keep the Self-Directed Services program the same, but make it run better
  – Minimum disruption to Participants and DCWs during the transition
  – High-quality service metrics and budget support
  – Transparency and accountability to MCOs and OLTL
  – Clear and accurate reporting to MCOs and OLTL
DHS indicted in Dec 20 plans to turn FMS responsibility to MCOs as an admin function

MCOs proposed a single vendor to replace existing contract

CHC Coalition workgroup formed & OLTL agreed with the plan to move in this direction.

MCOs identified six candidate vendors

MCOs selected new, nationally experienced vendor in April with ongoing collaboration with the Office of Long-Term Living

- DHS manages services with entity that has held contract since 2012
- Ongoing difficulties getting them to operate smoothly, especially under new CHC program

- One vendor will ensure common systems and P&Ps as well as shared development costs across the MCOs
- Separate contracts with each MCO

- Evaluation criteria and functional requirements defined
- Collaborate on vendor selection process
- Meet bi-weekly with OLTL

- Thorough, transparent review process

- Contracts being finalized
- Stakeholder outreach underway
• The Selected FMS Vendor is HHA eXchange
  – HHAx is a current CHC vendor to all three CHC MCOs
    • Supports Agency authorizations and EVV

• Tempus Unlimited will be the Fiscal Employer/Agent
  – CLEs and DCWs will deal directly with Tempus for all of their payroll and EVV needs

• WHY?
  – Experience, organization, mindset, technology
Current Challenges & Expected Improvements

Current structure

- DHS OLTL maintains FMS contract
- MCOs have little ability to directly manage FMS contractor or address customer service, CHC Participant and DCW complaints
- Significant resources are utilized now to address process issues, including multiple staff focused full-time on managing problems
- Current arrangement presents operational hurdles that may discourage Participants from using self-directed services option
- Lack of integration with existing MCO systems

Future structure

- MCOs hold contract with single vendor to ensure statewide continuity
- HHAx has proven track record with providing similar services in other states to other high-volume clients
- MCOs can directly ensure Participant and DCW needs are met, and any concerns resolved
- Clear accountability and transparency are being built into the new contract.
- Protects Participant and their DCWs
- Enhanced coordination and support with Service Coordination that allows SCs to focus on quality services
- Streamlined authorization and time submission process.
About HHAx and Tempus Unlimited
CHC MCOs Have Selected a Proven Partner for Pennsylvania Financial Management Services

- HHAeXchange has been a proven software vendor and partner to the CHC MCOs since 2016
- In late 2020, HHAeXchange acquired Annkissam, the leading provider of Financial Management Services (FMS) software in self-direction nationally
- With the acquisition, HHAeXchange combines deep knowledge and experience in Pennsylvania with the CHC MCOs with proven, time-tested self-direction FMS software
- Annkissam recommended their partner of over a decade, Tempus Unlimited, to perform the Fiscal/Employer Agent services for the CHC-MCO self-directing Participants
- The MCOs selected this powerful team to bring the best combination of:
  - FMS experience
  - Self-direction thought leadership
  - Proven project management
  - Pennsylvania experience
  - FMS tools purpose-built for self-direction
Experience = Tempus powered by HHAeXchange

Commitment to the PA Homecare System
Leverage current technology and partnership with HHAeXchange

Time and Growth Tested
12+ years and 400% consumer growth

Participant Focused Organization
The People We Serve is Our Mission

National Leader in Self-Direction Software
200,000 participants and 300,000 direct care workers

National Trusted Leader & Partner
F/EA for 22+ years with the same leadership team

Uniquely Positioned for Seamless Transition
Bandwidth to Manage Scope and Transition
Introductions
Tempus Unlimited Team

LARRY SPENCER  
CEO and FI Director  
io 22+ years as Director of F/EA Services  
io 20 years as Tempus Unlimited CFO  
io 9 years as Tempus Unlimited CEO  
io Applied Self-Direction Steering Committee Member  
io Commitment to Self-Direction

DAVID RIDDLE  
VP of Operations/Assistant FI Director  
io 8 years providing leadership and managing service delivery in FMS  
io 20+ years prior experience in management and business relationship roles  
io Oversees integration and delivery of FMS services

LAURA FRATICELLI  
Assistant FI Director  
io 11+ years as management at Tempus Unlimited  
io 19+ years F/EA work at Tempus Unlimited  
io Applied Self-Direction Steering Committee Member

LINDA ANDRADE  
Director of Community Services  
io 24+ years experience directing community service programs  
io 16+ years participating as a stakeholder, providing leadership and managing service delivery to community based MassHealth Long Term Services and Supports Services.
MISSION

Tempus Unlimited exists to provide a continuum of community-based services that support the efforts of children and adults with disabilities to live as independently as possible in the least restrictive environment.

Facts
- Non-profit organization
- One of the largest Fiscal/Employer Agents in the country
- Tempus board members and staff with disabilities bring lived experience to Tempus services
- Coming soon: three Pennsylvania offices
- Headquarters in Massachusetts
Performing payroll for 35,000 participants and 60,000 DCWs

Powered by self-direction software that has served over 250,000 participants in self-direction

Powered by software used in 40 states, over 80 programs and over 100 payers

Providing Fiscal/Employer Agent FMS in Massachusetts since 1998 (23 years)

Participant satisfaction over 98% every year for past 5 years
Tempus Approach

Set-up for Participants, common law employers (CLEs), and DCWs is quick and easy.

Pay is on-time and accurate with payroll run daily

Real people on the phone that help in real-time – first call resolution

Integrated, Participant-focused service delivery

Navigation of software and tools is simple

Training is proactive and flexible to meet the individual’s need
Next Steps
Key Milestones before January 1, 2022

- Transfer existing Participant, common law employer and DCW data to Tempus
- Hold information sessions for all stakeholders
- Ensure Participants, common law employers and DCWs can easily access information and assistance from Tempus
- Train Participants, common law employers and DCWs on new application for EVV and Self-Service tools
  - EVV requirements do not change
- Collect and update required paperwork from Participants, common law employers and DCWs
- Test, test, test to ensure payments will be smooth, accurate and on-time
Frequently Asked Questions
• FAQs

  • When does this change go into effect?
    ▪ Tempus Unlimited will become your F/EA effective January 1, 2022.

  • Is PPL no longer my F/EA?
    ▪ PPL is still your F/EA and will be until the transition to Tempus is completed January 1, 2022.
    ▪ After January 1, 2022, Tempus will be your F/EA

  • Will there be any interruptions to my services?
    ▪ You will continue to receive your services as authorized with no interruptions from this transition process.

  • Will my DCW(s) still get paid on time?
    ▪ There will be no changes to the current pay schedule with PPL and DCWs will experience no interruptions in their regularly scheduled payroll from this transition process.
FAQs

• **Will we still be submitting our time the same way using PPL’s Time4Care mobile app?**
  ▪ You will still submit your time using PPL’s Time4Care mobile app until late December 2021.
  ▪ Time submission will move to the new EVV system/app in December, 2021. We will share more information on exact dates to stop using that tool.

• **What if I need to hire a new DCW between now and January 1, 2022?**
  ▪ You will follow the same processes you have been with PPL. There will be no interruption to the DCW hiring process from this transition.

• **Are there any changes that are in effect now? How will I know what is changing and when those changes go into effect?**
  ▪ Nothing in your service delivery has changed, and nothing will change in the services you receive except as the result of a reassessment.
  ▪ In the upcoming weeks and months, additional information will be coming from OLTL, your MCO, and Tempus Unlimited about this transition.
  ▪ No changes will take place before they have been communicated to you.
• FAQs

  • What will change?
    ▪ Your services will remain the same. Those are not changing unless it’s the result of a reassessment. What will change is that you will begin working with Tempus Unlimited in late December 2021 instead of PPL. They will support you as your F/EA and provide the same type of services you have been receiving from PPL.
    ▪ There will be some changes in terms of to whom you communicate about your service delivery and how you communicate with them such as different phone numbers, fax numbers, e-mails, and websites.
    ▪ The Portals and Web Apps you use for logging, submitting, reviewing, and editing time worked will be different, but payroll schedules will remain the same.
    ▪ The EVV app will be all new and easier to use for Direct Care Workers and Common-Law Employers.

  • What should I expect from this transition?
    ▪ First and foremost, you should expect clear communication that occurs frequently. E-Mails, mailings, information site updates, as well as information sessions will all be regularly occurring during the transition.
    ▪ You should also expect an inclusive and collaborative approach to the transition plan, with easy accessibility to both staff and resources throughout the processes.
• FAQs

• **What do I have to do to get ready for this transition?**
  - Today, there is nothing you need to do other than watch your email and stay in touch with your Service Coordinator to learn about upcoming activities
  - In the future, CLEs and DCWs will need to complete new tax forms and participate in systems training

• **Who do I contact / where do I go if I have more questions?**
  - You can reach your MCO by contacting your Service Coordinator listed on your Service Plan
  - You can reach OLTL at ____________
  - You may also go to the HHA Website (coming soon!) for up-to-date information and resources
What’s Next?
Key Milestones to Launch January 2022

**JUNE**
- Announce new VF/EA FMS entity
  - Configure Test Environments
  - Extensive project planning
  - Develop data migration specifications

**JULY**
- Transition & Communications
  - Information sessions begin
  - Stakeholder Meetings
  - Data migration from incumbent
  - Contact Participants and DCWs regarding certain paperwork
- Communications
  - Share timelines, key dates and contact information with stakeholders
  - Establish information websites
  - Data migration coordination

**AUGUST - OCTOBER**
- Training & Go-Live
  - EVV and Self-Service Tools Training for Participants, CLEs, DCWs
  - Participants, CLEs, DCWs sign needed forms
  - Ongoing Information Sessions
  - Ongoing Stakeholder Meetings
  - Regular written and other communication

**NOVEMBER - JANUARY**
- Go Live
  - Existing payroll schedules remain
  - All EVV time recorded with new FMS entity
  - Payments made by new FMS entity
Communication Workflow

- Announcement
- Monthly Updates
- Information Webinars
- In-Person Information Sessions
- Information Site
- Introductory Webinars
- Training Webinars
- In-Person Training Sessions
Ensuring Success

• Complete contracts ASAP—clear detail on Scope of Work
• Build a detailed implementation Plan—who does what and when
• Clear communication with OLTL
• Stick to the scope—new features put pressure on quality implementation
• Reliable and complete participation by PPL in this transition
• Timely support from Participants & DCWs
• Minimize the noise—keep the extraneous conversations to a minimum