Commonwealth of Pennsylvania Vendor Fiscal/Employer Agent Financial Management Services (FMS)

OLTL Participant Directed Models of Service

Training for Service Coordinators (SCs)

PCG | Public Partnerships
Supporting Choice. Managing Costs.™

Agenda

- Goals of the Commonwealth of Pennsylvania
- Purpose of Training
- Process for Submitting Questions
- Timelines
- Public Partnerships, LLC (PPL)
- Coordinating and Communicating
- **Interim Enrollment Process**
- Participant Demographic Information
- Reports
- PPL Customer Service
- Questions

Goals of the Commonwealth of Pennsylvania

- **Ensure that FMS is provided consistently across all Home and Community-Based Services (HCBS) waivers and certain state-funded programs**
  - *Aging Waiver*
  - *Attendant Care Act 150 Program*
  - *Attendant Care Waiver*
  - *CommCare Waiver*
  - *Independence Waiver*
  - *OBRA Waiver*

- **Ensure that federal, state, and local taxes are managed consistently**

- **Reduce employer-related burden to individuals receiving participant directed services and their representatives**

Purpose of Training

- Introduce PPL, and review Roles and Responsibilities
- Describe Interim (Paper-Based) Referral Process
- Provide Contact Information for PPL Customer Service

IMPORTANT:

- This training covers the interim process for new OLTL participant enrollment only.
- Training on PPL's referral process, using a customized and easy-to-use PPL Web Portal, will be provided in October.
- Information on the normal, non-interim transition of existing participants will be provided at the October training.
- After the PPL Web Portal Training, you will no longer use the interim paper referral process (beyond 10/31).

Timelines

| Date	Activity
October 1, 2012	**SCs enroll new OLTL participants with PPL via paper referral process**
October 1 to mid-December, 2012	Incumbent FMS organizations transfer records to PPL for existing OLTL participants
Last December Pay Period	Direct Care Workers (DCWs) submit timesheets to PPL for existing OLTL participants (transfers)
January	PPL first payroll for existing OLTL participants (transfers)

Questions

- **Please send questions to:** padpw-oltl@pcgus.com

- We will respond to questions at the end of the training as time permits

- Questions will be used to compile a Frequently Asked Questions (FAQ) document

About Public Partnerships, LLC (PPL)

- Subsidiary of Public Consulting Group (PCG)
- Over 10 years as an industry leader in financial management for participant directed services
- Serving over 40,000 individuals in 22 states and the District of Columbia
- Offices in 7 states, including PA
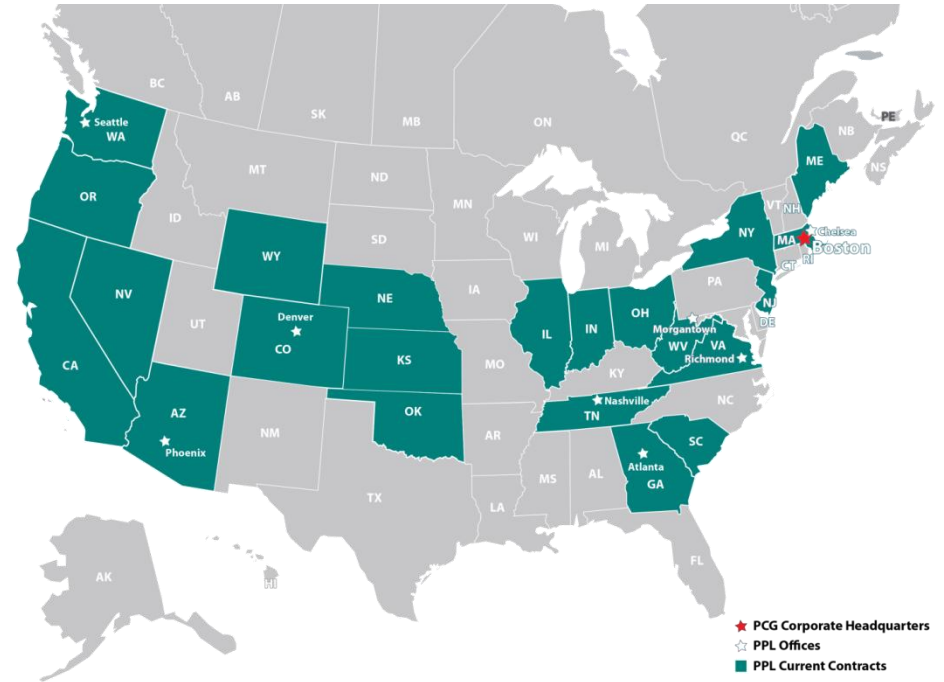
Our Vision:

People exercising choice and control of publicly funded long term services and supports

What will PPL do?

- ✓ *Enroll participants and provide Common Law Employer (CLE) tax paperwork*
- ✓ *Provide pre-populated CLE enrollment and tax forms*
- ✓ *Enroll DCWs*
- ✓ *Process electronic and paper timesheets and invoices*
- ✓ *Issue paychecks and direct deposits to DCWs*
- ✓ *Issue payments to vendors and small unlicensed providers*
- ✓ *Tax withholding, reporting, and garnishments*
- ✓ *Provide 24/7 on-line access to information via PPL Web Portal*
- ✓ *Provide user-friendly reports*
- ✓ *Provide quality customer service in multiple languages*

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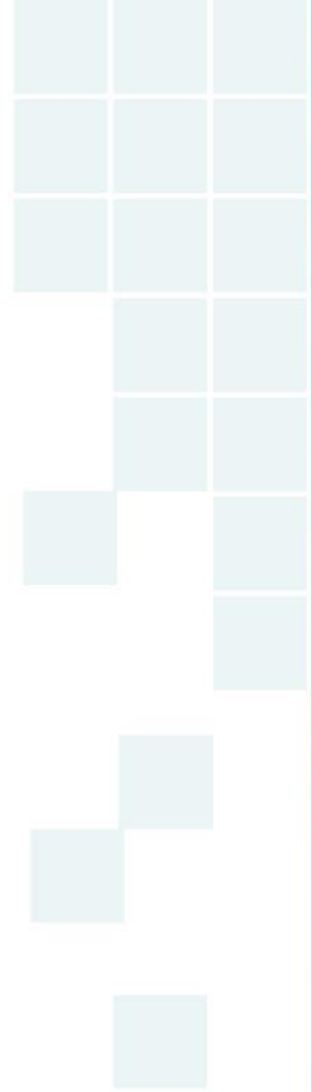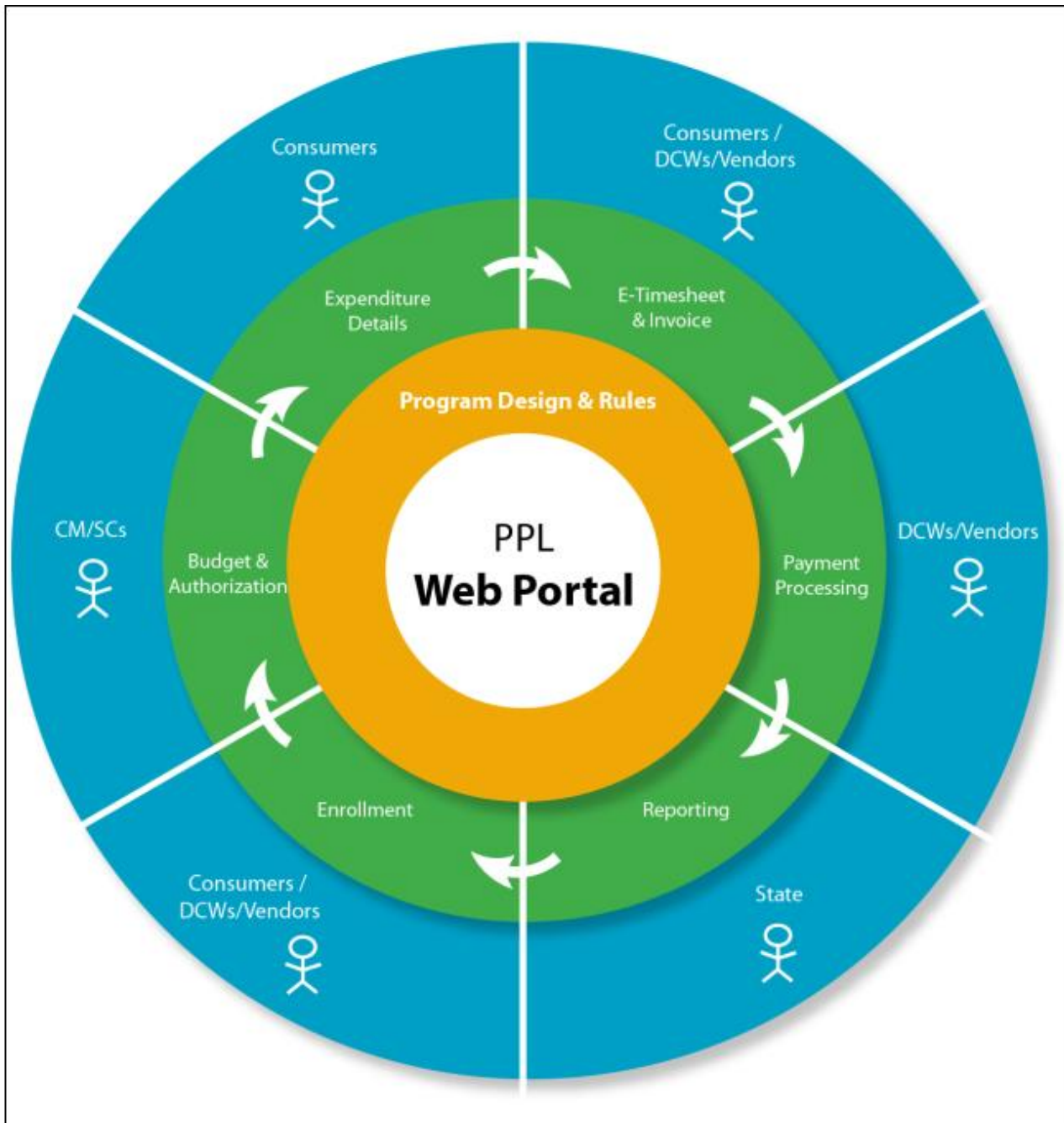
Coordinating and Communicating with SCs and OLTL

PPL will:

✓ Provide training and user guides on how to use PPL Web Portal

✓ Provide semi-annual orientation and training for SCs

✓ Report overuse of DCW hours to SCs and CLEs

✓ Inform SCs of any CLE who does not submit timesheets or invoices for two or more consecutive payroll periods (one month or more)
- Budget Summary Page
- Spending Reports
- Budget Utilization Reports
- 30 Days without Service Report

✓ Respond to SC complaints or grievances within 2 business days (PPL Support Ticket system)

Interim Referral Process Flow

1. SC will develop service plan and add PPL as the FMS vendor (see next slide for rates and codes)

2. SC will submit service plan to OLTL and make referral to PPL using the *New Participant F/EA FMS Referral* Form.

3. PPL will work with participant or Authorized Representative (AR) to complete required paperwork.

4. PPL will notify CLE and SC of "good-to-go" date.

IMPORTANT

Direct services cannot begin without an approved service plan from OLTL <u>and</u> "Good-to-Go" status from PPL.

Developing the ISP for New FMS Enrollments

Timeframe	Service
October – New Enrollees	
-October	7341 U4 (FMS start up - $277)
- November, December	7341 U5 (FMS – Temporary)
- January through June	7341 (FMS)
November - New Enrollees	
-November	7341 U4 (FMS start up - $277)
- December	7341 U5 (FMS – Temporary)
- January through June	7341 (FMS)
December and Beyond - New Enrollees	
- First Month	7341 U4 (FMS start up - $277)
- Subsequent months	7341 (FMS)

Interim (Paper-Based) Enrollment Process

SC will:

- **Submit paper referral to PPL via fax to <u>855-858-8158</u> or via email to <u>padpw-oltl@pcgus.com</u>**

PPL will:

- Verify information against data in HCSIS and notify SC of discrepancies

SC will:

- Reconcile discrepancies in HCSIS

PPL will:

- Distribute CLE Enrollment Packet and DCW Packets within 3 days of receipt of complete and accurate referral
- Receive and process packets
- Notify SC and CLE of CLE and DCW "Good-to-Go" status and date

Participant Demographic Information

SC referral to PPL must include:

- MCI ID (Medicaid ID)
- Participant Name
- Participant Address (mailing address and physical address)
- Gender
- Primary Language
- Common Law Employer/Name
- Common Law Employer/ SSN
- Common Law Employer/ Address and phone number
- Common Law Employer/Relationship to Participant
- Authorized Representative name, address, and phone (optional)
- Emergency Contact name, address and phone (optional)
- Service Coordinator name, phone, fax, and email

New Participant Interim Referral Form

Program Reminders

- Prior to enrollment, the SC will identify who will serve as the CLE, and if that person already has an existing federal Employer Identification Number (EIN). Do not refer participants who have previously been served by an incumbent FMS in 2012.

- The participant may identify a family member, friend or other person (AR) who is close to and chosen by them to share authority for managing services and supports, including the Direct Care Worker (DCWs).

- The participant will serve as the CLE unless pre-determined that an AR will serve in this role.

- The AR may be the CLE; but does not have to be the CLE.

- The AR may not serve as both the AR and the DCW for a single participant.

Reports – Sample Family-Friendly Report

Family Friendly Report- Spending Summary

- Participant and family audience
- Summarizes account activity to date
- Reflects budget variances
- Easy to read and understand
- Mailed directly to participant monthly

Reports – Sample Spending Detail

Family Friendly Report- Spending Detail

- ☐ Participant and family audience

- ☐ Provides check-level detail, grouped by service

- ☐ Details tie to Individual Budget and Summary Report

PPL Customer Service for OLTL Programs

Hours: 8:30am - 5:00pm (Monday-Friday)

Closed: Federal Holidays

Toll Free: 877-908-1750

TTY/TDD: 800-360-5899

Administrative Fax: **855-858-8158 (for referrals)**

Timesheet Fax: 855-858-8162

e-mail: **padpw-oltl@pcgus.com**

Web site:

https://www.publicpartnerships.com/programs/pennsylvania/padpwoltl

IMPORTANT:

   Username and password required to access Web site

PPL Customer Service

PPL will:

- Reflect principles of self-determination

- Demonstrate cultural sensitivity

- Provide translation and interpreter services

- Provide materials in alternate formats

- Respond to participant calls within 1 business day

IMPORTANT:

Only PPL, CLE, AR, SC, and Supervisor will be able to speak with the PPL customer service staff about the participant's budget and service authorizations

PPL Customer Service (continued)

PPL will:

- Track Communications via PPL Support Tickets

- Report Incidents to SCs

- Report Complaints and Grievances
  - PPL Support Tickets
  - Advisory/Grievance Committee
  - Respond within 2 business days
  - Resolve within 5 business days

- Conduct CLE satisfaction survey 60 days after referral and annually thereafter

- Implement corrective action plan

Questions?

Email: padpw-oltl@pcgus.com