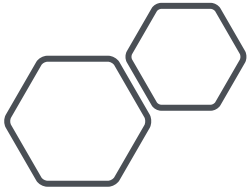


# FMS Training Presented by: Partners in Community Supports (PICS)

Presenters: Becca Schultz, Brooke Brown, Ashley Giguere



# Introduction of Presenters

# Today's Agenda

1. Introduction to CDCS
2. Roles & Responsibilities
3. Goods & Services
4. Service Authorizations
5. Questions

# Who is CDCS good for?

## Self-Directed Services & PICS Video

- Desire to live at home
- Desire to live independently
- Able to live independently, with some caregiver support
- Has family or friends who are and/or can provide support

CDCS allows people to self-direct their services, by allowing them to pick and choose what services they want and need. It also allows people to hire their loved ones, neighbors or friends to provide supports.

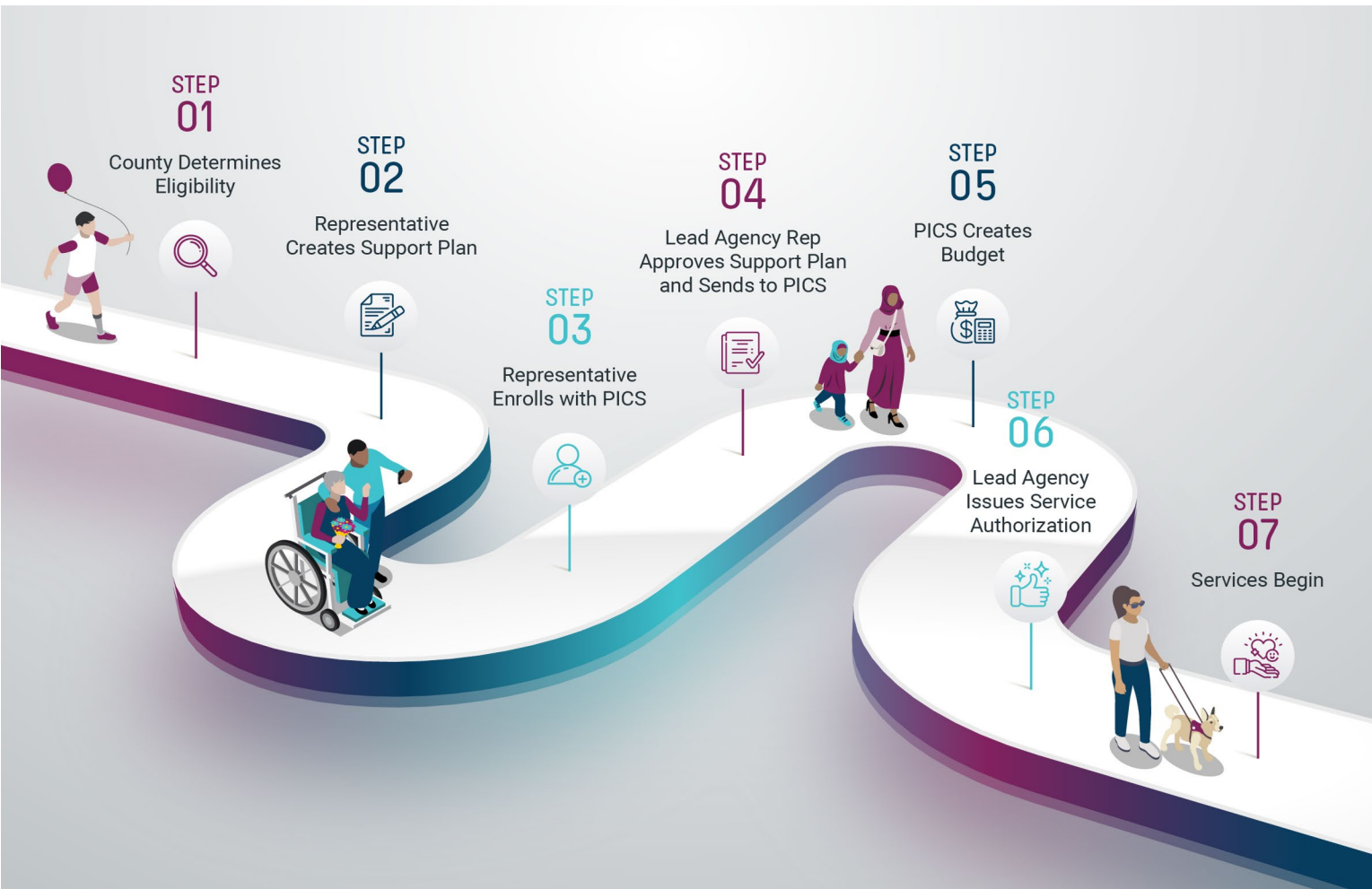


# Starting Services

YOUR CHOICES. OUR SUPPORT.

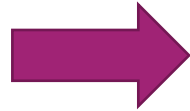


# Steps to Getting Started



# Making a Revision

Participant submits  
request to Care  
Coordinator



Care Coordinator  
sends approval to  
FMS



FMS Revises Budget  
& Submits to Care  
Coordinator



# **Roles & Responsibilities**



# Participant/Representative

- Conveys the preferences and desires of the Participant
- Recruits, interviews, and hires Workers
- Sets rate of pay, creates Worker schedule, trains Workers, evaluates Worker's performance and dismisses (if needed)
  - NOTE: Rate of pay is approved by the Care Coordinator
- Approves and signs timecards, and other documents on behalf of the Participant
- Develops and creates the support plan (if not using a Support Planner)
- Create and submit addendum and change requests to the Care Coordinator for review (if not using a Support Planner)
- Report incidents of abuse, neglect, exploitation, and fraud



# Financial Management Service (FMS) Provider

- An FMS provider is required for anyone on CDCS
- Creates & revises budget based on approved plan and addendums received from the Care Coordinator
  - Can create draft budgets to verify if numbers are accurate
- Process payroll, including maintaining compliance with the IRS and Department of Labor
- Process & pay expense reimbursements for approved goods and services
- Provide communications on over and under spending
- Send monthly reminders to review spending summaries
- Communicate with family and Care Coordinator as needed on overspending, overbudget, service authorizations, etc.
- Not the responsibility of the FMS to note if an item is allowable or unallowable



# CDCS Support Planner

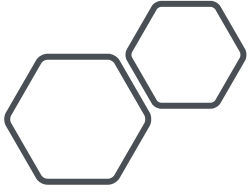
- Assists the Participant/Representative to develop the individual support plan
- Links Participant/Representative to community resources, worker training, goods and services products
- Creates & submits addendum changes to the Care Coordinator



# Care Coordinator

- Completes care assessment
- Approves support plan & addendums prior to services being rendered
- Issues the service authorization to the FMS and works with FMS to resolve any concerns
- Reviews spending summary
- Provides waiver orientation, policy, and information to the Participant and/or Representative. This can include:
  - Allowable goods and services
  - Resources, tools, and technical assistance available to Representatives





# Goods & Services



# Allowable goods and services



- Meet an assessed need
- Approved by the Care Coordinator, and included in the support plan
- Ensures health, safety, and welfare
- Needs to be in compliance with the Lead Agency Manual
- Goods/services collectively allow person to live independently
- Most cost-efficient option
- For the sole benefit of the person

# Unallowable goods and services:



- Duplicates other services covered by state plan, Medicare, etc.
- Travel, lodging, or meal expenses for Participant or caregiver
- Services that benefit others besides the individual
- Diversionary or recreational expenses
- Comfort or convenience
- Items/support normally provided by the person, their family, or spouse
- Insurance co-pays

# Service Categories

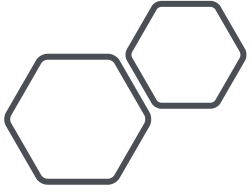
- **Personal assistance:** Services that help a person with ADLs and IADLs through hands-on assistance, cues, prompts, and instruction
  - **Examples:** Bathing, grooming, shopping, meal preparation, companionship, caregiver relief, skill building
- **Treatment and training:** A range of services that increase a person's ability to live and take part in the community
  - **Examples:** Day services, habilitative services, independent living services, physician prescribed therapies/supports



# Service Categories continued...

- **Environmental Modifications and Provisions:** Helps the person to live and participate in their community and is required to support the person's health and safety
  - **Examples:** Home/vehicle mods, assistive technology, supplies, equipment
- **Self-Directed Support Activities:** Supports, services, and expenses for administering or helping the Participant administer CDCS
  - **Examples:** FMS fees, employer related-costs, support planning costs

**NOTE: CDCS will be revising the service categories during the unbundling process, which will increase the service categories to eight.**



# **Service Authorizations**

# General Information

- Each MCO has their own systems and user guides to follow.
- Flexible Spending – generally, CDCS is an annual amount and allows for flexible use.
  - However, EW is strictly monthly, therefore not as flexible
- Monthly Amount – Need to ensure families remain within monthly case mix
- Issuing full annual allocation versus issuing budgeted amount
  - Example: Total allocation is \$24,000 but family only budgets \$17,000

# Case Mix Increases

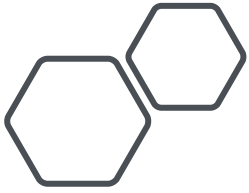
- Bill based on dates and amount of newest authorization
- If an authorization is split, families may be at risk for being invoiced
- If family is underspent at time of split, we need authorization to reflect funds being moved
- Recommend adding line with new budgeted amount instead of splitting authorization

# Start and End Time

- Ending Plan year early due to reassessment
  - Recommend to stick within 12-month span
- Ramifications of ending early:
  - Family could lose the last month of current plan
  - May be slightly overspent and will need to pay funds back
- If assessment is done early, and services **MUST** start early, please notify FMS at least 30 days in advance
- If the authorization and approved support plan are received after the new plan span starts, there is risk for overspending and the FMS may need to bill the family

# Resources

- [CDCS Policy Manual \(state.mn.us\)](#)



# Questions?

Contact: [sc@picsmn.org](mailto:sc@picsmn.org)