

Support Coordination and Participant Direction

BE D·B·H·D·D

Georgia Department of Behavioral Health & Developmental Disabilities

Division of Developmental Disability

May 2023



Acumen Overview: Working with the Fiscal Intermediary

Presented By:

Nicki Cline, MPA, GA Executive
Director

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Acumen Fiscal Agent

Innovation • Opportunity • Freedom



OUR MISSION

Acumen Fiscal Agent facilitates freedom, choice and opportunity through innovative fiscal agent solutions.

Who is Acumen?

- Providing services nationally to self-directed populations and programs since 1995
- Currently in 22 states; Headquartered in Mesa, AZ
- In GA since 2006; Local office in Duluth, GA
- Local team of 14 agents; including 1 team lead and 7 agents dedicated to NOW/COMP; 1 AR Agent for Billing issues
- Virtual one-on-one assistance with completing paperwork & training on using our EVV solution (DCI)



What is a Fiscal Intermediary

- AKA Fiscal Agent, Fiscal Support Services Provider (FSS) – Enrolled Medicaid Provider
- This is an IRS term that allows the IRS to recognize a fiscal intermediary as the legitimate employer *representative*.
- Allows the employer to direct and manage his/her workers.
- The fiscal intermediary assumes no liability for employer/employee related issues. Acumen is NOT the employer.

3 Players of Self-Direction

State and Case
Management



Employer / Member



Acumen Fiscal Agent



Employer/Representative Roles:

- Will be enrolled as an Employer with the IRS (i.e., has Employer Authority)
- Attend DBHDD Training to learn program rules and policies
- Enrolls with the Fiscal Agent of their choice
- Hire and fire employees
- Schedules, trains, and supervises employees
- Provides a safe work environment
- Complies with program rules and polices around use of services
- Compliance with government regulations like the use of EVV
- Keeps employee records confidential
- Manages their budget
- Follows employment laws

- Collects required enrollment forms & ensures completeness & accuracy
- Runs employee background check
- Sets up all employees in payroll system (DCI)
- Process employee payroll according to business rules of the program
- Manages payroll tax liability & Workers' Comp Policy
- Generates and distributes W2's and 1099's
- Garnishments, tax liens, and payroll reporting
- Processes client budgets: IDD Connects/GAMMIS
- Bills for reimbursement of services
- Provides approved EVV system – DCI
- Customer Service 5 days/week; 12 hours/day
- COMING SOON! Dedicated Agent for all client needs!

Acumen's Scope of Work:



The Enrollment Process:

When you have a client who wants to work with Acumen...

1. Contact us: enrollment@acumen2.net

We will send that person the necessary paperwork, and one of our GA Agents will follow up to assist with completion if requested.

2. Initiate their budget (PA)

New clients should start on the first of the month.
Start dates CANNOT be made retroactive!!!!

3. Acumen will notify the employer when their employee can begin working, after the background check is clear.

We call this our “**Good to Go**”!

Employers should NOT allow any work to begin prior to our GTG notice!!!

FAQs for Support Coordinators:

TAXES: The cost of taxes and workers' comp comes out of the budget. We call this the "Employer Burden".

- FUTA, SUTA, FICA (Social Security & Medicare) and WC
- Use our "**Show Me the Money**" form to calculate impact on budget.
- Employee Hourly Pay Rate x 1.1833 = Cost to You Hourly
- Weekly: Cost to You x Hours per Week = Weekly Cost

OVERTIME: Use of overtime will dramatically affect budget.

WORKERS' COMP: Employer should call us to file a claim as soon as possible. We will direct to an appropriate physician and assist with filing the claim.

EIN: Each Employer will need an EIN to be the Representative. If they have an existing EIN, they will need to contact us for their next steps. This is an IRS requirement.

Hot Topics:

- 1) PA Changes/Updates;*
- 2) Program Switches;*
- 3) Employer Switches -*
“Communicate, communicate,
communicate!”

Electronic Visit Verification (EVV)

Electronic Visit Verification:

Requirement of the 21st Century Cures Act (i.e., Federal Law)

Requires that HCBS shifts (CLS codes only) collect the following data in **real time** in order to be “compliant”:

- Clock in and clock out time
- Service date
- Name of Employee
- Location
- Service Code
- Name of Client

Electronic Visit Verification (EVV)

We use DCI for EVV compliance. Acumen works directly with Tellus/Netsmart.

- Acumen clients do NOT need to work with Tellus/ Netsmart.

How to be EVV compliant:

- Mobile App (free for employees)
- Landline EVV (needs DCH approval)

Employers can access their DCI account via an online portal where they can manage all aspects of their account.

Helpful Links:



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Acumen
Forms

<https://www.acumenfiscalagent.com/georgia/>

GAMMIS
Provider
Manuals

<https://www.mmis.georgia.gov/portal/PubAccessHome/t/abid/36/sessionredirect/true/Default.aspx>

DCH
Request
for
Landline

<https://medicaid.georgia.gov/programs/all-programs/georgia-electronic-visit-verification-evv/evv-service-providers>

GA DCI
Training
Materials

<https://acumenfiscalagent.zendesk.com/hc/en-us/articles/4404879193485-GA-Self-Direction-Training-Materials>



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THANK YOU!



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480-497-0343 EXT. 0535



Participant Direction Services

Olivia Nickens

Family Support and Participant Direction Manager
Office of Community Services



Georgia
Department of
Behavioral Health
& Developmental
Disabilities



Appendix-K Family Hire Employee Transition Plan

- Applications are due **July 31, 2023**
- Applications should be emailed to: participant.direction@dbhdd.ga.gov
- Notification of outcome by: **September 15, 2023**
- The approval period: **November 12, 2023- February 29, 2024**
- We will provide the next date your application is due on the notification of approval.

Appendix-K Family Hire Employee Transition Plan



All current Appendix-K Family Hire Employees will have an **end date of November 11, 2023** with fiscal agencies



Only DBHDD approved family hire employees will be authorized with fiscal agencies to continue employment after November 11, 2023.

Appendix K- Family Hire Transition Plan

WHO

- Legally responsible relatives such as spouses, parents to minor children, or court-appointed legal guardians are **PROHIBITED**
- Other family members, within third degree by blood, adoption or marriage, 18 years or older, **may be reimbursed for providing services when approved by DBHDD**
- Family member who is representative or back up representative may not be approved as family hire

Family Hire Request Form

Example of the Family Hire Request Form

Extenuating Criteria for Consideration of Employment of a Family Member:	
Must meet at least 2 of the following A-C:	
<p><u>A.</u> Lack of qualified providers in remote areas. There must be documentation which providers were attempted and how they failed to provide services. There must be documentation of why other providers in the area cannot be utilized for services; <u>and/or</u></p> <p>Needed information to qualify for this criteria include all of the following:</p>	<ol style="list-style-type: none"> 1. What County does the individual live in? 2. Proof/documentation of what has been tried and how it has failed- ex: placing ads, failed employment of non-family members etc 3. Why can't other providers be utilized for services? 4. Number of staff hired and terminated
<p><u>B.</u> The presence of extraordinary and specialized skills or knowledge by approvable family/relatives written in the request for approval. The proposed family hire must have documented proof of skills and/or education of ability or experience working in the area of the population served; <u>and/or</u></p> <p>Needed information to qualify for this criteria include all of the following:</p>	<ol style="list-style-type: none"> 1. Documentation of education and/or skills working in the area of ID/DD 2. What are the extraordinary and specialized skills or knowledge (<u>can't be because I've lived with them all my life and taken care of them</u>) examples- training pertaining to working with individuals with ID/DD disabilities
<p><u>C.</u> A clear demonstration of the use and compensation of family/relatives being the most cost effective and efficient means to provide the services in comparison to the cost of service if provided by a traditional provider of the same service;</p> <p>Needed information to qualify for this criteria include all of the following:</p>	<ol style="list-style-type: none"> 1. How is it most cost effective and efficient to hire a family member/relative than a traditional provider? Give concrete documentation of when the family member/relative will be used i.e. before school after parents have left for work, or after school before parents get home etc. 2. What is the pay rate you are considering for the employee? (<u>Can't be more than what would be paid for a traditional provider of similar service</u>)
<p>This application should be submitted to your Support Coordination Agency for review and submission to the Regional Field Office</p>	

Personal Assistance Retainer (PAR)

A personal assistance retainer is a component of Community Living Support Services (CLS) that allows 30 days continued payment of continued payment per year to CLS staff when the **waiver participant** is hospitalized or otherwise absent from home.

Only for the typically scheduled days and amounts of CLS services (e.g. if the individual typically receives CLS on Monday-Thursday, 4 hours each day, the PAR may only be claimed for those days/hours).

The Georgia Participant- Direction Group (GAPD)

Region	Member Name	Member Email
1	Kathryn Walesch	kdw98@bellsouth.net
1	Jane Grillo	jgrillo343@yahoo.com
2	Nalini Isaac	naliniisaa9@gmail.com
2	Vacant	
3	Debbie Shadrix	Debbieshadrix@yahoo.com
3	Clementine "Tina" Rivers	rattler79_2000@yahoo.com
4	Tammy Greenway	jamcade@gmail.com
4	Annemarie Vericono Hoyt	drewlongsmom@gmail.com
5	Mitzi Proffitt	gahappiegirl@aol.com
5	Kathy Simmons	ksimmonsdodge.k12.ga.us
6	Linda Dukes	bldukes@bellsouth.net
6	Debra Anderson	deBA264@aOl.CoM
Self-Advocate	Nandi Isaac	scanwithnan@gmail.com
Self-Advocate	Joshua Williams	jw11898@georgiasouthern.edu
Self-Advocate	Wesley Ford	wesleyford321@gmail.com

DBHDD Participant Direction Team



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Jeff Thompson PhD, Director of Community Services, jeffery.thompson@dbhdd.ga.gov

Olivia Nickens LPC, Family Support & Participant Direction Manager, olivia.nickens@dbhdd.ga.gov

Seth Oliver, Participant Direction Coordinator - Region 1, seth.oliver@dbhdd.ga.gov

Stacy Wurst, Participant Direction Coordinator – Regions 2 & 5, stacy.wurst@dbhdd.ga.gov

Kingsley Igunbor, Participant Direction Coordinator – Region 3, kingsley.igunbor@dbhdd.ga.gov

Belinda Carter, Participant Direction Coordinator – Regions 4 & 6, belinda.stephen@dbhdd.ga.gov



NOW/COMP
Waiver Fiscal
Agencies

Acumen Fiscal Agency

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Continuum Fiscal Services

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