Introductions

- Ben Davidson, Owner and Co-Founder of Premier Healthcare Services
- Victor Lira, Division Manager Respite and FMS Services
Making Waves Presentation Overview

- Self Determination Program
  - Outreach
  - Enrollment
- Veteran Directed HCBS program
  - Implementation
  - Outcomes
- Questions Along the Way
Fiscal/Employer Agent Overview

Fiscal/Employer Agent (F/EA) FMS perform various tasks to alleviate the administrative burden associated with being an employer under IRS section 3504. Program participants are the sole common law employer in this model exercising all employer and budget authority within the parameters of the program.
“The agency and participants are co-employers of the workers whom participants recruit and refer to the agency...”

-NRCPDS

How are they co-employers?
Participant maintains Employer Authority and Budget Authority while the Agency handles the administrative burden of employing a provider. This allows the Participant to focus on managing their LTSS.

Employer Authority:
Choose and control their own worker (Hire, Fire, Recruit, Train, etc...)

Budget Authority:
Choose how their budget is spent on goods and services
Participant Direction

Budget vs. Employer Authority

What is budget authority?
Budget authority means that a participant has choice and control over what goods and services to purchase within their spending plan.

What is employer authority?
In a self-directed program, participants are granted the decision-making authority to recruit, hire, train, and supervise service providers of their choice.
California Self Direction in DD System

• Senate Bill 468
  - Self Determination Program
    • Initial program 3 years and 2500 clients
    • After 3 years program opens up to the entire DD population

• Self Determination Stakeholder Committee
  - Waiver approval to CMS
  - Choice of FMS model(s)
  - Outreach to entire state about program
  - Working out the kinks during the initial phase
California Senate Bill 468

- Signed into law 2013
  - “The Statewide program would be phased in over 3 years, serving up to 2,500 regional center consumers during the phase-in period…”
  - “The department shall implement a statewide Self-Determination Program. The Self-Determination shall be available in every regional center catchment area to provide participants and their families, within an individual budget, increased flexibility and choice, and greater control over decisions, resources, and needed and desired services and supports implement their IPP.”
Outreach for SDP

• Challenges
  ▪ Ensuring all 288,000 possible candidates have an equal shot at being part of the phase in program
  • Video
    – Multiple Languages (Threshold Languages)
    – Subtitles
  • Newsletters
  • Emails
  • Town Hall Meetings
  • Webinars
  • SDP Council Meetings
Enrollment

• Informational Meeting
  ▪ Attendance Mandatory
  ▪ Apply for random selection

• DDS receives compiled list of applicants from Regional Centers
  ▪ Those selected can enroll in SDP after orientation
  ▪ Establish Individual Budget
  ▪ If not selected consumers remain on list for future enrollments
# Self-Determination Participant Selection Information

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VDHCBS in CA

• Implementation Process
  ▪ RFP released by SD County AIS (AAA) in April 2013
  ▪ Premier awarded bid
    • Contract signed in June 2013
  ▪ Meetings with AIS to prepare for Readiness Reviews for the NRCPDS
    • SD-VISA (Veterans Independence Services at Any Age) Program Readiness Review & VAMC Agreement finalized July 2014
    • FMS AWC Readiness Review approved February 2014
Detours and Delays

- Detours and Delays
  » F/EA vs. AWC
- Delayed due to F/EA being preferred model of FMS by ACL and VACO
  • Concerns over AWC billing practices
  • Concerns over lack of self direction
- Ultimately AWC chosen
  » Obstacles to F/EA
  • Workers comp cost prohibitive in CA
  • CA EDD filing is labor intensive
VDHCBS Preparation

San Diego Veterans Independence Services at any Age (SD-VISA)

Referral
VAMC refers Veteran to AIS with a Case Mix Budget or requests AIS to assess for Case Mix Budget.

Intake
AIS contacts Veteran schedules home visit. Compiles materials (e.g., forms, manuals).

Assessment

Plan Distribution
AIS transmits the authorized plan to the Veteran and to Premier Health Services (PHS) -- FMS provider.

Plan Authorization
VAMC reviews Plan. Assures no duplication. Determines item(s) support disability need. Sends approval to AIS. AIS bills 1-time full assessment fee.

Develop Plan
AIS works with Veteran to develop a spending plan. Helps identify goals, potential workers and other goods & services. Sends to VAMC.

预算
AIS authorizes the budget amount or tier & sends to AIS.

员工资格
Veteran rejects worker based on background.

建立就业
PHS/FMS processes worker information.

 Poor Candidate
Veteran not interested or needed representative not identified. (90dys) Referred back to VAMC. AIS bills 1-time half assessment fee.

 Good Candidate
AIS documents the Veteran’s needs. Validates or recommends alternate Case Mix Budget amount.

Employer Paperwork
PHS/FMS collects required employee information and conducts background checks.

Hiring Assistance
AIS assists the Veteran in the hiring process: job descriptions, recruitment, interview, and reference checks.

Establish Employer
PHS/FMS or AIS assists Veteran to complete the paperwork to be an employer.
VDHCBS Preparation Cont’d

San Diego Veterans Independence Services at any Age (SD-VISA)

Savings/Emergency Back-up Fund
PHS/FMS keeps track of unexpended budget amounts to be applied to approved savings, respite or back-up services.

Payments
PHS/FMS pays workers & invoices as in Spending Plan.

Timesheets & Invoices
Veteran submits timesheets & invoices to PHS/FMS.

Initiate Services
Veteran trains workers and begins services as authorized in the Spending Plan.

Reports
PHS/FMS sends detailed spending and Savings/Rainy Day Fund reports to Veteran and AIS via the Q System.

Quality Assurance
AIS monitors the Veteran’s health, safety and outcomes. Conducts monthly phone contact and quarterly visits.

Reimburs
AIS submits invoice to the VAMC.
VAMC remits payment.

Reassessment
Veteran reassessments and spending plans are done annually or sooner when changes occur.

Monitoring
AIS fiscal staff will monitor FMS provider -- PHS

Veteran’s Monthly Summary
A detail report of each individual Veteran’s spending (pay, taxes, goods and services and savings/emergency funds remaining) is sent to VMAC.
VDHCBS in CA

• First vet referral
  ▪ Began service October 2014

• Current census
  ▪ 22 vets active
  ▪ 27 referred
  ▪ 30 vet cap
The San Diego Veterans Independence Services at Any Age (SD-VISA) is a ‘veteran directed’ program and the first of its kind in California. Through the program, veterans selected for the partnership are provided a budget and meet with an AIS social worker who helps to implement a spending plan based on each participant’s unique needs. The veteran is then referred to Premier Healthcare Services, which acts as the payroll agent and manages timesheet, payroll, taxes and background clearances.