

SUCCESS WITH CONSUMER DIRECTED SERVICES

Texas Council Annual Conference

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INTRODUCTIONS

- ▶ Cheryl Harris, Imagine Enterprises
- ▶ Jennifer Farrar, Betty Hardwick Center
- ▶ Jenny Goode, Betty Hardwick Center
- ▶ Natasha Tucker, IDD Service Coordinator
- ▶ Jeff Owens, Client
- ▶ Donna Wagley, Parent

OBJECTIVES FOR TODAY

- ▶ Participants will understand how one Center encouraged growth in CDS as a financial strategy for Waiver programs
- ▶ Participants will understand the role of the FMSA, Provider, Service Coordinator and Family/Client in CDS
- ▶ Participants will gain knowledge about how to implement CDS at an agency level
- ▶ Participants will gain knowledge about how to implement and maintain CDS at an individual level
- ▶ Participants will ask questions and discuss issues with a panel who work and live with the CDS model

BHC SAW CDS AS A FINANCIAL STRATEGY

- ▶ Financial Losses in TxHmL caused us to look at our options
 - ▶ FY13 \$90k loss
- ▶ In FY14, we set out to make changes in many service areas
 - ▶ Reduced respite hours
 - ▶ Part Time CSS staff
 - ▶ Contract Day Habilitation and Part Time Day Habilitation staff
 - ▶ CDS

STAFF EDUCATION WAS ESSENTIAL

- ▶ None of us really understood CDS
- ▶ We contacted Imagine to educate us about their work in other areas
- ▶ Service Coordinators educated
- ▶ Provider staff educated

FAMILIES TALK FORUMS

- ▶ Invited families who were doing CDS to educate prospective families
- ▶ Shared sample documentation
- ▶ Discussed how to hire employees and who are employees
- ▶ Talked about pros/cons
- ▶ Handpicked families initially to invite with known supports in place

CHANGE IN PROVIDER STAFFING

- ▶ Our financial loss leaders were Day Habilitation and Community Support Services
- ▶ We announced in advance that we'd be changing from full to part time positions
- ▶ We allowed part time employees to be available to clients/families for CDS

BHC RESULTS TO DATE

	Consumers in CDS September 1, 2013	Consumers Currently in CDS
HCS	2	23
TxHmL	3	27

We have seen a steady an increased growth in CDS participation through:

- Staff Education
- Consumer Education
- Word of mouth
- Consumer Satisfaction with the CDS option

WHAT IS AN FMSA?

- ▶ Financial Management Service Agencies
 - ▶ Previously called Consumer Directed Services Agencies (CDSA's)
- ▶ Fiscal agent for employers
- ▶ Contract with DADS to do this role.
- ▶ Monitored and audited by DADS.

WHAT DOES AN FMSA DO?

- ▶ FMSA is the FISCAL AGENT for the employer
 - ▶ Establish EIN with the IRS & open TWC account
 - ▶ Produces payroll
 - ▶ Quarterly tax deposits to IRS & TWC accounts
 - ▶ W-2's
 - ▶ Criminal background checks with TxDPS secure website, DADS Employee Misconduct, SSA verification
- ▶ Paid \$154.79 per client per month of service. Cost built into IPC, billed in CARE by FMSA.

HOW DO FAMILIES SELECT AN FMMSA?

Choosing consumer directed services to self-direct your services gives you the control of who you hire, the hours they work, and their rate of pay. To be successful you need to choose a Financial Management Services Agency (FMMSA) that will be a good partner.

Your service coordinator will give you a list of FMMSA's in the area. Do your homework, call several FMMSA's and ask questions before you make your selection.

How long have you been in business?

What waivers do you provide services for?

What waiver contract areas do you cover in Texas?

How many clients do you have?

What is your turnover rate?

When was your last DADS audit and what was your score?

How often do you process payroll and do you offer direct deposit to employees?

How many staff do you have and are they in my area?

Are you an FMMSA and a provider agency?

How quickly did the FMMSA return my call?

WHAT CAN BE SELF DIRECTED?

- ▶ Clients may choose to self direct the following services –
 - ▶ HCS
 - ▶ Respite
 - ▶ Supported Home Living
 - ▶ Support Consultation
 - ▶ Cognitive Rehabilitation Therapy* (as of April 2014)
 - ▶ Supported Employment* (as of April 2014)
 - ▶ Employment Assistance* (as of April 2014)
 - ▶ Nursing** (as of July 2014, in own home or family home)
 - ▶ Texas Home Living
 - ▶ All Services and Support Consultation
 - ▶ Other Waivers – CLASS, CBA, DBMH, MDC
 - ▶ See Which Waiver Does What? for more information on these waivers

THE SERVICE COORDINATOR ROLE IN CDS

- ▶ The Service Coordinator does....
 - ▶ Explains CDS and educates Client/family
 - ▶ Provides information about the FMSA s available in the area
 - ▶ Advocate for the Client's needs
 - ▶ IPC if the Client completely self directs waiver
 - ▶ Monitor service delivery in accordance with PDP/IPC
- ▶ The Service Coordinator does not....
 - ▶ Choose or manage the Client's Employee
 - ▶ They don't set the work hours for the Client's Employee

THE PROVIDER ROLE IN CDS

- Make recommendations to SC for individuals who would make good CDS candidates
- Coordinate with SC, FMSA and consumer/family when making the transition from provider service to CDS
- If consumer remains in any provider services:
 - Provider remains responsible for completion of the IPC for HCS and for working with SC on revisions of the IPC in both HCS and TxHmL
 - Monitor and assist individual with money and budgeting if provider is the payee
 - Ensure any provider services are provided according to the Implementation plan
 - Communication is essential between the provider, consumer and SC when CDS is also part of the service array.

CLIENT & FAMILY PERSPECTIVE

- ▶ Why we chose CDS
- ▶ What we like about it
- ▶ What we don't like about it
- ▶ Services they self direct
- ▶ How long
- ▶ Who is employee?
- ▶ How do they structure the plan/hours
- ▶ Back Up?

CLIENT & FAMILY DECISIONS – TO DR OR NOT TO DR

- ▶ A Designated Representative is:
 - ▶ A willing adult the employer chooses to act as the primary contact and decision maker for the employer through the CDS option; however the employer still retains responsibility for CDS requirements; or
 - ▶ The individual is the employer of record.
- ▶ What if I have guardianship of my child or family member?
 - ▶ Guardianship makes you the Legal Authorize Representative (LAR) and the employer.
- ▶ What if my child is a minor?
 - ▶ The parent is the LAR and employer.

CLIENT AND FAMILY DECISIONS- CHOOSING AN EMPLOYEE

▶ Choosing an Employee

- ▶ Must be 18 yrs old
- ▶ Must pass a background check
- ▶ Present driver license, social security card, passport, or other documents validating their ability to work in the USA
- ▶ Cannot be the employer or the employer's spouse
- ▶ Cannot be the individual's spouse
- ▶ Cannot be the DR or the DR's spouse
- ▶ IN HCS and TxHmL, cannot be a person who lives in the same home with the individual, or a DFPS foster parent
- ▶ In TxHmL, for Behavioral Support & Adaptive Aids, cannot be a person related to individual within the fourth degree of consanguinity or second degree of affinity

CLIENT AND FAMILY DECISIONS – PLANNING YOUR SERVICES

- ▶ May self direct some or all
- ▶ Individual/Family chooses their FMSA
- ▶ Individual/Family & service coordinator collaborate what services are needed
- ▶ FMSA holds in-home CDS orientation meeting
- ▶ Employer & FMSA develop CDS budget
- ▶ Individual/Family chooses their employee(s)
- ▶ Individual/Family determines the rate of pay
- ▶ Individual/Family sets the work calendar

CLIENT AND FAMILY DECISIONS – PROS AND CONS

▶ Some Pros

- ▶ Employee pay is better than what any traditional agency will offer
- ▶ Budget is flexible
- ▶ Many families report greater satisfaction over the traditional agency option

▶ Some Cons

- ▶ The employer must network to recruit employees

CLIENT AND FAMILY DECISIONS – BACK UP PLANS

- ▶ A back up plan for employees is required when services are deemed critical by the service coordinator
 - ▶ Back up plan identifies natural resources such as family that can assist when the scheduled employee is unable to work

WORKING TOGETHER – THE BIG PICTURE

- ▶ Every Client situation is unique – total or partial self directing
- ▶ CDS employees may work for Clients and for a Provider
- ▶ Multiple FMSAs may operate in the area and manage differently
- ▶ Managing Complaints and Concerns
- ▶ What to do when it doesn't work out
- ▶ Center created a potential provider list to help families

DISCUSSION TIME

What would you like to know from the panel?

What has been your experience with CDS?

TAKING THIS HOME

- ▶ Where to start
 - ▶ Meet FMSAs
 - ▶ Staff Education
 - ▶ Case Review – what Client's are good candidates with support in place?
 - ▶ Families Talk
 - ▶ Look at current operations (contracting, family vouchers, staffing

Additional Resources....

