



# **FMS Vendor Transition for Self-Directed Services**

Community HealthChoices  
June 28, 2021

- Today's topic: Announcing the new CHC FMS Vendor
- Presented by your CHC MCOs
  - Amerihealth Caritas
  - Keystone
  - PHW
  - UPMC

- Self-Directed Services Option for CHC Participants
  - CHC Participant employs the direct care workers instead of a caregiver agency
  - Empowers Participant to make decisions regarding who provides services and how services are provided. Participant can recruit, hire, train and supervise the individuals who furnish their services (PAS & Respite) with payroll and other supports provided.
  - Self-direction promotes personal choice and control and can include engaging family and other loved ones in providing care and support
- Financial Management Services (FMS)—Effectively the Participant’s “HR Department”
  - Manage Employee Onboarding
  - Manage Payroll & payroll verification processes
  - Reporting and FWA compliance responsibilities

- Goals for the transition:
  - Keep the Self-Directed Services program the same, but make it run better
  - Minimum disruption to Participants and DCWs during the transition
  - High-quality service metrics and budget support
  - Transparency and accountability to MCOs and OLTL
  - Clear and accurate reporting to MCOs and OLTL

# Financial Management Services Decision-Making Process

DHS indicted in Dec 20 plans to turn FMS responsibility to MCOs as an admin function

- DHS manages services with entity that has held contract since 2012
- Ongoing difficulties getting them to operate smoothly, especially under new CHC program

MCOs proposed a single vendor to replace existing contract

- One vendor will ensure common systems and P&Ps as well as shared development costs across the MCOs
- Separate contracts with each MCO

CHC Coalition workgroup formed & OLTL agreed with the plan to move in this direction.

- Evaluation criteria and functional requirements defined
- Collaborate on vendor selection process
- Meet bi-weekly with OLTL

MCOs identified six candidate vendors

- Thorough, transparent review process

MCOs selected new, nationally experienced vendor in April with ongoing collaboration with the Office of Long-Term Living

- Contracts being finalized
- Stakeholder outreach **underway**

- The Selected FMS Vendor is HHA eXchange
  - HHAx is a current CHC vendor to all three CHC MCOs
    - Supports Agency authorizations and EVV
- Tempus Unlimited will be the Fiscal Employer/Agent
  - CLEs and DCWs will deal directly with Tempus for all of their payroll and EVV needs
- WHY?
  - Experience, organization, mindset, technology

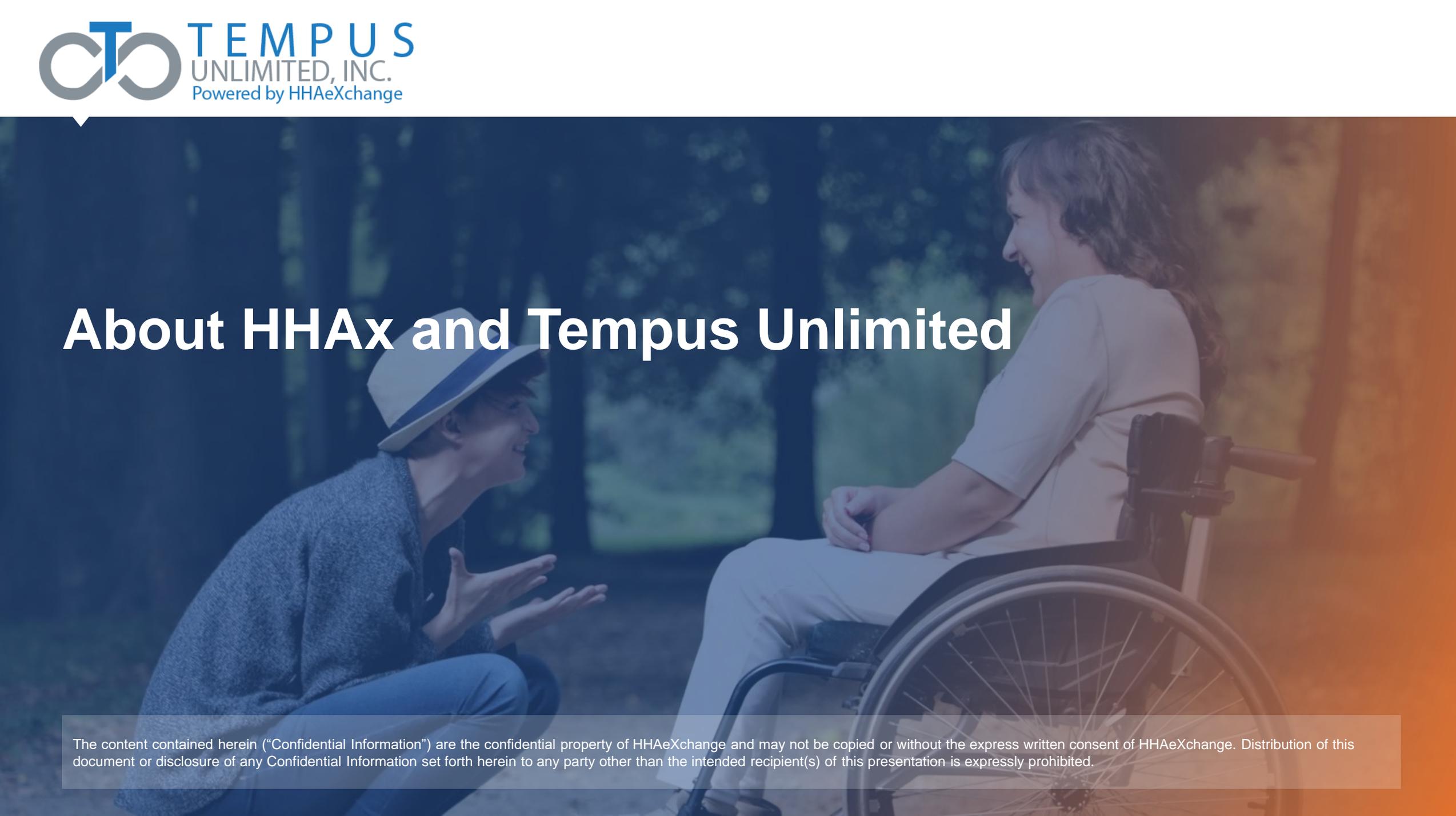
# Current Challenges & Expected Improvements

## Current structure

- DHS OLTL maintains FMS contract
- MCOs have little ability to directly manage FMS contractor or address customer service, CHC Participant and DCW complaints
- Significant resources are utilized now to address process issues, including multiple staff focused full-time on managing problems
- Current arrangement presents operational hurdles that may discourage Participants from using self-directed services option
- Lack of integration with existing MCO systems

## Future structure

- MCOs hold contract with single vendor to ensure statewide continuity
- HHAx has proven track record with providing similar services in other states to other high-volume clients
- MCOs can directly ensure Participant and DCW needs are met, and any concerns resolved
- Clear accountability and transparency are being built into the new contract.
- Protects Participant and their DCWs
- Enhanced coordination and support with Service Coordination that allows SCs to focus on quality services
- Streamlined authorization and time submission process.



# About HHAx and Tempus Unlimited

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# CHC MCOs Have Selected a Proven Partner for Pennsylvania Financial Management Services



- HHAeXchange has been a proven software vendor and partner to the CHC MCOs since 2016
- In late 2020, HHAeXchange acquired Annkissam, the leading provider of Financial Management Services (FMS) software in self-direction nationally
- With the acquisition, HHAeXchange combines deep knowledge and experience in Pennsylvania with the CHC MCOs with proven, time-tested self-direction FMS software
- Annkissam recommended their partner of over a decade, Tempus Unlimited, to perform the Fiscal/Employer Agent services for the CHC-MCO self-directing Participants
- The MCOs selected this powerful team to bring the best combination of:
  - FMS experience
  - Self-direction thought leadership
  - Proven project management
  - Pennsylvania experience
  - FMS tools purpose-built for self-direction

# Experience = Tempus powered by HHAeXchange



# Introductions



# Tempus Unlimited Team



**LARRY SPENCER**  
CEO and FI Director

- 22+ years as Director of F/EA Services
- 20 years as Tempus Unlimited CFO
- 9 years as Tempus Unlimited CEO
- Applied Self-Direction Steering Committee Member
- Commitment to Self-Direction



**LAURA FRATICELLI**  
Assistant FI Director

- 11+ years as management at Tempus Unlimited
- 19+ years F/EA work at Tempus Unlimited
- Applied Self-Direction Steering Committee Member



**DAVID RIDDLE**  
VP of Operations/Assistant FI Director

- 8 years providing leadership and managing service delivery in FMS
- 20+ years prior experience in management and business relationship roles
- Oversees integration and delivery of FMS services



**LINDA ANDRADE**  
Director of Community Services

- 24+ years experience directing community service programs
- 16+ years participating as a stakeholder, providing leadership and managing service delivery to community based MassHealth Long Term Services and Supports Services.

# Tempus At a Glance



# MISSION

Tempus Unlimited exists to provide a continuum of community-based services that support the efforts of children and adults with disabilities to live as independently as possible in the least restrictive environment

## Facts

- Non-profit organization
- One of the largest Fiscal/Employer Agents in the country
- Tempus board members and staff with disabilities bring lived experience to Tempus services
- Coming soon: three Pennsylvania offices
- Headquarters in Massachusetts

# Tempus, *Powered by HHAeXchange*: By the Numbers



Performing payroll for **35,000 participants** and **60,000 DCWs**

Powered by self-direction software that has served over **250,000 participants** in self-direction

Powered by software used in **40 states**, over **80 programs** and over **100 payers**

Providing Fiscal/Employer Agent FMS in Massachusetts since 1998 (**23 years**)

**Participant satisfaction over 98%** every year for past 5 years

# Tempus Approach



**S**et-up for Participants, common law employers (CLEs), and DCWs is quick and easy.

**P**ay is on-time and accurate with payroll run daily

**R**eal people on the phone that help in *real-time* – first call resolution

**I**ntegrated, Participant-focused service delivery

**N**avigation of software and tools is simple

**T**raining is proactive and flexible to meet the individual's need

# Next Steps



# Key Milestones before January 1, 2022



- Transfer existing Participant, common law employer and DCW data to Tempus
- Hold information sessions for all stakeholders
- Ensure Participants, common law employers and DCWs can easily access information and assistance from Tempus
- Train Participants, common law employers and DCWs on new application for EVV and Self-Service tools
  - EVV requirements do not change
- Collect and update required paperwork from Participants, common law employers and DCWs
- Test, test, test to ensure payments will be smooth, accurate and on-time

# Frequently Asked Questions

- **FAQs**

- **When does this change go into effect?**

- Tempus Unlimited will become your F/EA effective January 1, 2022.

- **Is PPL no longer my F/EA?**

- PPL is still your F/EA and will be until the transition to Tempus is completed January 1, 2022.
- After January 1, 2022, Tempus will be your F/EA

- **Will there be any interruptions to my services?**

- You will continue to receive your services as authorized with no interruptions from this transition process.

- **Will my DCW(s) still get paid on time?**

- There will be no changes to the current pay schedule with PPL and DCWs will experience no interruptions in their regularly scheduled payroll from this transition process.

- **FAQs**

- **Will we still be submitting our time the same way using PPL's Time4Care mobile app?**
  - You will still submit your time using PPL's Time4Care mobile app until late December 2021.
  - Time submission will move to the new EVV system/app in December, 2021. We will share more information on exact dates to stop using that tool.
- **What if I need to hire a new DCW between now and January 1, 2022?**
  - You will follow the same processes you have been with PPL. There will be no interruption to the DCW hiring process from this transition.
- **Are there any changes that are in effect now? How will I know what is changing and when those changes go into effect?**
  - Nothing in your service delivery has changed, and nothing will change in the services you receive except as the result of a reassessment.
  - In the upcoming weeks and months, additional information will be coming from OLTL, your MCO, and Tempus Unlimited about this transition.
  - No changes will take place before they have been communicated to you.

- **FAQs**

- **What will change?**

- Your services will remain the same. Those are not changing unless it's the result of a reassessment. What will change is that you will begin working with Tempus Unlimited in late December 2021 instead of PPL. They will support you as your F/EA and provide the same type of services you have been receiving from PPL.
    - There will be some changes in terms of to whom you communicate about your service delivery and how you communicate with them such as different phone numbers, fax numbers, e-mails, and websites.
    - The Portals and Web Apps you use for logging, submitting, reviewing, and editing time worked will be different, but payroll schedules will remain the same.
    - The EVV app will be all new and easier to use for Direct Care Workers and Common-Law Employers

- **What should I expect from this transition?**

- First and foremost, you should expect clear communication that occurs frequently. E-Mails, mailings, information site updates, as well as information sessions will all be regularly occurring during the transition.
    - You should also expect an inclusive and collaborative approach to the transition plan, with easy accessibility to both staff and resources throughout the processes.

- **FAQs**

- **What do I have to do to get ready for this transition?**

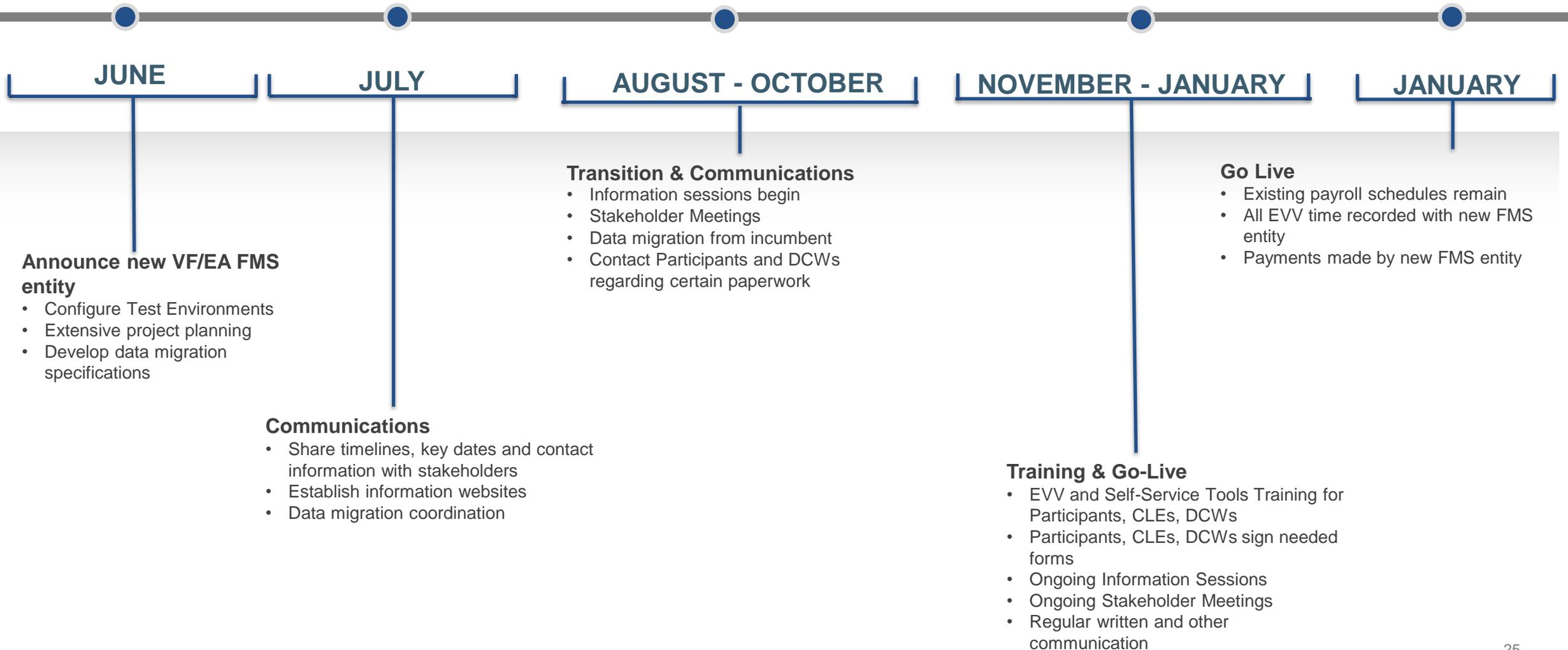
- Today, there is nothing you need to do other than watch your email and stay in touch with your Service Coordinator to learn about upcoming activities
- In the future, CLEs and DCWs will need to complete new tax forms and participate in systems training

- **Who do I contact / where do I go if I have more questions?**

- You can reach your MCO by contacting your Service Coordinator listed on your Service Plan
- You can reach OLTL at \_\_\_\_\_
- You may also go to the HHA Website (coming soon!) for up-to-date information and resources

# What's Next?

# Key Milestones to Launch January 2022



# Communication Workflow



## Ensuring Success



- ~~Complete contracts ASAP—clear detail on Scope of Work~~ 
- Build a detailed implementation Plan—who does what and when
- Clear communication with OLTL
- Stick to the scope—new features put pressure on quality implementation
- Reliable and complete participation by PPL in this transition
- Timely support from Participants & DCWs
- Minimize the noise—keep the extraneous conversations to a minimum