

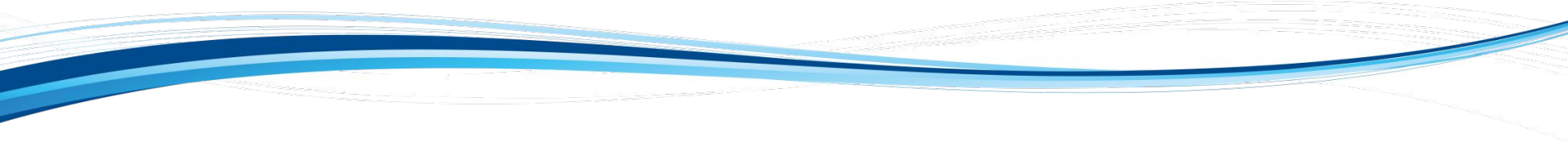
Self-Direction and Acumen

Presented by: Nicki Cline, MPA,
Executive Director for Acumen Fiscal Agent in GA



Acumen, LLC

What is Self-Direction?

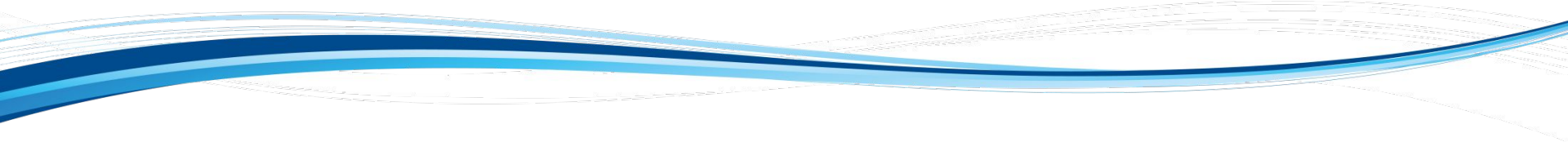
- Self-directed Medicaid services enable participants, or their representatives if applicable, to have decision-making authority over certain services and take direct responsibility to manage their services with the assistance of a system of available supports.
 - The self-directed service delivery model is an alternative to traditionally delivered and managed services, such as an agency/provider delivery model.
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Why choose Self-Direction?

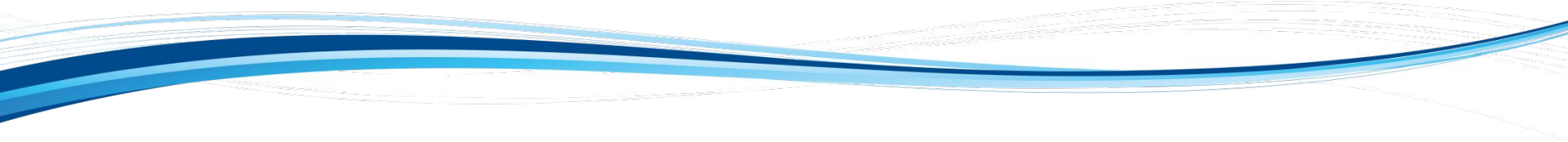
Self-direction promotes personal choice and control over the delivery of waiver services, including, but not limited to:

1. Who provides the services
2. How services are provided
3. How much you pay for your services

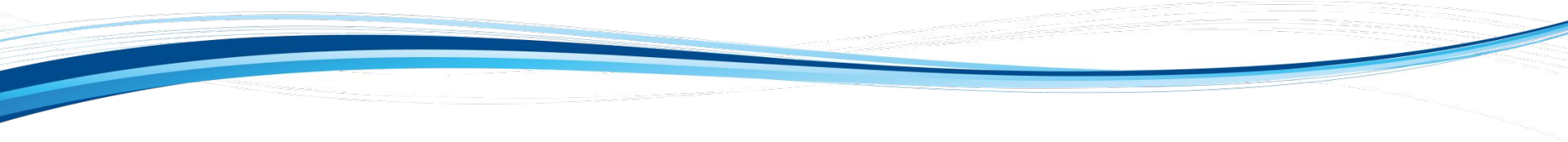
For example, participants are afforded the decision-making authority to recruit, hire, train and supervise the employees who deliver their services.



Other Names for Self-Direction:

- Home and Community-Based Services (HCBS)
 - Participant-directed services
 - Consumer-directed services
 - Veteran-directed services
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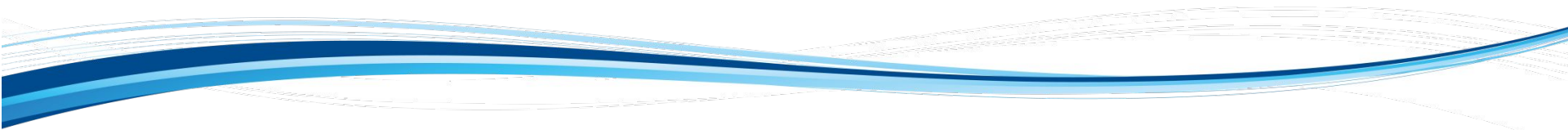
Four Principles Of Self Direction:

1. Everyone should have the **freedom** to plan their own lives, including resources.
 2. Everyone should have the **authority** to manage their support dollars.
 3. Everyone should have access to the **support** they need to be involved in the community.
 4. Individuals take on the **responsibility** for the use of public funds, with the help of a fiscal agent.
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Acumen at a Glance:

Who We Are.....

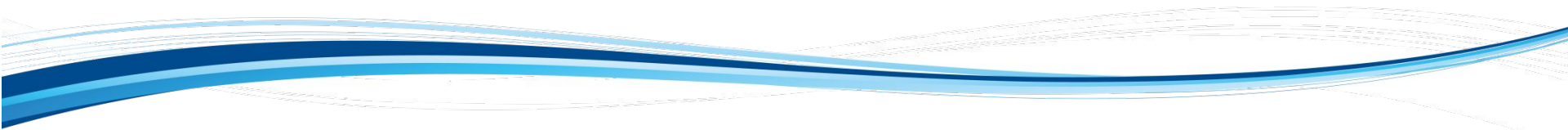
- We are one of the largest and oldest Fiscal Employer Agent/Financial Management Services (FEA/FMS) in the country (26+ years!).
- We have a breadth of experience spanning 23 states and over 100 different programs.



Acumen - Georgia Team:

Who We Are in Georgia...

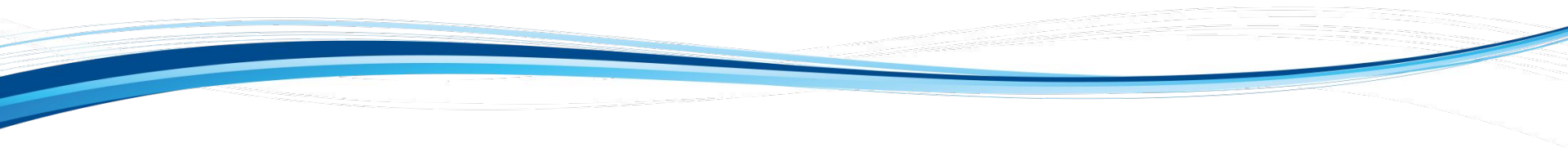
- We have been providing services in GA since 2006 and have a local office in Duluth.
- We currently have a team of 10 local agents.
- We provide Fiscal Intermediary services to participants in the EDWP and NOW/COMP Waivers.



What do we do as an FEA/FMS?

We **help** Individuals/Employers:

- Perform payroll and employer-related duties such as withholding and filing federal, state, local and unemployment taxes; purchasing workers' compensation; collecting and processing worker timesheets; issuing payroll checks; processing payments for goods and services; issuing employee W-2s, etc.
- Identify expenditures that are over or under the budget



Roles and Responsibilities:

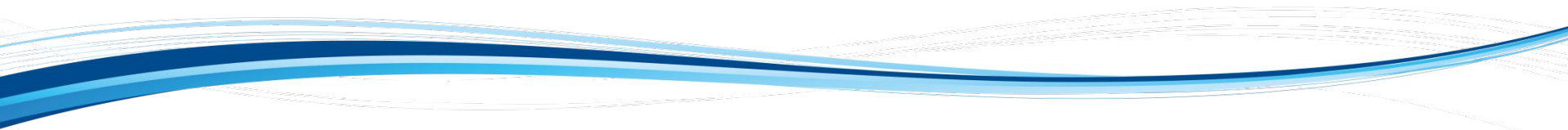
**State/Support
Coordinator/Case
Manager**



**Participant/
Employer**



**Financial
Management
Service**



State/Support Coordinators/Case Managers Role:

- Facilitate the Individual Service Plan (ISP) and generate the service Prior Authorization (PA)
- Use their expertise to support the participant as they navigate the system and helps to identify additional resources and supports



The Authorization for Service:

The Support Coordinator/Case Manager provides everything we need to know about the funding available to the participant in the Service Authorization (PA or Budget) including:



Type of services in the plan (ISP)



Total amount of dollars allocated to each service (Budget)



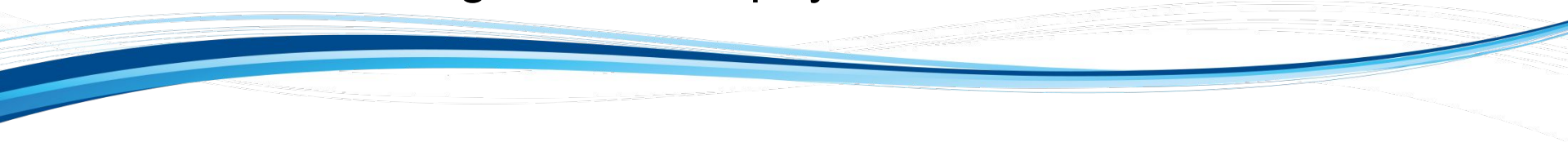
Date range for the service (typically renews on participant's date of birth)

The Employer or Authorized Representative Responsibilities:

- Will be enrolled as an Employer with the IRS (i.e. has Employer Authority)
- Recruits, interviews, and selects his/her employees
- Has authority to set schedules, hire and fire staff
- Provides the necessary training and support to their employees
- Establishes the wage for the employee within the approved wage ranges
- Enrolls the employee with the FMS



Acumen's Role as an FMS:

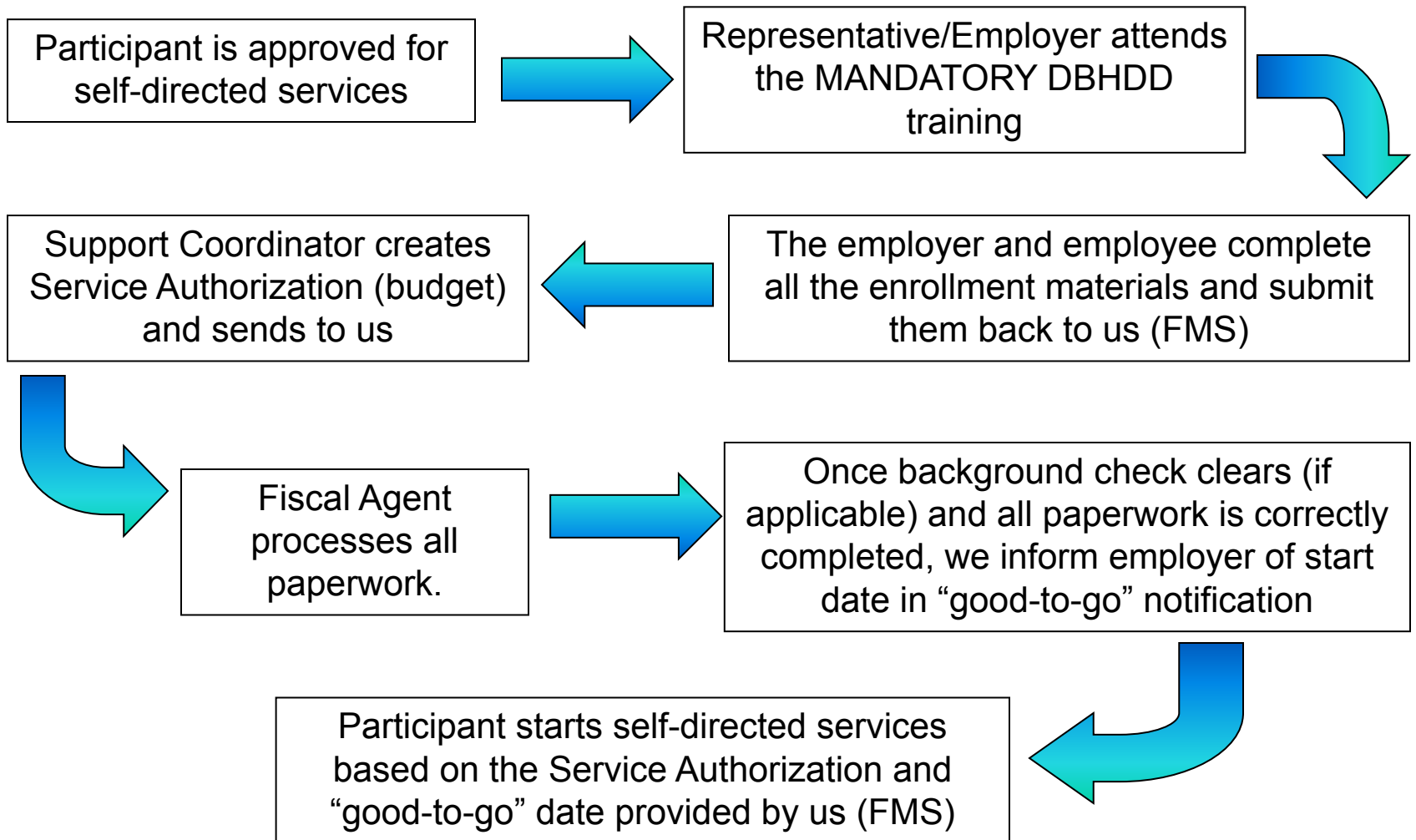
- Collect required enrollment and program forms; ensures completeness and accuracy
 - Set up all employees for payroll
 - Criminal background checks (for most programs)
 - Process employee time submitted via the DCI Web Portal or the DCI EVV Mobile app
 - Pay employees
 - Provide account statements
 - Manage payroll tax liability and workers' compensation
 - Generate and distribute W2's
 - Administer garnishments, tax liens, and payroll reporting
 - Bill the funding source for payments that were made
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The FMS Does NOT:

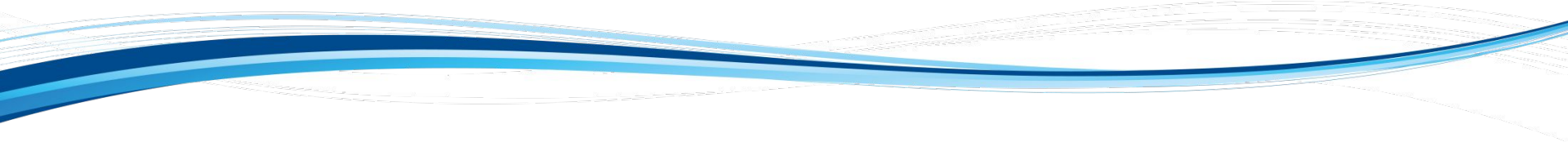


- Fund Programs
- Decide workers' schedules, duties, or pay
- Hire, train, or terminate employees
- Provide direct services
- Act as a temp agency
- Develop program specific rules or requirements

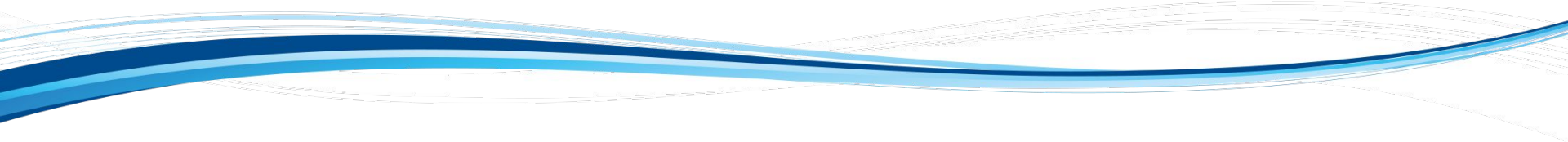
General Process Overview:



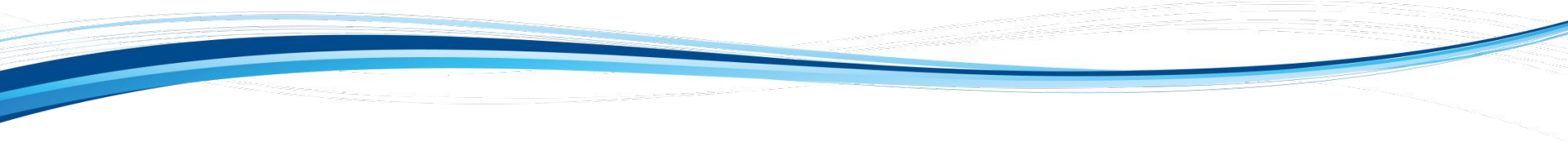
How to Get Started:

- Attend and complete the mandatory training provided DBHDD each month for New NOW/COMP Employers/Representatives
 - Choose a Fiscal Agent and contact them to get started.
 - If you choose Acumen, you can send an email to enrollment@acumen2.net to get started.
 - An Agent will contact you with the information you need to start the process. This can be done independently or with the help of a local GA Agent.
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What to Expect During Enrollment:

- Processing time frames are within 1-4 business days, assuming all paperwork is accurate and complete, and depending on the background check.
 - Necessary corrections are communicated to the Employer (ER) via email. It is very important for the ER to check email regularly for this process to move forward.
 - “Good to Go” (GTG) is not issued until ALL the paperwork is complete! This means the employee (EE) should not begin work until the GTG is received.
 - New participants get a start date of the first of the month.
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What Happens After GTG?

- Both the Employer and Employee will receive a GTG email/letter that includes their unique username and login credentials to the DCI web portal and EVV Mobile App.
 - Employers will log in to the DCI Web Portal to review and approve time, review budgets, and account statements.
 - Employees will use the DCI EVV Mobile App (downloaded to a smartphone or tablet) to enter real time clock in/out times.
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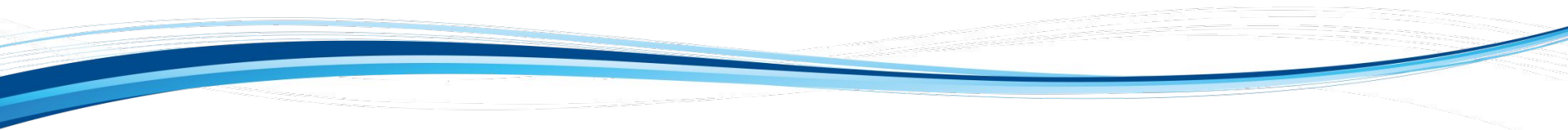
Additional Acumen Resources and Links:

- Acumen Forms, Tools, and Resources:

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

- EVV Training Information:

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



Additional Resources and Links:

- DBHDD GA PD Training:

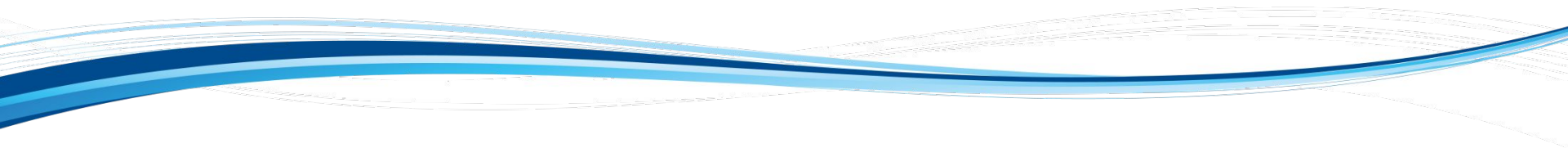
<https://dbhdd.georgia.gov/training/developmental-disabilities-training-announcements>

- DBHDD PD WebPage:

<https://dbhdd.georgia.gov/be-compassionate/home-services/participant-direction>

- GAMMIS Program Manuals:

<https://www.mmis.georgia.gov/portal/PubAccess.Provider%20Information/Provider%20Manuals/tabId/18/Default.aspx>

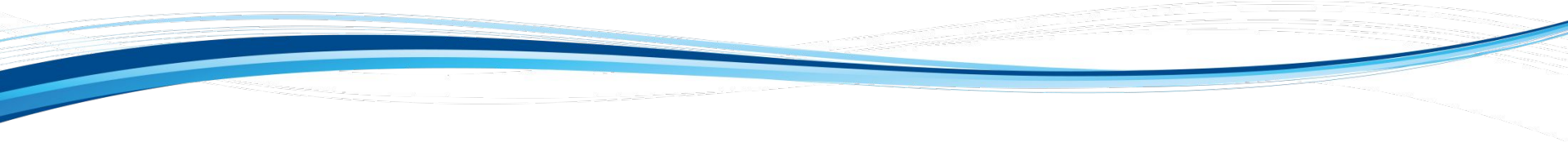


Thank You!

If you have any questions or concerns, please feel free to contact me at:

nickicl@acumen2.net or
480-497-0343 EXT. 0535
For Enrollment Questions:
enrollment@acumen2.net

For General Questions:
Customer Service 7 days a week; 12
hours a day at 877-211-3738



Questions???

