



# Financial Management and Counseling Services (FMCS)

OPEN ENROLLMENT INFORMATIONAL FAIRS

August 1, 2022

**Monica Hariri, FMCS Program Manager  
Developmental Disabilities Administration**



# Agenda

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- Opening Remarks
- Introduction
- Developmental Disabilities Administration Choice Process
- GT Independence
- The Arc of Central Chesapeake Region
- Public Partnerships, LLC
- Questions and Answers (Q/A)
- Closing Remarks

# Opening Remarks -

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Secretary **Carol Beatty**  
Department of Disabilities



Deputy Secretary, **Bernard Simons**, Developmental Disabilities Administration



Deputy Secretary **Steve Schuh**, Health Care Financing and Medicaid

# Introduction

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## Welcome to the Open Enrollment Virtual Informational Fair Kick-off

# Introduction

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- Open enrollment period is August 1, 2022 through November 15, 2022.
- After November 15th, if you have not chosen a FMCS, one will be assigned for you by DDA.

# In-Person Informational Fairs

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Registration for all events is available via Constant Contact and the dates and locations are listed below. Afternoon and evening sessions are available for all events at 12 to 2 p.m. and 5 to 7 p.m. Choose the event that is most convenient for you.

<p><b>Holiday Inn Express - Easton</b> 8561 Ocean Gateway, Route 50 Easton, MD 21601</p> <p><b>Thursday, August 4th</b> <a href="#">Register</a></p>	<p><b>Owen Brown Interfaith Center</b> Owen Brown Village Center, 7246 Cradlerock Way Columbia, MD 21045</p> <p><b>Thursday, August 11th</b> <a href="#">Register</a></p>
<p><b>Ramada Plaza by Wyndham - Hagerstown</b> 1718 Underpass Way Hagerstown, MD 21740</p> <p><b>Wednesday, August 17th</b> <a href="#">Register</a></p>	<p><b>Comfort Inn Conference Center-Bowie</b> 4500 Crain Highway Bowie, MD 20716</p> <p><b>Tuesday, August 23rd</b> <a href="#">Register</a></p>

# Developmental Disabilities Administration - Financial Management and Counseling Services (FMCS)

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- Financial Management and Counseling Service (FMCS) agencies will support Marylanders who self-direct their services.
- The FMCS will replace the use of the Fiscal Management Service (FMS) agencies. The FMCS agencies will perform the same activities as the current FMS with **enhanced support and services like**
  - Web portals with real-time reports
  - Online, phone, and in-person customer service
  - Smartphone and tablet apps for timekeeping and approval
  - Multiple languages and other accessibility features

# Developmental Disabilities Administration - Open Enrollment (for participants **currently** self-directing)

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Learn

Choose

Take Action

- Open Enrollment is from August 1, 2022 through November 15, 2022.
- If a participant/legal guardian/designated representative does not choose an FMCS before November 15, 2022, one will be chosen for them.

**Note: If a participant is currently using The Arc Central Chesapeake Region as their agency, they will still need to choose an FMCS agency during open enrollment. They may choose any of the three agencies, including the Arc CCR.**



# DDA - Open Enrollment

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## 1. Learn

- Connect with each FMCS today and ask questions that are specific to you.
- You can also connect with each FMCS by phone, email, or schedule a meeting.
- Discuss what you've learned with your team. You can use your CCS, Support Broker, and other team members to help you make the decision.

# DDA - Open Enrollment

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## 2. Choose

- Choose an FMCS agency and an Effective Date for your new services to begin. You may choose either October 1, 2022 or January 1, 2023 as your effective date.
- Once you've made an informed choice, your CCS will complete the [FMCS Participant Choice Form](#). They should send you a copy of the completed form.
- Your CCS will then send a service referral to your chosen FMCS in *LTSSMaryland*.

# DDA - Open Enrollment

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## 3. Take Action

- Update your budget sheet with your FMCS fees.
  - [DDA - SDS Budget Sheet- Revised July 21, 2022 - FMCS Addition](#)
- Let your employees know what FMCS you have chosen. You can let them know that your FMCS will make sure there are no missed payments for the work they will do.
- Meet with your new FMCS team to make sure all your employee and vendor paperwork is completed.

# DDA - FMCS Choice for participants **considering self-direction**

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1. **Learn** about all the FMCS agencies today
2. **Choose** an FMCS agency and effective date (any date you would like to begin services). Share this information with your CCS.
  - a. Your CCS will then send a service referral to your chosen FMCS in *LTSSMaryland*.

# DDA - FMCS Choice for participants **considering self-direction**

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## 3. **Take Action** by submitting your PCP and budget

Submitted to DDA in PCP Process	Submitted to FMCS after PCP Approval
Participant Agreement	SDS Budget Sheet
Rights and Responsibilities documentation	Family as Staff Form
Service Implementation Plan (SIP)	Wage Exception Forms (as needed)
Other documents to support assessed need and as per DDA policy	

# DDA - FMCS Choice for participants who **have recently submitted or plan to submit an Initial PCP in late July or August 2022**

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1. **Learn** about all the FMCS agencies today
2. **Choose** an FMCS agency and effective date (any date you would like to begin services)

# DDA - FMCS Choice for participants who **have recently submitted or plan to submit an Initial PCP in late July or August 2022**

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## 3. Take Action

- Use the updated SDS Budget Sheet and include FMCS fees for every month of the year.
- Submit your PCP and Budget Sheet together to the DDA.
- Meet with your FMCS to start your services when your PCP and budget are approved.

# FMCS Provider Introductions

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- GT Independence
- The Arc of Central Chesapeake Region
- Public Partnerships, LLC



# GT Independence

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## **FMCS Open Enrollment Informational Fairs**



## **Approach to Services**

Customer Service

Enrollment Process

Caregiver App

GT Portal

Contact Information and Rates



# Small Beginnings

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Founded in 2004, GT Independence was created out of the basic instinct of a parent trying to provide the very best options for their child.



**Ben**

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**Maggie**

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gt



## Customer Service

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## Call Center Expertise

### 35 Seconds to a Live Person

Calls are automatically routed to the support team that is assigned to that program, who are trained on program-specific policies and procedures.

### 90% First-Call Resolution

Calls that are not resolved on that first call are resolved within 8 hours on average.

### 97.1% Customer Satisfaction

Participants and employees across all states served respond that they are satisfied and would recommend us to friends and family.

### Culturally Humble

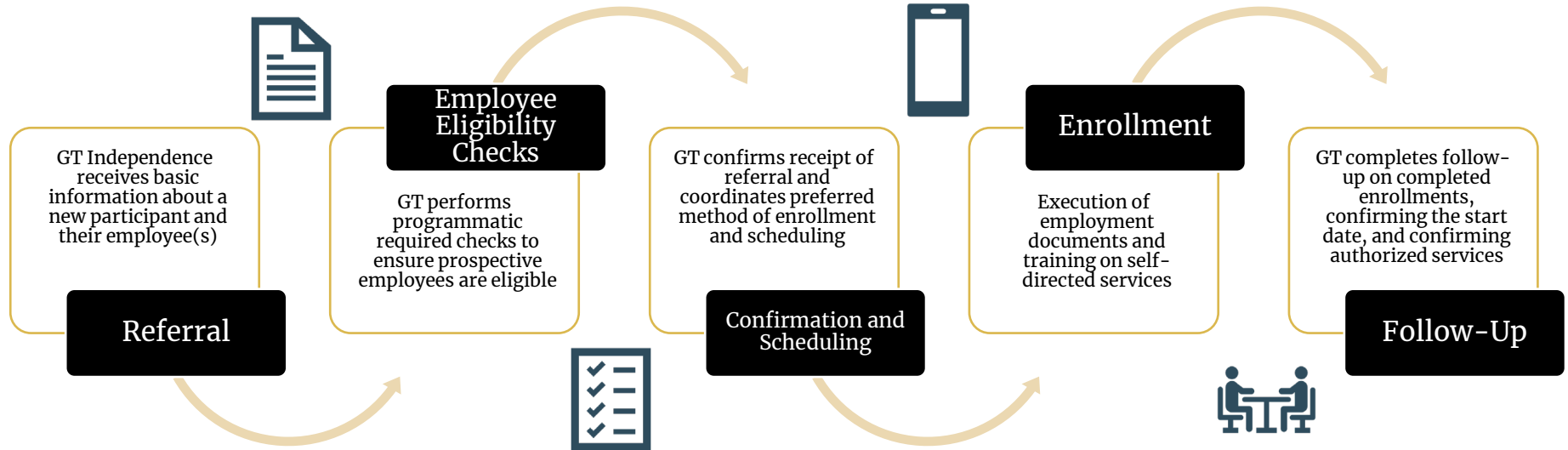
Many of our support team are bilingual and all support team members are trained to assist people regardless of age, ability, ethnicity, or language.

**gt**

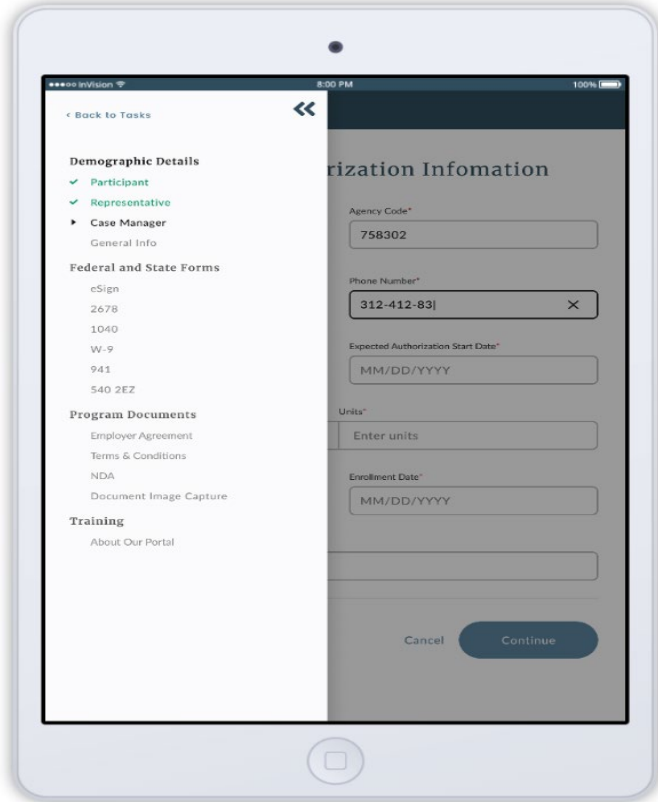
# **GT Referrals and Enrollments**



# Enrollment Workflow







# GT Enroll

E-Enrollment Service with virtual assistance as well as live support from enrollment specialists

Accessible through any computer, tablet, or smartphone

HIPAA-secure environment

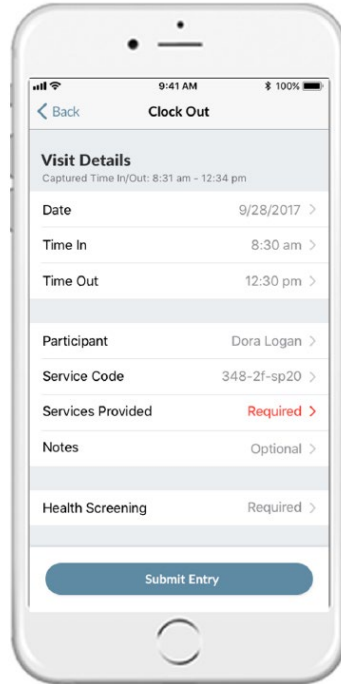
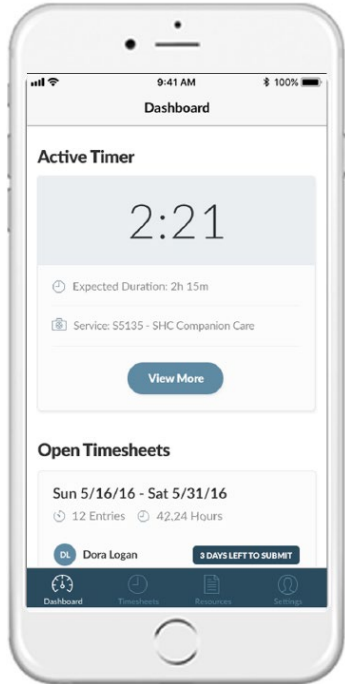
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# GT Caregiver App





# GT Independence: EVV Mobile App



Creating EVV Entries

Secure. Simple. Free

Track Your Hours

Get Fast Approval

Notes and Task Feature

Switch to Spanish

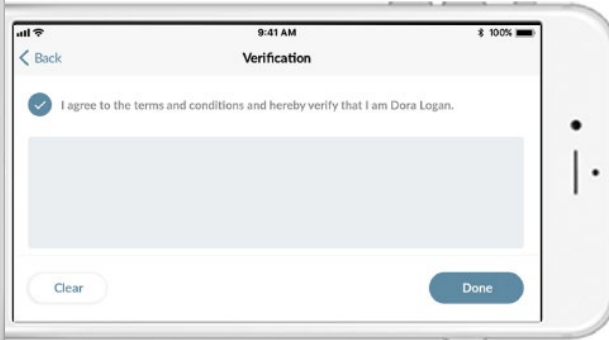
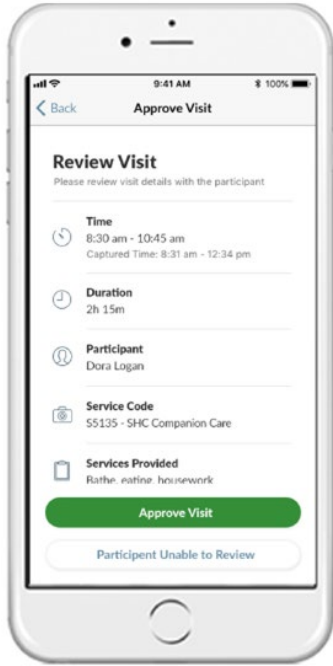
Free Download



# GT Independence: EVV Mobile App

## Participant Approval of EVV Entries

The GT EVV app requires participants to verify that services were received and entries are accurate.



Participant signature for approval/rejection of shifts for EVV entries on employee devices

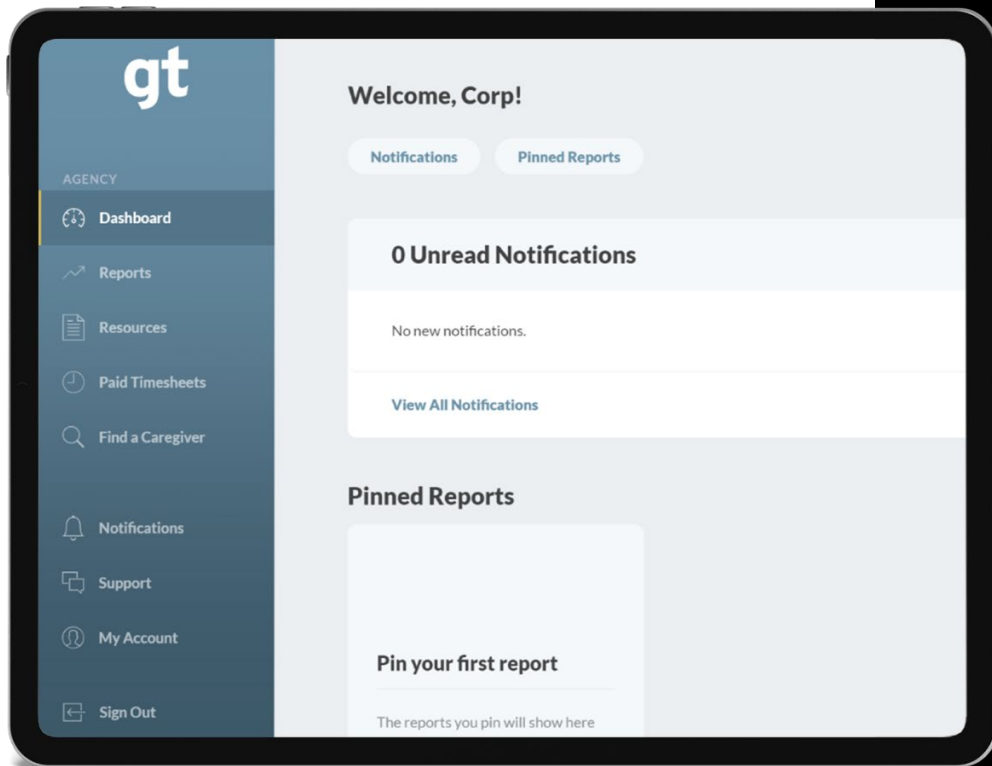
Two-factor pin authentication to verify entry

Participant can merge timesheets and review pay period through the GT Portal

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# GT Portal





## Portal Dashboard

### Notifications

Stay informed with news and updates from GT or contact us to send important notifications to the people you serve.

### Pinned Reports

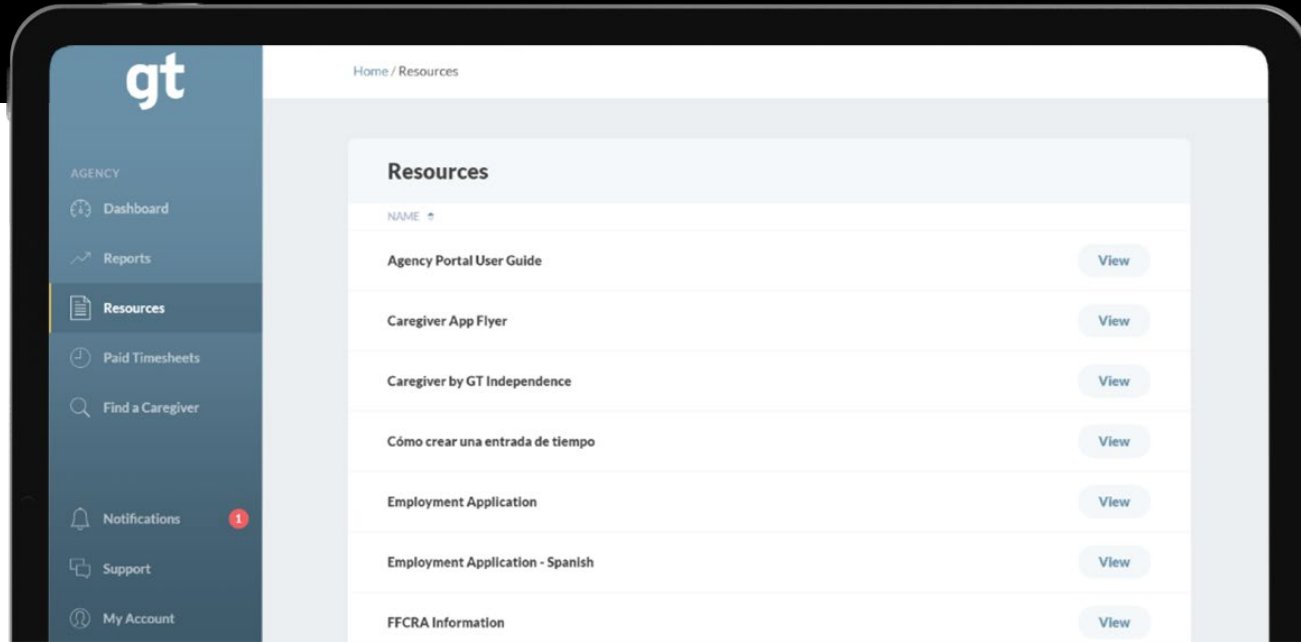
The pinned reports section allows you to save the reports you frequently use to your dashboard for easy access.



## Resources

The GT Portal includes access to program or agency specific resources and fillable forms.

Resources available to your program members can be customized or added to based on the needs of your members.

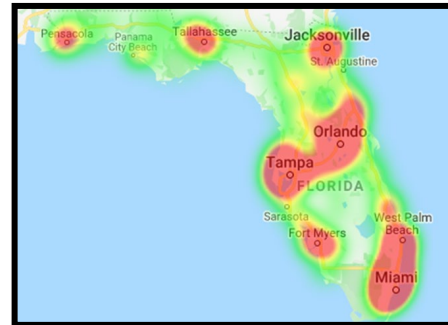
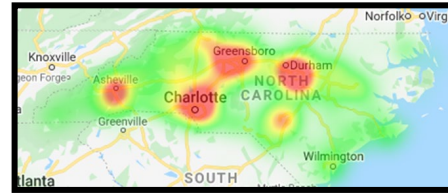
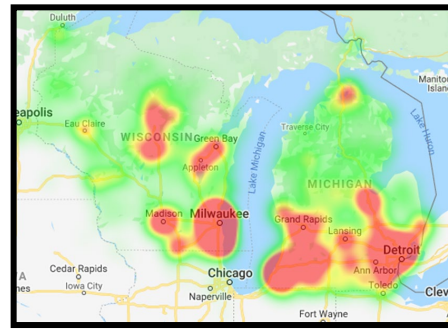


# gt Caregiver Link

Recruiting assistance tool available to participant employers.

Search by zip code and select radius, filter by language or caregiver trainings.

Results list name and contact information of potential caregivers who have passed initial screenings previously.







GT Independence



### Contact Information

- [customerservice@gtindependence.com](mailto:customerservice@gtindependence.com)
- (877)659-4500



### Website

- [www.gtindependence.com](http://www.gtindependence.com)



### Rates

- \$123 Per Month Financial Management Service Fee
- Competitive caregiver wages

# Financial Management Services

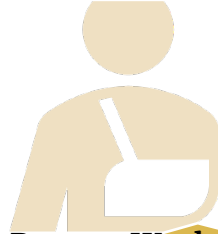
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**Enrollment and Education**



**Employee Eligibility**



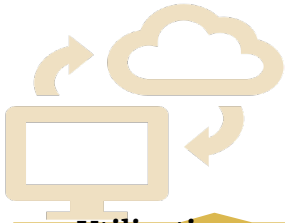
**Procure Workers' Compensation Insurance**



**Budgeting and Authorization Management**



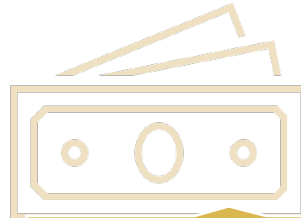
**EVV and Payroll**



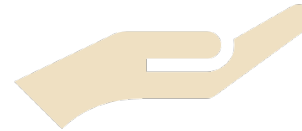
**Utilization Management and Budget Reporting**



**Withhold and File Taxes**



**Claims Submission**



**Customer Support**



**Maintaining Records and Compliance**



Thank you!

GT Independence would be honored to serve you!

Jen Drganc  
Director of Relationships  
E. [jdrganc@gtindependence.com](mailto:jdrganc@gtindependence.com)  
Ph. 651.247.7107

Kirsten Capeless  
Director of Business Development  
E. [kcapeless@gtindependence.com](mailto:kcapeless@gtindependence.com)  
Ph. 207.465.6488

# The Arc of Central Chesapeake Region

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***The Arc***<sup>®</sup>

*Central Chesapeake Region*

## FMCS Open Enrollment Informational Fairs

**Tracy Davis**

*Vice President of Self-Directed Initiatives*

**Leigh McHargue**

*Director of Employer Resources*

## Our Vision, Mission & Values

### Vision

People with intellectual and developmental disabilities will live the lives they choose in communities that are equitable, accessible, and fully inclusive.

### Mission

We support people with intellectual and developmental disabilities to live the lives they choose by creating opportunities, promoting respect and equity, and providing access to services.

### Values

**We embrace individuality.** We see the whole person, celebrate our differences, and offer the people we serve and our team opportunities tailored to them.

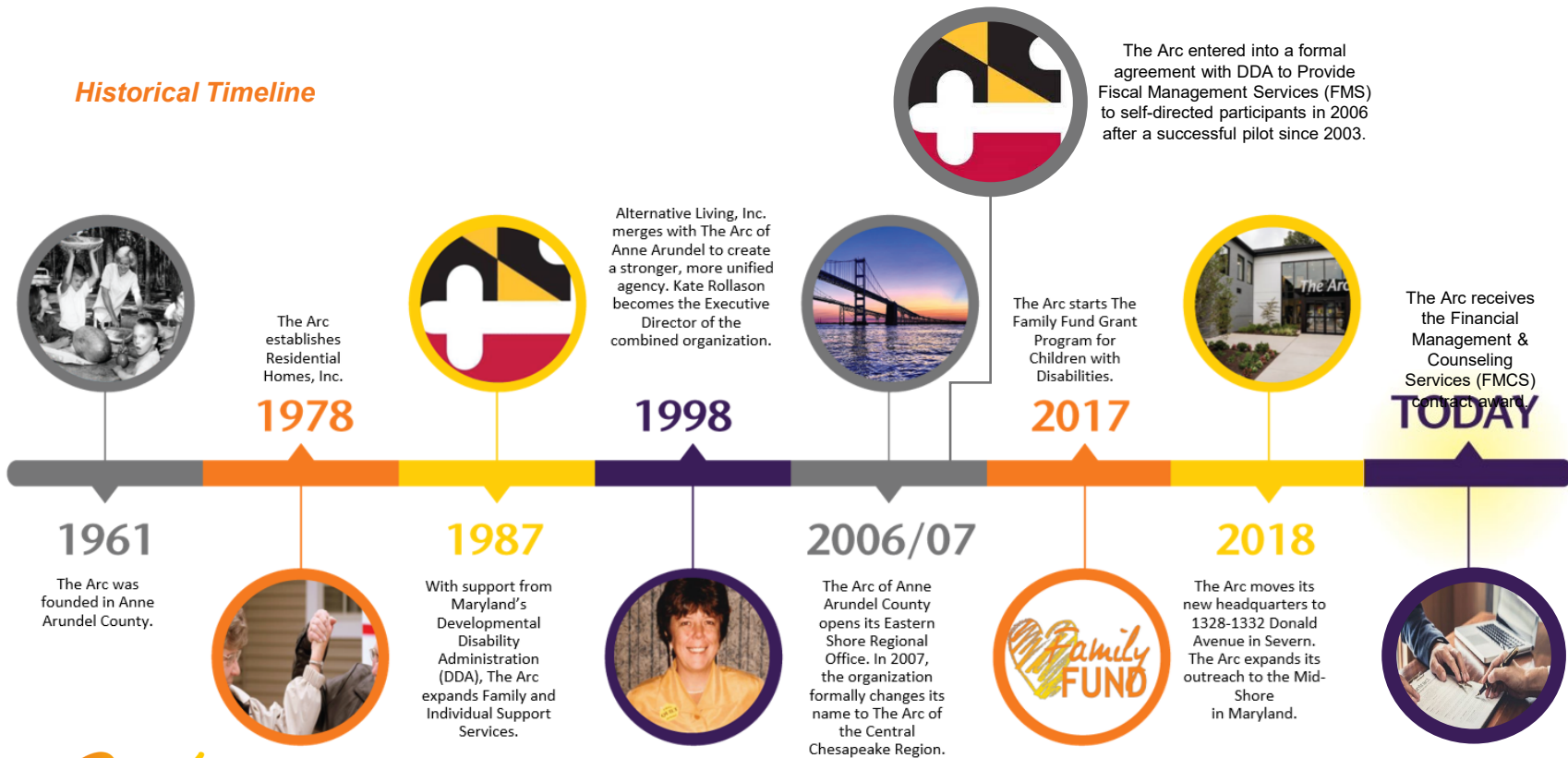
**We are heart-driven.** Every interaction matters to us; we go the extra mile for the people we serve and our team.

**We take strategic risks.** Fueled by the urgency of our mission, we continually push for better and more innovative approaches.

**We are action-oriented.** We are creative, resourceful, and have a "get it done" approach to overcoming challenges.

**We promote equity and respect.** We value the different identities and experiences of the people and communities we work with, and we build respectful relationships to meet them where they are.

## Historical Timeline



# *What makes The Arc stand out as a provider?*

- History with Self-Directed Services
- Relationships with Maryland Stakeholders
- Customer-Centric Approach
- Commitment to Transformation





## What makes The Arc stand out as a provider?



### History with Self-Directed Services



- **2003** – The Arc was the **original agency** to pilot self-direction in Maryland.
- **2006** – The Arc continued to grow and entered into a **formal agreement** with the DDA .
- **2012** – The Arc became the **largest provider** of self-directed services in Maryland.

**The Arc has been the largest provider of self-directed services in Maryland for 10 years in a row!**

- **Institutional knowledge** of program's history
- Currently serving **over 1,800 state-wide!**

*What makes The Arc stand out as a provider?*



Relationships  
with Maryland  
Stakeholders



- Deeply rooted community connections with **Maryland-based resources, advocacy groups, and key contacts you need to know!**
- Partnerships with **Maryland-based Support Broker Agencies** and **Centers for Independent Living** for Counseling Services
- Networks with Coordinators of **Community Service Agencies** as well as veteran **Support Brokers** and administrators for the state of Maryland.

*What makes The Arc stand out as a provider?*



Customer-  
Centric  
Approach

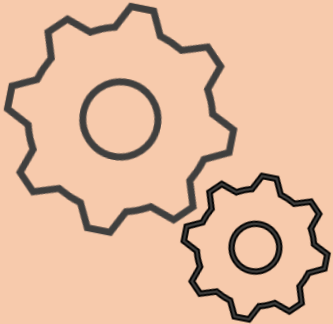


- **Robust customer service framework** that effectively engages participants and other stakeholders to provide you with the information you need to make important decisions.
- **Experienced team** ready to help you navigate common programmatic challenges and providing timely, professional, and thorough responses.
- **Annual satisfaction survey** used for continuous evaluation and ongoing process improvement.

## What makes The Arc stand out as a provider?



### Commitment to Program Transformation



- Support to successfully maneuver and **adapt to new program requirements and processes**
- Vision for innovation while **vested in service continuity** for ongoing Participants
- Build a bridge to new tools providing automation and a **modern approach** to legacy services
- Implement technology to ensure compliance while **making self-direction easier and more convenient** than ever!

# What is The Arc's technology solution?



FMS Engine &  
EVV  
Compliance



- The participant dashboard shows **real-time spending information** and links your payments to your budget.
- **Automated employee onboarding** is available through a self-service portal, which ensures secure transfer of personal information.
- Your team has access to **EVV-compliant electronic timekeeping** along with the support of training resources.
- **Logging in is super easy!** You can use it anywhere there's an internet connection.

## What is The Arc's FMCS fee?

**\$200 per month**



The Arc onboards new hires and confirms eligibility, processes payments and provides tax-related information to state and federal authorities as required by law.



The Arc reviews participants' budgets and tracks expenditures for programmatic compliance.



The Arc provides value-added approaches to services.



The Arc ensures service continuity for ongoing participants and transition support.

## What do others say about The Arc?



“We appreciate the commitment and quality you bring to your services and the timely way staff responds to questions and concerns.”



“A lot of great folks that really care about folks with disabilities. We’ve really come to love working with The Arc. They are quick to respond about any concerns we have. They provide a GREAT service, and they just keep getting better all the time. Highly Recommended.”



“Payroll Services and Accounts Payable team members are AWESOME!! They are always polite and answer all questions in easy-to-understand explanations.”



“I believe the Arc has done an outstanding job of negotiating the changes from DDA...”



“Very thorough intake process. Helped first-time employer, employee get set-up in the system. Very patient with us.”



*Questions?*

We'd love to hear from you!

**Visit us online**

[www.thearcccr.org/self-directed-services](http://www.thearcccr.org/self-directed-services)

**Give us a call**

1.866.252.6871





# Public Partnerships, LLC

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# FMCS OPEN ENROLLMENT INFORMATIONAL FAIRS

public partnerships  PPL  
*Your #1 choice for self-directed care™*

# 3 REASONS TO CHOOSE PPL AS YOUR FMCS



public partnerships   
*Your #1 choice for self-directed care™*

Anita Parris, Self-  
directing with PPL  
since 2018.

# 1. Financial Benefits To You/Your Loved One & Your Providers



Sergio and Osmel  
Martinez  
Self-directing with  
PPL since 2019

Financial Benefits for You/Your Loved One & Your Providers

# 2. Ease of Getting Started and Managing Your Self-Directed Life



public partnerships   
Your #1 choice for self-directed care™

Jeff Corsi  
Self-directing with  
PPL since 2020.

Ease of Getting Started and Managing Your Self-Directed Life

# 3. Experienced For Your Peace of Mind



public partnerships   
Your #1 choice for self-directed care™

Teresa McMahon  
Self-directing with  
PPL since 2018.

Experienced For Your Peace of Mind

# 1. Financial Benefits To You/Your Loved One & Your Providers



**Sergio and Osmel  
Martinez**

Self-directing with  
PPL since 2019

PPL is the lowest  
cost FMCS choice in  
MD at \$83!

Choosing PPL saves you between  
\$480 and \$1400 per year!



# How would you spend extra money in your budget?

- A new piece of equipment?
- A new service?
- More hours of care?
- More respite hours?

*The Coulson's – Self-directing since 2018*

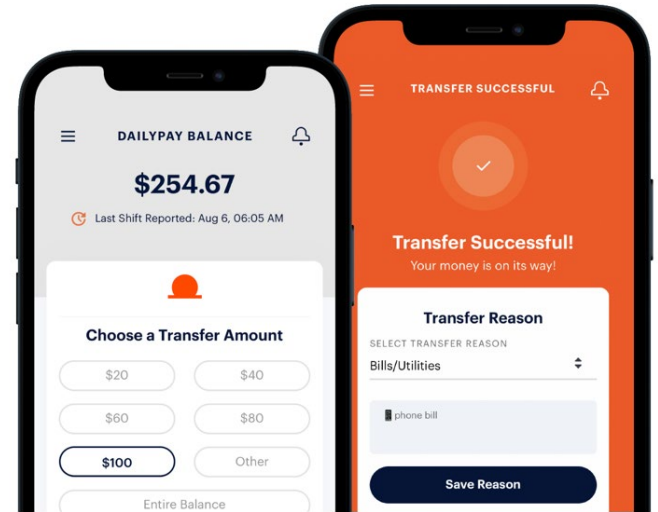


# FINANCIAL BENEFITS

## Make Any Day Pay Day For Your Provider(s)

A ***new service*** allows your in-home providers to access their money any day to pay bills on time and avoid late fees.

Access to earned wages before payday for as little as ***0.49 cents*** transfer and processing fee to receive funds **next** business day.





# 2. Ease of Getting Started and Managing Your Self-Directed Life



Jeff Corsi  
Self-directing  
with PPL since  
2020.

# GETTING STARTED & MANAGING YOUR SELF-DIRECTED LIFE



Get started today.  
PPL is ready to get  
you enrolled  
immediately

Call us at 1-833-660-2509

Email us at

[PPLMDDDA-CS@pcgus.com](mailto:PPLMDDDA-CS@pcgus.com)

Visit us at

[publicpartnerships.com/MDSD](http://publicpartnerships.com/MDSD)

- Call your CCS today and ask to be assigned to PPL!
- You will have **1 point of contact** to assist with enrollment & questions
- Your personal PPL enrollment specialist will help you with your enrollment paperwork
- Our **online portal, mobile app, and accompanying tools** help make self-direction easier for you

**PPL's user-centered web portal. A complete reimagination of self-direction tools and capabilities.**

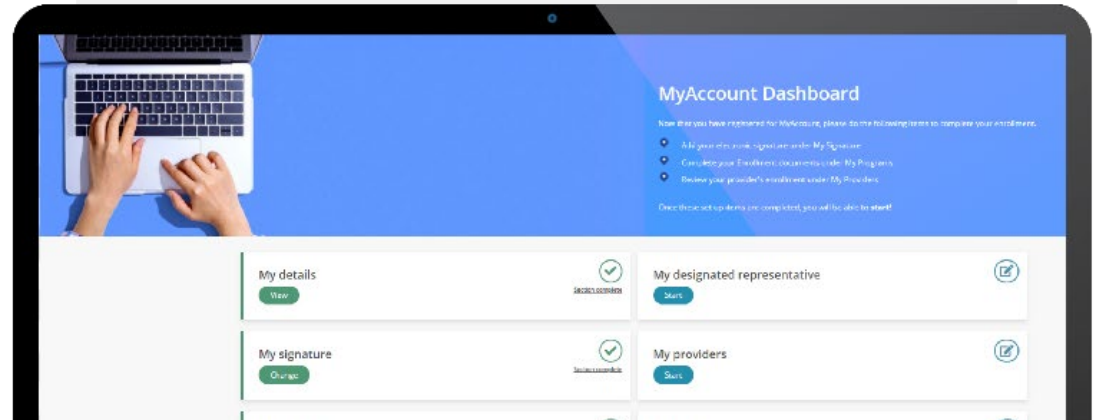


### **MyAccount features**

- Personalized dashboard
- A modern user interface
- Simple graphics
- Real time notifications and e-signature capabilities
- Accessibility through a computer or any handheld device

**Purposely designed around our decades of experience listening to, and supporting:**

- Case Managers
- Participants
- Authorized Representatives
- Care and Support Workers.



# Time4Care™: PPL's Fully Integrated EVV Solution used across 13 states

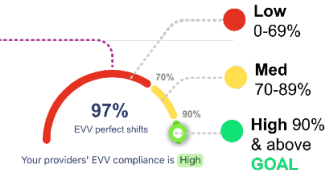
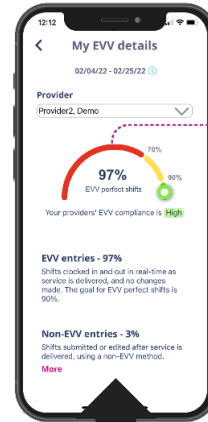
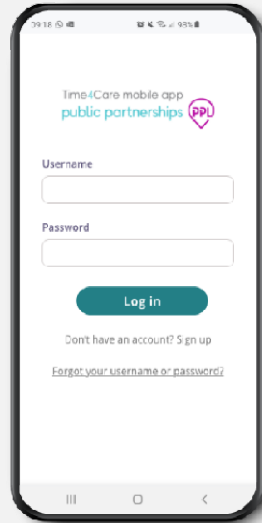
## Electronic Visit Verification (EVV) Solution EVV Exclusively for Self-Directed Home Care

### MOBILE APP

- CLOCK IN/OUT
- LOCATION CAPTURE
- MANUAL/RETRO TIME CAPTURE
- TIME APPROVAL

### FMS

- EVV DATA AND TIME CAPTURE
- RULES & AUTHORIZATION VALIDATION
- TIMESHEET CREATION
- TIME PROCESSING (SUBMIT ALL)
- PAYROLL
- CLAIM SUBMISSION



EVV Compliance data collected through our Time4Care™ app

# 3. Experienced For Your Peace of Mind



public partnerships   
*Your #1 choice for self-directed care™*

**Teresa McMahon**  
Self-directing  
with PPL since  
2018.

# EXPERIENCED FOR YOUR PEACE OF MIND



Currently Serving  
22 States, including  
your neighbors

***We have 23 years  
Self-Direction  
Experience Nationally.***

## **We know Maryland!**

- 7 total years of proudly serving Maryland residents through 2 fixed term contracts

## **We proudly serve your Neighbors**

- West Virginia (since 2006), Pennsylvania (since 2012) and Virginia (since 2012)

## **We're on the ground in Maryland**

- At 145 West Ostend St, Suite 600, Baltimore, MD 21230

**We know the IDD community!**

# 1. Financial Benefits To You/Your Loved One & Your Providers

A photograph of Sergio and Osmel Martinez, two men standing together. Sergio is on the left, wearing a grey sweater, and Osmel is on the right, wearing a white jacket. They are both smiling.

Sergio and Osmel  
Martinez  
Self-directing with  
PPL since 2019

Financial Benefits for You/Your Loved One & Your Providers

# 2. Ease of Getting Started and Managing Your Self-Directed Life

A photograph of Jeff Corsi, a man with glasses wearing a light blue striped shirt, smiling.

public partnerships PPL  
Your #1 choice for self-directed care

Jeff Corsi  
Self-directing with  
PPL since 2020

Ease of Getting Started and Managing Your Self-Directed Life

# 3. Experienced For Your Peace of Mind

A photograph of Teresa McMahon, a woman with long dark hair, smiling. She is standing next to a young man in a green hoodie who is also smiling.

public partnerships PPL  
Your #1 choice for self-directed care

Teresa McMahon  
Self-directing with  
PPL since 2018

Experienced For Your Peace of Mind

# FMCS Live Contacts

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## GT Independence

Jen Drganc, Director of Relationships

[jdrganc@gtindependence.com](mailto:jdrganc@gtindependence.com)

(651) 247-7107

Kirsten Capeless, Director of Business  
Development

[kcapeless@gtindependence.com](mailto:kcapeless@gtindependence.com)

(207) 465-6488

## The Arc of Central Chesapeake Region

Tracy Davis, Vice President of Self-Directed  
Initiatives

[tdavis@thearcccr.org](mailto:tdavis@thearcccr.org)

(443) 808-1921

## Public Partnerships, LLC

Jose Padilla-Suarez, Customer Service Specialist

[josepadillasuarez@pcgus.com](mailto:josepadillasuarez@pcgus.com)

(833) 660-2509



## DDA Self Directed Lead Staff

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- Kristi Culbreth, DDA Statewide Coordinator of Self-Directed Services, [kristina.culbreth@maryland.gov](mailto:kristina.culbreth@maryland.gov)
- DDA Regional SDS Leads
  - Eastern - Jonna Krabill, [jonna.krabill@maryland.gov](mailto:jonna.krabill@maryland.gov)
  - Central - Ola Otuyelu, [olasubomi.otuyelu@maryland.gov](mailto:olasubomi.otuyelu@maryland.gov)
  - Southern - Tia Henry, [tia.henry@maryland.gov](mailto:tia.henry@maryland.gov)
  - Western - Cara Buckman, [Cara.buckman@maryland.gov](mailto:Cara.buckman@maryland.gov)

# Resources and Tools

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- [Self-Directed Service Guidance, Forms, and Webinars](#)
- [DDA FMCS Webpage](#)
- [Training Calendar](#)
- [Financial Management and Counseling Services Monthly Fees](#)
- [Financial Management and Counseling Services - Open Enrollment](#)
- [MDH Memo Financial Management and Counseling Services June 23, 2022](#)
- [MDH Financial Management and Counseling Services - Provider Onboarding and Open Enrollment Letter June 1, 2022](#)

# Poll Questions

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# Any Questions

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# Closing Remarks

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- Thank you for attending the FMCS Informational Fair Virtual Kick-off.
- There are in-person sessions planned throughout the state during the month of August, so please register via Constant Contact if you're interested and let us know if you require any special accommodations.
- Mask are required to attend, and will be available at each site.
- Additional fairs will be scheduled in October, more information will be provided in the coming weeks, visit the DDA web page for the upcoming events:  
<https://health.maryland.gov/dda/Pages/home.aspx>.