



**Keystone First Community HealthChoices (CHC)
Participant Advisory Committee (PAC)
PAC Minutes**

Chair: Jennifer Rogers
Co-Chair: Maritza Padua
Scribe: Kathleen Shiomos

Date: Friday, September 17, 2021
Time: 12:00pm-1:30pm

Agenda Item	Owner(s)	Time	Action/Steps
Call to Order	Maritza Padua, Community Outreach Program Manager	Maritza Padua called the meeting to order at 12:03 PM	N/A
Welcome and Introductions	Jennifer Rogers, Director of LTSS Program Management & Quality	Jenn Rogers welcomed the group to the Keystone First Community HealthChoices (CHC) Participant Advisory Committee (PAC) meeting. Introduction of Nicole Ragab, new Community Relations Representative and Frank Santoro, new Director of Operations and Administration.	N/A
New Business/Updates			
New Business/Updates - Quality (CAHPS, Flu Shots, Health Screenings, Trigger events)	Allison Krause, Coordinator Quality Improvement	<p>Allison Krause presented information related to the Consumer Assessment of Healthcare Providers and Systems (CAHPS) Survey. SPH analytics, a third party vendor, will be administering the survey on behalf of Keystone First CHC and Participants may be contacted to take the 30 minute survey.</p> <p>Allison explained that the Quality Management department is working with Community Outreach department to create new CAHPs measures based on survey results.</p> <p>Allison reminded members that the Centers for Disease Control (CDC) recommends everyone receive an annual flu shot, which is covered by the plan. Lastly, Allison reminded Participants to please contact their Service Coordinator</p>	N/A

		<p>following all hospitalizations and emergency room visits; Service Coordinators will set up time with Participants to review services and needs.</p>	
<p>New Business/Updates - Financial Management Services (FMS) Presentation</p>	<p>Frank Santoro, Director Plan Operations & Administration</p>	<p>Frank Santoro discussed the self-directed services program, the role of the financial management services (FMS) vendor that supports the self-directed services program, and the transition to a new FMS vendor, HHAx/Tempus, which is set to roll out April 1, 2022.</p> <p>As part of this transition, Participants, common law employers (CLEs) and direct care workers (DCWs) will be required to complete new enrollment paperwork, but there will be no changes to services. Participants who are signed up for self-directed services will receive information related to the transition, via mail, ahead of the transition.</p> <p>*full PowerPoint attached*</p> <p>Questions/Comments</p> <p>PAC member AH provided background information from personal experience with Participant-directed services. AH explained that when visiting the online portal to approve DCW hours you will see time entry to the far left that says Participant profile, click associated direct care works, and it will give you a list of your DCWs. On the far right of that it will say ‘services;’ click the DCW you are looking at and it will show you the max rate you can pay that person. They can receive up to \$14.45. Agencies determine the direct care worker salary.</p> <p>PAC member BT asked about the services covered under Community HealthChoices (CHC). BT explained that she learned that she was not receiving all of the services that were available to her. Jenn Rogers explained that each Participant’s Service Coordinator should be educating their Participants on all the services that are available to them. Jenn also explained that all covered services are listed in the Participant handbook.</p> <p>PAC member AH asked whether the DCW will continue to be paid on the same schedule as they were with public partnerships (PPL). Frank Santoro explained that during the transition, the payment to DCWs will remain on the same</p>	<p>Send BT a <i>Participant Handbook</i></p>

		<p>schedule. Tempus is looking to refine the process and make it easier.</p> <p>PAC member AH asked whether mail from Massachusetts will potentially delay receipt of paper checks. Frank Santoro agreed to check with Tempus and report back at the next meeting.</p> <p>PAC member AH asked if the FMS presentation could be shared with the Committee. Frank Santoro confirmed.</p> <p>PAC member AH explained that during the pandemic there were exceptions to those allowed to be DCWs like spouses, etc. and asked if there is any possibility of those normally excluded to be grandfathered in to be DCWs. Jenn Rogers explained that OLTL or the Commonwealth would make the decision if this will continue after the COVID-19 restrictions are lifted. We will look for guidance from them.</p> <p>PAC member AH asked if the Participant’s emergency back-up person needs to have all their paperwork in to PPL for an emergency. Frank Santoro explained that all DCWs would need to be registered with PPL. Needing a plan if your DCWs are not available is a larger issue.</p>	<p><i>Check with Tempus regarding mailing of paper checks</i></p> <p><i>Share FMS presentation with committee</i></p> <p><i>Follow-up with OLTL regarding whether DCW exceptions will be continued</i></p>
<p>New Business/Updates - Community HealthChoices Resources and Tools (Aunt Bertha)</p>	<p>Jennifer Rogers</p>	<p>Jenn Rogers shared and reviewed the recent Community HealthChoices Resources and Tools presentation at the September Medical Assistance Advisory Subcommittee (SubMACC) meeting. The resources reviewed included:</p> <ul style="list-style-type: none"> • Aunt Bertha or FindHelp.org – Participants and Service Coordinators can search Aunt Bertha for services and supports by their location. • QUIL – digital health and engagement solutions for caregivers, offers resources to the caregiver community. • Behavioral Health Resources • Housing Resources • Employment Resources • Community Resources tab on the Keystone First CHC website, which provides community information and access to Participant Advisory Committee (PAC) and Health Education Advisory Committee (HEAC) information. 	

Open Forum	All	<p>PAC member AH asked if copies of today's FMS presentation would be available to meeting attendees. Maritza Padua has started the internal process to have this presentation added to the minutes.</p> <p>PAC member AH asked if there would be online or in-person training on how to use Tempus for the Participant and DCW. Frank Santoro explained that Tempus will have online and in-person sessions.</p> <p>PAC member CP asked who determines how many hours Participants are approved for. Maritza Padua will schedule some time with CP to discuss this process.</p> <p>PAC member CP asked about continuing to use the MTM key-card. Jenn Rogers explained that Keystone First CHC is moving away from wallet debit card, and MTM will manage all key-cards, loading them every month with funds to use on SEPTA.</p> <p>Additional Participant concerns raised: CCT – critical issues with dispatch and having rides come or pick up. Maritza Padua and Nicole Ragab will contact the Participants in attendance today for a conversation about transportation issues they are having, potentially bringing them together for a group discussion.</p>	<p><i>Share FMS presentation with committee</i></p> <p><i>Contact CP regarding process</i></p> <p><i>Contact Participants regarding transportation issues</i></p>
Next Meeting:	Maritza Padua	Next meeting will be held on December 17, 2021 at 12:00pm. Invitations will be sent prior to the meeting.	N/A
Adjourn			
Adjourn	Maritza Padua	Maritza Padua adjourned the meeting at 1:44 PM	N/A

FMS Vendor Transition for Self-Directed Services

Presented by Frank Santoro

Director of LTSS Plan Operations and Administration
September, 2021



Agenda



- **Self-Directed Services Program Overview**

- Description and Benefits
- Qualifications
- Participant Responsibilities
- CLE/DCW Responsibilities
- MCO Responsibilities
- Service Coordination Responsibilities
- FMS Vendor Responsibilities



- **FMS Vendor Transition**
Vendor transition and comparison
HHAx/Tempus Organization
- **Questions**

What are Personal Assistance Services?



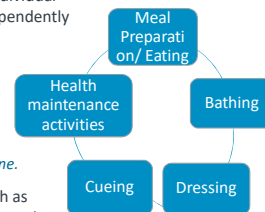
Personal Assistance Services (PAS) are aimed at assisting the individual to complete tasks of daily living that would be performed independently if the individual had no disability. These services include:

Assistance with activities of daily living activities (ADLs)

- *eating, bathing, dressing, and personal hygiene*
- *cueing to prompt the Participant to perform a task*
- *supervision to assist a Participant who cannot be safely left alone.*

Health maintenance activities provided for the Participant, such as bowel and bladder routines, ostomy care, catheter, wound care and range of motion as indicated in the individual's service plan and permitted under applicable State requirements.

Routine support services, such as meal planning, keeping of medical appointments and other health regimens needed to support the Participant. Assistance and implementation of prescribed therapies.



Pennsylvania Office of Long-Term Living Home and Community-Based Services (HCBS) offer persons with disabilities and Pennsylvania seniors a choice on how services will be delivered.



Agency Provided

Participant Directed / Self-Directed

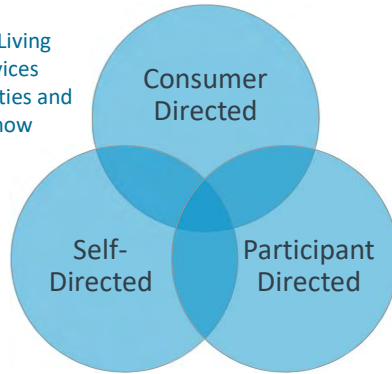


Self-Directed Services Program Overview Description and Benefits



Pennsylvania Office of Long-Term Living Home and Community-Based Services (HCBS) offer persons with disabilities and Pennsylvania seniors a choice on how services will be delivered.

Self-Directed Services enable Participants to take more control of services giving them the power to manage their own workers as the Common Law Employer.



Self-Directed Services Program Overview Description and Benefits



What are Participant – Directed Services?

- Self-directed care services, often referred to in Pennsylvania as Participant Directed Services, is a philosophy and practice that assumes Participants:
 - have the right and ability to assess their own needs
 - determine how and by whom those needs are met
 - evaluate the quality of the services they receive.
- Participants have the ability to hire family, friends, or neighbors to provide some of the services they might need, such as meal preparation or personal care.
- As a CHC Participant, you employ the direct care worker instead of a caregiver agency. This will enable you 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 support provided.
- Self-direction promotes personal choice and control and can include engaging family and other loved ones in providing care and support.
- Services My Way (available in Community HealthChoices Waiver only) is a model of service that gives Participants the option to manage a flexible budget (Individual Spending Plan).

Self-Directed Services Program Overview Description and Benefits



WHAT ARE THE BENEFITS OF SELF-DIRECTED CARE?

- Self-direction allows you greater access to care/support services in rural areas
- Self-direction enables you or your loved one to keep living in your own homes, communities, and local support systems as opposed to restrictive institutional care. It might also be an option for individuals within residential facilities to move back home. The approach enables you to control and structure your own life.
- Self-direction is flexible and personal
You work with a service coordinator to determine your eligibility for a set of services. Together you tailor your requirements by choosing what support and services are needed, when they are needed by whom, and where. Your needs can change over time, and self-directed programs allow for that future flexibility.
- Self-direction allows you to choose a care/support worker you know, trust and relate to
This can include friends and may include family. You have the security of choosing and knowing who is coming into your home. You can hire workers that you feel most compatible with, including those that share your same interests and culture.

Self-Directed Services Program Overview Direct Care Worker Responsibilities



A Direct Care Worker (DCW) is a person assigned by the Participant or Common Law Employer to provide care to the Participant. Here are their responsibilities:

- Complete DCW enrollment paperwork and required background checks for each Participant-employer
- Complete the required DCW Orientation and obtain a Unique ID
- Alert PPL to any address changes
- Complete a Live-In Exemption form if moving into or out of the home of the Participant to whom services are provided
- Provide services to Participant as described in Person Centered Service Plan (PCSP)
- Meet all qualification requirements and complete training as identified in the PCSP
- Be aware of guidelines related to their own withholdings



Note: A DCW can not be a spouse, Power of Attorney, or person under 18 years of age

Self-Directed Services Program Overview Participant Responsibilities



The Participant is a member of the Pennsylvania CHC program and qualifies to participate as a self-directed Participant. Here are their responsibilities:

- Recruit, hire, train, schedule, manage, and dismiss Direct Care Worker (DCW)
- Verify DCW and vendor qualifications
- Ensure that DCWs complete the enrollment requirements
- Train DCWs in providing services described in the ISP
- Decide how much to pay DCW, within state guidelines
- Monitor adherence to Service Plan and budget
- Develop and implement a backup plan –
 - The steps to be taken to meet the Participant’s needs during an emergency. Emergency back-up plans address power outages, weather events, travel restrictions, and other events.
- Approve and submit all time worked
- Report suspicions of Medicaid fraud or financial abuse
- Designate a representative or alternate CLE to assist with employer duties, as necessary



Self-Directed Services Program Overview Common Law Employer (CLE) Responsibilities



A common law employer is someone who is designated by the Participant to assist in their care. The responsibilities are:

- Understand personal assistance needs of the Participant
- Make decisions about care
- Understand how to recruit, hire, train, and supervise providers of care
- Understand the impact of decisions and assume responsibility for the results
- Approves all submitted Time
- Can not be the Direct Care Worker
- A CLE can not be a CLE for multiple Participant’s
- Updates CLE address changes by submitting the CLE address change form
- Sign all Initial Onboarding Enrollment Forms



Self-Directed Services Program Overview MCO Responsibilities



MCO responsibilities include:

- Manage the HHAx/Tempus vendor relationship
- Receive and review reports from HHAx/Tempus
- Train Service Coordinators on program requirements and MCO system entry and utilization
- Provide support to Service Coordinators in the management of the Participants’ services
- Provide Service Coordination Supervision
- Provide authorizations for HHAx/Tempus for Participants in the program
- Approve Plan of Care submitted by Service Coordinators
- Mandatory Reporter – requires MCO to investigate critical incidents such as exploitation, serious injuries, neglect, elder abuse, child abuse in the home, etc.

Self-Directed Services Program Overview Service Coordinator Responsibilities



Service Coordinator responsibilities include:

- Introduce the choice for Participant Directed Services to Participants
- Assist with the designation of an alternate CLS where necessary and allowed
- Develop and update the Person Centered Service Plan (PCSP)
- Assist Participants to develop and implement a backup plan
- Monitor the delivery of services and support
- Provide HHAx/Tempus with any temporary gaps in service in a timely fashion

Self-Directed Services Program Overview FMS Vendor Responsibilities:



Financial Management Services (FMS)—Effectively the Participant’s “HR Department”

- Manage Employee Onboarding
- Conducts background checks
- Manage Payroll & payroll verification processes
- Compiles and submits tax documents to State and Federal entities, as well as annual tax statement to the Direct Care Worker.
- Reporting and FWA compliance responsibilities

FMS Vendor Transition



FMS Vendor Transition PPL to HHAx/Tempus Transition



On June 28, 2021, PA Office of Long Term Living (OLTL) announced the transition from the current vendor, PCG Public Partnerships, to HHAx/Tempus. The go-live implementation date is [April 1, 2022](#).

The following comparison shows the main reasons HHAx/Tempus was chosen:

Current structure	Future structure
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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.

FMS Vendor Transition HHAx/Tempus Organization



HHAxExchange has been a proven software vendor and partner to the CHC MCOs since 2016.

HHAxExchange engaged Tempus Unlimited to perform the Fiscal/Employer Agent services for the CHC-MCO self-directing Participants. Tempus will be performing the payroll administration for HHAx. Participants, DCWs and CLEs will use Tempus for their timesheet and payroll services.

- Non-profit organization
- One of the largest Fiscal/Employer Agents in the country
- Tempus board members and staff with disabilities bring live experience to Tempus services
- 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)

FMS Vendor Transition Participant/DCW/CLE Next Steps



Q. Will I be able to keep my current DCW?

A. Yes. You will be able to keep your DCW.

Q. What do I need to do because of this change?

A. You and your DCW will need to fill out some paperwork. You will get more information about this when we get closer to the transition date. Tempus will also reach out to you about trainings.

Q. Will the pay rate for my DCW change?

A. No. The pay rate for your DCW will not change because of this switch.

Q. Will the services I get change?

A. No. The services you get will not change because of this switch.

FMS Vendor Transition Participant/DCW/CLE Next Steps



Q. Does Tempus have experience as an F/EA?

A. Tempus has been providing F/EA services for more than 20 years. It has served over 20,000 members and has a 98 percent satisfaction score.

Q. How can I contact Tempus?

A. Tempus will be sharing contact information soon.

Q. What if I need to contact PPL, the current F/EA company?

A. You can still reach PPL with questions or concerns at 1-877-908-1750.

Q. What can I do if I have more questions?

A. You can call the Keystone First PA CHC Personal Care Connection team at **1-855-332-0729**. TTY users should call **1-855-235-4976**. Help is available Monday through Friday from 8:30 a.m. to 5 p.m.

Questions?



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