



## Case Management Guide

This guide was created to provide the Case Manager some quick, at a glance information. More in depth information is located in the Employee, Employer and Vendor Only Packets.

Self-direction provides individuals the opportunity to self-direct their own services, meaning they can hire and train employees, set their own schedules and decide what daily activities they want to do. Self-Direction consists of the Participant, Employer and Employee. If appropriate, the participant can be the employer. The employer is responsible for hiring and training employees. The employer will oversee the employees that are hired to provide services. Employees can be family members or friends. Employees cannot be the rep payee, conservator or have any control over the participants finances. The employer cannot also be an employee for the same participant they are the employer for.

As the Fiscal Management Service (FMS) provider, Acumen contracts with the State of Montana. Acumen sets up the employer, processes payroll for the employees, provides reports to monitor service delivery and provides ongoing support with employer tasks. As the FMS, we support the employer with the following:

- Employer skills training.
- Process employee paperwork.
- Determining employee eligibility including processing background checks
- Process and pay employees for time worked, including processing taxes.
- Calculate and process quarterly employer taxes.
- Process and pay vendor payments or reimbursements, including processing 1099 vendor tax forms.
- Broker and process workers' compensation and insurance.
- Produce monthly spending summaries and spending detail reports to track use of hours.

## Referral Process:

If a Case Manager has a participant who is interested in Self Directing services, all they need to do is let Acumen know! The Montana team is happy to assist in filling out paperwork. If a Case Manager completes a referral, all Acumen needs to know is if the participant wants full self-direction (employee/vendor) or vendor only services. The easiest way to submit a referral it is to send an email, requesting an enrollment packet for either full self-directed or vendor only services,

There is a packet for employers and a packet for employees. The packets are a mix of Acumen forms and federal-IRS/Montana state forms. Many of the forms require a 'wet' signature, so the packet forms do need to be printed out. If your client does not have access to a printer, Acumen will be happy to send out a paper packet in the mail. Please make sure that when the paperwork is filled out and sent in, that a hard copy is kept by either the Case Manager, or the Employer. This is in case any corrections need to be made.

Often when packets are filled out and sent to Acumen there are corrections that will need to be made. Many of the forms are state or federal forms and leave little room for error. When that happens, the MT Enrollment Agent will send a very detailed email back to the employer, letting them know exactly what form and corrections need to be made. During any of the paperwork process, the Montana team would be happy to set up a call with families to go through the packets with them to fill them out.



### **Acumen Fees:**

Monthly Admin Fee- \$62.00 (includes processing of 2 checks per month)

New Employee Enrollment- \$50.00 (One-time fee for each new employee)

Check Fee for 3+ Checks Per Month- \$50.00 (in addition to the \$62.00 monthly admin fee)

**Example-** One individual with one employee.

\$62 x 12 months= \$744

\$50.00 (One time enrollment fee for 1 employee)

Total cost for full fiscal year- \$794.00

### **Employee Services that can be self-directed:**

TRM - Transportation (Mileage)

RSP OR RSP-O - Respite

PLS/PLSO - Personal Support Services

SBS - Support Broker Services

FAS - Follow Along Support

IES - Individual Employment Support

CWS - Co-Worker Support (Daily Rate)

### **Vendor Services that can be self-directed:**

IGS - Individual Goods and Services

SMES - Specialized Medical Equipment

SMS - Specialized Medical Supplies

ENVM - Environmental Modifications

MEAL - Meal

PERS - Personal Emergency Response System (Monthly Service)

PERI - Personal Emergency Response System (Installation/Testing)

CTS - Community Transition Services

TRMO - Transportation (Other- Taxi/Bus Pass, Misc)

### **Good to Go Process:**

Once the paperwork has been completed and there is an approved cost plan that Acumen can pull from the MMIS site, the employer will receive a 'Good to Go' letter. This letter contains all the information the employer will need to log into the system. The employee will also receive a letter with the same information. No services can be started until both the employer and employee receive a copy of that Good to Go letter. Some requirements such as a background check, or a required certification may delay enrollment. There are specific training or certification requirements required to provide each service. It is the employer's responsibility to contact the regional office to set up the employee for the College of Direct Supports training and notify Acumen when the training has been completed.



## **Training Information Provided to the Employer on the Good to Go Letter:**

College of Direct Support - Contact the DDP Regional Administrative Assistant to enroll your employee in College of Direct Support [Login \(elsevierperformancemanager.com\)](https://elsevierperformancemanager.com)

Before you can log in to the College of Direct Supports, you must contact the DDP Regional Administrative Assistant to enroll your employee in the required training modules. You can reach them at the following numbers:

Region 1- Glasgow/Miles City (406) 228-8264  
Region 2- Great Falls (406) 454-6085  
Region 3- Billings (406) 259-8122  
Region 4- Helena/Bozeman/Butte (406) 444-1714  
Region 5- Missoula/Kalispell (406) 329-5415

## **Vendor Reimbursements:**

Participants can also enroll in the Vendor Only Program, meaning Acumen can reimburse or pay for equipment, supplies and environmental modifications. The Vendor Only packet must be filled out and the client or authorized representative must have a 'Good to Go' letter before any item can be reimbursed. All vendor only items must be approved by the TCM and approved in the cost plan. Any contractor who is going to be reimbursed by Waiver funds must submit a W9 prior to services being completed.

## **Change to Cost Plan/Services:**

Acumen's system and ICP do not talk to each other. If there are changes made to the cost plan, please notify Acumen of the change. If funds are added or removed, please let Acumen know. If a client makes a change and decides to change services, please check with Acumen. More than likely, paperwork will need to be updated.

## **Medicaid Eligibility:**

Before every payroll, Acumens run Medicaid eligibility for every client. If they are found to be not eligible, payment will not be processed. Acumen will notify the employer and the RM letting them know and the Acumen account will be suspended. When eligibility has been confirmed with no lapse in services, their Acumen account will be reinstated.

## **Termination:**

If you have a client who decides to leave self-direct, please fill out the termination form. This ensures that things on the Acumen side are shut down and the employee does not continue to submit hours for reimbursement.

**If you have any questions or need assistance, please contact your Montana agent by email at [enrollment-mt@acumen2.net](mailto:enrollment-mt@acumen2.net) or by phone at 480-295-3345.**