



COLORADO DEPARTMENT OF HEALTH CARE POLICY & FINANCING

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John W. Hickenlooper, Governor • Susan E. Birch MBA, BSN, RN, Executive Director

DATE: October 10, 2014

DAL#: CMA 0912-1 CD

EFFECTIVE DATE: January 1, 2015

EXPIRATION DATE: January 1, 2016

SUBJECT: Financial Management Services Changes

Dear Case Management Agency Administrator:

The purpose of this Dear Administrator Letter (DAL) is to inform Case Management Agency (CMA) administrators of upcoming changes to Financial Management Services (FMS) provided within Consumer Directed Attendant Support Services (CDASS).

Effective January 1, 2015, the Department will contract with three FMS vendors and one Training and Operations vendor to support the functions of CDASS. Additionally, each FMS vendor will offer two employer models: Agency with Choice (AwC) and Fiscal/Employer Agency (F/EA).

FMS Vendors

Following a competitive procurement process the following vendors have been selected to provide FMS in Colorado:

- ACES\$ Financial Management Services – www.MyCIL.org
- Morningstar Financial Services – www.morningstarfs.com
- Public Partnerships, LLC – www.publicpartnerships.com

These three FMS vendors will offer services statewide. CDASS clients and authorized representatives will select the vendor with which they want to work.

Clients must make the initial selection of vendor and employer model by December 1, 2015. There will be an annual open enrollment period during which CDASS clients can change their vendor and model selection.

FMS Employer Models

The current employer model offered in Colorado is AwC. Under the AwC model, the FMS and the client are considered co-employers; however, the FMS is the common-law employer per the Internal Revenue Service.

Under the F/EA model, the client is the common-law employer. Please see the attached document entitled *FMS Employer Models for CDASS* for additional information about both models.

Training and Operations Vendor

Beginning January 1, 2015, the Department will contract with a fourth entity to provide training and operational support of CDASS. The primary functions of this organization are to:

- Provide CDASS training to clients and authorized representatives through a peer trainer network
- Provide customer service support on participant direction
- Provide technical assistance to case managers on participant direction
- Assist in the Coordination between FMS vendors
- Provide routine training to case managers on participant directed service delivery options including CDASS and In-Home Support Services (IHSS).

Transition Process

CDASS clients must select an FMS agency and employer model prior to **December 1st, 2014**. This allows the FMS agencies time to get client and attendant information into the respective systems by January 1, 2015, with no gap in services for clients or payroll for attendants.

This selection must occur regardless of the FMS agency that is chosen. Case Management Agencies and clients will receive information from each FMS agency which can be used to inform clients of their choices.

FMS vendors will work with Case Management Agencies to set up secure email, provide training on their web-based systems, and PAR processing for CDASS clients.

The Department will be hosting a series webinars to provide information on upcoming changes. Details of the webinar dates are forthcoming.

Please contact me at 303.866.5365 or Kelly.jepson@state.co.us if you have any questions.

Thank you,

Kelly Jepson, MPA
Contract Benefit Support Specialist