



SELF-DETERMINATION IN CALIFORNIA

A guide to choosing a Financial Management
Services (FMS) Provider



By Public Partnerships PPL
A Financial Management Service (FMS) Provider

Choice, independence, freedom, control, await you or your loved ones in California.

Working with your circle of support -- including your family, friends, and possibly an independent facilitator, person-centered planner, and/or your Regional Center service coordinator -- you will develop your unique plan and budget to meet your life goals.

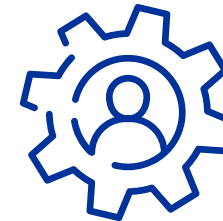
This includes the **support** and **services** you will need.

You are required to select a **Financial Management Services (FMS)** provider company to help you manage and pay for these **on your behalf**.



SUPPORT

Help with daily living in your chosen home and being active in your community.



SERVICES

Funds for activities and items within your home and out in the community that meet your unique needs.

These could be transportation, home modifications, physical therapy, skills training, and equipment.



Choice, independence, freedom, control.

Responsibility beyond your Regional Center “vendorized” companies*



You get to choose, **even employ**, who provides support to you, including family and friends.

You are no longer tied to those companies vendorized* to work with your Regional Center.

Find your own service vendors/companies that meet your needs.

* Service providers must be vendored by a Regional Center before they can provide and be reimbursed for services. “Vendorization” is the term used to describe the entire approval process involved in preparing to provide services to Regional Center consumers.

Congratulations
on choosing to be part of the
California **Self-Determination Program(SDP)**!

Choice
Independence
Freedom
Control

...await.

You/your loved one are probably in
the process of, certifying your **individual
budget...**

...and thinking about your **spending plan?**

Remember: You choose who helps you self-determine your life, including the Financial Management Services (FMS) provider company

- *Vetted and approved FMS companies listed on DDS website.*
- *You pay the costs through your Individual Budget.*
- *Cost is based on the model and services you need.*

REQUIRED BY CALIFORNIA LAW

A FINANCIAL MANAGEMENT SERVICES (FMS) PROVIDER

Why required? The law prevents direct cash payments to you to pay for your support and services.

To “self-determine,” you are required to appoint a Financial Management Services (FMS) provider company to help you:

- Pay for your services, activities, items
- Pay/withhold taxes for those who support you, and ensure all employment and other laws are being followed
- Track your monthly spending
- Verify the background/qualifications of your chosen care/support provider(s)

How do I know what Financial Management Services (FMS) provider **model and services** I need for myself or my loved one?



“Bill Payer”



“Co-Employer”



“Sole Employer”

Think of the FMS model choice as a large **menu** of options for your **support** and **services**.

Your choice of model and cost, is based on the number of options and level of choice, independence, freedom, and control **YOU** want and need over the following:



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SERVICES

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EXAMPLE OPTIONS – There are a few!

- 1. Maintain all the documentation related to the services, activities, and items you are authorized to purchase on a monthly basis*
- 2. Pay the bills/invoices for your approved services, activities, and items*
- 3. Prepare you to be an employer of your care/support workers (or joint employer with the FMS) handling program enrollment and paperwork*
- 4. Verify the background/qualifications of your choice of care/support worker(s)*
- 5. Perform criminal background checks on your choice of care/support worker(s)*
- 6. Collect and process timesheets of your care/support worker(s)*
- 7. Pay/tax those who support you and ensure all employment and other laws are being followed. This includes issuing W2 tax statements and verification of employment services for your worker(s) to apply for credit/purchase items*
- 8. Track monthly spending for you/the Regional Center/the individuals and companies who provide services to you with alerts to ensure you do not exceed amounts set by your budget*
- 9. Provide a monthly accounting statement of how you are spending your individual budget to make sure you have enough left throughout the year*

Let's start with the easy one...

All FMS models:



“Bill Payer”



“Co-Employer”



“Sole Employer”

...assist with paying the bills/invoices on your behalf, for the **services** (vendors, activities, and items) listed on your/your loved one's Individual Program Plan.



SERVICES

Funds for activities and items within your home and out in the community that meet your unique needs.

These could be transportation, home modifications, physical therapy, skills training, and equipment.



SUPPORT

Help with daily living in your chosen home and being active in your community.



BILL PAYER MODEL



The simple “Bill Payer” model may be all you need if you don’t need/want to hire and pay for your support.

For example:

- Your Individual Program Plan determines you don’t need support
- Your family/friends support you and they don’t require payment
- A “home care agency” and its employers currently support you and you are satisfied

The cost to you is based on the number of bill paying services you need.

Just writing checks? **OR** writing checks **AND** maintaining all the documentation related to the services, activities, and items you are authorized to purchase on a monthly basis.

Minimum Cost \$50/month
Maximum Cost \$100/month



SERVICES

Funds for activities and items within your home and out in the community that meet your unique needs.

These could be transportation, home modifications, physical therapy, skills training, and equipment.



SUPPORT

Help with daily living in your chosen home and being active in your community.

You choose!



The model primarily depends on how much *choice, independence, freedom,* and *control* you want or need regarding your *support*. This includes:



Who provides?

- Family/friends that you love/trust?
- Employees you/your loved one handpick due to shared interests/backgrounds?



Hours worked?



The pay rate offered?



Importance of the continuity of the same providers?

- Your/your loved one's comfort around strangers



Ending the relationship...firing?



CO-EMPLOYER MODEL

In addition to the monthly bill paying for the services, activities, and items needed, you also use the FMS provider as a shared “employer” of your care/support workers.

The cost to you is based on the number of bill paying and employment services by the FMS provider that you need.

Minimum Cost \$125/month
Maximum Cost 165/month

✓ PROS

- You and your FMS provider share the responsibility of being an employer
- The FMS provider handles the work-related injury insurance

CONSIDER:

- *What if you want to hire someone that your FMS provider does not like or approve?*
- *What if you do not approve of the choice of care/support workers given to you by the FMS provider?*
- *Your/your loved one’s comfort around strangers, should your given FMS workers constantly rotate?*
- *What if the FMS-employed worker is restricted in the hours they can provide your support? For example, 9am-5pm only?*

✗ CONS

- The most expensive FMS provider model
- Compared to Sole Employer, this model offers less choice and control over who you hire/fire, their pay, and hours they can work for you
- A company is still influencing your choices vs. you



SOLE EMPLOYER MODEL



In addition to the monthly bill paying for the services, activities, and items needed, you hire workers directly to support you/your loved one(s).

The cost to you is based on the number of bill paying and employment services by the FMS provider you need.

Minimum Cost \$110/month
Maximum Cost 150/month



PROS

- Maximum choice and freedom for you/your loved one
- Complete freedom to hire your own care/support workers, (including friends and family members) that you love and trust
- Independence. You're in charge and have maximum control over your Self-Determination journey
- Less expensive than Co-Employer – more of your budget is available for you



CONS

- Being an employer is not for everyone
- You may have to take out insurance to protect your "employee(s)" from work-related injury

You have a choice of which Financial Management Services (FMS) provider to use. **We are here to help you** make the right decision for you or your loved one.

We can help. We are Public Partnerships | PPL



Self-Determination has
different labels across states.

Whether you call it:



Participant-Direction

Consumer-Direction

or

Self-Direction

It offers...

Choice

Independence

Freedom

Control.



At PPL, we know a little bit about that.



We are the **nation's largest and most experienced** Financial Management Services provider serving populations who choose to “self-direct” and “**self-determine**” their long-term home care.



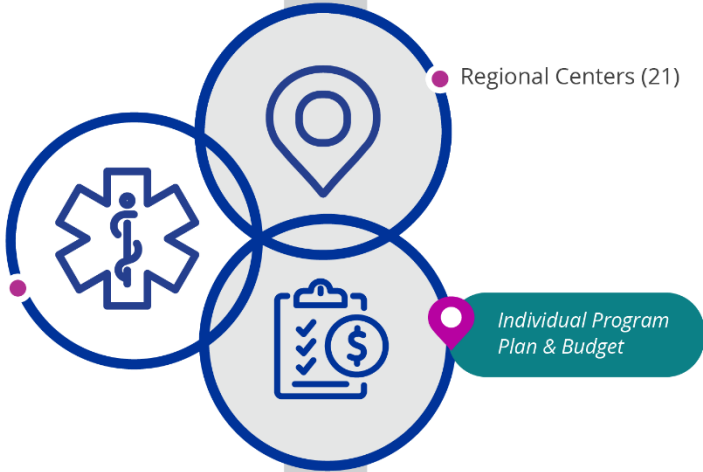
Individuals with Disabilities
Family Representatives



Care/Support Worker(s)

Regional Centers (21)

Department of Developmental Services (DDS)



Individual Program Plan & Budget

Wherever you are in your self-determined journey, we are determined to use our size, experience and growing capabilities to continually invest in our mission:
Transforming more lives by making self-directed home care easier for all.



DISCOVER



CHOOSE



GET STARTED



MANAGE



RECOMMEND

Easier... to discover and choose the long-term support & care option

Easier... to get started, manage, identify and resolve issues quickly

Easier... to measure self-direction's many benefits and recommend it (and PPL) to others

public partnerships

Your #1 choice for self-directed care™



WE OFFER:



Bill Payer Model Services

Number of Services	Rate Per Month
1-3	\$50
4-6	\$75
7+	\$100



Sole Employer Model Services

Number of Services	Rate Per Month
1-3	\$110
3-4	\$125
5+	\$150

REMEMBER: You pay our monthly fees from your unique, approved SDP individual budget. Our fees are **standard, set by the Department of Developmental Services (DDS)**, and are dependent on the model and the number of services you need and choose.

PPL FACTS *at a glance*



The most experienced FMS



Over 20 years of building **trust and reliability** by advocating for choice and independence



Providing FMS services in California **since 2012**



Deeply familiar with the **rules and regulations** around SDP



The largest FMS, which means local and reliable



Serving the most states, participants, and providers



Double the customer service agents vs. our nearest competitor

200+

Over 200 bilingual customer service team members



Proven ability to **mobilize in times of crisis** or natural disasters

A+

Maintaining our **A+ BBB rating** through rapid responses and 12-hour daily social media monitoring



Innovative to constantly make Self-Determination easy

24/7

Providing an industry-leading **24/7** web portal to help you self-direct – **BetterOnline™**



Offering an on-the-go, easy-to-use, secure **mobile app** for time entry and approval – **Time4Care™**



Putting **more money** in your care/support workers' pockets each pay period vs. end of tax year¹



Online access/retrieval of **W-2 tax forms** and verification of employment information



Dedicated California SDP **Program Staff**



Supporter of **Difficulty of Care** and **live-In tax exemptions** that may increase worker take home pay¹



Debit card payment options available to pay care/support workers



User-Friendly website available in multiple languages



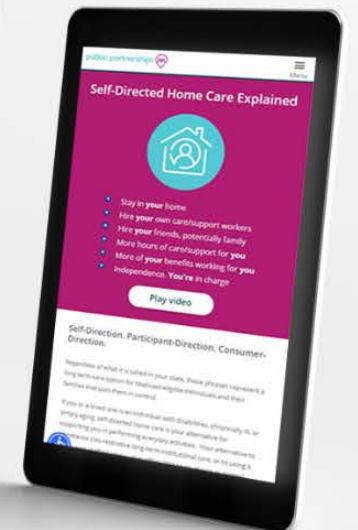
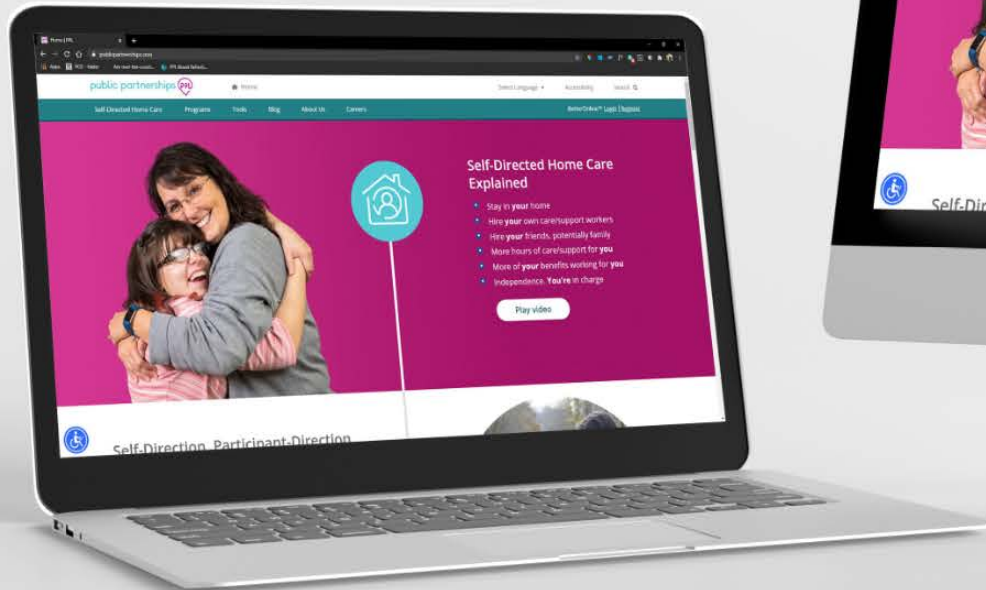
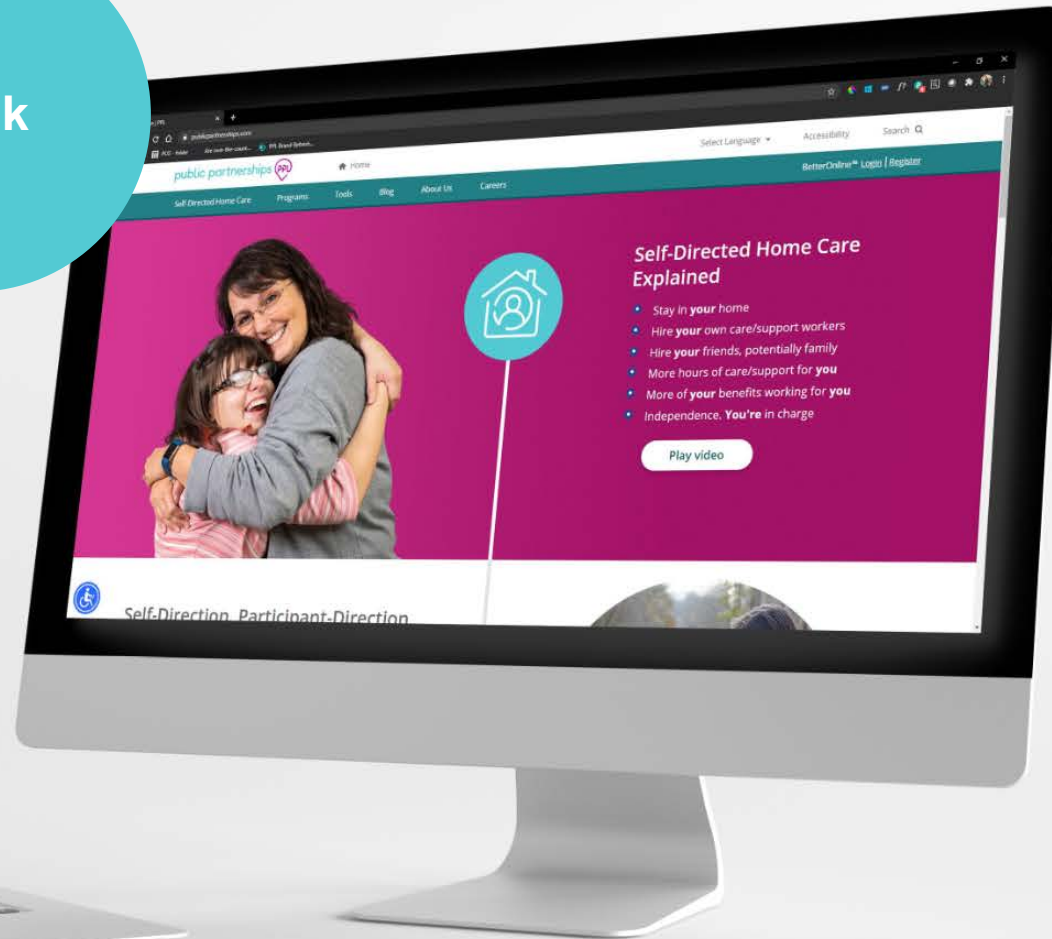
Contact us **live** via **Web Chat** Function



Fully A.D.A. and 508 **compliant and accessible**

¹ Achieved through our pioneering IRS partnership on "Difficulty of Care" income exclusion... for providing Medicaid services in the worker's home

From more information, visit us at publicpartnerships.com and request to talk to one of our dedicated CA SDP experts.





www.publicpartnerships.com