

# Aging and People with Disabilities

## **Fiscal Intermediary 'Acumen' Supporting the Independent Choices Program**

**Presented by:**

**Christine Maciel with Medicaid APD Services and Supports Policy**

**&**

**Denise Smith with Acumen**

**March 2019**

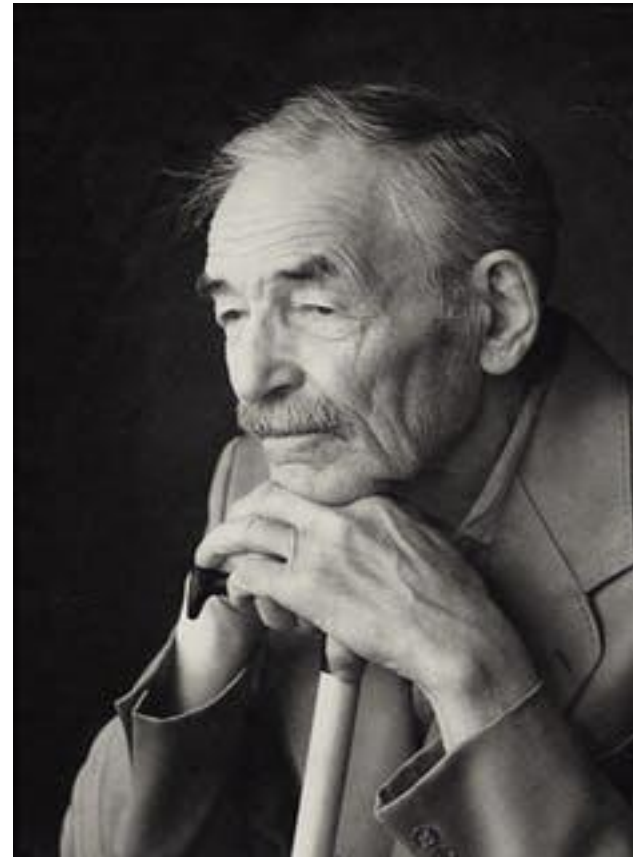


Confidential and Proprietary



# Agenda

- ICP Requirement
- What is 'Acumen?'
- Benefits of using Acumen
- Acumen services
- Enrollment timelines
- How to make Acumen referral
- What **MUST** be reported
- Acumen technology & enrollment
- Acumen reports
- Contacts & helpful tools

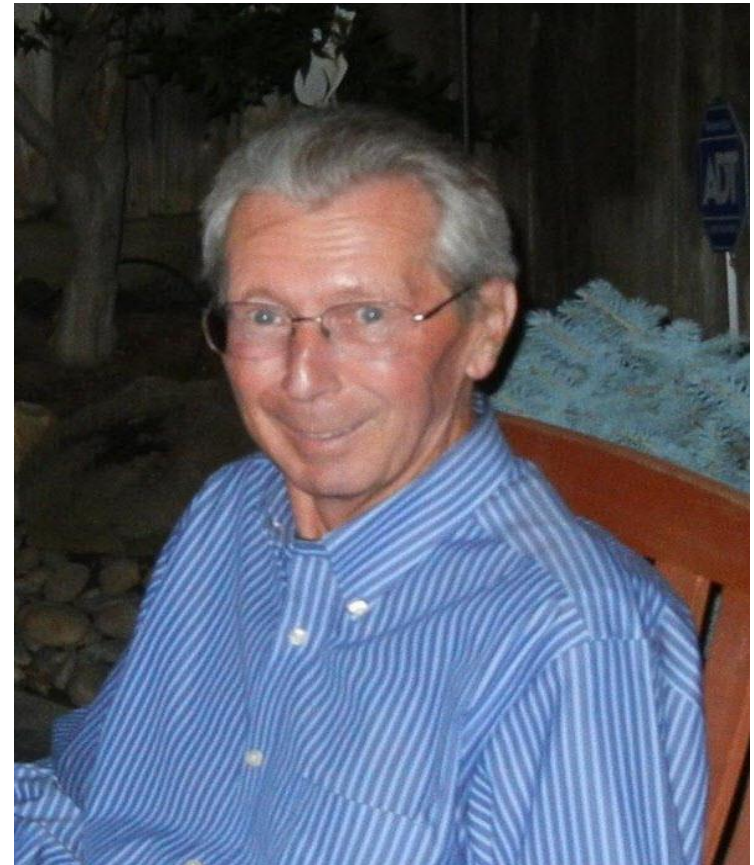


# OAR 411-030-0100(4)(c) Requirement

- If a participant is unable to manage the ICP cash payment accounting, tax, or payroll responsibilities and does not have a representative, the participant must arrange and purchase the ongoing services of a fiscal intermediary, such as an accountant, bookkeeper, or equivalent financial services.

# Acumen = Fiscal Intermediary (FI)

- APD has contracted with Acumen, a Fiscal Intermediary with the intent to assist ICP participants with their bookkeeping and payroll responsibilities.



# Benefits of Using Acumen

- Fee does not have to be paid out of the ICP benefit.
- Acumen manages all financial aspects
  - Payroll;
  - Taxes;
  - WBF; and
  - Discretionary / Contingency funds.
- Acumen provides 6 month financial information to CMs.
- Providers use ETC system.
- Acumen works directly with the participant.

# Acumen Service's Includes

- Electronic enrollment, and filing of all federal and state forms
- Payroll processing
- Tax calculation, withholding and filing
- Vendor payment services
- Budget management
- Workers' compensation
- Training: Participant & provider
- Electronic time capture

# New to ICP Enrollment

- 1<sup>st</sup> Qtr.: Jan. – Mar.
  - Enrollment completed by Dec. 1<sup>st</sup>
  - First service dates paid Dec. 16<sup>th</sup> – Dec. 31<sup>st</sup>
  - Check date – January 15<sup>th</sup>
- 2<sup>nd</sup> Qtr.: Apr. – Jun.
  - Enrollment completed by Mar. 1<sup>st</sup>
  - First service dates paid Mar. 16<sup>th</sup> – Mar. 31<sup>st</sup>
  - Check date – Apr. 15<sup>th</sup>
- 3<sup>rd</sup> Qtr.: July – Sept.
  - Enrollment completed by Jun. 1<sup>st</sup>
  - First service dates paid Jun. 16<sup>th</sup> – Jun. 30<sup>th</sup>
  - Check date – Jul. 15<sup>th</sup>
- 4<sup>th</sup> Qtr.: Oct. – Dec.
  - Enrollment completed by Sept. 1<sup>st</sup>
  - First service dates paid Sept. 16<sup>th</sup> – Sept. 30<sup>th</sup>
  - Check date – Oct. 15<sup>th</sup>

# Acumen Referral

- Email the following forms to:
  - [ICP.SPD@dhsosha.state.or.us](mailto:ICP.SPD@dhsosha.state.or.us) AND [Enrollment@acumen2.net](mailto:Enrollment@acumen2.net) (or via fax to (844) 343-2590)
    - ICP Acumen Referral form
    - SDS 548 – ICP Employee Provider(s) Information
    - ICP Service Budget Worksheet



# INDEPENDENT CHOICES PROGRAM (ICP) ACUMEN REFERRAL

<b>Consumer name:</b>			
<b>Prime #:</b>		<b>Phone #:</b>	
<b>Consumer address:</b>			
<b>Consumer email: (if they have one)</b>			
<b>CM name:</b>		<b>Phone #:</b>	
<b>Date of referral:</b>		<b>Branch #:</b>	

- Check to confirm that the following are attached:

SDS 0548 Independent Choices Program Employee Provider(s) Information form

Independent Choices Budget Worksheet

- Does the consumer have a designated representative (Rep.)?  Yes  No
  - If yes, please complete the following:
    - Please note: The Rep. cannot be the consumer's paid provider

<b>Rep. name:</b>	
<b>Rep. phone #:</b>	
<b>Rep. address:</b>	
<b>Rep. email: (if they have one)</b>	

**Additional notes for Acumen:**

- Send referral(s) to both of the following email addresses:
  - [Enrollment@Acumen2.net](mailto:Enrollment@Acumen2.net)
  - [ICP.SP@dhsoha.state.or.us](mailto:ICP.SP@dhsoha.state.or.us)

# What Must be Reported

- Provider hired/fired
- Benefit ends or consumer passes away
- Temporary interruption of services of more than 30 days
- Benefit changes:
  - Cash benefit
  - Contingency/Discretionary fund
  - Pay-in
  - Provider rate of pay



# Things to Consider

- Pay-in **MUST** be made by the 10<sup>th</sup>
  - Acumen will withdraw funds on the 12<sup>th</sup>
- Provider changes
  - Hired or fired
  - Pay rate changes
- Overtime potential
  - Electronic time capture
- Benefit changes
  - Total cash benefit
  - Taxes
  - Contingency / Discretionary funds

# Things to Consider

- Representatives and provider background checks
- Communication is critical!



Acumen  
*Supporting the Oregon Independent  
Choices Program (ICP)*

Presented by: Denise Smith



# ACUMEN-Why Participants Choose Us

ERROR FREE PAYROLL

EASY, FAST  
EFFICIENT  
ENROLLMENT

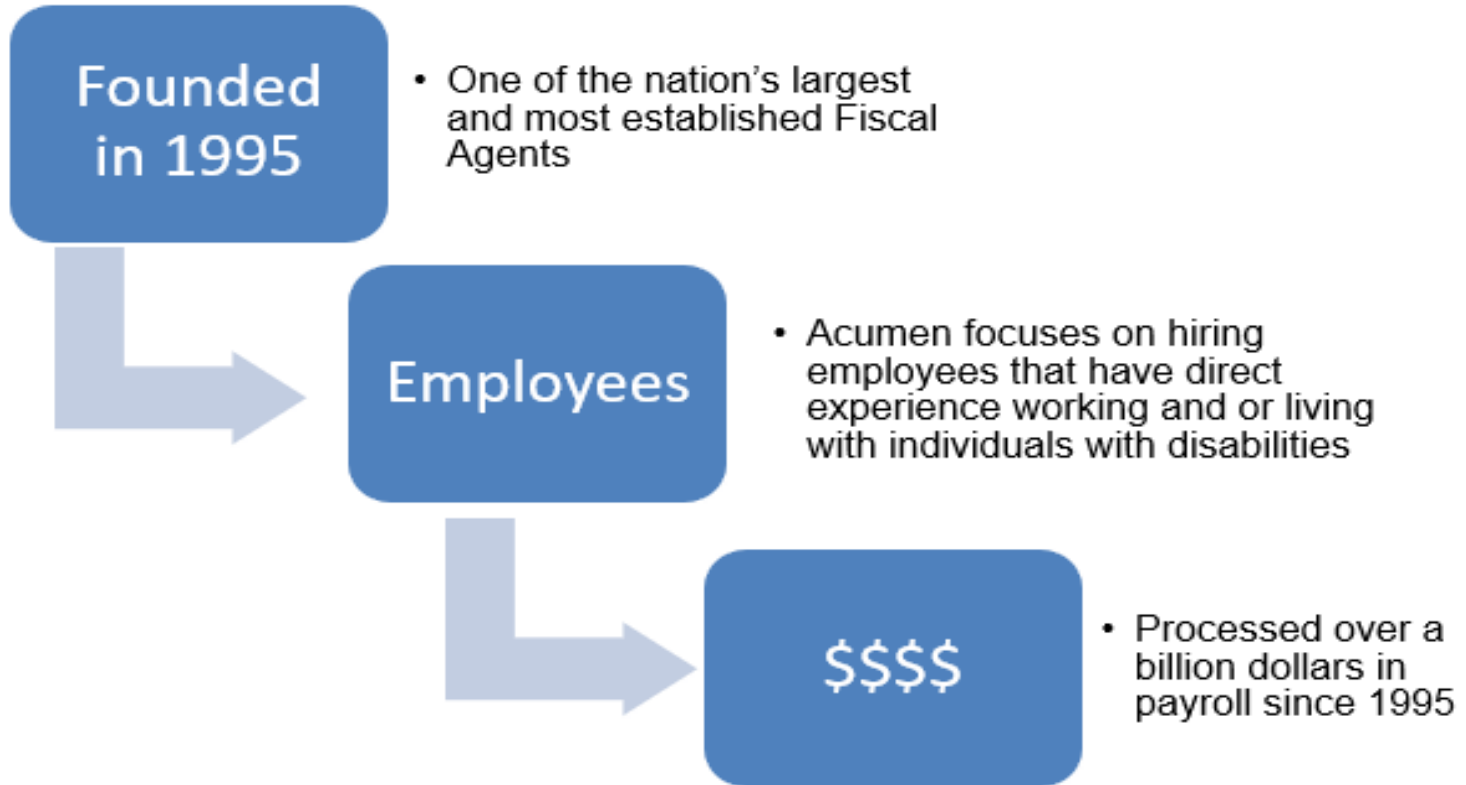
USER FRIENDLY  
TECHNOLOGY

EXPERIENCE

CUSTOMER  
SERVICE



# Experience



# Customer Service

- Customer Service – Providing excellent service is our focus and passion.
  - Satisfaction: 99.8% National customer service satisfaction rating.
  - Acumen will walk the participant through the enrollment paperwork and will answer any follow-up questions.
  - Convenience: We will try and meet the participant wherever it is most convenient for them. This can be at their home, a local office, or at the local coffee shop.
  - Understanding and empathy: Acumen focuses on hiring individuals with experience or a background in disability services.
  - Training: Immediate and ongoing training regarding our customer base and best practices.





# Payroll

Acumen takes pride in providing quality services



99.98% Payroll Error Free

Acumen Fiscal Agent facilitates freedom, choice and opportunity through innovative fiscal agent solutions...



ENROLL NOW



Participant Employers

...offering training, continuous education, and professional development for our employees and participants.

Choose Your State >



Employees

Our fiscal agent services span the United States.

Choose Your State >



Funding Partners

Acumen provides state-of-the-art technology solutions for senior citizens, individuals with disabilities, veterans, children, and other populations that self-direct their care.

Learn More >




# Acumen Home Page-Technology



## Participant Employers

We support training, continuous education, and professional development for our employees and participants.

 [Choose Your State >](#)



## Employees

Our fiscal agent services span the United States.

 [Choose Your State >](#)

# Technology



ENROLL NOW

PARTICIPANT EMPLOYER PORTAL

ACUMEN LOG IN

HIRE MY CARE REGISTRY



# Technology



# Forms on Website

ICP ▾

## ICP

### Participant Employer Forms

Form 2678

Form 8821

Form SS-4

Form W-9

OR Client & Employer Change Information Form

OR Employee Termination Form

OR ICP Acumen Authorization Form

OR ICP Cash Benefit Auto Withdrawal Form

OR ICP Cash Benefit Payment Agreement

OR ICP Employer Agreement Form

OR ICP Request for Vendor Reimbursement Form

OR Individual & Employer Business Information

OR Pay Schedule March 2019 to June 2019

OR Tax Authorization

OR Vendor EFT Form

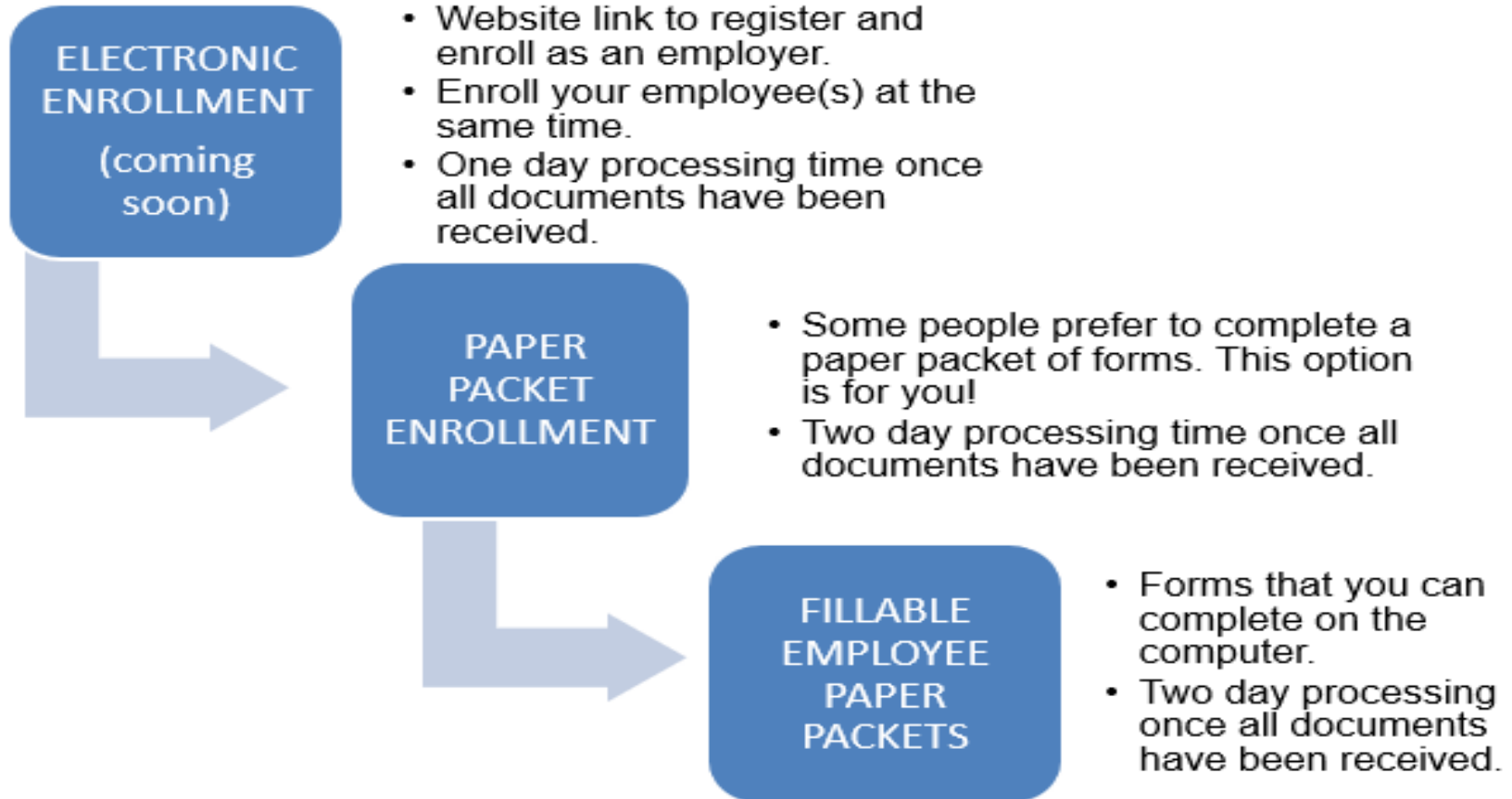
### Direct Care Employee Forms

Form I-9

Form OR-W-4

Form W-4

# Technology - Enrollment



# Technology – Webtime Entry

Pending Entries

From (MM/DD/YYYY) To (MM/DD/YYYY) IFD 3

Type Client Name Type Employee Name Type Cost Center

Hourly

Reset Search

Export

Showing 5 out of 5 records

Approve	Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code	Units
A R	862	Dec 10, 2015	09:00 AM	10:00 PM	Hourly		Test, EmployerB - 00-0001235	ClientB Test	EmployeeB Tester	IFD 3	13.00
A R	861	Dec 09, 2015	09:00 AM	05:00 AM	Hourly		Test, EmployerB - 00-0001235	ClientB Test	EmployeeB Tester	IFD 3	20.00





# Technology – Webtime Entry

- Computer Portal:
  - Secure employer and employee log-ins.
  - Employer approves time entries (punches) online.
  - No more frantically faxing, mailing timesheets by a due date.
  - Online system provides tools so employer can easily and effectively manage employees and services (budget).
  - Program rules built in to stop overlapping, overtime, over budget employee time entries (punches) unless approved by program.
  - Reports, reports, reports!



# Technology – Webtime Entry

- Mobile Apps. on Android and iPhone:
  - Real-time reporting and notification.
  - Immediate time entry (punch) approval.
  - Employee sees hours worked, overtime gauge, hours pending (needing approval), approved and rejected on app. No guess work!
  - Program rules built in, so will stop punches that don't meet program rules.
  - Mileage calculations: No more calculating transportation/mileage payments. GPS location and transportation tracking calculating for the employee.
    - Case manager does still need to authorize service related mileage as part of the service plan.



# Reports Reports Reports!

- Employee Time Entry Report (punch report)
- Authorization Balance Report
- Pending Punch Report
- Employee Report
- Account Summary Report
- Account Statement Report
- And many more!



# Employee Time (Punch) Entry Report

Pay Week	Date of Service	Account T	Employee Name	Employee	Client/ Program Name	Client Nur	Cost Center	Service Co	Start Date	End Date	Hours	Amount	Client Sigr	Status
9	2/26/2019	Hourly	WENDY WORKER	4615	PETER PARTICIPANT	GA5549	ICP PROGRAM	PYRL	2/26/2019 8:42	2/26/2019 10:43	0:02:01	2.02	No	Unverifi
6	2/7/2019	Hourly	WENDY WORKER	4615	PETER PARTICIPANT	GA5549	ICP PROGRAM	PYRL	2/7/2019 13:07	2/7/2019 13:09	0:00:02	0.03	Yes	Pending
47	11/18/2018	Hourly	WENDY WORKER	4615	PETER PARTICIPANT	GA5549	ICP PROGRAM	PYRL	11/18/2018 23:00	11/19/2018 7:00	0:08:00	8	No	Pending
48	11/27/2018	Hourly	WENDY WORKER	4615	PETER PARTICIPANT	GA5549	ICP PROGRAM	PYRL	11/27/2018 20:00	11/28/2018 0:30	0:04:30	4.5	No	Pending
46	11/13/2018	Hourly	WENDY WORKER	4615	PETER PARTICIPANT	GA5549	ICP PROGRAM	PYRL	11/13/2018 20:00	11/13/2018 21:30	0:01:30	1.5	No	Approve
46	11/15/2018	Hourly	WENDY WORKER	4615	PETER PARTICIPANT	GA5549	ICP PROGRAM	PYRL	11/15/2018 8:00	11/15/2018 13:25	0:05:25	5.42	No	Approve
46	11/17/2018	Hourly	WENDY WORKER	4615	PETER PARTICIPANT	GA5549	ICP PROGRAM	PYRL	11/17/2018 12:41			0	Yes	Rejected

# Employer Authorization Run Rate Report

Authorization ID	Client Name	Service Code	Cost Center	Region Name	Start Date	End Date	Initial Bal	Remaining	Projected	Current Weekly Run Rate	Projected # of Weeks	Determined Status
1345	PETER PARTICIPANT	PYRL	ICP Program		4/1/2019	4/30/2019	10000	10000	191.79	0	0	Under Providing
1344	PETER PARTICIPANT	PYRL	ICP Program		3/1/2019	3/31/2019	0.01	0.01	0	0	0	On Target
1343	PETER PARTICIPANT	PYRL	ICP Program		2/1/2019	2/28/2019	10000	200	1000	0	0	Under Providing
1341	PETER PARTICIPANT	PYRL	ICP Program		1/1/2019	1/31/2019	10000	0	1000	0	0	On Target

# Account Statement



## Acumen Fiscal Agent Account Statement

Employer: JANE SMITH

123 OAK ST  
MEDFORD OR 97501

Activity Period: 3/1/2017 to 4/16/2017

Participant ID:  
124567

Program: ICP

### Account Information

	Total Allotments		Period Utilization		Total Utilization		Balance	
	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars
PYRL 03/01/2017 - 02/30/2018	0	\$16,475.00	0	\$950.00	0	\$950.00	0	\$15,525.00
TRANS- 03/01/2017 - 02/30/2018	0	\$1,140.00	0	\$95.00	0	\$95.00	0	\$1,045.00
VENDOR 03/01/2017 - 02/30/2018	0	\$1,100.00	0	\$0.00	0	\$0.00	0	\$1,100.00
<b>Totals</b>	<b>0</b>	<b>\$18,715.00</b>	<b>0</b>	<b>\$1,045.00</b>	<b>0</b>	<b>\$1,045.00</b>	<b>0</b>	<b>\$17,670.00</b>

### Employee Information

Name	Pay Type	Status	EE Number	Good to Go Date
EMPLOYEE, ONE	Direct Deposit	Active	3054	3/1/2017
EMPLOYEE, TWO	Direct Deposit	Active	2975	3/1/2017
EMPLOYEE, THREE	Check	Active	3262	3/1/2017

Sheet1 Sheet2 (+)

# Account Statement 2

Totals	0	\$18,715.00	0	\$1,045.00	0
--------	---	-------------	---	------------	---

## Employee Information

Name	Pay Type	Status	EE
EMPLOYEE, ONE	Direct Deposit	Active	✓
EMPLOYEE, TWO	Direct Deposit	Active	✓
EMPLOYEE, THREE	Check	Active	✓

## Payroll Check Information

Check #: 47519952

Date: 3/30/2017

Payee: EMPLOYEE, ONE

Net: \$1,112.33

Gross: \$1,228.15

Medicare: \$17.81

FICA: \$76.15

SUTA: \$14.49

FUTA: \$7.37

Work Comp: \$0.00



Employer taxes

Code	Work Date	Time In	Time Out	Wage	Hours
PYRL	03/01/2017	10:00 AM	12:00 PM	\$16.94	2
PYRL	03/01/2017	2:00 PM	6:00 PM	\$16.94	4
PYRL	03/02/2017	10:00 AM	6:00 PM	\$16.94	8
PYRL	03/03/2017	10:00 AM	6:00 PM	\$16.94	8
PYRL	03/06/2017	4:00 PM	6:30 PM	\$16.94	2.5

# Spending Summary

**Spending Summary as of: 03/20/2019**

---

**Client Name:** \_\_\_\_\_

**Participant Number I**  **Case Manager**

**Phone:** (  )

---

**ID FDS**

---

<b>Auth</b>	Start <input type="text" value="05/25/2018"/>	End <input type="text" value="05/24/2019"/>	% Time Elapsed <input type="text" value="82"/>	<div style="display: flex; justify-content: space-between;"> <span>% Elapsed</span> <span>% Remaining</span> </div>
-------------	---	---	--	---

---

**Dollars (Dollar Based Programs)**

Authorization ID	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
<input type="text" value="1233"/>	\$1140.00	\$665.00	\$0.00	\$475.00	 41%
<input type="text" value="1234"/>	\$5279.75	\$2950.36	\$653.28	\$2329.39	 44%
<input type="text" value="1235"/>	\$1569.40	\$416.91	\$242.54	\$1152.49	 73%
<input type="text" value="1236"/>	\$360.85	\$102.26	\$0.00	\$258.59	 71%

---

<b>Auth</b>	Start <input type="text" value="02/06/2019"/>	End <input type="text" value="05/24/2019"/>	% Time Elapsed <input type="text" value="40"/>	<div style="display: flex; justify-content: space-between;"> <span>% Elapsed</span> <span>% Remaining</span> </div>
-------------	---	---	--	---

---

**Dollars (Dollar Based Programs)**

Authorization ID	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
<input type="text" value="5678"/>	\$50.00	\$10.87	\$0.00	\$39.13	 78%



# Spending Summary 2

1236	\$360.85	\$102.26	\$0.00	\$258.59	71%
<b>Auth</b>	Start 02/06/2019	End 05/24/2019	% Time Elapsed 40		

Dollars (Dollar Based Programs)					
Authorization ID	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
5678	\$50.00	\$10.87	\$0.00	\$39.13	78%

Client Name:  
Authorization ID : : From Date 05/25/2018 To Date 05/24/2019

No records to display

Client Name:  
Authorization ID : : From Date 05/25/2018 To Date 05/24/2019

Service Code	Cost Center	Entry ID	Entry Type	Account Type	Employee / Program Name	Date of Service	Amount	Bill Rate
				1				

PYRL		3075859	Punch	Hourly		05/25/2018	-39.09	
PYRL		3379577	Punch	Hourly		06/03/2018	-17.37	
PYRL		3385768	Punch	Hourly		06/10/2018	-26.06	

# Acumen – Your Trusted Partner



# Contacts & Tools

## Acumen Fiscal Agent

- Email:
  - [Enrollment@acumen2.net](mailto:Enrollment@acumen2.net)
  - [customerservice@acumen2.net](mailto:customerservice@acumen2.net)
- Website:  
[www.acumenfiscalagent.com](http://www.acumenfiscalagent.com)
- Toll Free Phone: 866-235-4745
- Toll Free Fax: 844-343-2590
- TTY: 888-853-0010

## APD - ICP

- Email:
  - [ICP.SPD@dhsosha.state.or.us](mailto:ICP.SPD@dhsosha.state.or.us)
- CM Tools ICP webpage
  - Acumen Referral Sheet
  - Acumen Power Point
  - Acumen Referral Fact Sheet
  - Acumen brochure
  - Acumen Employer Authorization forms

