

Best Practices in Collaboration Between Financial Management Service Providers and Counselors

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Community Living Services of Oakland County

- Funded by the Oakland County (MI) Community Mental Health Authority
- CLS/OC was developed in October, 2004 after a response to a RFP issued by OCCMHA
- OCCMHA was looking to contract with an agency exclusively designed to advance Self-Determination, and to add choice of provider agencies for people with developmental disabilities in Oakland County.



Community Living Services of Oakland County

- Actively supporting 540 people, each self-directs their services via an individual budget and use of a Fiscal/Employer Agent.
- Our enrollment numbers increase each month by approximately 15-20 people per month, some are transferring from the other service provider, and some are new to the system.



Community Living Services of Oakland County

- Everyone who chooses CLS/OC is choosing Self-Determination, as it is our only model of support.
- GT Financial Services is the Fiscal/Employer Agent for everyone served by CLS/OC.
- Our agency is designed exclusively around the principles of Self-Determination and having people being served self-direct ALL of their authorized services through a Fiscal/Employer Agent.



GT Financial Services

- Founded by David Bair, LLP and Tim Carmichael, CPA, two lifelong friends who share a passion for helping people with disabilities.
- Provide F/EA services to 2500+ people in Michigan and Wisconsin.



GT Financial Services

We Believe...

Accountability, Collaboration, Face-to-face
Services, Professionalism, and the
Application of Technology

We believe in Self-Determination!



GT Financial Services

We provide:

- Payroll Agent Services
- Face-to-Face Kickoff Meetings
- Electronic Claims Submission
- Toll-Free Customer Service



Best Practice Item – Setting up a Program that Supports Self-Determination

- Involve the F/EA in the policymaking process – use their experience for tough questions like employee eligibility.
- Involve Clinical and Finance people- create partnerships not rivalries!



Best Practice Item- Face to Face Services

- Face-to-face enrollments – F/EA prepares enrollment documents and covers applicable procedures in the participant's home
 - Ensures that complicated tax forms are completed correctly.
 - Helps the individual understand their role as the employer.
 - Removes an unnecessary burden from counselors/supports coordinators.



Best Practice Item – Disbursements Cover Whole Budget

- F/EA is paying for every service in the plan not just payroll – could include paying invoices from staffing agencies professional service providers, etc.
 - Gives individual an easy way to monitor ALL service dollars.
 - Provides a true picture of public funding usage – makes planning easier and more flexible.



Best Practice Item – Claims Reporting

- F/EA prepares and submits claims in the required reporting format.
 - Makes F/EA a partner in creating efficiencies and ensuring compliance with regs.
 - Removes a duplication of effort – why manipulate the data in two places?



Best Practices Item – Make Sure your Customer Support Philosophies Align

- Understand the “customer experience”.
- Have the same goals.
- Ensure that we have clarified and are comfortable with our roles.



Challenges

- Monthly Reporting
 - Including enough data and making the report readable
- Measuring F/EA Performance
 - Surveys
 - Review Tools
 - Audits

