



Fiscal/Employer Agent Transition

KEY INFORMATION FOR SELF-DIRECTION STAKEHOLDERS

SEPTEMBER 2019

What you need to know...

- There are two providers:
 - Acumen (incumbent)
 - Morning Sun (new entrant)
- The two providers will present information on their companies today
- Your choice of Fiscal/Employer Agent (F/EA) is entirely voluntary
- You will have the ability to switch F/EA before the start of each quarter (4x per year)
This is restricted for tax filing purposes
- If you wish to stay with Acumen, you do not need to do anything
- If you chose to switch to Morning Sun, a new employer and employee packet must be completed

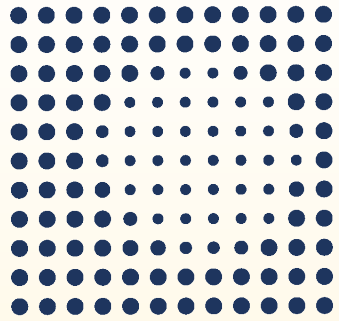
Timeline

- As the new vendor, Morning Sun is preparing its system to incorporate electronic visit verification (EVV)
- November 1 – November 30, 2019: Anticipated testing period for Morning Sun's system
- December: Enrollment with Morning Sun & system adjustments
 - Contact your Support Coordinators for the packets
- January 2020: Anticipated first payroll check for Morning Sun
 - NOTE: LDH is working closely with Morning Sun to prepare for this transition but may adjust the start date to April if additional time is needed for system testing or additional programming time to ensure payments process properly

Additional Questions

If you have any additional questions please send email to:

Selfdirection@la.gov



MORNING SUN

Your Financial Management Service

Louisiana

September 2019

Introductions



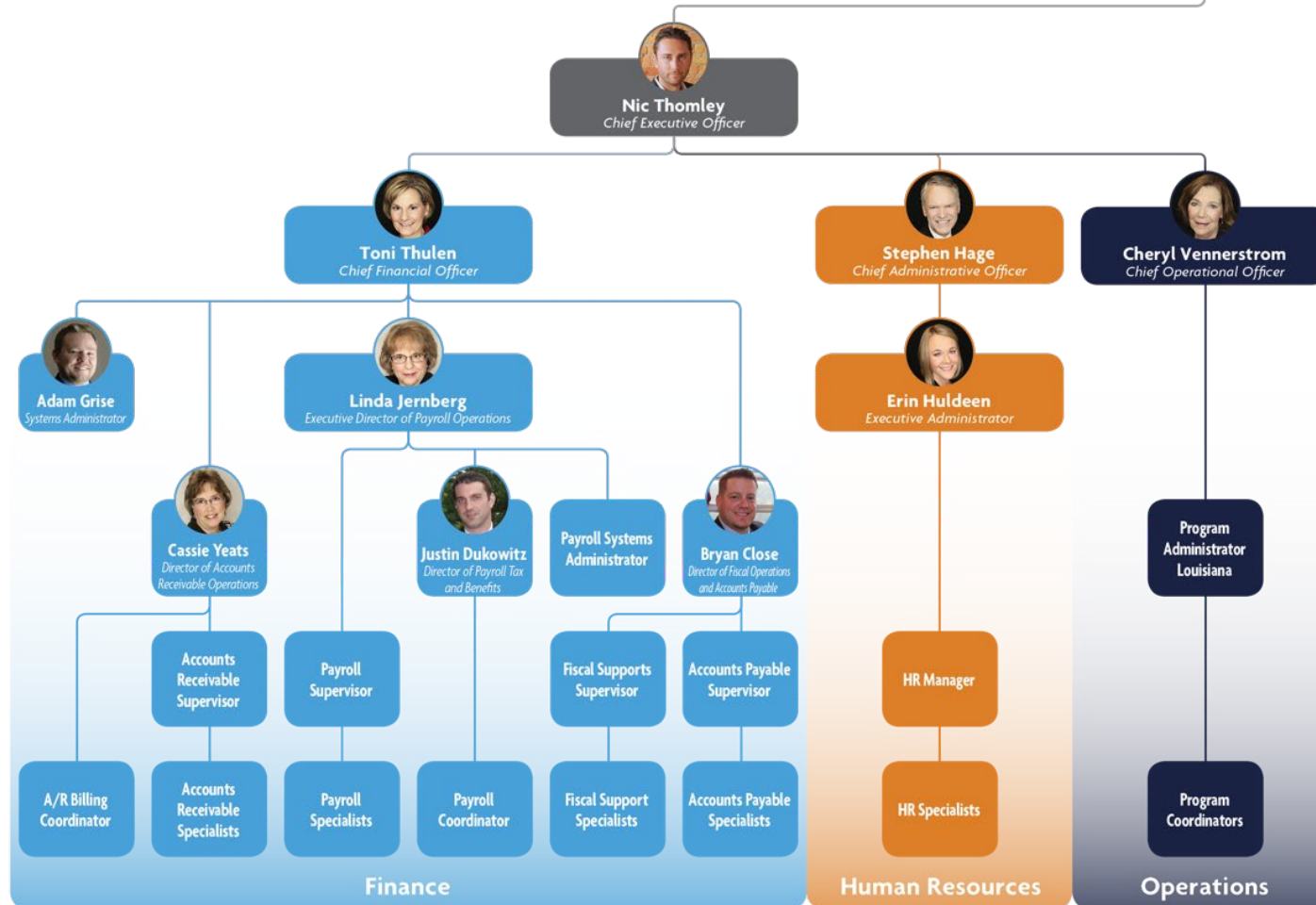
Nicolas Thomley, Chief Executive Officer



Cheryl Vennerstrom, Chief Operating Officer

Introduction

- Morning Sun is headquartered in Golden Valley Minnesota, a suburb of Minneapolis.
- We have been in business outside of the State of Minnesota since 2006 serving individuals in Utah, Oklahoma, Tennessee, Ohio and Alabama.
- Related entity, Orion ISO serves over 2,000 Minnesotans since 1999.
- Our businesses in Minnesota include traditional services- residential, in-home, case management
- Our customer service is provided to participants by phone, email and in person. We provide as much education and training as each person needs.
- We have tailored our financial systems to enhance the programs in the States with which we contract.



Management Strategy

- Finance Department organized by function with senior manager leadership in each area

- Payroll
- Billing
- Fiscal- budgets and expenses

The benefits of this approach include a high level of expertise, accountability, internal controls.

- Teams are organized by State. Staff are cross-trained.
- Continuous review of systems effectiveness, efficiency and customer satisfaction
- September 2019 review for a Minnesota Readiness Review; we scored 99 %.

Customer Service Strategy

- Louisiana based customer service
- Program Administrator is the supervisor of customer service and the local project manager.
- Program Administrator will be the primary contact for support coordinators, participants/employers and employees.
- Provide enrollment and follow up on missing or incorrect forms, payroll issues, interface with support coordinators for authorizations or other budget or utilization issues.
- Provide education and training on self-direction, FMS systems and other relevant program information.
- Program Administrator provides participant/employer and LDH with information after research and coordination with payroll, fiscal and billing.

Customer Service

Transition

- Cheryl Vennerstrom, Chief Operating Officer, Morning Sun
- Toll free number 1-833-239-3768
- cherylv@morningsunfs.com

Customer Service System

Ohio Office Calls May 2019	
Total calls received	947
Total calls answered	869
Voicemails left	78
Average talk time	3:50
Voicemails returned	78
Percentage answered/received	90%
Percentage of voicemails returned same day or within 24 hours.	100%

Customer Service Advantages

- Participants are assigned to a Louisiana based Administrator or Coordinator
- Participants/Employers and employees speak to the same person each time
- Coordinators understand Louisiana program specifics and educate and train employers and employees
- All Morning Sun staff are trained on self-direction philosophy, person-centered thinking, cultural responsiveness.
- Program Administrator provides “hands-on” supervision

Customer Satisfaction Surveys

STATE	2017	2018
Minnesota	94%	95%
Ohio PASSPORT	98%	98%
Oklahoma	100%	100%
Utah	95%	97%
Tennessee	99%	N/A

Enrollment

- Within 2 days of referral the participant will be mailed, emailed or receive an on-line version of our employer and employee packets.
- When the participant/employer returns the packets they are reviewed for any missing or incomplete items. Local staff contact employers for missing items.
- Once we receive complete employer and employee packets, we will process within 4 days.
- Once all packets are complete and the authorization is in place, employees can start working. Support Coordinator are contacted, “Good to Go.”
- Call Us ! We will help you.

Self-Direction Access

- Morning Sun will provide phone, email or in person assistance
- Language line for interpreter assistance in 176 languages
- In person interpreters or translation services
- All staff receive on-going training on cultural responsiveness and diversity

Electronic Visit Verification (EVV)

- Morning Sun Financial Services has partnered with Direct Care Innovations (DCI) for our Electronic Verification System (EVV) for Louisiana.
- DCI has well developed cloud-based technology solutions and is the current EVV provider for Acumen.
- Morning Sun will provide EVV with all required elements compatible with:
 - Smart phones and tablets using Wi-Fi
 - Web based console *

Payroll Issues

- Every other week schedule, payment on Friday.
- We are committed to paying people on time!
- Issues will be flagged and moved into an “issues folder” for the Louisiana coordinators to follow up with the employer.
- Acceptable time entry includes authorization by both employer and employee, correct dates, no overlapping hours with another employee, within budgeted amounts.
- Payroll due dates are enforced, late time entry is paid on out of turn pay date, 3 days following original pay date.

Expense/Utilization Reports

- Summary payroll payment reports will be mailed, emailed or can be viewed in the web portal in real time.

The Morning Sun Difference

- We have a local presence
- We ensure participants are satisfied with our services
- We provide easy access to information
- We are flexible
- We are committed to processes that work for participants
- We are experienced at vendor turnover

QUESTIONS ?

- Contact :
 - Cheryl Vennerstrom, Chief Operating Officer
 - 1-833-239-3768



Acumen – *Your* Fiscal Agent

Elizabeth Kiefer – Executive Director
of LA Programs for Acumen Fiscal
Agent, LLC

elizabethk@acumen2.net

(504) 655-8754



Welcome

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THANK YOU!

Acumen is the original Fiscal/Employer Agent ("F/EA"), serving participants/employers, their families, and employees since 1995 across nearly 30 states. **Acumen is excited to announce the opening of an office and locally based Agent staff in Louisiana in late 2019!**

Acumen's Services Include:

- ✓ Locally-based Agent support, and filing of all federal and state forms.
- ✓ Payroll processing.
- ✓ Tax calculation, withholding, and filing.
- ✓ Vendor payment services.
- ✓ Budget management tools.
- ✓ Personalized attention.
- ✓ Workers' compensation.
- ✓ Training.
- ✓ Web-based time entry.
- ✓ And much more!

As a national F/EA provider serving thousands of individuals, we understand the needs of our clients. Acumen continues to focus on providing the best possible customer experience, including an easy to use platform that is available from any internet connected device or from our Mobile App!



National Customer Satisfaction Rate



Of Fiscal Agent Experience



Of Payments Made Are Accurate and Timely

Beyond technology, Acumen's quality of service is among the highest in the industry.

Customer Spotlight

Over 99% of our customers nationally are satisfied with Acumen's services. We love hearing feedback from our customers so that we can improve each and every day!

"Acumen's program staff go above and beyond the call of duty. They treat me with grace, dignity, and respect. I am truly appreciative."
— Customer, Georgia



"Acumen staff are patient, professional, and caring. It is a pleasure speaking with them, and their customer service is excellent!"
— Customer, Louisiana



"When I call Acumen my questions are quickly answered, and they always know exactly what they're doing."
— Customer, Utah



Why Consider Acumen?



Acumen will seek to support Clients without service disruption.



Experience! Acumen has supported thousands of families in Louisiana for over a decade and is a nationally recognized Fiscal Agent.



Fast, attentive and professional Agents staff located in Louisiana for your convenience with a local office opening in late 2019!



Access to a Louisiana-based Agent for personalized support.



Industry-leading operations, ensuring payments made are accurate and timely.



EVV technology platform, with web-time entry, budget management, training, all in one place, and best of all, you're already using it!



Mobile App, compatible on iPhone and Android, to manage all fiscal agent services, such as time entry and mileage tracking.

Facilitating freedom, choice, and opportunity through innovative fiscal agent solutions.



Call to Learn More
(855) 514-9938

****LOUISIANA
OFFICE OPENING
LATE 2019!!****



Acumen Fiscal Agent

Call to Learn More

(855) 514-9938 toll free

Open Floor



We want to hear from *you!*

Thanks Again!!!

elizabethk@acumen2.net

(504) 655-8754