

DDS



FY27 Open/FY26 Close Training for Providers

April 1, 2026

Housekeeping

- Introductions
- Please mute yourself
- Enter questions in the chat function
 - We will periodically stop to answer questions
- Open/Close Power Point will be posted to the DDS/POS Contracts website
 - Links will be included in the posting
 - Q&A will be posted as well

Agenda

- RFR Updates
- Cutover: Programs Rebid
- UFR & Provider Updates
- Change in Contractor Identity
- Timely Billing and Documentation
- Accommodation Rate Contracts
- Rosters
- Guidance Updates
 - Start-up
 - Financial Assistance
 - ALTR Day Staffing
- Rate Regulation Updates
- Adult Long Term Residential
 - Occupancy
- Site IDs
- Year End Timelines

RFR Updates: FY27

Independent Living Supports (formerly known as In Home Supports) *

- March 25: priority deadline for a July 1st contract start date

DESE/DDS Program *

- March 6: priority deadline for July 1st contract start date

Supported Collaborative Living *

- New pilot program
- April 15: priority deadline for July 1st contract start date

Submissions received after the priority deadline might not have a contract for 7/1 and could impact service delivery and billing

*Proposals received after the priority date will be reviewed on a quarterly basis beginning in July-September

RFR Planned: FY27

Contracts in these activity codes will terminate on June 30, 2027

Clinical Team: 3170

Corporate Representative Payee: 3274

Pilot Program that will become regular services

ASD Community Wrap Around: 7120

COMMBUYS Clean Up

DDS will be updating some RFR language and other bid documentation in May 2026

COMMBUYS alerts providers of changes with a mass email

Qualified Providers: nothing is required in COMMBUYS to stay on contract

DO: review the RFR Change Summary document to see what updates were made

Cut Over Contracts due to Rebids

DDS/DESE Program

- Activity Codes: 3700 & 3738

Independent Living Supports

- Activity Code: 3798 & 3780

Steps in Cut Over: Contracts and Document IDs

- As evaluation teams complete reviews, DDS Central Office will email award letter and Master Agreement standard contract form to qualified providers to complete and sign electronically
- Until the Master Agreement contract is signed and processed to final, regional contract offices cannot begin process to execute Rosters
- Delays in signing the Master Agreement contract may result in delays in billing
- New Document IDs will be created as a result of rebids. Current Doc IDs will terminate on June 30, 2026

Steps in Cut Over: Enrollments

- All current enrollments will transition to new Doc IDs
- All existing enrollments will be end-dated and new enrollments created and interfaced to EIM.
- If you don't see enrollments in EIM by August 1, or see errors, please reach out to your regional contract office

Uniform Financial Statements and Independent Auditor's Reports (UFR)

UFRs are due annually to OSD based on your fiscal year end date.

****See Chart below****

If you need an extension, you must make the request at: [UFR Extension & Allocation Forms - Intellistack](#)

If you have any technical questions regarding your UFR, i.e., login, uploading documentation, etc., email OSD at efilehelp@mass.gov

Fiscal Year End	UFR Filing Due
6/30	11/15
9/30	2/15
12/31	5/15

Supplier Diversity Plans (SDP)

POS Providers must submit an updated SDP form with their UFR and there must be spend for reporting and current year with certified partners

Rolling Enrollment/Qualified Provider RFRs

- Use updated SDP forms provided with the RFR in COMMBUYS

You can download the correct version from here:

<https://www.mass.gov/lists/sdo-forms> The correct form is under the header ***Supplier Diversity Program (SDP) Plan Form for Human and Social Services/Purchase of Service (POS)***

More information about SDP can be found with the Supplier Diversity Office: [Supplier Diversity Office \(SDO\) | Mass.gov](#)

Provider Updates

Email DDSPOSProcurement@mass.gov if any of the following may need an update:

- Address Change
- Banking changes
- Legal Name changes
- Contract Authorized Signatory Listing (CASL) Form

Central Office Contracts will work with providers to make changes to MOSAIC (formerly MMARS)/Comptrollers Office.

Providers are responsible for updating EIM, other Virtual Gateway applications, and COMMBUYS.

Change in Contractor Identity

Best Practices for Change in Contractor Identity

- *DDS strongly encourages communication throughout planning process – please reach out to discuss with Regional Directors*
- DDS requires minimum of **120 days** formal notice of a merger or affiliation to all impacted Regional Directors, Central Office Contracts Administration, and Commissioner
- **DDS must approve all contract/program transitions – existing contracts may not remain with surviving entity/affiliation**

Change in Contractor Identity

Mergers & Affiliations Review Process

- Complete and submit documentation describing how programs will operate under the new/affiliated entity
 - Must be submitted **90 days** before the target merger, affiliation or change in ownership date
- Regional Offices and Office of Quality Enhancement will conduct reviews of programs
- If you are considering a Merger, Affiliation or Change in Ownership— please review DDS’s change in contractor identity policy in detail:
 - [DDS Contracts Website](#)

Timely Billing and Documentation

- Submit billing by the 21st of the following month after service delivery.
- Providers must maintain adequate documentation for all services rendered in such detail as to substantiate claims for payment.
- DDS defines the requirement to maintain records necessary to substantiate billing as follows:
 - Attendance records / logs that are signed and dated
 - Brief summaries of the nature of service provided such as progress notes, daily logs, service encounter summaries, or other description of each service encounter. The date, time worked, staff who worked, individual who received service, and a short summary of what the staff did with the individual should be documented.

End of Year Billing

- CEC deadline for the fiscal year is the 2nd week in July
- Last Billing in the fiscal year in EIM will be announced
- Run Payment Tracking Reports to make sure what has been billed has been paid
 - Report issues to Regional Contracts Office ASAP
 - Something not been billed? Bill prior to July 30th
- Prior Year Deficiency (PYD) – payments made after the fiscal year closes
 - Needs Comptroller approval
 - Payment can take up to six months to be processed
 - Uses FY 27 funds so impacts Area Office budgets

Accommodation Rate Contracts

DDS requires attendance reporting for Accommodation Rate (AR) Contracts that have enrollments, but this is not currently enforced by EIM in every case.

For FY27, EIM will require that an AR SDR is reported before releasing an AR invoice for the activity codes listed below. A supplemental AR SDR can be created at a later date to make any attendance corrections.

AR Activity Codes with Required SDR

3182 Emergency Stabilization Residence

3759 Site Based Respite

3196 Transportation (AR)

6753 Agency with Choice Admin Fee

7120 Intensive Community Wrap Around Services (ICWAS)

Supported Collaborative Living Pilot (SCL)

FY27 Rosters & Contracting Processes

- DDS authorizes services, not dollars
- When DDS authorizes a service, there is a commitment to funding those services
- DDS determines the amount of funding necessary to support authorized services, and reserves right to modify those based on actual utilization

FY27 Rosters & Contracting Processes

FY26/27 Open/Close Process

- No format changes from FY 26
- DDS will continue to use FY26 Roster to manage the remainder of FY26
- DDS will use FY26 roster to populate initial/annualized FY27 rosters
- Providers and Area Offices may continue to negotiate changes to service authorizations and rosters. **Changes will be reflected in amendments during FY27.**
- **Standard Contract Form:** use updated form dated 2/23/2026

FY27 Rosters & Contracting Processes

Activity Codes and Adjustment Factors

DDS will use roster formats for the following activity codes. When establishing the initial FY27 encumbrance, the following adjustment factors may be applied.

Over course of fiscal year DDS will modify encumbrances based on actual utilization.

Activity	Activity Name	Adj. Factor
3163	Community Based Day Supports	70%
3165	Adult Day Health Services	70%
3168	Supported Employment Services	70%
3181	Group Supported Employment	70%
3196	Transportation (Unit Rate)	70%
3291	Individualized Staffing Support	70%
3664	Day Habilitation Services	70%
3777	Nursing Facility Active Treatment	70%

Activity	Activity name	Adj Factor
3253	Vision and Mobility	95%
3274	Corporate Representative Payee Services	95%
3282	Assistive Technology Devices	100%
3289	Assistive Techology Eval & Training	95%
3700	Family Support Navigation	95%
3701	Respite in Recipient's Home	95%
3702	Respite In Care Giver's Home	95%
3703	Individualized Home Supports	95%
3705	Child Respite in Caregiver's Home	95%
3707	Adult Companion	95%
3710	Behavioral Supports and Consultation	95%
3712	Emergency Stabilization in Caregiver's Home	95%
3716	Community Peer Support/Residential Peer Support	95%
3731	Respite in Recipient's Home-Hour	95%
3735	Child Respite in Caregiver's Home	95%
3773	Intensive Flexible Family Support Services	95%
3781	Financial Assistance Administration	95%
3782	Remote Supports Specialized Devices	95%
3786	Remote Supports and Monitoring	100%
3798	Individual/Community Supports	95%
7100	Autism Coaching Support-Agency	95%
7102	Adult Autism College Navigation - Agency	100%
7105	ASD Pre-Engagement-Agency	95%

Start-up Contracts

- Area Office authorization is not sufficient to purchase any items associated with a startup or capital contract
- If a contract is not signed, the Department will not reimburse provider for costs incurred
- Make sure a contract is signed and fully executed before you make any purchases or incur any costs
- FY27 funding limits for new programs
 - ALTR: \$125,000
 - CBDS: \$60,000

Start-up Contracts

Changes for FY 27

- Updated Start-up Expense Proposal Worksheets
- New requirement of Start-up Invoice Workbook
- Updated guidelines to include new invoicing process and submission requirements

Updated guidance and associated Excel workbooks will be posted to the DDS Contracts webpage

Upcoming Contract Training Session

- **Save the date: April 29, 2026, 10 am to 12 pm**
- Will focus on start-up contracts and associated workbooks

Adult Long Term Residential – Day Staffing

FY 25/26 day staffing approach will remain in effect in FY 27

- **Permanent Situation** – adjustment to contract made using a rate model change
- **Temporary Situation** – adjustment to contract using add-on's; add-on's will be periodically reviewed and adjusted as needed, at a minimum, every six (6) months
- **Blended Situation** – adjustment to contract uses a rate model change and, if necessary, add-on's - add-on's to be reviewed and adjusted as needed, at a minimum, every six (6) months

Financial Assistance Contracts Guidance (3780)

- Financial assistance is intended to be short-term, limited in scope, and provided when all other resources have been fully explored and exhausted
 - DDS is always the payor of last resort
- Provides consistent parameters and expectations for various types of financial assistance such as but not limited to:
 - Rental assistance
 - Utilities, food, and emergency housing
 - Specialized equipment & transportation
- Effective July 1, 2026, for all new 3780 contracts
- Check writing fee will be discontinued

Rate Regulation Update

January 1, 2026

- 101 CMR 414.00: Rates for Family Stabilization Services
- Payments will be retro back to January 1, 2026, when promulgated

July 1, 2026

- 101 CMR 411 Rates for Certain Placement, Support, and Shared Living Services
- 101 CMR 420 Rates for Adult Long-Term Residential Services
- 101 CMR 423 Rates for Certain In-Home Basic Living Supports
- 101 CMR 424 Rates for Certain Developmental and Support Services (Corp Rep Payee & RSM)

Timeline for Implementing Updated Rates

- EHS will inform providers on distribution list when updated regulations are posted and public hearings scheduled
- Proposed rates will not be final in time for FY27 initial contracting
 - DDS will only use published rates – not proposed rates
 - When rates are finalized, DDS will implement FY27 rates retroactive to July 1
- As regulations are finalized, DDS will post updated Rate Regulation Table on the DDS/POS web site
 - [Rate Table](#)

ALTR – Occupancy Overview: Three Primary Documents

Occupancy Worksheets

- Single Contract-Level Rate
- Displays Rate Components for all sites in a Contract
- Created and Updated by Central Office whenever site attributes change

Occupancy Rate Application (ORA)

- For new, re-opened, or materially changed sites
- Available on our website
- When signed, incorporated into Occupancy Worksheet

Site Improvement Form

- Pre-Approval Originates with Area and Region
- Central Office signs off on Payment and Depreciation schedule after work completed and documentation reviewed
- When signed, incorporated into Occupancy Worksheet

Adult Long Term Residential – Occupancy Worksheets

- Since the new regulation is currently under review, the FY27 occupancy worksheet distribution and review process will be postponed until the 101 CMR 420 regulation is published.
- The worksheets will reflect all signed ORAs and Site Improvement Forms. Prior to rate publication, DDS will continue paying in accordance with the most recently reviewed FY26 occupancy worksheet.
- To ensure accuracy, FY27 occupancy worksheets will not be distributed prior to rate publication. Upon publication, FY27 rates will be retroactively applied back to 7/1/26.
- Providers with sites shared with MBY or MCB should discuss FY27 details with the corresponding agency.

Adult Long Term Residential – Occupancy Rate Application (ORA)

As previously shared, the FY26 deadline for new ORA submissions is 4/3/26

Documentation deadline for FY26 ORAs is 4/17/26

On request, Regions may execute a cost reimbursement contract to cover costs for the remainder of the FY for authorized sites that opened without a FY26 ORA

Submissions after this point must be made on a FY27 ORA



FY27 ORAs will be made available on our website after rate publication.

Adult Long Term Residential – New Site Rate Indexer (NSRI)

- A new process, the **New Site Rate Indexer (NSRI)**, will be implemented as of 7/1 and will remain in effect until ALTR rates are published.
- This process will determine a site's Occupancy Rate Index, and the actual rate will be finalized **after** rate publication. Supporting documentation will be gathered and reviewed.
- Payments based on the new index will not begin until rate publication.
- **New Site Rate Indexer (NSRI)** submissions will be accepted as of 7/1.

Adult Long Term Residential – General Guidelines for ORAs

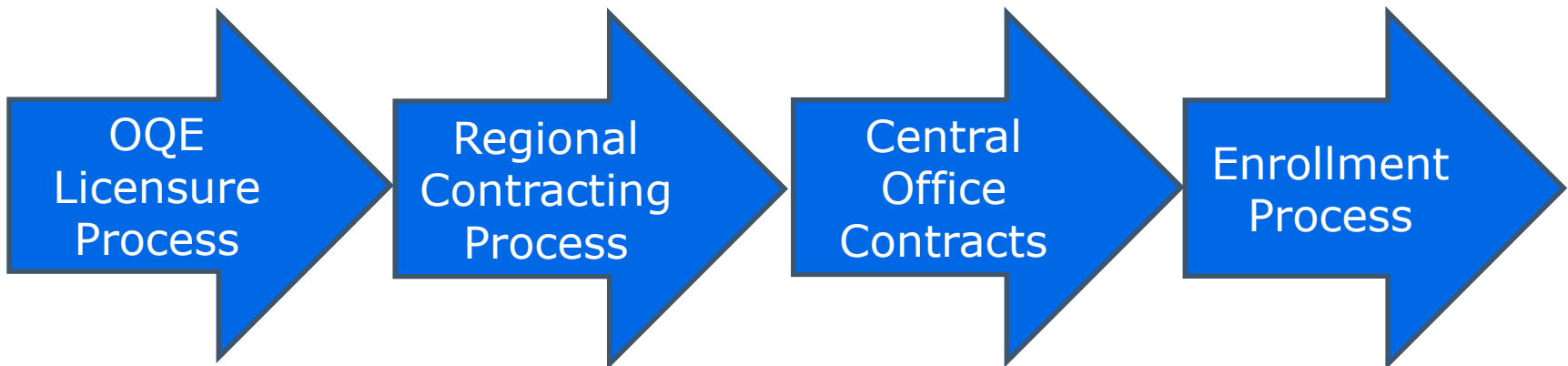
- FY27 ORAs will be retro to 7/1/26 or date of move-in, whichever is later.
- ORAs must be submitted no later than 60 days after move-in. ORAs will not be reviewed until first move-in has occurred. ORAs may be submitted up to two weeks before realistic move-in date.
- DDS pays only for sites that are occupied by DDS residents.
- Sites that are owned by a related party are subject to related party rules. DDS checks the legal ownership of all new sites.
- ORAs may be issued with provisional rates. Provisional rates are good for one year after first move-in.
- Contact Central Office any time for general assistance or help with advance planning.

Adult Long Term Residential – Occupancy Site Improvements

- Providers must receive a signed site improvement pre-authorization form from the Area and Regional Office before incurring any costs
- DDS will not fund site improvements without signed pre-approval
- After project is complete and fully paid, provider submits documentation (final invoices and proof of payment) to Area Office.
- Central Office will compute and include depreciation in the Occupancy Worksheet
- Depreciation reimbursement will be retroactive to the payment date or the first day of the fiscal year when documentation is submitted (whichever is later)

Site ID and Enrollment Process

- Process in which a licensed site (using a "site ID") is connected to a location and active contract for the purpose of enrolling individuals into the service
- Process and paperwork must be completed with OQE and Regional Contracts Offices before an enrollment can be built
 - For licensed services, especially ALTR and CBDS, speak with QE early in the process
 - For ALTR, a site ID cannot be assigned until an individual moves in



Year End Timelines/Deadlines

April 3: Deadline for submitting new FY26 ORAs

April 17: Documentation Deadline for FY26 ORAs

April 24: Amendment Deadline

- FY26 Amendments Standard Contract Forms, Rosters, and SSFs

April 23: Last Ready Payments processed

May 1: FY27 Documentation Submission Deadline

- Standard Contracts, Rosters, and SSFs

TBD: FY27 ALTR Rate Publication - FY27

Occupancy Worksheets will be sent to providers

Contracts Training Sessions

Focus on specific aspects of contracting with DDS

- Standard Contract Form and Attachments 1, 3 & 6
- Rosters and SSF
- Billing and EIM Reporting

Often includes live demonstrations

Program will continue in FY 27

Calendar invites to these will be forwarded by Regional Contract Managers

Helpful Emails and Web Sites

Emails

Questions related to ALTR Occupancy (forms, worksheets, etc.):

DDS-POS-Occupancy@mass.gov

Questions related to BIDS/RFR/UFR or Provider Info Updates:

DDSPOSProcurement@mass.gov

Web Sites

POS Guidance Documents

[Guidance Documents | Mass.gov](#)

POS Contracts Information: Rate Tables, Forms, Trainings, etc.

[DDS Contracts Information | Mass.gov](#)

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Questions	Answers
Can you post the COMMBUYS numbers for those contracts?	ILS-27: COMMBUYS BD-26-1023-1023C-1023L-125153 DESE-27: COMMBUYS BD-26-1023-1023C-1023L-124541 SCL-27: COMMBUYS BD-26-1023-1023C-1023L-125572
Can we add documents once a bid has been submitted for an RFR, or do we need to withdraw the quote to add documents?	You can add documents to a response in COMMBUYS. A job aid to do can be found here: https://www.mass.gov/doc/how-to-withdraw-reopen-and-resubmit-a-quote-in-commbuys/download
Are you able to retouch on the statement made about code 3170 Clinical team?	3170, Clinical Teams, will go out for rebid in FY 27. SSQUAL 3710 is not up for rebid.
Is the DESE 3700 the same as Family Navigation 3700?	DESE-27 replaces DESE-19; if you are qualified for 3700 through SSQUAL-23, no action is needed at this time.
Please define CEC.	CEC is a Credit Memo Encumbrance Correction.
Does DDS intend to provide start-up costs for the new SCL pilot? If so, will it use the ALTR cap?	Supportive Collaborative Living does not have a start-up contract component.
Is there a start-up for employment supports, or are those part of CBDS?	Start-up funds are only available for CBDS and not employment supports.
Is start-up still available for new CBDS programs?	Yes, start-up funds may be sought for new CBDS programs.
Will the 3780 limitations apply to AFC with DDS wrap?	The guidance will cover all topics, including AFC.
Where can we find the current 3780 guidelines?	There is no published guidance prior to 7/1.
Is there a draft of the ALTR rates calculations yet?	No. The draft will be posted once the public hearing is set.
When can we expect proposed new rates and a public hearing for 101 CMR 420?	The rate is currently under review; EHS will post the public hearing notice.

Questions	Answers
Is there any written instruction available for how to participate in the 3780 contract for 3798 providers until 7/1?	Please contact the Area Office where this situation may apply.
Does DDS intend to do Occupancy Rate Worksheets in the spring for new contracts, or wait until new rates are adopted?	FY27 Occupancy Worksheets will be distributed once new rates are published. DDS will continue using FY26 worksheets in the interim, with FY27 rates applied retroactively to 7/1/26.
Will all service codes under 101 CMR 423 be increased, or only certain ones (e.g., 7102 College Navigation)?	All rates under CMR 423 are under review, including 7102.
Can we anticipate a rate increase for 7100 and 7105 (Coaching and Pre-Engagement)?	These fall under CMR 414, which is still under review.
When should we expect to hear back regarding ILS-27?	Proposals are being reviewed right now and we hope to have contracts and memos out in early May.
Where can we find the SCF in the old format, or should we use DocuSign going forward?	<p>DocuSign should be used for all POS contracts that require a SCF. The link to the DocuSign form and job aid can be found on our webpage: DDS Contracts Information Mass.gov</p> <p>If you need to process a SCF for a non-POS contract, the form can be downloaded from the Comptroller's website: Forms - Office of the Comptroller</p>
What is the plan for FY27 Occupancy Worksheets?	Distribution date is TBD (dependent on rate publication). DDS will pay based on FY26 worksheets in the interim, with FY27 rates applied retroactively.

Questions	Answers
Is the new site rate indexed for new sites or existing ones?	All sites have indexed rates that reference the CMR 420 regulation. The New Site Rate Indexer (NSRI) is a new, temporary process that will be used to develop an initial rate index for a new site in advance of an ORA to be completed later when the new rates are published. This will allow us to complete new ORAs quickly when the new regulation is final. New sites that open between 4/4/2026 and the promulgation of the new ALTR rates can start the NSRI process as of 7/1/2026.
Who should be contacted for enrollment issues (missing, duplicate, or incorrect enrollments in EIM)?	Contact Area and Regional offices.
If clients are missing in EIM or not pulling from Mosaic, who should be contacted?	Contact Area and Regional offices.
Who handles removing names from EIM?	Contact Area and Regional offices.
Who receives prequalification applications?	This process is for new applicants who wish to be qualified for a DDS contract. The prequalification determines if a provider is financially stable to perform such services. If you are a new provider, please email us: DDSPOSProcurement@mass.gov
When can we expect AWC award letters?	Questions related to RFR and award information can be sent to DDSPOSProcurement@mass.gov .