

DDS



FY25 Open/FY24 Close Training

April 10, 2024

Agenda

- Welcome and Introductions
- RFR Updates
- Change in Contractor Identity
- Timely Billing and Documentation
- Accommodation Rate Contracts
- Rate Regulation Updates
- Roster/FMIS
- Cutover
- Shared Living and Adult Long Term Residential
- Occupancy
- Year End Timelines

Presentation will be posted on the DDS/POS web site

RFR Updates: FY24

Shared Living*

- March 28th was deadline for a July 1st contract start date

Assistive Technology*

- April 16th: priority deadline for July 1st contract start date

Remote Supports and Monitoring*

- May 7th: priority deadline for July 1st contract start date

Urban Youth Collaborative

- Closed March 25th and is under review

Home Based Residential Supports Pilot

- Reissuing bid to identify providers for specific regional programs

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

RFR Planned for FY25

Supplemental Day Services

- RFR is specific to MassHealth services for which DDS individuals are not eligible

ASD Pre-Engagement Coaching and College Navigation

Supplier Diversity Plans (SDP)

Competitive/limited award RFRs

- SDP submissions are 25% of the total score of the RFR
- Pay attention to the instructions in the RFR related to how SDP will be scored
- Use the SDP form provided with the RFR in COMMBUYS

Rolling Enrollment/Qualified Provider RFRs

- Use updated SDP forms provided with the RFR in COMMBUYS

More information about SDP can be found with the Supplier Diversity Office: [Supplier Diversity Office \(SDO\) | Mass.gov](https://www.mass.gov/info-details/supplier-diversity-office)

Change in Contractor Identity

Best Practices for Mergers & Affiliations

- Communication with DDS is key throughout process
- DDS must approve that programs/contracts can move to a new organization
- ***DDS strongly encourages communication throughout planning process – please reach out to discuss with Regional and Area Directors***
- DDS requires minimum of 90 days formal notice of a merger or affiliation to trigger review and contract assignment process – ***this should not be the first time DDS hears about it!***

Change in Contractor Identity

Mergers & Affiliations Review Process

- Providers must give minimum of 90 days written notice to all impacted Regional Directors, Director of Contracts Administration, and Commissioner.
- Providers must complete and submit checklist documents describing how programs will operate under the new/affiliated entity.
- Regional Offices and Office of Quality Enhancement will conduct reviews of programs
- If you are considering a Merger or Affiliation – please review DDS's change in contractor identity policy in detail:
 - [DDS Contracts Website](#)

Timely Billing and Documentation

- Submit billing by the end of the month following 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.

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 FY25, 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)

7120 Intensive Community Wrap Around Services (ICWAS)

FY25 Rosters & Contracting Processes

New Roster Features:

- **By Unit Type:** Rosters categorized by unit type (hourly, daily, monthly, trip)
- **Templates:** Two templates issued—one for hourly rosters (with ten tabs) and another for all other types
 - **Template formats must be used as provided without alterations.**

Format Changes:

- Moved signature authorization and financial management section to roster header, these sections are collapsible and for DDS use only.
- Service authorization section pre-formatted and is now filterable and sortable.
 - **DO NOT** insert rows or columns to new rosters. Sufficient pre-formatted rows have been provided.

Data Tab: Compiles all roster data for Central Office, available for all users.

FY25 Rosters & Contracting Processes

DDS has updated rosters for FY25, extending new roster management methods from CBDS and Supported Employment to all hourly and daily unit rate codes

Purpose:

- Streamline contract and encumbrance management processes
- Simplify fiscal year cutover process
- Separately manage service authorizations and service utilization

Methodology:

- 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

FY25 Rosters & Contracting Processes

FY24/25 Open/Close Process

- DDS will continue to use FY24 Roster formats to manage the remainder of FY24
- DDS will use FY24 roster to populate initial FY25 rosters, which will be shared back to providers
- DDS will set the initial FY25 encumbrance for the contract based on initial FY25 roster
- Providers and Area Offices may continue to negotiate changes to service authorizations and rosters. **Changes will be reflected in amendments during FY25.**

FY25 Rosters & Contracting Processes

Activity Codes and Adjustment Factors

DDS will use new roster formats for the following activity codes. When establishing the initial FY25 encumbrance, the following adjustment factors will 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 | 95% |
| 3282 | Assistive Technology Devices | 100% |
| 3289 | AT 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% |
| 3709 | Family Training | 95% |
| 3710 | Behavioral Supports and Consultation | 95% |
| 3712 | Emergency Stabilization | 95% |
| 3716 | Peer Support | 95% |
| 3731 | Respite in Recipient's Home-Hour | 95% |
| 3735 | Child Respite in Caregiver's Home | 95% |
| 3764 | Facility Day Habilitation | 95% |
| 3773 | Intensive Flexible Family Supports | 95% |
| 3781 | Financial Assistance Administration | 95% |
| 3782 | Remote Supports Devices | 100% |
| 3786 | Remote Supports and Monitoring | 95% |
| 3798 | Individual/Community Supports | 95% |
| 7100 | Autism Coaching Support | 95% |
| 7102 | Adult Autism College Navigation | 100% |

Rate Regulation Update

Completed

- 101 CMR 414.00: Rates for Family Stabilization Services
 - Rates are published
 - Retro payments back to January 1, 2024

July 1, 2024

- 101 CMR 411.00: Rates for Certain Placement, Support and Shared Living Services
- 101 CMR 420.00: Rates for Adult Long Term Residential Services
- 101 CMR 423.00: Rates for Certain In Home Basic Living Supports
- 101 CMR 424.00: Rates for Certain Developmental and Support Services
 - Corporate Representative Payee
 - Remote Supports and Monitoring

January 1, 2025

- 101 CMR 420.00: Rates for Certain Developmental and Support Services
 - Clinical Team

Cut Over Contracts due to Rebids

Shared Living

- Activity Codes: 3150 and 3752

Assistive Technology

- Activity Codes: 3289 (Unit) and 3282 (Cost)

Remote Supports and Monitoring

- Activity Codes: 3786 (Unit) and 3782 (Cost)

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 FY25 initial contracting
 - DDS will only use published rates – not proposed rates
 - When rates are finalized, DDS will implement FY25 rates retroactive to July 1
- As regulations are finalized, DDS will post updated Rate Regulation Table on the DDS/POS web site
 - [Department of Developmental Services | Mass.gov](https://www.mass.gov/info-details/department-of-developmental-services)
- In Home Supports, Corp Rep Payee and Remote Supports funding will be based on current rates. Blended Rates for Shared Living and ALTR will be based on current rates.

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 Service Summary Forms (SSF)
- Delays in signing the Master Agreement contract may result in delays in billing
- New Doc IDs will be created as a result of rebids. Current Document IDs will terminate on June 30, 2024

Steps in Cut Over: Enrollments

- All current enrollments will transition to new Doc IDs
- There are approximately 1,550 Shared Living enrollments, 1,700 Assistive Technology enrollments and 80 Remote Supports and Monitoring enrollments that have to “cut over” to new Document 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

Shared Living and Adult Long Term Residential - Operational Contracts

Reminder: FY25 contracts will initially be based on FY24 rate schedules. DDS will recompile contract rates after the new regulation is published. We will send a new set of reports and will make rate adjustments in EIM retroactive to July 1.

Blended rates will be compiled on a new software platform.

- New blended rate reports resemble current report, combined into a single contract document.
- Shared Living reports will display names and enrollment IDs.
- ALTR reports will reference location IDs instead of QE IDs
 - Location IDs are permanent identifiers for places and are created on demand by CO.
 - QE IDs are basically licenses to provide services.

Adult Long Term Residential – Occupancy: 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 a site changes

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

- Existing occupancy contracts: Final FY24 Accommodation Rate used to start FY25 billing. No occupancy worksheets required.
- After the new rates are published, Central Office will create FY25 Occupancy Worksheets with FY25 rates and send them to providers. They will reflect any newly signed ORAs and Site Improvement Forms.
- Providers update offsets and provider info and send signed worksheets back to Central Office (CO). Contact CO if other changes are requested. Notify CO if homes are unoccupied!
- Central office confirms offsets, signs, and returns worksheets to providers. Rates will be retroactive to July.

Adult Long Term Residential – Occupancy Rate Application (ORA)

New ORAs for sites opening in FY24 are no longer accepted.

Documentation deadline for FY24 ORAs is 4/12/24

Submissions after this point must be made on an FY25 ORA

Regions will execute a cost reimbursement contract to cover costs for authorized sites that have opened until an FY25 ORA has been executed.



FY25 ORAs will be made available on our website only **after** the new rates are published

Adult Long Term Residential – ORAs (Continued)

- FY25 ORAs will be posted on our web page following FY25 rate publication.
 - FY25 ORAs are retro to 7/1/24 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.
 - New sites are checked for related party ownership. Related parties, including those required by HUD, have special documentation requirements.
 - ORAs may be issued with provisional rates. Provisional rates are good for one year after move-in.
 - Contact Central Office any time for general assistance.
-

Adult Long Term Residential – Occupancy Site Improvements

- All change requests start with discussion with the Area and Regional Office
- Providers must receive a signed site improvement pre-authorization form before incurring any costs
- DDS will not fund site improvements without signed pre-approval
- After project is complete, provider submits documentation to Area Office. Central Office will compute payment and depreciation schedule.
- Central Office will update Occupancy Worksheets and compute new contract rate.

Adult Long Term Residential – Startup and Capital 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

For more information, related to allowable/disallowed, please visit the Start Up Expense Worksheet: <https://www.mass.gov/doc/fy24-start-up-expense-worksheet/download>

Year End Timelines/Deadlines

April 12: FY24 Occupancy Rate Documentation Deadline

April 26: Amendment Deadline

- FY24 Amendments Standard Contract Forms and SSFs
- FY25 Standard Contracts and SSFs

Staff

Dylan Lattimore, Chief Financial Officer

Dylan.Lattimore@mass.gov

Russ Clift, Director of Business Systems

Russell.Clift@mass.gov

Cesar Barreto-Gonzalez, Business Analyst

Cesar.A.Barreto-Gonzalez@mass.gov

Thomas Higgins, Residential Housing Analyst

Thomas.Higgins6@mass.gov

Charles Smith, Contracts Specialist

Charles.M.Smith@mass.gov

Nita Trivedi, Contracts Analyst

Nita.Trivedi2@mass.gov

Jess Wall, Procurement Coordinator

Jess.Wall@mass.gov

William Tanda, Qualification and Accountability

William.Tanda@mass.gov

Deven Gandhi, Intern

Deven.Gandhi@mass.gov

Helpful Emails and Web Sites

Emails

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

DDS-POS-Occupancy@mass.gov

Questions related to BIDS/RFR:

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](#)

QUESTIONS