



# UNDERSTANDING AGENCY WITH CHOICE

**Financial Management**  
**Services** Agency with Choice

August 2025

# Financial Management Services (FMS) Agency with Choice

## Who We Are

- Fiscal intermediary assisting with self-directed supports
- Partner in implementing your Individual Support Plan (ISP)
- Ensures financial accountability and employer responsibilities

## What We Do

- Process vendor and self-directed employee payments
- Manage tax requirements and labor law filings
- Provide payroll and compliance support
- ...and much more

## Your Role in AwC Model

- FMS = Employer of Record
- You = Co-Employer



## What is Self-Direction?

- An approach to home and community-based services
- Gives individuals choice and authority over services received
- Alternative to traditional provider-managed services
- Empowers participants to organize supports and services they choose
- Guided by a Support Coordinator through person-centered planning

# Role of Financial Management Services in AwC



ENSURE SELF-DIRECTED EMPLOYEES (SDES) COMPLETE AND SUBMIT BACKGROUND CHECKS AND DRUG TESTING



ENSURE SDES COMPLETE ALL APPLICABLE DDD-MANDATED TRAININGS WITHIN THEIR REQUIRED TIMEFRAMES



ISSUE PAYMENTS TO SDES HIRED BY THE INDIVIDUAL/AUTHORIZED REPRESENTATIVE



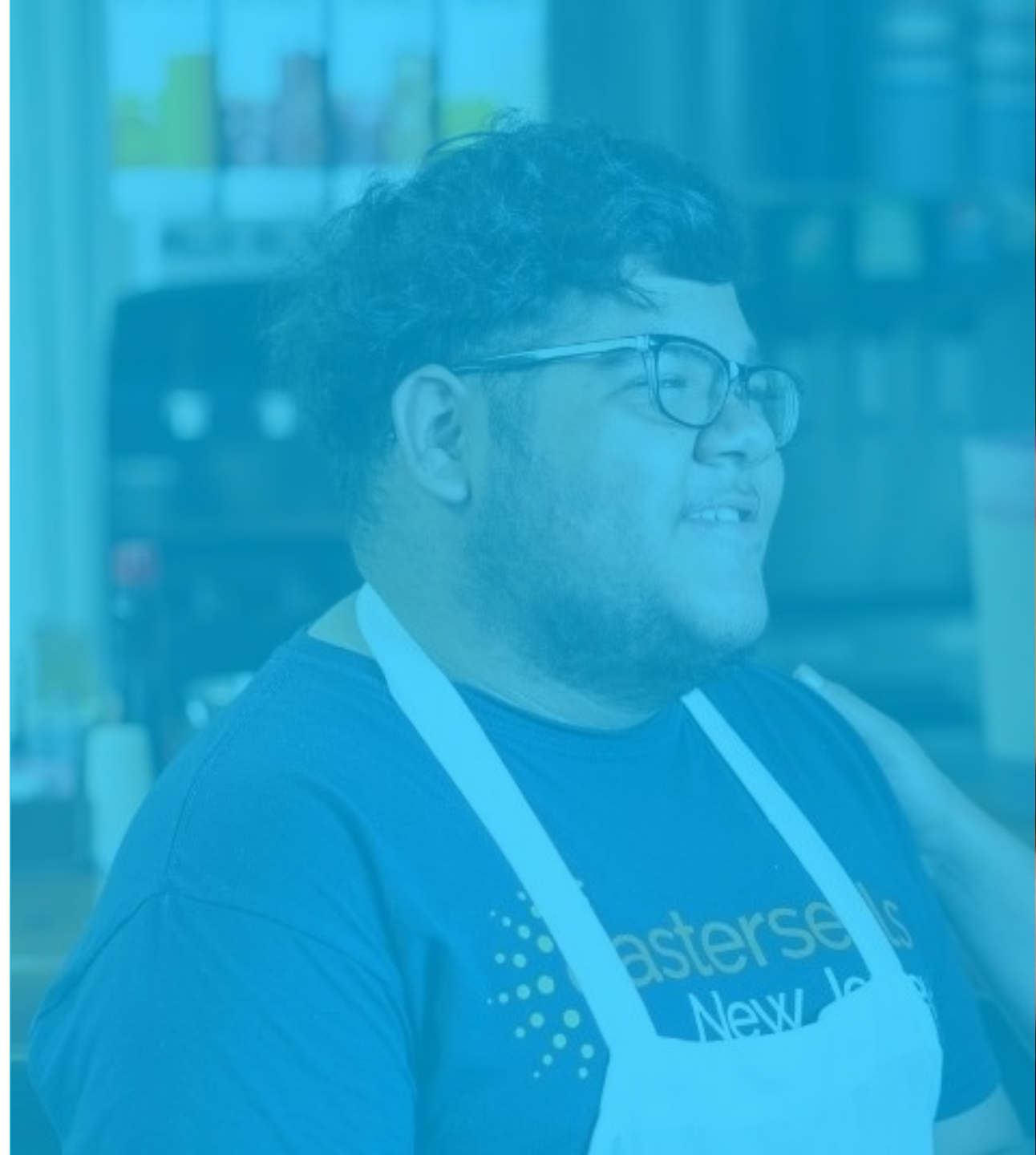
ISSUE PAYMENTS TO COMMUNITY VENDORS THAT HAVE PROVIDED PRIOR AUTHORIZED SERVICES TO THE INDIVIDUAL



ENSURE APPROPRIATE SERVICE DOCUMENTATION IS SUBMITTED BY THE SDE AND, WHEN APPLICABLE, THE VENDOR



ENSURE SERVICES AND SERVICE DOCUMENTATION ALIGN WITH THE INDIVIDUALIZED SERVICE PLAN (ISP)





*“Our staff has gained the experience and insight required to navigate an ever-changing disability service system here in NJ. No matter the change, Financial Management Services has persevered and continued to provide top-tier services to our program participants. This makes us the perfect partner to support you and yours, so you make the most of the disability services in New Jersey.”*

### Services that can be provided by a **SELF-DIRECTED EMPLOYEE**

- Community Based Supports
- Individual Supports
- Interpreter Services
- Respite
- Supports Brokerage
- Transportation

### Services that can be provided by a **COMMUNITY VENDOR**

- Goods & Services
- Assistive Technology
- Environmental Modifications
- Vehicle Modifications

# Dually Enrolled

**No Problem!**

## Financial Management Services: Agency with Choice

- Supports are paid out of your budget
- Rate/Hours are determined by individuals and families, and discussed with the support coordinator
- Referrals are done through I-record and can be sent directly in as a backup
- Co-employer Model

## PPP- Personal Preference Program

- Not funded through the DDD budget. Funded
- Through medical insurance Hours and rate decided by PCA
- Referral and intake done with NCM



### Enrollment Process

- **Referral received** → Onboarding initiated
- **Enrollment Specialist assigned** – provides full support (virtual & in-person)
- **SC & AWC Specialist** review vendor transfer, billable rate, and draft submission
- **Welcome email & ME guide** sent to Managing Employer
- **Intake call** within 24–48 hours of referral

### Support Coordinator Role

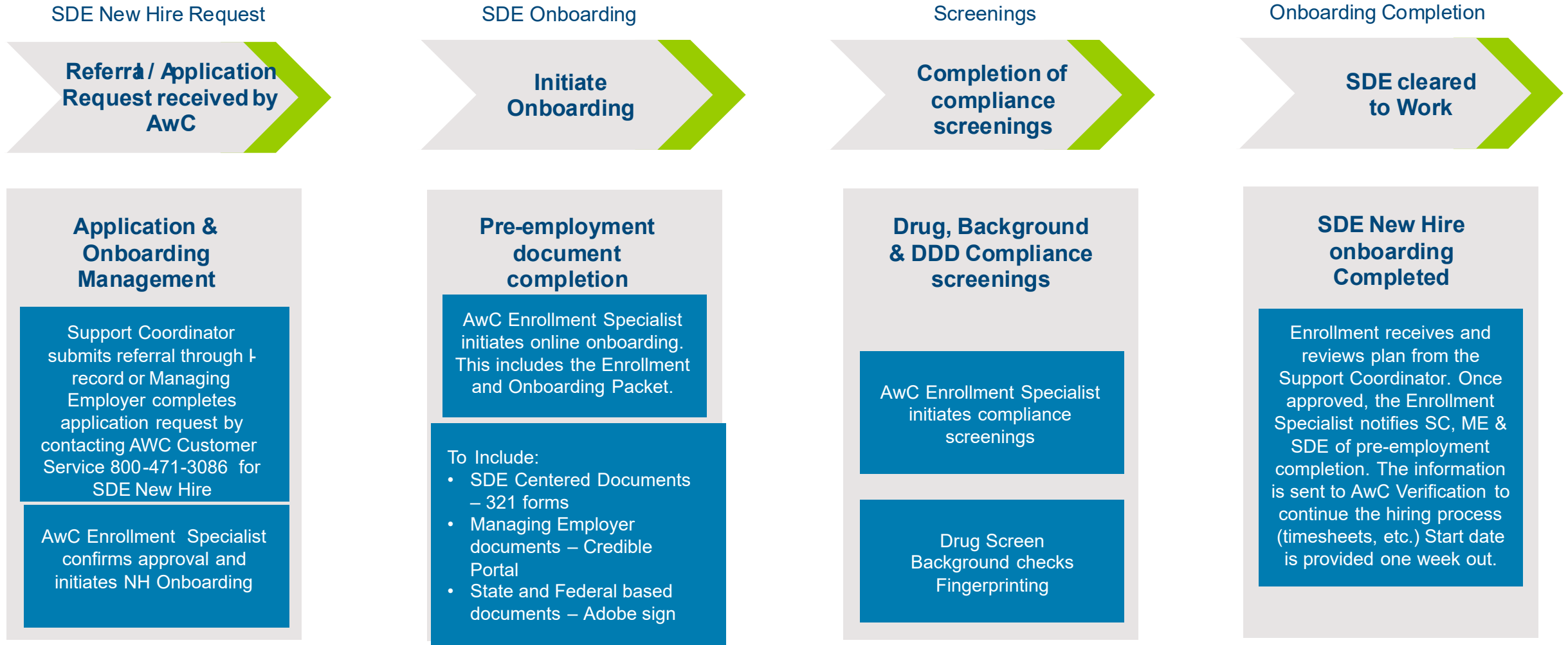
- Review **budget, hours, rate, PMPM impact** early
- Ensure families understand **budget sustainability**
- Prevent delays in **final plan of care submission**



## Enrollment



## Self Directed Employee (SDE) Onboarding Process Flow





# Vendor Enrollment

Agency with Choice does NOT approve or deny vendors

We will enroll the vendor that is in the approved plan of care

If there is a question on which type of vendor services are allowed, it is best to contact SC

Once AwC receives the authorization from the approved plan of care we will begin outreach to the vendor to start the enrollment process

A consumer must have one SDE with Agency with Choice to be eligible for AwC to pay community vendors



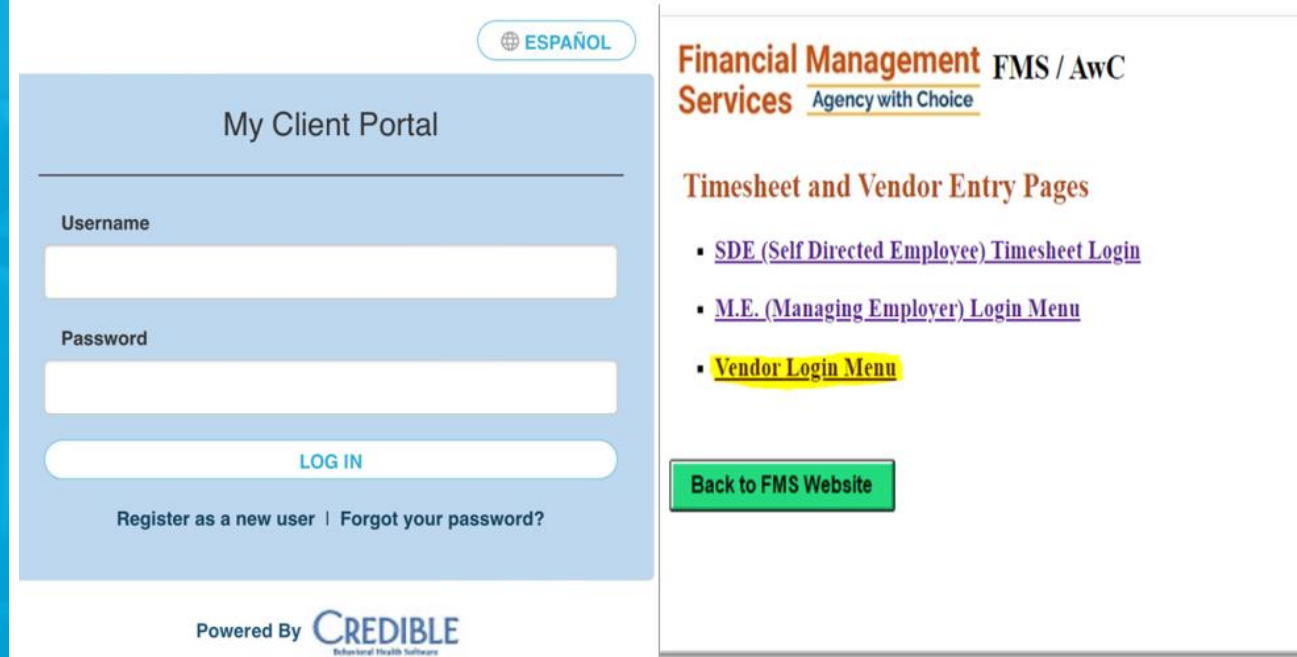
For Support Coordinators:

When adding Vendor services to a plan of care, it is imperative to submit the plan draft to [AWCpurchasing.com](mailto:AWCpurchasing.com) prior to final plan submission. To avoid any processing delays, kindly add a thorough description regarding the goods and service.



# Vendor Enrollment (cont.)

- Vendors are sent through DocuSign:
  - W-9
  - Electronic Funds Transfer Letter (EFT)
  - Vendor Request Form
  - Certificate of Liability Insurance (COI)
  - Support Manual service description/expectations
- Once enrollment is complete the Vendor is sent a voucher or given access to our AwC Pace website to submit for services rendered along with instructions
- AwC Client Portal- EFT payments
- AwC Pace website



ESPAÑOL

## My Client Portal

Username

Password

LOG IN

[Register as a new user](#) | [Forgot your password?](#)

Powered By **CREDIBLE**  
Behavioral Health Software

**Financial Management Services** FMS / AwC  
Agency with Choice

### Timesheet and Vendor Entry Pages

- [SDE \(Self Directed Employee\) Timesheet Login](#)
- [M.E. \(Managing Employer\) Login Menu](#)
- [Vendor Login Menu](#)

[Back to FMS Website](#)



# SDE Benefits

## Health Benefits

- Available to SDEs working **30+ hours/week** (averaged over 4 weeks)

to include Medical, Dental, Vision

## Paid Time Off

- PTO available for all SDEs

## Paid Holidays

- Holiday pay for eligible SDEs

## Retirement Plan (403B)

- Available to all SDEs
- Auto-enrollment for new hires (opt-out option)



# SDE Holiday Schedule

All Self-Directed Employees in the Agency with Choice program will be afforded the following six (6) paid holidays:

## 2025 Paid Holidays (6)



Holiday

New Year’s Day

Memorial Day (Observed)

Independence Day

Labor Day

Thanksgiving Day

Christmas Day

## Guidelines

- No alternate holiday if not a regular workday
- If scheduled & required to work → **1.5x hourly rate**
- Holiday calendar is updated & distributed annually

# Financial Management Service

Agency with Choice-Fiscal Intermediary Service-Community Based Individual Support  
**2025 Holiday Schedule**

## Full-Time and Part-Time

Date of Holiday	Date of the Week	Holiday Observed
January 1	Wednesday	New Year's Day
May 26	Monday	Memorial Day
July 4	Friday	Independence Day
September 1	Monday	Labor Day
November 27	Thursday	Thanksgiving Day
December 25	Thursday	Christmas Day

The above are paid holidays generally afforded to full-time and Part-time employees who are normally scheduled to work on these days.



## Compliance and Training



The SDEs will receive notification reviewing their due dates to complete all trainings that are still outstanding.



Support coordinators and Managing Employers will be included in the 30-day communication.



SDE's who cannot/do not complete trainings by their expected completion date will risk suspension without pay and an interruption of service.



There is no retro payment for self-directed staff or agency staff for the period of time they are out of compliance and suspended without pay. Payment will resume when they have completed their requirements and are reinstated.



One-time lump sum payment once completed. CPR/First aid renewal every two years.



*In person-practicum available at various site locations*



## CPR/FA Training Instructions

### 1 Schedule Skills Session

📞 Call 800-471-3086 to book your in-person training.

### 2 Complete Online Training

📧 7 days before your session, you'll receive a link from [rclcsfdevteam@redcross.org](mailto:rclcsfdevteam@redcross.org).

✓ Check junk/spam folder.

🕒 Allow 2.5 hours to complete.

### 3 Attend In-Person Training

➡ Once online portion is complete, proceed with your scheduled skills session.

📌 Questions?

📧 [awccustomerservice@nj.easterseals.com](mailto:awccustomerservice@nj.easterseals.com)

📞 800-471-3086

# Benefits of AWC Electronic Platforms

## ***For Managing Employers (MEs)***

- View, edit, sign & approve timesheets
- Complete ME enrollment packet in one system
- Access and complete required forms (via DocuSign)

## ***For Self-Directed Employees (SDEs)***

- Enter and submit timesheets electronically
- Access and complete training forms (CDS)
- Use onboarding/enrollment tools for State & program forms

## ***For Vendors***

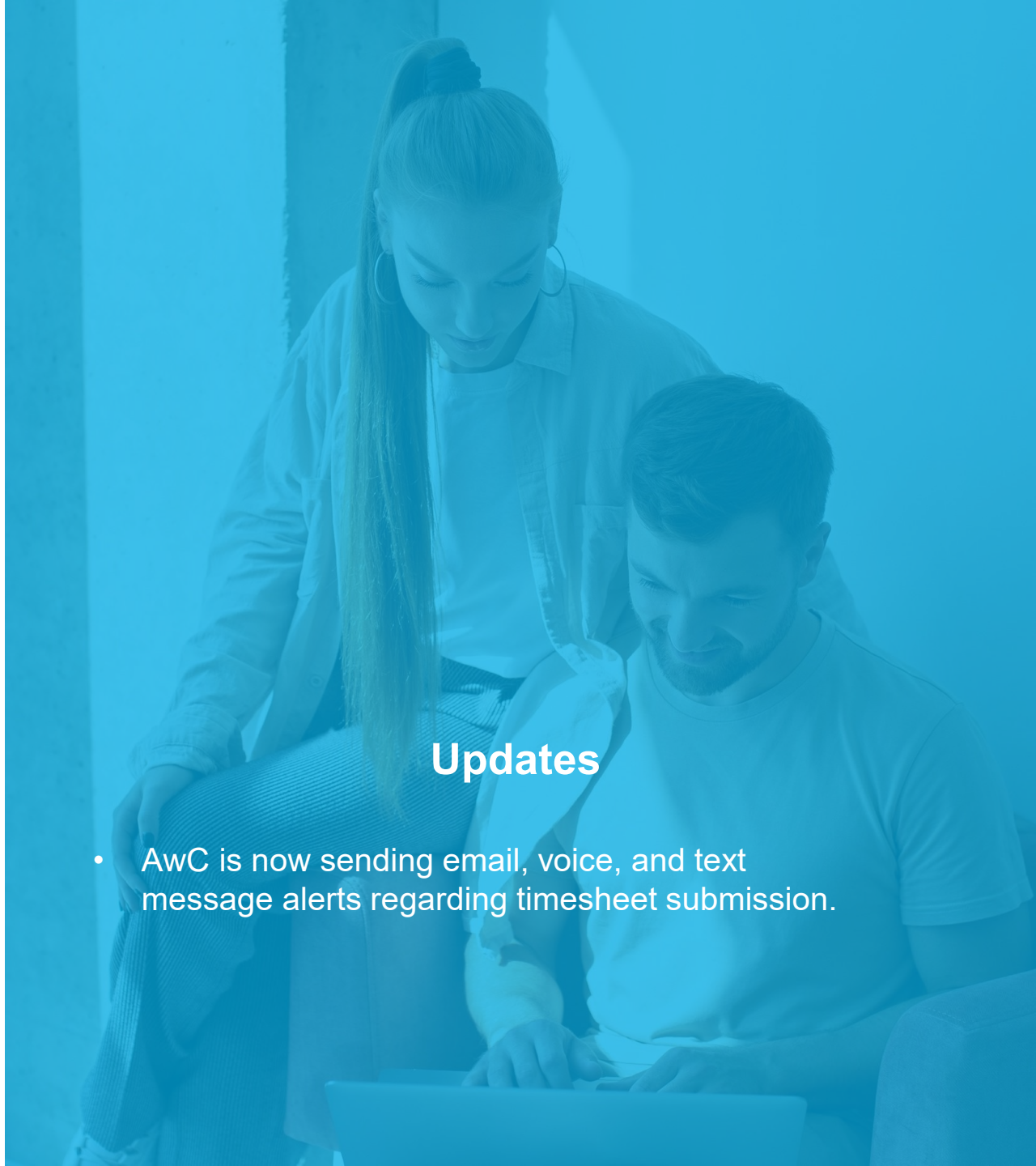
Submit required forms via electronic attachments

- View billing & payments
- Confirm payment processing status
- Identify who/what payment is for

*AWC Encourages members to use electronic platforms for faster, easier processing*

## **Updates**

- AwC is now sending email, voice, and text message alerts regarding timesheet submission.







## About PMPM

### ***PMPM Fee Overview***

- Monthly administrative fee to participate in the Agency with Choice (AwC) model
- Known as Per Member, Per Month (PMPM) fee
- DDD pays the same amount toward the AwC PMPM fee as for the Fiscal/Employer Agent model
- The individual's budget covers the remaining PMPM fee
- PMPM fee begins when an SDE service is added to the plan
- Fee deducted from participant's budget

### ***Pro-Rated PMPM Applies:***

- First & last month of an existing plan when SDE service is added
- First & last month of a renewed plan with SDE service
- First & last month of a new plan due to program or tier change (e.g., Supports Program → Community Care Program)

## Per Member, Per Month (PMPM) Fees

	PMPM 1	PMPM 2	PMPM 3	PMPM 4
	One or more SDEs working 0-40 hrs. per week for you or the employer of record (ESNJ) and not electing health benefits	One SDE working less than 30 hrs. per week for you but 30+ hrs. per week for the employer of record (ESNJ) and electing not health benefits	<ul style="list-style-type: none"> <li>One SDE working 30+ hrs. per week for you and electing health benefits; <b>OR</b></li> <li>Two or more SDEs working less than 30 hrs. per week for you but 30+ hrs. per week for the employer of record (ESNJ) and electing health benefits</li> </ul>	Two or more SDEs working 30+ hrs. per week for you and electing health benefits
<b>FINAL PMPM</b>	<b>\$266.34</b>	<b>\$493.98</b>	<b>\$646.62</b>	<b>\$987.82</b>
<b>ANNUAL Cost to Individual Budget:</b>	<b>\$3,196.08</b>	<b>\$5,927.76</b>	<b>\$7,759.44</b>	<b>\$11,853.84</b>

**NOTE:** SDE hours are reviewed and averaged over a 4-week period to ensure correct PMPM

# Timesheet Process

## Requirements

- Each timesheet must include total weekly hours, and service documentation notes aligned with the ISP.
- Notes are required for Medicaid billing compliance.

## Submission Timeline

- Timesheets are due **every Saturday by 10:00 AM**.
- Workweek = **Saturday through Friday**.

Effective **Sept 13, 2025**

- Timesheets must be submitted **within 90 days** of the service date.

Example:

Service on Sept 15, 2025, must be submitted by Dec 14, 2025.

- Services delivered before Sept 13, 2025, must be submitted by Dec 12, 2025.

## **Late Submissions**

- AWC reserves the right to reject untimely submissions if they conflict with budget limits, authorizations, or documentation standards.

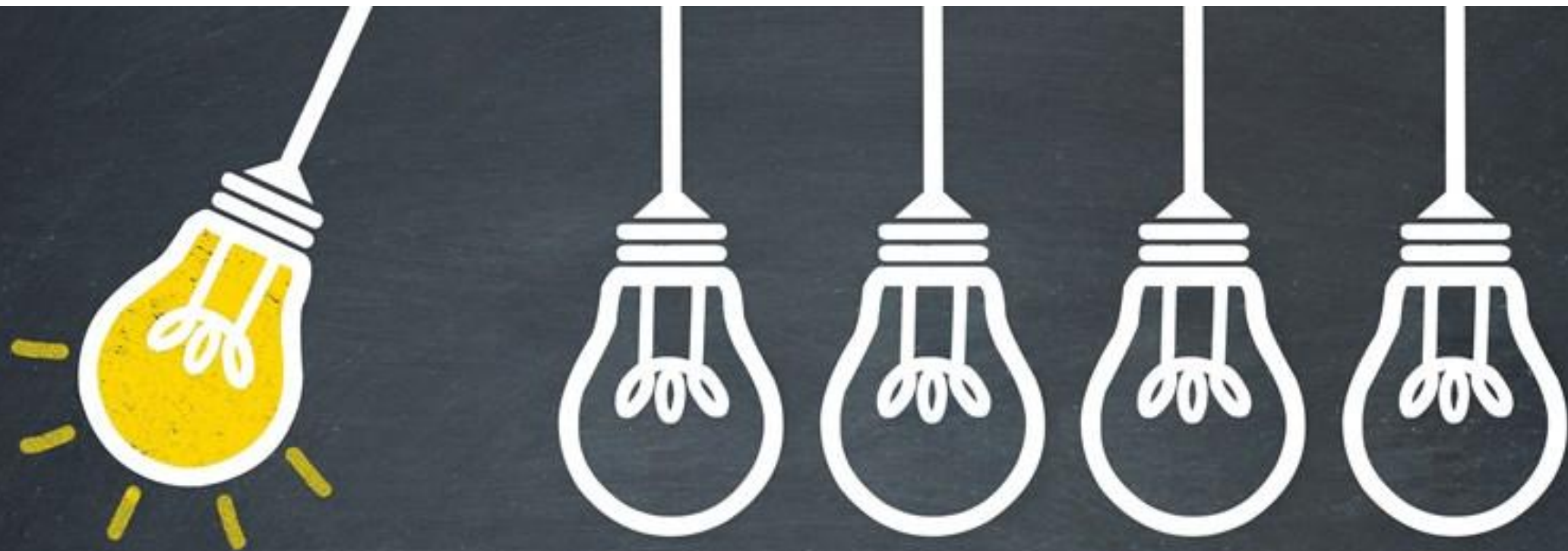
When timesheets are submitted outside of the original pay period, it increases the risk for discrepancies to be present, which may cause delays in payments and claim submission. Therefore, it is imperative that timesheets be submitted as soon as possible within the appropriate time frame.

Update:

New Jersey's Minimum Wage to Increase to \$15.49/Hour for Most Employees on Jan. 1

- Link to instructional video:  
<https://www.youtube.com/watch?v=GVXcgJxRV30&feature=youtu>





**BEST PRACTICE**

### Important Message:

To remain compliant with program guidelines and funding requirements, it's critical that all submitted hours fall within the weekly authorized limits outlined in the *Plan of Care*.

Authorization standards:

If the ME and SDE are the same person, a backup authorizer must sign off on timesheets.

Submit

- Submit timesheets weekly

Submit

- If your shift ends mid week, submit your timesheets immediately – there's no need to wait
- Review for accuracy. Ensure all entries are correct before submission

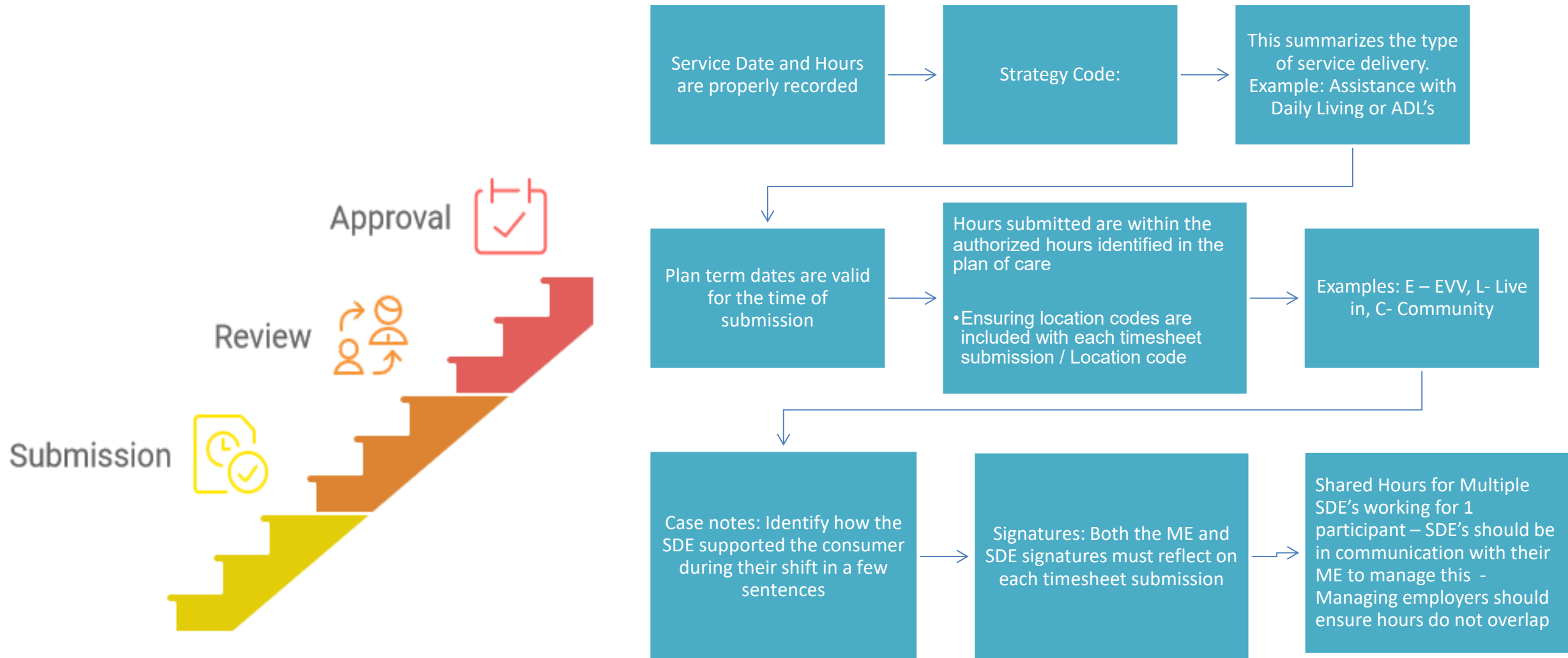
Follow

- Follow submission guidelines. If using a paper timesheet, submit it in PDF format – image files (JPEG, ENG, etc.) will not be accepted



**PAY DAY!**

# Timesheet Submission Review and Guidelines







# Agency With Choice Presents Our New IVR Platform!

We have implemented a new Interactive Voice Response (IVR) phone system to streamline call routing, reduce wait times, and improve the overall caller experience.

## **Spanish Caller – Key 0**

### **Customer Service – Key 1**

1. Where to submit timesheets
2. Best Practices
3. Understanding Strategy Codes
4. Dayforce Wallet
5. General

### **Verification – Key 2**

1. Budget Plans
2. SDR revisions
3. Rate of Pay
4. Loss of Medicaid
5. Support coordinator

## **HR – Key 3**

1. Verification of employment
2. Updating contact information
3. Dayforce wallet registration
4. Lincoln Financial

### **Enrollment – Key 4**

1. SDE Fingerprinting info
2. SDE Drug testing info
3. ME Rate Form
4. Assigned Enrollment Specialists

### **Vendor Services – Key 5**

1. Vouchers
2. Vendor information

## **Compliance – Key 6**

1. Compliance questions

### **Payroll – Key 7**

1. Payroll questions
2. Direct deposit form
3. Tax information
4. W2
5. W4
6. Difficulty of care form

### **Easterseals NJ Programs Information – Key 8**

1. Overview on additional services offered at Easterseals NJ

# Contact & Enrollment Support

For Managing Employers (MEs) & SDEs

- Schedule In-Person Enrollment Days or Virtual Onboarding

-  [AWCEnrollment@nj.easterseals.com](mailto:AWCEnrollment@nj.easterseals.com)

 For Support Coordinators & Agencies

- Schedule Virtual or In-Person sessions with the Enrollment Manager

-  [Tnorris@nj.easterseals.com](mailto:Tnorris@nj.easterseals.com)

 Looking for Additional I/DD Services?

- Easterseals offers programs to support your needs!

-  [ServiceReferrals@nj.easterseals.com](mailto:ServiceReferrals@nj.easterseals.com)

- NAAD (National Association for the Dually Diagnosed) Dual Diagnosis Certification Training certification is open for all SDE's!

-  [Csteinlauf@nj.Easterseals.com](mailto:Csteinlauf@nj.Easterseals.com)

# UPDATE!





# FMS Website



Our website supports DDD program participants under the Supports program and the Community Care Program or CCP, Managing Employers, Self-Directed Employees, Support Coordinators, Community Vendors and Support Brokers.

You can find all forms and resources located on our website visit.

<http://www.financialmanagementservices.org/>

FAQ's and Content

Spanish/English translated content

Direct Link to our electronic payroll system and documentation portal.

Goods and Service List: Approved vendors and contact information.



# Contacts You Need to Know

**AwC Customer Service Phone**  
**Number 1+800-471-3086**

**AwC CSR Email**

[awccustomerservice@nj.easterseals.com](mailto:awccustomerservice@nj.easterseals.com)

**AwC Time Sheet Submission**  
**Fax 1+888-399-0427**

**AwC Time Sheet Submission Email**  
[awcforms@nj.easterseals.com](mailto:awcforms@nj.easterseals.com)

**AwC Fax Number**  
**1+888-525-0415**

**Training and Compliance**

[Awccompliance@nj.easterseals.com](mailto:Awccompliance@nj.easterseals.com)

[awchr@nj.easterseals.com](mailto:awchr@nj.easterseals.com)

[awcenrollment@nj.easterseals.com](mailto:awcenrollment@nj.easterseals.com)

[awcpurchasing@nj.easterseals.com](mailto:awcpurchasing@nj.easterseals.com)

# THANK YOU

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