



**CABINET FOR HEALTH AND FAMILY SERVICES  
DEPARTMENT FOR MEDICAID SERVICES**

**Matthew G. Bevin**  
Governor

275 East Main Street, 6W-B  
Frankfort, KY 40621  
[www.chfs.ky.gov](http://www.chfs.ky.gov)

**Adam M. Meier**  
Secretary

**Pam Smith**  
Director

**Carol H. Steckel, MPH**  
Commissioner

**Department for Medicaid Services (DMS) Participant-Directed Services (PDS) Advisory  
Subpanel**

**July 23, 2019, 1:00pm-3:00pm**

**Meeting Summary**

**Meeting:** Participant-Directed Services (PDS) Advisory Subpanel – Meeting #4

**Date:** July 23, 2019

**Location:** James Thompson Conference Room, CHR Building, 275 East Main Street, Frankfort  
KY 40601

**AGENDA TOPICS AND KEY DISCUSSION POINTS**

**I. Welcome New Subpanel Members**

- a. DMS welcomed new members to the panel and all panelists gave brief introductions.

**II. Objectives and Recap**

- a. DMS discussed agenda and objectives.
- b. DMS recapped the previous subpanel meeting in May and provided an overview of all previous subpanel meeting topics.

**III. Review of PDS Employer Responsibilities Review Tool**

- a. Panelists reviewed the tool and offered the following recommendations:
  - i. Introduction/Instructions should clarify who needs to fill out the form and from what perspective. Clarify how a participant vs. a PDS Representative would approach answering the questions on the Tool.
  - ii. Introduction/Instructions should clarify why the participant needs to list natural supports.
  - iii. Consider condensing the length of the Tool, perhaps by removing the white checkbox portion if it contains duplicative information.

- iv. Reverse the order of the options for “Participant/Representative Response.”
  - v. Consider conducting the Tool one time, then again if the PDS Representative changes.
  - vi. Make specific wording recommendations to clarify language in the Tool.
- b. DMS will consider panelists’ input and make updates. Next, the final version of the Tool will be presented at the All-Panel meeting in mid-September.

#### **IV. Input on PDS Concepts: Background Checks and Representatives**

- a. Panelists discussed different ways background checks are usually paid for. Panelists agreed that most of the time, background check costs are paid by the participant.
- b. Panelists discussed the PDS Representative and the need to clarify that this individual takes on the roles and responsibilities of the participant/the employer of record. Panelists suggested the following names for this role: supervisor, coordinator, manager, agent.

#### **V. Introduce Financial Management Agency (FMA) Standards**

- a. DMS provided an overview of the financial management agencies and how DMS aims to make service delivery more consistent.
- b. Panelists agreed that there is a need to standardize training, customer service functions, and timesheet functions.
  - i. Some panelists indicated that timesheet issues make up the bulk of customer service topics with FMAs.
  - ii. Panelists suggested that a reasonable timeframe for FMAs to respond to customer service requests would be 1-2 business days.
  - iii. Panelists suggested that FMAs be required to report on overall trends that will be useful and add value, and not be required to report on all pieces of data.

#### **VI. Legally Responsible Individuals Webinar Topics**

- a. DMS indicated a goal to host educational webinars on PDS and legally responsible individuals. DMS may host these webinars in Fall 2019.
- b. Panelists indicated the following topics would be important to cover:
  - i. The process for submitting applications, timelines, and process for appeals
  - ii. Diagram/flowchart of the PDS application process which describes timeframes, steps, and responsible parties
  - iii. How applications would be evaluated/how applicants would meet the qualifying criteria

#### **VII. Next Steps**

- a. The next subpanel meeting date will be on September 24, 2019.