

OPRA Finance Focus Group Meeting

Meeting Date: Tuesday, August 7, 2018
Time: 12pm-2pm
Location: OPRA Office - 1152 Goodale Blvd, Columbus, OH 43212
Chair(s): Lori Sontag, Franklin Management Resources
Debbie Rogner, Heinzerling Community

12:15 pm – 2:00 PM - Presentations: (Webinar Begins @ 12:15pm)

Resident & Personal Funds Management and Regulations:

1. Lisa Mathis, OPRA- Transportation.
 - a. Lisa reviewed the NMT and HPC proposed restructured rates
 - b. Rates will emphasize smaller groups
 - c. OPRA has advocated for an extended roll out period so to give providers time to transition services, fleets, and routes as needed
 - i. Anticipated implementation will be October 2019
2. Anne Weisent, DODD – Personal Funds rule and what DODD looks at during a regulatory review to ensure compliance.
 - a. Anne reviewed why the personal funds rule was written and its requirements for service delivery. She also shared a Frequently Asked Question sheet with example ledger templates.
 - b. Rules applies regardless of settings
 - i. The personal funds rule is applied when an individual meets all their financial obligations and has remaining funds
 - ii. Is only for individuals who have been assessed to need the support
 1. There is no formal assessment- an individual and their team members will come to such decision
 2. Not every individual will need assistance with personal funds, it is assumed an individual can handle their personal funds unless otherwise demonstrated
 3. ISP should be very detailed about what supports an individual needs regarding personal funds
 - c. Agencies should have policies in place regarding keeping track of an individual's personal funds, how to give individuals access to their personal funds
 - d. Agencies need ledgers for all types of accounts and must be able to break apart expenditures by facility and individual if using a co-mingled account
3. Lori Horvath, DODD, Medicaid Unit - Representative to speak on the Money Management waiver services rules.
 - a. Lori reviewed why the money management rule was written and its requirements for service delivery
 - i. An agency or independent provider can provide money management but cannot bill HPC services and money management to one individual
 - ii. County Boards and cogs are not allowed to provide the service
 - iii. Providers must be certified in money management to provide the services

