



*Consumer Direction Philosophy  
and  
Case Management Best Practices*

**Section V: Working with the  
Financial Management Service  
(FMS)**

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**Financial Management  
Services**

These services are furnished for two purposes:

- (a) to address Federal, state and local employment tax, labor and workers' compensation insurance rules and other requirements that apply when the participant functions as the employer of workers and
- (b) to make financial transactions on behalf of the participant when the participant has budget authority.

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## Responsibilities of the FMS



- Morning Star Financial services is the contracted FMS for PASSPORT consumer directed services. The FMS is responsible for obtaining and maintaining all necessary documentation to support the consumer in their role as an employer.
- The FMS is responsible for handling the activities associated with employee payroll processing including federal, state, and local employment tax, labor and workers' compensation insurance rules.

## FMS Process

- **STEP 1:** Consumer meets the criteria for the self-directed care service delivery option.
- **STEP 2:** Consumer chooses the personal care or Choices Home Care Attendant services.
- **STEP 3:** Consumer will select the personal care or Choices Home Care Attendant provider(s) that they desire as their employee. Consumers may choose more than one provider (employee).
- **STEP 4:** Employee(s) must complete ODA certification and Ohio Medicaid provider enrollment. **This step may take 60 days or more**
- **STEP 5:** Consumers and employee(s) must complete FMS enrollment forms from Morning Star, the financial management service before receiving personal care or Choices Home Care Attendant services from the employee(s). **This step may take 10 days or more**
- **STEP 6:** Morning Star will inform the consumer when each employees is "good to go" and may start providing services. **This step may take 10 days or more**
- **STEP 7:** Every pay period, the consumer will verify the employee(s) work hours, have the employee(s) sign their timesheet, sign the employee(s) timesheets, and send them to Morning Star.
- **STEP 8:** Morning Star pays the employee(s) on consumer's behalf.
- **STEP 9:** Each month the PAA will need to review any forms/reports provided by Morning Star about the consumers services.

## FMS Contact Information

To request Employer and Employee packets:

Phone 866-233-7024 option 1  
or to Hatti Grills, Program Administrator at  
hgrills@morningstarfs.com

Send completed Employer packet and Employee packet to:

- Fax to Morning Star Financial Services at 866-233-3792
- or mail to: Morning Star Financial Services  
9400 Golden Valley Road  
Golden Valley, Minnesota 55427

Fax or mailing address for timesheets:

- Fax Morning Star Financial Services at 866-233-3792
- or mail to:  
Morning Star Financial Services  
9400 Golden Valley Road  
Golden Valley, Minnesota 55427

Morning Star staff will assist with questions at: 866-233-7024

## Resources

○ National Resource Center for Participant Directed Services (NRCPPDS)  
“The Boston College People”  
[www.participantdirection.org](http://www.participantdirection.org)

○ The clearinghouse for Home and Community Based Services  
[www.hcbs.org](http://www.hcbs.org)

Ohio Dept. of Aging  
[www.age.state.oh.us](http://www.age.state.oh.us)

Center for Medicare and Medicaid Services (CMS)  
[www.cms.gov](http://www.cms.gov)

Waivers & Best Practices

*Thank you!*

*This concludes the Ohio Department of  
Aging presentation on consumer direction  
philosophy and case management best  
practices, section 5, Working with the  
Financial Management Service  
(FMS)*