

AAA FMS Participant & FMS Agreement

Participant Information

- **Participant Name:** _____
 - **UCI #:** _____
 - **Regional Center:** _____
 - **Service Start Date:** _____
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Welcome to AAA FMS!

We're excited to have you participate in the California Self-Determination Program (SDP) with AAA FMS. This program empowers you to take control of your services and financial resources, giving you the flexibility to make decisions that best fit your unique needs.

Please read, understand, and agree to the terms below before proceeding.

Self-Determination Overview

Self-Determination gives participants the freedom to choose and manage their services. However, with this increased control comes responsibility. AAA FMS is here to help you stay on top of your budget, track your expenses, and ensure that your spending aligns with the program's requirements.

While we provide tools and support, it's essential that you manage your budget effectively and stay within its limits.

Your Responsibilities as a Participant

As a participant, AAA FMS expects the following from you:

- **Communication:** Stay in touch with AAA FMS about any changes in your budget or services. This includes notifying us of important updates from your Regional Center that might affect your program.
- **Using Approved Services:** Ensure that all services you use are included in your spending plan. Unauthorized services are not covered, and any excess costs must be paid privately.

- **Changes to Spending Plan:** If you need to adjust your spending plan, inform us as soon as possible. Be aware that changes might take 1-2 months to process with your Regional Center.
 - **Coordinating with Your Regional Center:** Work with both AAA FMS and your Regional Center Service Coordinator to make sure your services are appropriate and within budget.
 - **Exiting the Program:** If you plan to leave the Self-Determination Program, give at least 30 days' notice.
 - **Provider Documentation:** If needed, assist AAA FMS with obtaining required documentation from service providers. This might include tax forms (e.g., IRS W9s) for processing payments.
 - **Certified Spending Plan:** Make sure your spending plan is certified with your Regional Center before starting services.
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Program Guidelines

- **Spending Plan Adjustments:** Any changes to your spending plan for the next budget year must be certified at least 90 days before the current plan expires. Your Regional Center can guide you through this process.
 - **Service Provider Payments:** AAA FMS only processes payments for services in your certified plan. If a service is not listed, you'll need to cover the costs yourself.
 - **Review Your Statements:** It's important to check your monthly statements and inform AAA FMS of any discrepancies or concerns.
 - **No Reimbursements:** AAA FMS cannot reimburse participants directly for any out-of-pocket expenses. All payments must be processed through AAA FMS to comply with legal requirements.
 - **Respectful Communication:** Maintain respectful and collaborative communication with AAA FMS and your Regional Center. Inappropriate behavior or language may lead to termination from the program.
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AAA FMS Responsibilities

As your financial management service provider, AAA FMS is committed to:

- **Safeguarding and Disbursing Funds:** We'll pay authorized service providers upon receiving valid invoices or purchase requests.
- **Issuing Payments for Services:** We ensure that payments are made only for services and supports outlined in your IPP.
- **Monthly Statements:** AAA FMS will provide you with a monthly statement that breaks down your expenditures and remaining balances.

- **Liaising with the Regional Center:** We work with your Regional Center to ensure proper funding for your services.
 - **Provider Inquiries:** We'll address any administrative issues with your service providers, including missing documents or payment-related questions.
 - **Maintaining Accountability:** AAA FMS keeps accurate records of your spending and updates your budget monthly.
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Service Provider Responsibilities

AAA FMS ensures that service providers meet certain standards, such as:

- **Background Checks:** For personal care services, background checks are required.
 - **Compliance:** Providers must comply with local and federal regulations, such as ensuring they are not on any exclusion lists.
 - **Verification Requirements:** For respite services, electronic visit verification may be needed to comply with state and federal laws.
 - **HIPAA Compliance:** AAA FMS ensures the security and confidentiality of your personal information according to HIPAA regulations.
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Participant Agreement

By signing this agreement, you acknowledge that you have read, understood, and agreed to the terms outlined above. You also authorize AAA FMS to assist you in managing your budget and services as part of the Self-Determination Program.

Participant / Conservator / Representative Signature:

Date: _____

Please send signed agreements to: admin@aaa-fms.com

A copy will be retained for your records.