



This survey aims to serve as a communication tool to update OPWDD on the present status of FI contract usage and to gather the necessary information for the implementation of future contracts for FIs. It also seeks to understand the current and future practices being employed by FIs to ensure fiscal responsibility.

Please complete and submit this form electronically. Handwritten forms will not be accepted.

To be completed by Fiscal Intermediary

1) Date Survey Completed

2) CORP ID and Name of Fiscal Intermediary (FI)

3) Who is the primary contact for Fiscal Intermediary (FI) matters at your agency?

Name
Phone
Email

4) Which Regions does your agency currently provide FI services?

Region 1
Region 2

Region 3
Region 4

Region 5

5) Based on your spending patterns, will a contract amendment be needed prior to January 1, 2025?

- 6) As of the current date (date this survey is being completed), how many individuals are actively enrolled (approved DDP1) with your agency as the Fiscal Intermediary (FI)?
 - a. How many of those individuals are currently billing for state-paid services?
 - b. How many individuals have pending DDP1 to be submitted to OPWDD?
 - c. How many total enrollees do you expect to have December 31, 2024?
- 7) If you are requesting a contract amendment in the remaining contract duration (through December 31, 2024), what is the total contract increase being requested?
- 8) As of the current date, what is the dollar value of any unsubmitted claims your agency currently has for services performed/purchased?

If you have unsubmitted claims, how far back do they go?

- 9) What is your agency procedure for collecting and maintaining supporting documentation, including receipts from service recipients to support state paid services?

If other, please describe:

- 10) What is the frequency of submitting state paid vouchers to OPWDD?
- 11) In terms of number of people your agency will plan to provide Fiscal Intermediary services to in the coming years:
 - a. How many people does your agency plan to provide Fiscal Intermediary services to in 2025?

- b. How many people does your agency plan to provide Fiscal Intermediary services to in 2026?
- c. How many people does your agency plan to provide Fiscal Intermediary services to in 2027?

12) To manage program enrollments within approved contract values, does your agency operate a waitlist?

If YES, how many people are on the waitlist with your agency?

13) Please describe the strategies your agency has implemented to manage contract award capacity to date.

14) Please describe the strategies your agency will implement to manage contract award capacity prospectively.

15) Please provide any additional information pertinent to the status of your FI contract.

Additional documentation should be submitted with completed surveys.

Please complete the survey and submit it to self.direction.redesign@opwdd.ny.gov by May 2nd, 2024, with the subject line "[FI Name] FI Contract Survey". If you provide services in multiple regions, submit only one survey for all regions served.