



**Government and Vendor Fiscal/Employer Agent Workshop:  
Key Elements, Challenges and Lessons Learned**

**December 5, 2005**

**Renaissance Harborplace Hotel, Baltimore, MD**

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7:30 - 8:30 am: Breakfast Buffet  
Baltimore Ballroom

8:30 – 8:45 am: Welcome Remarks (Pamela Doty, Ph.D., Office of the  
Maryland B Assistant Secretary for Planning and Evaluation/DHHS and Kevin J.  
Mahoney, Ph.D., Cash & Counseling National Program Office at Boston  
College)

Overview of Consumer-Directed Care Movement/Growth of Cash &  
Counseling.

8:45 - 10:15 am: Plenary Session: What You Need to Know to be a Vendor or  
Maryland B Government F/EA: Key IRS Requirements, Issues and New Initiatives  
(Nancy A. Harmon, Office of Taxpayer Burden Reduction and Sue  
Flanagan, MPH, The Westchester Consulting Group)

This session will address current IRS policies and procedures for entities  
to become Government and Vendor F/EAs and for managing federal  
income tax withholding and employment taxes for individuals enrolled in  
self-directed support programs; key ongoing operations issues; and any  
new IRS policy initiatives related to F/EAs and household employers.

10:15 – 10:30 am: Break

10:30 – 11:30 am: Continue discussion of IRS issues and new initiatives.  
Maryland B

11:30 am – 12:00 pm: 30 minutes for Q & A  
Maryland B

12:00 – 1:00 pm: Lunch  
Baltimore Room

1:00 – 2:30 pm: F/EA Customer Relations (Moderator: William A. B. Ditto, MSW, LSW  
Maryland B Director, NJ Division of Disability Services)

Panel Participants: Dan Florio (Stat Attorney Legal Services of New  
Jersey) and Seren Derin (Fiscal Director of Stavros Center for Independent  
Living in Amherst, MA)

This session will address F/EA customer relations policies and procedures,  
operations issues and promising practices from the consumer's

perspective. Topics will include: (1) the importance of receiving timely and user-friendly monthly financial statements, (2) providing good customer service skills and (3) providing good employer skills training. This session will also explore the F/EA's relationship with Supportive Service providers (i.e., supports brokers, counselors or supports coordinators).

2:30 – 2:45 pm:

Break

2:45 – 4:15 pm:  
Maryland B

F/EA Promising Practices (Moderator: Kevin J. Mahoney, Ph.D.)

This session will address a number of F/EA promising practices related to program implementation, managing program participant volume, preparing user-friendly reports for program participants and using automation to effectively manage F/EA tasks and paperwork.

George Murray (Director of Fiscal Intermediary Services, Community Access Unlimited) will discuss implementing federal and state income tax withholding and employment tax requirements as an F/EA and responding to ongoing implementation challenges.

Marc Fenton (President, Public Partnerships, LLC) will provide insight into developing accurate, timely and user-friendly financial reports for program participants (both paper and web-based).

Larry Spencer (Controller, Cerebral Palsy of Massachusetts) will discuss using automation to manage program participant volume.

Gwen Williams (Vice-President, Health Care Services at First Data Government Solutions) will discuss the Authenticare product as a means of implementing a paperless timesheet reporting system.

Sue Flanagan, MPH (Principal, The Westchester Consulting Group) will discuss the importance of developing effective F/EA Policies and Procedures Manuals, staying up to date with federal and state tax and insurance rules and regulations, and conducting initial F/EA readiness reviews and ongoing performance reviews.

4:15 – 5:15 pm:  
Maryland B

Open Mike Session

This session will provide F/EAs with an opportunity to ask questions and report relevant experiences and insights.

5:15 – 5:30 pm:  
Maryland B

Closing Remarks

5:30 – 6:00 pm:

Break and Time for Vendors to Set Up Exhibits

6:00 – 8:00 pm:  
Baltimore Ballroom

Reception and Vendor Exhibits

The session will provide vendors the opportunity to display their work and services to the Cash & Counseling State Grantees as well as other State Program Directors interested in implementing F/EA Services.