



FMS Transfer Process with PPL

1. Eligibility and Submission Deadlines:

- Participants in the Self-Determination Program (SDP) can switch FMS providers.
- Transfers from Bill Payer to Bill Payer and Co-Employer to Sole Employer can be done monthly.
- Sole to Sole FMS transfers are accepted quarterly (January, April, July, October). Paperwork is due by the 15th of the month before the desired transition month.
- **Within the SDP year:** The above statement holds true.
- **Renewal of SDP year:** If you're renewing your SDP year and want to switch to PPL, you can do so with any model, including Sole Employer. Contact us to find out how to start your new SDP year with us.

2. Required Documentation from Participant:

- New spending plan reflecting remaining budget funds and correct start dates.
- Certified copies of the client's budget
- SDP Individual Program Plan (IPP)
- Employees' background checks (if applicable). PPL will coordinate these details with your current FMS during the transfer process.

3. Submission Requirements:

- Spending plans must have the **correct start date**.
- For Bill Payer or Co-Employer transfers, submit all required documentation for the transfer process.
- For Sole Employers, submit all required documentation along with all employee-related documents.
 - Documentation must be completed by the 15th of the month preceding the intended transfer date.
 - Example: For a transfer effective April 1st, all paperwork must be completed and approved by March 15th.

| PPL Open Transition Enrollment Dates Sole Employer Model | |
|-------------------------------------------------------------|-------------------------------------|
| Transition & Spending Plan Start Dates | Transition Paperwork Due to New FMS |
| January 1 st | Dec 15 th |
| April 1 st | March 15 th |
| July 1 st | June 15 th |
| October 1 st | Sep 15 th |

4. Coordination with Current FMS Provider:

- Upon deciding to transfer to PPL, coordinate with your current FMS provider and PPL to ensure they share your information.

5. Communication with PPL:

- Provide PPL with all the required documents and information to facilitate the transfer.
- Once all necessary documents are gathered, communicate with PPL to ensure everything has been received.

6. Enrollment and Questions:

- You are welcome to reach out to PPL to confirm a transfer start date and initiate the process.
- Contact us if you have any questions or need assistance to ensure a smooth transition.



FAQ: FMS Transfer Process with PPL

1. What is the process for transferring FMS providers?

- Participants in the Self-Determination Program (SDP) can switch FMS providers. Transfers from Bill to Bill or Co-Employer to Sole Employer can occur monthly. Sole to Sole FMS transfers are accepted quarterly (January, April, July, October), with paperwork due by the 15th of the month before the desired transition month.

2. What paperwork is needed for the transfer?

- For Sole Employers: The required paperwork includes a signed spending plan, certified budget, and all employee-related documents. These documents must be completed by the 15th of the month prior to the transfer date. For example, for a transfer effective April 1st, all paperwork must be submitted by March 15th.
- For Bill Payers and Co-Employers: The required paperwork includes a signed spending plan & certified budget. No employee-related documents are needed for the transfer process.

3. What are the important dates for Sole Employer transfers?

| Date of Transition | Paperwork Due |
|---------------------------|----------------------|
| January 1st | December 15th |
| April 1st | March 15th |
| July 1st | June 15th |
| October 1st | September 15th |

4. How is the transition coordinated with the current FMS provider?

- When a participant decides to transfer to PPL, we will request the current FMS provider to provide key information about the participant. This information helps us ensure a seamless transition by integrating all necessary details into our system for the participant's smooth transfer and onboarding with PPL.

5. What happens after the information is received?

- Once PPL receives the participant's information from the current FMS provider, we will enter the details into our system to ensure a seamless transfer. This allows us to ensure that everything is set up correctly for the participant's start date with PPL.

6. How is enrollment completed?

- A Support Broker will then reach out to the participant to initiate the enrollment paperwork and complete the necessary steps for transitioning to PPL.

7. What documentation will PPL assist with?

- PPL will assist participants in obtaining and understanding all necessary documentation, including a new spending plan that reflects the remaining budget funds, certified copies of the participant's certified budget, and SDP Individual Program Plan (IPP), and, if applicable, background checks for employees. This support ensures that all required documents are in place and clearly understood to facilitate a smooth transfer to PPL.