

Tips for Completing the New Money Follows the Person (MFP) Work Plan Template

July 2024

As part of the Consolidated Appropriations Act of 2021, Money Follows the Person (MFP) grant recipients are required to submit a Work Plan for each year of their MFP Demonstration Program. The MFP Work Plan ("Work Plan") should describe: 1) the use of grant funds for each proposed initiative that is designed to accomplish MFP objectives, including a funding source for each activity that is part of each proposed initiative; 2) an evaluation plan that identifies expected results for each proposed initiative; and 3) a sustainability plan for components of proposed initiatives that are intended to improve transitions, which shall be updated with actual expenditure information for each Federal fiscal year that occurs during the MFP Demonstration Program.¹ MFP recipients will use the Work Plan to document their individual goals and objectives related to demonstration initiatives, which will enable MFP recipients and the Centers for Medicare & Medicaid Services (CMS) to monitor initiatives and make course corrections where needed. The Work Plan will be submitted by MFP recipients to the [Medicaid Data Collection Tool \(MDCT\)](#), and CMS has also provided a Work Plan template in Word to support MFP recipients in planning and submitting the required information. MFP recipients should reference the Work Plan template to view required and optional Work Plan initiatives as well as the required reporting components for each initiative. This tip sheet provides best practices and resources for MFP recipients to reference while developing and updating their individual Work Plans.



Following initial submission, update the Work Plan transition benchmarks semi-annually and other initiatives at least annually.

MFP recipients must update transition benchmarks semi-annually and should revise other parts of the Work Plan as needed. CMS will review and approve all proposed changes. CMS approved changes will be integrated into the MFP recipient's Semi-Annual Report (SAR) for the next SAR Reporting Period.



Coordinate with your CMS Project Officer about updates that are needed and the timing for Work Plan creation or revision.



Clearly define the populations impacted. Approaches to defining the standard MFP target populations may vary among MFP recipients. The standard MFP populations include older adults, individuals with physical disabilities, individuals with intellectual and developmental disabilities, and individuals with mental health and substance use disorders. Populations may be defined based on the individual's primary diagnosis, qualified institutional setting, expected service utilization, HCBS authority enrollment, or other criteria. MFP recipients may use the "Other" category to specify other target populations. MFP recipients may also select "HCBS infrastructure/system-level development" for initiatives that strengthen or expand HCBS without targeting a particular population.



Talk to your CMS Project Officer about how these populations are defined for your state's or territory's demonstration and ensure the criteria used to categorize the target populations, including the rationale for using the "Other" category, is described in your Operational Protocol.



Use the Work Plan template for planning and the MDCT for submission. MFP recipients should use the Word-based Work Plan template to organize and synthesize information that they intend to include in their Work Plan submission. Coupled with the Work Plan Help File, the Work Plan template closely aligns with what users will see in the MDCT which allows MFP recipients to gather all information in advance of developing and submitting their Work Plan in the official MDCT application.



Use the paper-based Work Plan template as a planning tool to gather and arrange data; the Work Plan template should be prepared in advance of inputting data into the MDCT application.



Engage internal teams early and often to complete the Work Plan. State and territory-specific MFP initiatives often involve coordination and collaboration across internal divisions and agencies as well as with external partners. Brainstorming SMART² initiative objectives, identification of key milestones, and proposing realistic targets for the Work Plan should include these same stakeholders. For instance, MFP programs should engage their data and quality analyst (DQA) who will likely need to obtain data outside of the MFP program data (e.g., T-MSIS Analytic Files (TAF), Medicare, Minimum Data Set (MDS), etc.).



Develop an approach and timeline with internal teams under the direction of the MFP program director to engage stakeholders, facilitate working meetings, and submit the Work Plan timely.



MFP recipients should report activities that are currently in progress or planned for future implementation that are a result of findings from prior evaluations, gap analyses, and assessments on the quality of HCBS. One of the required initiatives in the Work Plan is an initiative related to quality measurement and improvement. These initiatives should illustrate how a state or territory will improve the quality of services received by individuals receiving HCBS through the MFP Demonstration and the systems that serve them. These initiatives should also include how the state or territory monitors and evaluates the quality of services provided to MFP participants (including supplemental services), the roles and responsibilities of all agencies involved, and remediation and improvement processes. Relatedly, MFP recipients are expected to report on a subset of the measures in the HCBS Quality Measure Set and to develop a quality improvement plan related to two measures of their choice. These two measures should align with your state or territory's quality initiative and will be used to monitor progress toward achieving the initiative's objectives.



Refer to the CMCS Informational Bulletin on the [Home and Community-Based Services \(HCBS\) Quality Measure Set \(QMS\) Reporting Requirements for Money Follows the Person \(MFP\) Demonstration Grant Recipients](#) to see the list of measures MFP recipients might consider using to measure initiative progress in the Work Plan.



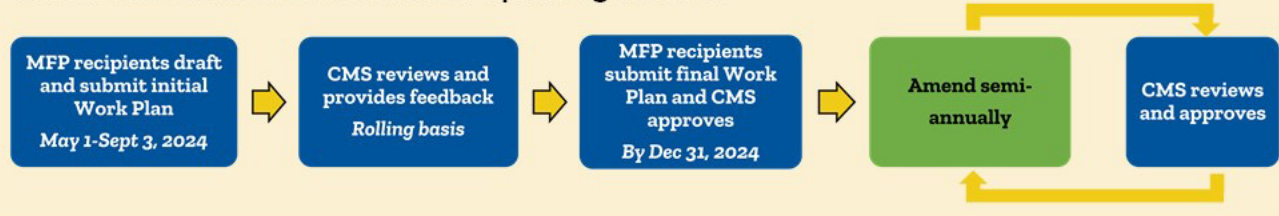
Report all MFP funding sources for required and optional Work Plan initiatives. MFP recipients receive MFP cooperative agreement funds for qualified home and community-based services (HCBS) and demonstration services, supplemental services, administrative activities, and capacity building activities. MFP recipients also use state equivalent funds attributable to the MFP-enhanced match.



Review the list of required and optional initiatives early on to map funding sources to initiatives, which will help identify if your state or territory has or has not covered all the required initiatives. Additionally, work with your MFP program and state finance and budget staff to develop processes to track both actual and projected expenditures by funding source for each initiative.

² SMART objectives are Specific, Measurable, Achievable, Realistic/relevant, and Time-bound.

Work Plan Initial Submission and Updating Process



Additional Resources

MFP recipients are encouraged to utilize additional resources to assist with successful completion of their Work Plan. Written resources include the Work Plan template, Work Plan Help File, [Technical Assistance Brief: Using Data to Improve Money Follows the Person Program Performance](#), and slides and recordings from the Data Learning Collaborative and Housing Learning Collaborative are available on the Moodle site or through a request to the CMS MFP Demo Mailbox. Other resources include peer group calls to engage with fellow MFP recipients, subject matter experts, and your CMS Project Officer. Send questions and technical assistance requests to the CMS MFP Demo Mailbox (MFPDemo@cms.hhs.gov).