



## CHECKLIST FOR SELF-DIRECTING SERVICES

### LISTS OF RESPONSIBILITIES

**The responsibilities listed are to be completed by responsible parties. NOTE: Some items are happening at the same time that other entities are completing their responsibilities.**

- The member/Legal Representative is given information regarding Self-Directing Services and Self-Determination at every Pre-plan meeting and documented. *Verification is documented during the pre-planning process* (Support Coordinator).
- The Support Coordinator documents the member's choice to self-direct in the Progress Note or at the Pre-Plan.
- The member/Legal Representative is offered a choice of Financial Management Service Agency (FMS) (formerly called Fiscal Intermediary Services) and selects a FMS.
  - ~**Money Minders Plus, LLC** (Currently only works with Community Living Services, Inc.), Phil Pappalardo, 734-522-0080 (Garden City), email; [PhilP@mmpbiz.com](mailto:PhilP@mmpbiz.com).
  - ~**Personal Accounting Services (PAS)**, Patti Sielaff, 734-729-3100 (Taylor), email; [enrollment@1-pas.com](mailto:enrollment@1-pas.com).
  - ~**GT Independence (also known as Guardiantrac)**, Tammy Friesen, 269-221-1753 (Wayne), email; [Tfriesen@gtindependence.com](mailto:Tfriesen@gtindependence.com).
  - ~**The ARC of Northwest Wayne County**, Gretchen Sanewsky, 313-532-7915 (Redford), email; [gsanewsky@thearcnw.org](mailto:gsanewsky@thearcnw.org).
- The member/Legal Representative selects the method of staffing supports desired: Direct Hire Staff and/or Staffing Agent.
  - ~If Direct Hire is selected, the Support Coordinator can give the potential employee the required trainings if they want to get a "head start", otherwise the FMS will provide at the EOR mtg; First Aid, Bloodborne Pathogens, and Recipient Rights (RR).  
**First Aid:** An on-line option for First Aid and Bloodborne Pathogens is <https://www.nationalcpfoundation.com/#modal-offer>. The potential direct hire pays upfront, submits the proof of payment and a certificate to the FMS for verification and reimbursement. However, if the person prefers free/in-person training, email [selfdetermination@dwih.org](mailto:selfdetermination@dwih.org) to arrange attendance with Community Living Services, Inc's First Aid training.  
**RR training:** New hire RR training will need to be arranged by the FMS who will email [orr.training@dwih.org](mailto:orr.training@dwih.org) with the following information; Staff full name, DOB, Date of Hire, Staff's email, and Employer (Member receiving services). However, if staff have taken face-to-face training at least once in their work history but their certificate is beyond one year, (expired) they can update their Recipient Rights via Detroit Connect <https://www.dwctraining.com/>.
- The Support Coordinator completes a referral using the DWIHN Hiring Checklist and emails it to the selected FMS and [Selfdetermination@dwihn.org](mailto:Selfdetermination@dwihn.org).
- The Support Coordinator completes a backup plan with the member/Legal Representative (uploads the document into MHWIN using IPOS as the document type).
- The Support Coordinator facilitates the Individual Plan of Service (IPOS) or an Addendum to the IPOS to identify and authorize the services which will be self-directed no more than 3 business days after the selection of a FMS. All authorized services (typically CLS- H2X15 or Respite- T1005) must have the FMS as the provider. **All authorizations must be approved prior to starting any Self-Directed Agreements.**
  - The IPOS is updated with goals that support the authorizations and are in the member's own words (or the person that speaks on behalf of the member).
  - The IPOS is updated with objectives that are written in the S.M.A.R.T. format.



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- The IPOS is updated with interventions that include detailed steps to provide staff with direction to know how to support the member in achieving the goal (job description) and must include the amount, scope, and duration of services.
- The Support Coordinator enters a single/separate authorization for T2025 with the correct modifier for 1x/month is entered for the selected FMS service.
  - **T2025 x7-** Member has the FMS as a representative payee for entitlements or has a direct hire for CLS and/or Respite services (formerly called Full Budget).
  - **T2025 x6-** Member has a direct hire with respite which totals less than 491 units/123 hours per IPOS year (formerly \$2,000/year and called Family/Friend Respite).
  - **T2025 x4-** Member uses an Independent Supports Coordinator (with no other self-directed service), Support Broker, or only has vocational services.
  - **T2025 x3-** Member has a staffing agency.
- DWIHN will approve authorizations submitted by the CRSP. Typically, authorizations take no more than 2 business days but if additional information is needed, authorizations will be returned and the SC has 2 business days to make adjustments. DWIHN has a total of 14 calendar days of receiving the request from the CRSP to make a final decision. If denied, the *Due Process* steps will be followed.
- DWIHN will host a virtual SD Welcome Meeting with the member/Legal Representative.
  - DWIHN will welcome members and answer any SD questions.
  - DWIHN will review and sign the Self-Directed Service Agreement which outlines the roles and responsibilities of DWIHN and the member/Legal Representative.
  - If applicable, DWIHN will review and initiate the Purchase of Service Agreements which outlines the roles and responsibilities of the Provider Agency and the member/Legal Representative.
- The FMS initiates the Employment Agreement with the member/Legal Representative and the direct hire.
- The FMS will forward the completed DWIHN Direct Hire Checklist and the signed Employment Agreement to DWIHN ([Selfdetermination@dwihn.org](mailto:Selfdetermination@dwihn.org)).
- The FMS sends DWIHN a copy of the Employment Agreement with the member/Legal Representative's signature.
- DWIHN signs the Medicaid Provider Agreement portion of all agreements no later than 3 business days of receipt and returns a copy of the signed agreements to the FMS and CRSP.
- DWIHN tracks and uploads completed agreements and corresponding documents to MHWIN with IPOS as the document type.
- DWIHN will initiate the budget through MHWIN based on the authorizations in the IPOS and forwards the budget to the CRSP representative for signatures. *The budget will include Units of service X Standardized Rate of service = Dollars approved.*
- The Support Coordinator will have the member/Legal Representative review and sign the budget.



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- The Support Coordinator ensures budget related documents (external signature pages) are uploaded in MHWIN.
- The Support Coordinator will in-service the member/Legal Representative and service provider on the IPOS or Addendum and the back-up plan. (obtain signature for validation)
  - Verification of in-service has been uploaded into the scanned documents in MHWIN (using IPOS as the document type).
- An Employer of Record meeting is held with the FMS, member/Legal Representative, employee(s), and the SC/SCM to ensure all direct hire employment paperwork is completed and training requirements are met.
- The CRSP forwards copies of *all* signed agreements (SD and PSA/Employment Agreements) and the budget to the member and/or their Legal Representative.

### PRIMARY ONGOING RESPONSIBILITIES

- The Support Coordinator will provide verbal reminders to the employer/employee that training must be maintained as part of coordination to prevent staff's ineligibility to be paid using Medicaid dollars.
- The Support Coordinator will monitor and document the member's progress monthly toward achieving the goals set in the IPOS.
- DWIHN will offer continual education on goal development, budget processes, and Self-Direction.
- The FMS will ensure the Employer of Record has verified all services provided and ensure submission of timesheets in a timely manner (paper or electronic submissions).
- The FMS will confirm that staff that are paid with Medicaid funds have not allowed trainings to expire.
- The FMS is responsible for monthly payment for authorized services.
- The FMS will provide the monthly budget status report and monitoring of staff training to the member/Legal Representative.
- The FMS will notify the CRSP and DWIHN of active members that have not received staffing supports longer than 3 months.

### TERMINATION OF A SD ARRANGEMENT

- ~ The SC must document the conversation of a member/Legal Representative desiring to no longer self-direct services. To afford the SD Team an opportunity to address any system gaps; an Addendum to the IPOS must include barriers to continuing the current arrangement (reason for the change), attempts to resolve any barriers, and the effective date. SC will provide the documented discussion, early terminate the FMS service if needed, and email the FMS and [selfdetermination@dwihn.org](mailto:selfdetermination@dwihn.org).
- ~The Supports Coordinator will complete an Addendum to the IPOS. *Existing authorizations (including Fiscal) will be terminated and new authorizations will be approved if applicable.*
- ~The Supports Coordinator/Case manager will in-service the new service providers, if applicable, on the IPOS.