



CHECKLIST FOR SELF-DIRECTING SERVICES

PROCESS/LIST OF RESPONSIBILITIES

The responsibilities listed are to be completed by responsible parties. **NOTE: Some tasks are happening at the same time that other entities are completing their responsibilities. Contact DWIHN for any questions along the way; selfdetermination@dwihn.org.**

☐ The Support Coordinator (SC) uses the Person-Centered Planning process to explain the option to Self-Direct Services (SDS) by using resources such as the DWIHN brochure or other training material to share the benefits of self-directing services at every Pre-Plan. **If the member/legal rep do not want services via a SDS model, an authorization straight to the provider of service via the PCP process is done and this process is not followed.**

☐ The Support Coordinator documents the member's choice to self-direct in the Progress Note, IPOS, Addendum, Periodic Review, or during 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**, Phil Pappalardo, 734-522-0080 (Garden City), email; PhilP@mmpbiz.com.

~**Personal Accounting Services (PAS)**, Karen Dillon, 734-729-3100 (Taylor), email; enrollment@1-pas.com.

~**GT Independence (also known as Guardiantrac)**, Heather Quaak, 269-503-7408 x572 (Wayne), email; referral@gtindependence.com.

~**The ARC of Northwest Wayne County**, Gretchen Sanewsky, 313-532-7915 (Redford), email; gsanewsky@thearcnw.org.

☐ The FMS will instruct the direct hire of the required trainings and provide the exact start date which can only be after all agreements are fully executed by the member/legal rep. and DWIHN.

☐ The Support Coordinator completes a backup plan with the member/Legal Representative (uploads the document into MHWIN using IPOS as the document type). A detailed Crisis Plan will also meet this need.

☐ The Support Coordinator completes the applicable sections of the Residential Assessment. If the member does not need support or will use natural supports in an area, it can be marked as zero. The scored areas can be used as talking points to identify and develop potential goals or supports needed.

☐ The Support Coordinator completes 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.

☐ 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 (objective has to be measurable).
-The interventions must 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 being requested.

The Support Coordinator enters a single/separate authorization with no other service in the same auth for T2025 with the correct modifier for 1x/month for the selected FMS service provider.

☐ 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 x4- Independent Support Coordinator/broker. Rarely used externally (in MHWIN).

☐ T2026 x6- Less than 400 units of respite per year.

☐ T2025 x3- Member has an Agency Supported Self-Direction Model.



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- ☐ After the authorization has been approved, the Support Coordinator completes a referral using the DWIHN Referral Checklist and emails the form to the selected FMS and Selfdetermination@dwihn.org. A link for the Welcome Meeting will be sent when the referral is obtained. **Member/family cannot attend a Welcome Meeting prior to an authorization approval.** The referral starts the system set-up and cannot be skipped.
- ☐ DWIHN will approve authorizations submitted by the CRSP once goals support auth requests. If additional information is needed, authorizations will be returned and the SC has 2 business days to adjust and return the authorization. If it is not returned, follow up with Mgr/Supervisor/Director will be done. DWIHN has a total of 14 calendar days of receiving the request from the CRSP to make a final decision. If denied, *Due Process* will be issued. **Member/family cannot attend a Welcome Meeting prior to an authorization approval.**
- ☐ The Support Coordinator will in-service/train the member/Legal Representative and service provider(s) on the IPOS and the back-up plan (initially, new staff, and on new IPOS'). Once a person has been trained, they can be a train-the-trainer. Verification must be uploaded to MHWIN or agreements will not be signed.
- ☐ Pre- registration at least 24 hours in advance is required to ensure coverage, space is limited. Support Coordinators are highly encouraged to be present.
 - ☐ DWIHN will welcome members and answer any SD questions.
 - ☐ DWIHN will review and obtain signatures on the Self-Directed Service Agreement which outlines the roles and responsibilities of DWIHN and the member/Legal Representative in a SDS Arrangement.
 - ☐ If applicable, DWIHN will review and initiate the Purchase of Service Agreements with the employer to review the roles and responsibilities of the Provider Agency and the member/Legal Representative.
- ☐ *If urgent needs arise for an immediate Purchase of Service Agreement to change a provider, SC will coordinate with the SD Team for methods of securing the agreement.
- ☐ The FMS completes an Employer of Record (EOR)/onboarding meeting with the member/Legal Representative and employee(s) to ensure all direct hire employment paperwork is completed and training requirements are met. SC may assist as part of coordination of services.
- ☐ The FMS obtains signatures on the Employment Agreement after training requirements are met and will forward the completed DWIHN Direct Hire Checklist and the signed Employment Agreement to DWIHN (Selfdetermination@dwihn.org) for signature on the Medicaid Provider section.
- ☐ DWIHN verifies the member/Legal Rep has attended a Welcome Meeting and the SD Agreement has been signed before proceeding to sign the Medicaid Provider portion of Employment Agreement (EA). Pending verification, the EA is signed no later than 3 business days of receipt and returns a copy of the signed agreement to the FMS and CRSP Representative.
- ☐ DWIHN tracks and uploads completed agreements and corresponding documents to MHWIN.



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- ☐ DWIHN will complete the budget in MHWIN based on the authorization and forwards to the SC for signatures. The DWIHN rate will be pro-rated if the member shares staff with housemates.
Authorized Self-Directed Services X DWIHN Standardized Rate = Budget \$ Approved
- ☐ The Support Coordinator ensures budget related documents (external signature pages) are uploaded in MHWIN with IPOS as the document type.
- ☐ Verification of in-service and back-up plan has to be uploaded into the scanned documents in MHWIN (using IPOS as the document type) initially and annually thereafter. EOR or agencies must maintain written evidence of training for each staff.
- ☐ The staff/agency cannot be paid with Medicaid funds until the FMS has provided an approval based on fully executed Self-Directed Service and Employment or Purchase of Service Agreements.
- ☐ DWIHN emails the signed SDS Agreement to the signer. The CRSP ensures the member/legal rep have all signed agreements (SD and PSA/Employment Agreement) and the budget to monitor ongoing satisfaction with the arrangement.

PRIMARY ONGOING RESPONSIBILITIES

- ☐ The EOR will ensure all required trainings remain current. SC 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 review staff documentation and document the member's progress monthly toward achieving the goals set in the IPOS. Documentation for every service/shift billed for must meet Medicaid guidelines and support the services provided or funds may be subject to be taken back.
- ☐ 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 cannot be beyond 30 days of service provision).
- ☐ The FMS will confirm that staff who are paid with Medicaid funds meet Medicaid requirements and do not pay anyone without valid training.
- ☐ The FMS is responsible for monthly payment for authorized services that meet Medicaid guidelines.
- ☐ The FMS will provide the monthly budget status report and status of staff trainings coming due to the member/Legal Representative and the employee.
- ☐ The FMS will notify the CRSP and DWIHN of active members that have not used staffing supports longer than 3 months.

TERMINATION OF A SDS ARRANGEMENT

~ The SC must document the conversation that a member/Legal Representative desire to no longer self-direct services. To afford the SD Team an opportunity to address any system gaps, the SD Termination Form must be completed and an Addendum to the IPOS must include 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 form to the FMS and selfdetermination@dwihn.org.

~If the reason is due to a Residential Referral, the SC will also complete the SD to Residential Form, an Addendum to the IPOS and follow the SD to Residential Process.

~The Supports Coordinator/Case manager will in-service the new service providers, if applicable, on the IPOS.