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ONE OF THE 500 LARGEST COMPANIES

Self-Directing Services

SD Team

Beverly Thompson, Nicole Jones, Chaundrika Baldwin , Lucinda Brown





Welcome

~Meet the Team~

- ***Beverly Thompson***, Clinical Specialist; primarily responsible for authorizations, Durable Medical Equipment, Enhanced Pharmacy.
- ***Nicole Jones***, Clinical Specialist; primarily responsible for authorizations, ORR allegations, SD to Residential moves.
- ***Chaundrika Baldwin***, Financial Management Service Coordinator; primarily responsible for agreements, all coordination that involves the FMS agencies, triage various issues regarding starting a SD Arrangement or billing issues.
- ***Lucinda Brown***, Program Administrator; primarily responsible for all of the above, Habilitative Support Waiver (HSW) team, and Applied Behavioral Analysis (ABA) Teams.



LEARNING OBJECTIVES

- *What is Self-Directing Services
- *How to Setup a New SD Arrangement
- *Self Directing Services Referral Checklist and Process
 - *Backup plan/In-service Training
- *Self-Directing Services Welcome Meeting
- *Self-Directing Services Agreements





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**TOP
WORK
PLACES**
2023-2024

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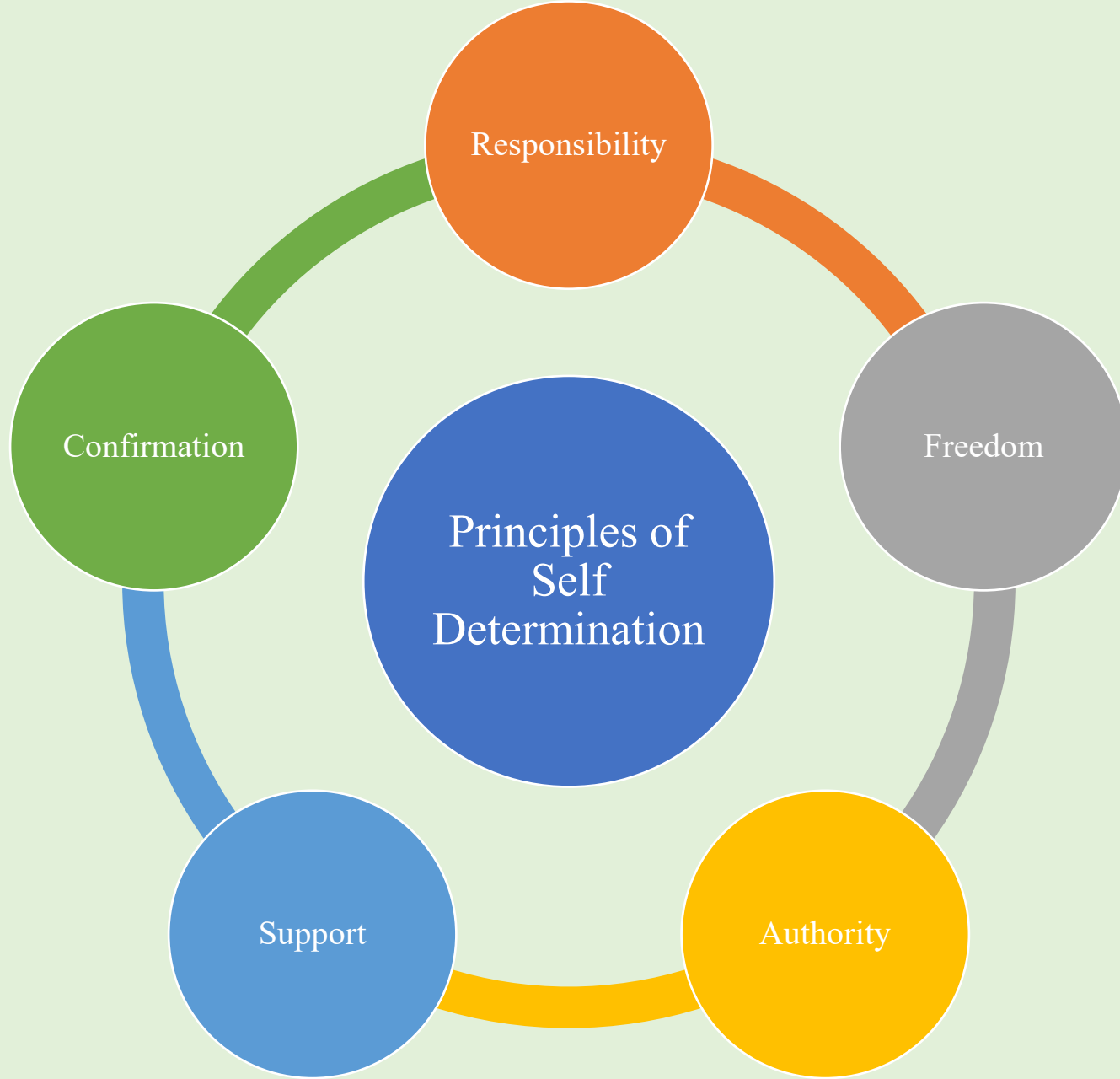
**Although many people use the term
"Self-Determination" and Self-Directed Services"
as if they mean the same thing; they actually have
two different meanings.**



Self-Determination

The belief and value that you have the freedom to define your life, make meaningful choices regarding your life and have the chance to direct the services and supports you need to pursue that life





SELF-DETERMINATION

- These principles focus on the rights of **all individuals**:
 - to decide how to live their own lives (where and with whom)
 - to have knowledge of their funding
 - to have help to organize their resources
 - to be responsible for the wise use of public resources
 - to have the ability to play important roles in their communities if they choose to do so





Self-Directed Services



Self-Directed Services

- A *Partnership* between DWIHN and the Individual/Employer of Record
- It is a method for moving away from professionally managed models of supports and services.
- It is the act of selecting, directing, and managing one's services and supports.
- Individuals who self-direct their services are able to decide how to spend their CMH services budget with support, as desired.





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SELF-DIRECTING: WHAT DOES THAT MEAN?

There are **TWO** methods of service delivery at DWIHN

Traditional service delivery	Non-traditional services delivery
<p>Network Providers, Licensed Homes, SIP/SIL</p> <ul style="list-style-type: none">▪ DWIHN has a contract with the provider▪ The authorization would be in the provider's name▪ The individual may choose the agency and interview potential staff from the agency▪ The provider is the employer and provides most of the services and supports▪ The agency decides who provides the services and the length of their shifts.▪ Agency rules may dictate how certain services are provided	<p>Self-Directing Services</p> <ul style="list-style-type: none">▪ The member/Legal Rep are the Employer of Record (EOR).▪ The EOR is in charge of who provides services, how the services are provided, when, and how often.▪ The EOR can select family, friend, or an agency to provide authorized services.▪ The member/Legal Rep are not required to use a DWIHN contracted provider, but all providers must meet Medicaid qualification requirements.▪ The Financial Management Service (formerly referred to as Fiscal Intermediary) pays the employees on behalf of the member.▪ The authorizations would be in the Financial Management Service Agency's name <p>Example.... If the individual needs support one hour twice a day, he or she can hire someone to do that.</p>



Benefits of Choosing Self-Directing Services

- Individuals control who comes into their life, when, and what workers will do to assist them
- Individuals use services and supports to create connections to and participate in their community.
- Individuals/Employer of Record find workers among friends, family, and community members.
- Greater control over who directly provides services which are authorized.



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Benefits of Choosing Self-Directing Services

- Flexibility to use services and supports regarding how the person wants to meet the goals identified in the Individual Plan of Service; beyond traditional services (CLS or Respite), people may decide to purchase classes, memberships, specific items that will help with goal achievement. (MUST BE IN IPOS)
- Greater retention of staff.
- Fewer required trainings.
- Out of network providers can be used after Medicaid qualifications are verified.
- Direct flexibility and control over behavioral health dollars (up to DWIHN standardized rates); member/family will determine staff pay rate, additional training requirements, and decide employee benefits; this is budget authority.



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DETROIT REGIONAL HEALTH NETWORK





Wendy Tourangeau

Autumn's Mother



2023-2024



Self-Directing Services

*How to Setup a New SD Arrangement



Steps to Self-Directed Services

1. 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.

Note* 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



Authorizations

2. The Supports 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 Financial Management Services Agency.
3. All authorized services (typically Community Living Supports (H2X15) and Respite (T1005)) must have the FMS as the provider.
4. The Supports Coordinator enters a single/separate authorization with no other service in the same auth for T2025 with the correct modifier with the frequency of 1/x per month for the selected FMS service provider.



Self-Directed Services Welcome Meeting

5. The DWIHN Self-Directed Referral Checklist must be completed and received by the Detroit Wayne Integrated Health Network & the Financial Management Services Agency prior to scheduling the SD Welcome Meeting.
6. Once received, the links to the SDS Welcome Meeting are sent to the SC who assists the Individual/EOR in scheduling for one of the sessions.

****Individuals/Employer of Records must attend the Self-Directed Services Welcome Meeting prior to setting up a Self-Directed Services Arrangement.**



Assessments

- **Residential Assessment-** The Supports Coordinator completes the applicable sections of the Residential Assessment. The scored areas can be used as talking points to identify and develop potential goals or supports needed. The Residential Assessment and the authorization must match.
- **Community Living Services Tool-** children ages 7 to 17.
- **Additional Respite Tool-** authorizations that exceed the Services Utilization Guide (96 units/24 hours per month).
- **Children's Waiver Guide** (Children's Waiver)



Steps to Self-Directed Services (continued)

- ❖ The SC trains staff on the IPOS and the training log is uploaded into MHWIN by the SC.
- ❖ The SC also completes a back up or crisis plan with the member/legal representative identifying what happens in case of an emergency and/or services are not provided (staff do not show up). The document is uploaded into MHWIN by the SC.



Responsibilities Related to Self-Directing Services for the Employer of Record

- Cannot exceed the individual budget.
- Hiring staff is a responsibility; employment, equal opportunity, as well as all labor laws must be followed.
- If staff training expires and they are directly hired (person is the employer) and they continue to work, the employer may be responsible for paying staff with your own money.
- Signing timesheets is a legal Medicaid verification of service delivery and falsifying times can have legal consequences.
 - All documentation must meet Medicaid requirements; be detailed enough to support the service provided.
 - Cannot use Medicaid dollars to pay a provider unless their Medicaid credentialing for the specific service has been verified by DWIHN.



HOW IT FLOWS

SC use Person-Centered Planning process to explain the option to Self-Direct Services at Pre-Plan/IPOS



The Support Coordinator documents the member's choice to self-direct in the IPOS, Addendum/PR



The member/Legal Representative is offered a choice of Financial Management Service Agency (FMS)



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 .



The Support Coordinator completes the applicable sections of the Residential Assessment



The Support Coordinator completes a backup plan/In-Service with the member/Legal Representative (uploads the document into MHWIN using IPOS as the document type).



All authorized services CLS- H2X15 or Respite- T1005 must have the FMS as the provider. The IPOS is updated with goalsthat support the authorizations and are in the member's own words (or the person that speaks on behalf of the member)



Complete DWHIN SD Referral List and send to DWHIN SD Email AND to the chosen FMS



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.



DW IHN SD Referral Checklist

All training must be completed as a pre-condition for employment based on date of hire and then updated annually unless stated otherwise.

Support Coordinator: _____ Date: ____/____/____
CRSP: _____
DWIHN Member: _____ ID #: _____ Contact #: _____
Legal Representative: _____ Email Address: _____

Check all that apply:

- ☐ A new Self-Directed arrangement ~SD Welcome Meeting is needed (if done, SD Agreement date ____/____/____)
☐ Member/family wants to directly manage their staff through an individual budget.
☐ Member/family wants staff through a contracted Agency. (if checked, contact Selfdetermination@dwihn.org to confirm this form is needed)
☐ Member is replacing previous staff/agency ☐ Member is adding another DSP/Agency
Additional information needed for the SD Arrangement: _____

TYPE OF SUPPORTS

FMS AGENCY: _____
Provider Agency: _____ Contact #: _____ Eff. date: ____/____/____
Direct Support Professional (DSP): _____ Contact#: _____

THIS SECTION TO BE COMPLETED BY THE FMS FOR DIRECT HIRES

DATE	Background Checks/Information <i>(Required at time of hire or prior to hire)</i>
_____	Criminal Record Check (Prior to hire and annually)
_____	Office of Inspector General (Monthly)
_____	Michigan Driver License (Annually if transporting the person)

	Trainings <i>(Required at time of hire and updated thereafter)</i>
_____	First Aid (2 years)
_____	Emergency Preparedness (all, 2 years) _____ CPR (2 years- CWP only)
_____	Universal Precautions/Bloodborne Pathogens/Infection Control (2 Years)
_____	Recipient Rights- one time face-to-face (One time only) _____ ORR updates (Annually)

Required if Medication is put in your plan (Both offered by CLS & LIVE In-Person Training)

_____ Initial DCH Approved Medication Administration Training (One time only)
_____ Medication Administration Competency Review Annual Training (Annually)

Verification in MHWIN

_____ Backup plan verified in MHWIN (Initial or if changed)
_____ Inservice/training of IPOS in MHWIN (Initial and Annually)

Date of Hire: _____ Direct Hire Wage: \$ _____
(after making a conditional/contingent offer of employment to the candidate and prior to the candidate providing services to the person)

I verify that the above information is accurate and available in the employee's record files.

FMS Representative Signature: _____ Date: _____

Submitted to DWIHN Representative's Signature: _____ Date: _____





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Integrated Health Network**

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Backup Plan for Self-Directing Services

Members name:_____ MH-Win ID #:_____

If my hired staff is unable to provide services identified in
Individual Plan of Services, my backup plan is as follows:

- ☐ I have natural supports who will help me.
- ☐ I can remain safe without staff being present.
- ☐ I have additional trained staff to meet my needs.
- ☐ I use a staffing agency for back up staff.
- ☐ Other: _____

Member signature

Date

Legal Representative signature, if applicable

*This document must be uploaded to MHWIN in the scanned document section.
Please label the document as Backup Plan and have IPOS as the document type.





DWIIHN Treatment Plan Training Log

This form is to serve as a Training Record. It is essential that this form be completed each time a plan is developed or revised and retained in the member's record.

Member Name: _____ MHWIN # _____

Today's Date: _____ Today's Location: _____

Check if virtual training: ☐

Training Category:

- | | |
|---|--|
| <input type="checkbox"/> IPOS/POC | <input type="checkbox"/> Physical Therapy Plan |
| <input type="checkbox"/> Plan Amendment | <input type="checkbox"/> Speech Therapy Plan |
| <input type="checkbox"/> ABA Applied Behavioral Analysis (Autism Benefit) | <input type="checkbox"/> Supported Employment Plan |
| <input type="checkbox"/> Behavior Treatment/Support Plan | <input type="checkbox"/> Occupational Therapy Plan |
| <input type="checkbox"/> Other: _____ | <input type="checkbox"/> Vocational Plan |

Date of Document selected above: _____

Staff being Trained

Print Name	Sign Name	Title	Date

Staff providing Training

Print Name	Sign Name	Title	Date





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Self-Directing Services

***What is Self-Directing Services**



The Self-Directed Services Agreement

- *The Self-Directed Services Agreement* is a contract that defines the roles and responsibilities of the parties of the **Detroit Wayne Integrated Health Network**.
- **The Purpose of the Self-Directed Services Agreement:**
 - Describe the responsibilities of the Detroit Wayne Integrated Health Network (DWIHN), including ways that the DWIHN can support the individual in creating and using self-directed services
 - Describe the authority and responsibilities of the individual/Employer of Record
 - Describe how the agreement, the IPOS, or the individual budget can be changed
 - Describe the financial management service arrangements



Self-Directing Services Welcome Meetings

Monday 4:00pm ~ Tuesday 1:00pm

Wednesday 12:00pm ~ Thursday 10:00am

Please register at least 24 hours in advance

- After registering, you will receive a confirmation email containing information about joining the meeting.
- Required for Employers starting new arrangements ***after* the authorization is approved**
 - SCs are welcome to attend
 - Direct Hires are not required to attend



REFERENCES

- HIRING AND MANAGING DIRECT CARE WORKERS, JANUARY 2021 ARC MICHIGAN
- [Self-Determination Conference 2023](#), Live a Life of your Choosing ARC MICHIGAN
- SELF-DIRECTION TECHNICAL GUIDE Version 2.3
March 2024

