

## **Self-Directed Services---Frequently Asked Questions**

### **How do arrangements that support self-direction work?**

*Through the PCP process, persons-served can pick the best way to obtain the services and supports in their plan. Persons-served may know who they want to hire to be their worker or they may choose how to find workers.*

### **How do individuals use arrangements that support self-direction?**

*By using arrangements that support self-determination, individuals with developmental disabilities or serious mental illness or children with a serious emotional disturbance are better able to achieve their dreams and goals. With the support of their workers, they pursue their interests: many times these interests turn into businesses or paying opportunities. They meet and make friends with common interests. With control over funding comes the power to build the lives they want in the community, just like anyone else.*

### **How is person-centered planning different than self-direction?**

*Person-Centered Planning (PCP) is the way that a person-served decides what their overall goals are; an Individual Plan of Service (IPOS) comes out of the PCP process to outline how a person-served can achieve those goals including what services and supports they need from the community mental health system. Self-Direction is a way to have more control over how those services and supports are provided.*

### **How can persons-served make changes or solve problems?**

*Persons-served will go through the PCP process any time they want to change their IPOS. A new or updated PCP process is often the best way to make changes or solve problems because a person's allies can work together to help come up with creative solutions.*

### **What is a Self-Directed Services Agreement?**

*The local mental health agency has the responsibility to make sure that Medicaid and other public funds are used the way they should be used. When persons-served use arrangements that support self-directed services, their mental health agency agrees to share that responsibility with them. Persons-served manage their individual budget, but the supports coordinator or case manager will check in to make sure that their needs are being met. Persons-served and their mental health agency have a written agreement called a Self-Directed Services Agreement. The agreement describes a person's rights and responsibilities. Before signing it, a person-served/ employer should review it with their supports so they understand it and agree to it. If a person-served doesn't agree with something in the agreement, they should talk to their supports coordinator or case manager about it.*

## **What is an Individual Budget?**

*An individual budget is the funding needed for the services and supports in a person-served's plan from a mental health agency. A person's individual budget is developed after or at the same time their IPOS is developed through the PCP process and approved by the mental health agency.*

## **Can persons-served use the funds in the individual budget any way they want?**

*No. The dollars contained in the individual budget can only be used for the services and supports in the plan approved by the mental health agency.*

## **What do persons-served use the funds in the Individual Budget for?**

*Persons-served use the funds in their individual budget to pay the professional providers or the workers they choose to provide the services and supports in their plan. Persons-served may choose how much they are going to pay someone within rates set by their mental health agency. Persons-served sign the timesheets for their workers or invoices from the professional providers to authorize payment to them.*

## **How does the Financial Management Service (FMS) support persons-served with the Individual Budget?**

*A Financial Management Service (FMS) is an agency that handles an individual budget. The FMS receives the money in the individual budget from the mental health agency. When it receives a signed timesheet or invoice from the person-served/employer, it makes a payment to the workers or providers of services. The FMS also handles all of the legal and tax aspects of being an employer for the person-served.*

## **Can persons-served use arrangements that support self-direction if they have a guardian?**

*Yes. Depending on the type of guardian they have (plenary or partial) and the powers the guardian has been given by the court, persons-served and their guardians will work together so they can participate in arrangements that support self-determination in a self-directed services arrangement.*

## **How can the primary clinician assist persons-served?**

*The primary clinician is responsible for working with persons-served to develop a plan and individual budget. They can give information about arrangements that support self-direction. They must monitor arrangements to make sure everything is going well and assist persons-served when they need help. Any time persons-served have a problem, they should let their primary clinician know right away.*

## **How do persons-served hire workers?**

*Persons-served may choose any worker who meets the Medicaid provider qualifications for the service or support the staff is providing. Persons-served may hire friends or family members or recruit workers through word of mouth, ads, the Internet, or other means. Persons-served cannot hire their legal guardian or a relative who has legal responsibility for them (such as a spouse).*

## **How do persons-served manage workers?**

*Persons-served set the hours and job duties (consistent with the duties for the workers in their plan). Persons-served sign the timesheet so worker(s) get paid. Persons-served must let a worker know if they are unhappy with their work and what needs to change.*

## **Can a person's friends and family help?**

*Yes. Persons-served should ask people they have chosen to be involved in their PCP process or others to be allies and help handle responsibilities. When choosing allies, persons-served should think about people who they trust and who will respect and honor their feelings and preferences throughout the process. Examples of allies may include:*

- *Friends*
- *Family members*
- *People a person-served works with or goes to school with*
- *People known from community organizations they are involved in*
- *Members of church, mosque or temple*
- *Staff who have worked with persons-served*

## **What happens if a worker doesn't show up?**

*For the times that a worker is sick or wants to go on vacation, persons-served need a plan for who will support them while a staff is gone. This plan is called a back-up plan. It ensures that persons-served get the support they need if a worker is not there. The back-up plan is developed through the PCP process and is outlined in the IPOS. Persons-served can have an agency provide back-up or have a list of friends and family members willing to support them when a worker is not there.*

## **How do workers get paid?**

*When directly employing workers, the Financial Management Service (FMS) serves as the employer agent. The FMS pays the workers and withholds and pays taxes and unemployment insurance. While the FMS performs these duties for the person-served, as employer the person-served has a responsibility to make sure that the FMS does its job right.*

## **How can a person-served make changes?**

*Making changes to the Individual Plan of Service (IPOS) is easier when the person-served is in charge. Persons-served can find a new worker if the worker they have is not meeting their needs or is no longer available. Persons-served may be able to make small changes in their individual budget without involving the supports coordinator or case manager. A person-served and their case manager may be able to make some changes over the phone. For many changes, a person-served should work with their case manager to make the change. Bigger changes are best made using the PCP process. A person-served can have a PCP meeting and update to their IPOS at any time.*

## **What if a person-served cannot solve a problem through the PCP process?**

*If a person-served is unable to find a solution to a problem through the PCP process, they should be sure to let their case manager or the Customer Service Department know. Every mental health agency has local dispute resolution and mediation processes to help persons-served resolve a dispute about self-directed services. Persons-served also have the right to appeal any actions the mental health agency plans to take to change, reduce or terminate their Medicaid services through the Medicaid Fair Hearings Process once the local dispute resolution process has been exhausted.*