



Self-Directed Supports Member Handbook

If you have questions or need to request an interpreter please call or visit us at:

My Choice Wisconsin
24-Hour Phone Coverage/7 Days a Week

Main Office: (414) 287-7600
Toll Free: (800) 963-0035
TTY: 711

www.mychoicewi.org

Office Hours

Monday – Friday: 8:00 AM – 4:30 PM

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INTERPRETER SERVICES

English

ATTENTION: If you speak English, language assistance services are available to you free of charge. Call 1-800-963-0035 (TTY: Wisconsin Relay System at 711).

Spanish

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Hmong

CEEB TOOM: Yog koj hais lus Hmoob, kev pab rau lwj yam lus muaj rau koj dawb xwb. Hu 1-800-963-0035 (TTY: Wisconsin Relay System at 711).

Chinese Mandarin

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Somali

DIGTOONI: Haddii aad ku hadasho afka Soomaaliha, adeegyada caawimada luqadda waxaa lagu heli karaa iyagoo bilaash ah. Wac 1-800-963-0035 (TTY: Wisconsin Relay 711).

Laotian

ໝາຍເຫດ: ຖ້າທ່ານເວົ້າພາສາລາວ, ທ່ານສາມາດໃຊ້ການບໍລິການ
ຊ່ວຍເຫຼືອດ້ານພາສາໄດ້ໂດຍບໍ່ເສຍຄ່າ. ໂທ 1-800-963-0035
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My Choice Wisconsin:

- Provides free aids and services to people with disabilities to communicate effectively with us, such as:
 - Qualified sign language interpreters
 - Written information in other formats (large print, audio, accessible electronic formats, other formats)
 - Auxiliary aids and services for hearing-impaired and vision-impaired members
- Provides free language access services to people whose primary language is not English, such as:
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Introduction

What is this handbook about?

This Self-Directed Supports (SDS) Member Handbook explains the Self-Directed Supports option and how to make it work for you. This book will walk you through each of the steps in:

- Developing your own service plan.
- Managing your individualized service budget.
- Hiring and paying caregivers.

Participation in SDS is voluntary. The choice is entirely up to you. Read this handbook, think about it, and talk with your team if you want to choose SDS or just want to talk more about how it might work for you.

What is Self-Directed Supports (SDS)?

Self-Directed Supports (SDS) means:

- Making decisions about how you want to live life and making choices about the type of supports and services you need.
- Having more control over your supports and services within a set budget.
- Taking responsibility for personal decisions and actions.

Guiding Principles

What is Self Determination?

Self-Directed Supports is one component of the larger self-determination philosophy. My Choice Wisconsin supports the following values and guiding principles of self-determination:

Dignity, Respect, and the Right to Take Risks

All people have the right to be treated with dignity and to be respected as a whole person. All people have the right to the dignity of risk.

Choice and Control

People have the right to choose what they will do with their lives and with whom they will do it. When people need help with choices, family and friends who are closest to them should be the primary source of assistance. Self-determination means that people have the power to make decisions and truly control their lives. This includes authority over financial resources available for support services, authority to determine the goals and nature of support services, and authority to hire the people who will provide chosen supports.

Relationships

Those with whom the individual has real relationships provide the strength, assistance, and security that ensures each person's well-being. It is essential that each person have a circle of friends and family chosen by him or herself to provide strength and assistance.

Contribution and Community

Everyone has the ability to contribute to his or her community in a meaningful way. Giving of ourselves helps us to establish a sense of belonging and identity. Community membership includes having an opportunity for employment, to have your own home, to be truly

involved in the routines of the community and to make a difference in the lives of others.

Fiscal Responsibility

Control over how funds are spent comes with responsibility to live within a budget. When people have choice and control, it allows them to purchase supports in a way that permits them to get what they need, pay only for what they get, invest in goods or services that will produce long-term benefits, spend money more efficiently, explore alternatives to paid supports, and make adjustments to their supports as their needs change.

Choice Has Limits

Public funds will not be used to support choices that are illegal or harmful to the member or others. Expenditures must be consistent with the established plan developed with the member and team. The member shall also provide information necessary for the team to adequately monitor member health and safety.

Creating a Plan for Services

Step 1: Your Personal Outcomes

The first step in creating your plan for services is to think about your short-term goals. What do you want in your future? Is there something you wish were different? What barriers have to be overcome? How can your circle (of family, friends and community) help? In other words, what are your personal goals and outcomes?

A few examples of personal outcomes might be:

- I want to stay in my own home.
- I want to become involved more with my church.
- I want to find a job working in the community.

Step 2: Comprehensive Assessment

Now think about the kinds of support you need to achieve your own personal outcomes. What are your preferences for when and how you would like to receive that support?

Your team will work with you to complete an assessment. The assessment will help you and your team identify ideas about the kinds of support you need and the types of services that would best provide that support. You may invite others, such as your family and friends, to join in this assessment process.

Step 3: Member Centered Plan

Now that you have talked about your personal outcomes, needs, and preferences for support, it's time to make a plan for how you will get support or services. Your member centered plan (MCP) will then list all of

your services, including those you plan to self-direct and the names of the individuals or agencies that will provide the support.

IMPORTANT

Your care plan should list services that match your needs and personal outcomes in the most efficient and cost-effective manner available. In order to ensure this, your team will work with you to discuss all options that are available to meet your needs. Once determining all options your team will then work to determine which option is the most efficient and cost effective. It is important to note that this discussion must take place before any service can be approved and set up.

Your care plan is about you. Your care plan will address your unique set of outcomes and may look very different from the plans for supports and services of other members.

Your care plan must also address any issues related to your health and safety, including emergency back-up plans. For example, what happens if your personal care worker is scheduled to get you out of bed in the morning, but he or she is sick? You need to make sure you have someone else to call as a back-up.

Your team will meet with you at least every 6 months to review your personal outcomes. You and your team are responsible for working together to ensure that your services are meeting your needs and helping you work toward your personal outcomes.

Developing a Service Budget

Managing your individualized service budget is an important part of SDS. The amount of money in your service budget is based on the needs identified during your comprehensive assessment, and the type and amount of services in your service plan.

In SDS, you choose how much you want to spend for each service based on your individualized budget amount.

Determining an Individualized Service Budget Amount

Your team will work with you to set up a monthly service budget amount. The amount of your budget depends on the cost of each of your services. The cost of each service is based on what a typical contract service provider is paid for that particular service. For instance, if My Choice Wisconsin would have authorized supportive home care for the member if the member were not participating in SDS, then the cost of the supportive home care through a contracted provider may be used in establishing the member's SDS budget.

Creative Budgeting

You can be creative when managing a budget in many ways. Try to think of the many different ways services could be provided, that would cost less and provide you with more freedom in how your monthly budget is used.

Over Budget/ Under Budget

My Choice Wisconsin will be financially responsible when you spend more than what is in your budget. However, if you are substantially over-budget (or over-budget by a small amount on a regular basis) you may lose access to Self-Directed Supports. If your access to SDS has been limited due to spending over the approved plan, your team will work with you to regain access to SDS. This could involve more education regarding SDS management or offering a co-employment service that offers you more support while still choosing your caregiver. Your team will routinely assess your needs to make sure that your needs can be met with your plan. Part of your responsibility as the member is to notify your team if your needs have changed and you feel you need more or less support.

Shopping for Services

Ask yourself these questions before shopping for services:

Who will provide my services?

Be aware of costs. It may cost more to hire staff from a provider agency because of the agency's administrative costs. It may be cheaper for you to hire a friend or neighbor instead.

What do I want my caregivers to do?

Try to be specific when thinking about the type of assistance you need. For example, do you just need a ride to the grocery store, or do you also need help putting away the groceries at home?

When do I want my services delivered?

Think about your daily routine. Do you need to wake up at a certain time? Do you like to eat lunch at 11:00 instead of noon? Do you prefer morning or evening baths? Do you need to be ready to leave your home by a certain time for appointments or work?

Where do I want to receive my services?

Do you want your services in your home? If you work, do you need support at your job site?

How do I want my services delivered?

Make sure your caregivers understand your needs and are comfortable doing the work you expect. If you need help with personal care, are your caregivers properly trained? Are you willing to train your caregivers? Do you need help with training your caregivers?

Choosing Caregivers

The next step is to think about who will provide your supports.

Are any of these people willing and able to assist you?

- Family members or other relatives
- Friends
- Neighbors
- Church groups
- Co-workers
- Roommates
- Provider agencies
- Community volunteer organizations

There are three ways to choose the people that will provide your support and services. You may choose to use any or a combination of all three.

1. **Find volunteers.** Do you have a family member, neighbor or friend that may be willing to volunteer their time to assist you as a natural (or unpaid) support?
2. **Use an agency.** My Choice Wisconsin has contracts with over 9,000 different agencies and organizations. Your team is available to assist you with choosing an agency that will meet your needs.
3. **Hire your own caregivers.** You may already know someone (a friend, neighbor, or family member) who would be willing to provide your support. If you want to hire your own caregivers, but do not know anyone who is willing to provide your support, you may need to advertise and interview for a caregiver.

Hiring & Paying Your Own Caregivers

There are two options for hiring and paying your caregivers:

1. **Co-employment.** You and an agency share the duties of an employer
2. **Fiscal Agent.** You act as the employer while the fiscal agent helps you with payroll.

Co-employment

Co-employment agencies hire the caregiver (or caregivers) you choose for in-home services such as house cleaning and personal care. Here's how it works if you have a provider in mind: The caregiver completes an employment application and the co-employment agency completes all of the employment paperwork such as background checks, reference checks, tax withholding forms, etc.

Once your caregiver is hired, a co-employment agency will:

- Provide unemployment compensation and worker's compensation benefits.
- Issue a paycheck to your caregiver.
- May give your caregiver basic orientation and training and will also support you in doing your own training for your caregiver.
- May provide back-up/emergency coverage in case your caregiver is unable to work their scheduled shift.
- Complete an annual performance evaluation based on your feedback.
- Handle the process for resignations, disciplinary actions, grievances and terminations.

If you choose the co-employment option, your team will work closely with you to make sure the SDS option goes smoothly.

Fiscal Agents

Fiscal agents process payroll, timecards, and issue pay checks to your caregivers.

If you choose a fiscal agent service, you are responsible for:

- Finding and hiring your caregiver(s).
- Ensuring that your caregiver(s) completes the Background Information Disclosure form. This allows Fiscal Agent to complete a criminal background check.
- Training your caregiver(s).

- Making sure you have an emergency back-up plan in case your caregiver is unable to work their scheduled shift.

Once you have a caregiver, a fiscal agent will:

- Issue a paycheck to your caregiver bi-monthly (2x each month).
- Provide workers' compensation benefits.
- Handle tax withholdings for your caregiver.
- Provide any needed tax documents.
- Assist with any questions related to the needed submission of time worked.
- Provide reporting on how much of your services are being utilized.

The chart on the next page provides an overview of each option. You will notice that the co-employment option offers more assistance and support with employment-related tasks, and the fiscal agent requires that you take more responsibility for these tasks.

Comparing the Options

Here is a chart that gives an overview of each option. Notice that the co-employment options offer more assistance and support with employment-related tasks and the fiscal agent requires that you take most of the responsibility for these tasks.

Employment-Related Task	Who is responsible with the co-employer option?	Who is responsible for the fiscal agent option?
Writing a job description, screening applications, interviewing and hiring caregivers	You and/or the co-employment agency	You
Completing background checks	The co-employment agency	The fiscal agent
Deciding wage amount for your caregiver within SDS budget	The co-employment agency in most instances	You

Employment-Related Task	Who is responsible with the co-employer option?	Who is responsible for the fiscal agent option?
Deciding on benefits such as health/dental insurance, vacation, holiday and sick time within SDS budget	Benefits may be offered by the co-employment agency	You
Orientation and training for your caregiver	You and/or the co-employment agency	You
Supervision and work performance evaluation of your caregiver	You and/or the co-employment agency	You
Disciplinary action and firing, if necessary	You and/or the co-employment agency	You
Emergency back-up coverage	You and the co-employment agency	You
Signing off on caregiver timecard	You and the caregiver	You
Sending caregiver timecard	You and the caregiver	You and the caregiver
Issues pay checks	The co-employment agency	The fiscal agent
Responsible for payroll deductions	The co-employment agency	The fiscal agent
Reporting work-related injuries	Caregiver reports to co-employment agency	You notify IDT. IDT notifies fiscal agent

Caregiver Standards

My Choice Wisconsin requires that all providers, including your own staff, meet these requirements:

- Comply with a criminal and caregiver background checks
- Are over the age of 18 – though may be considered for employment if 16 or over in compliance with Wisconsin legislative code

Your team is available to assist you in making sure that your caregivers meet these requirements.

You may also add your own requirements to this list, such as reference checks or a TB skin test.

Communicating with your Caregivers

You have hired caregivers to perform a certain job. Remember that you are the boss. It is important to give your caregivers feedback. As an employer, you are responsible for telling your caregivers when they are doing a good job. You are also responsible for discussing concerns with your caregivers. Remember that you are paying for their support and assistance.

Your caregivers are there to support you in achieving your goals and personal outcomes.

Evaluating your Services and Outcomes

Am I happy with the services I receive? Do my caregivers meet my service expectations? Are my needs being met? Are my caregivers reliable and trustworthy? In other words, am I getting my money's worth from the caregivers I employ and the services I buy?

Ask yourself these questions as you continue to receive services. Think about the personal outcomes that you identified in your member centered plan. Are your caregivers and services helping you work toward those outcomes? If not, please remember that your team is available to assist you in problem solving to find other ways to make sure your needs and outcomes are met.

My Choice Wisconsin is very concerned with quality. When you choose the SDS option, it is your responsibility to continually evaluate if you are receiving quality services. Remember that it is your right to receive services that meet your needs and help you work toward your personal outcomes.

If you have a conflict with one of your caregivers, try to discuss the problem openly. Make sure your caregiver understands exactly what you are asking them to do. It is important to have reasonable expectations for your caregivers. Good relationships involve respect and trust. It helps if you and your caregivers are honest with each other. Everyone deserves a chance to do his or her very best. However, it is okay to find a new caregiver if you are just not happy with the one you have hired.

Self-Advocacy

Self-advocacy means taking control and making your own decisions. It means having a say in who your providers are, the types of services you receive and when, where and how those services are delivered.

Self-advocacy relates to more than just your care and services. It means taking chances and accepting responsibility for the consequences of your actions.

In considering self-advocacy, you should:

- Set your goals and make a plan to get there.
- Be willing to make changes in your life.
- Surround yourself with people who support your dreams and will help you reach your goals.
- Speak up for yourself. Learn from your mistakes and don't give up!

Fraud, Waste, and Abuse

You are responsible to make sure you use your budget for the services and supports agreed upon. Breaking the rules about how you can use your benefits could be considered Medicaid fraud. One example of fraud would be if you put false information on a timesheet for one of your workers so they will be paid for doing work they did not complete. You must only sign a timesheet or an invoice for services or supports that have already been done. Do not sign a timesheet for a service or support you did not receive. **Do not sign a blank timesheet.**

Potential warning signs:

- Concerns raised by others that may indicate abuse
- Evidence of poor care, care not being provided, or services authorized that do not appear to be provided
- Employees show up to work intoxicated or under the influence of drugs
- You consistently go over/under budget or timesheets have excessive hours
- Employees are not doing the tasks they were hired to do
- Employee, legal representative or relative consistently speaks on your behalf and their communication appears to be inconsistent with your wishes or needs
- Employees ask for an increase in wages/hours or changes in services that you have never expressed
- You feel (or appear to feel) obligated to hire family or friends due to their past financial issues although you would not have done this in the past
- You are unwilling to provide input and appear apprehensive to say what your needs are

REPORT!

You play a vital role in reducing fraud, waste and abuse of SDS services and we encourage you to discuss any concerns you may have with your team. You can report concerns to the My Choice Wisconsin Compliance Officer by calling the toll-free hotline at 1-833-253-3465. You may also contact the DHS Office of Inspector General (OIG) toll-free at: 877.865.3432. Online reporting also available at www.reportfraud.wisconsin.gov

My Choice Wisconsin and your team are here to support and empower you to make your own choices. My Choice Wisconsin and your team recognize that every human being has the right to accept a certain level of risk in life.

My Choice Wisconsin, however, is a government funded program and is responsible for ensuring your health and safety.

We will work with you to make sure your individualized service plan promotes your well-being.

If for some reason, your choices are threatening your health or safety (or the health and safety of another person) your team may need to limit your participation in SDS.

If that happens, your team will work with you to find additional supports or training for you so that you can resume directing your services as soon as possible.

Frequently Asked Questions

Q: Must I participate in the Self-Directed Supports option?

A: No. Participation in SDS is completely voluntary. Your team will help you decide if this is the right choice for you.

Q: How do I know if the SDS option is for me?

A: Every member of My Choice Wisconsin has the right to choose and direct all or some of his or her services. Choosing the SDS option means that you will take on the responsibility for arranging and managing your own service providers and service budget. Some people prefer to have their team do all of this for them, and that's fine. The SDS option is there for you in case you want to handle some or all of these responsibilities on your own.

Q: If I choose the SDS option, am I on my own to handle all of my services and providers?

A: No. Your team will make contact with you on a regular schedule of every six months. These meetings can also occur more often if you choose. My Choice Wisconsin is still responsible for ensuring that your personal outcomes are being addressed and that you are safe. Your team is available to support you in making the SDS option successful.

Q: Will SDS work for me?

A: SDS will work for you if you are willing to accept the responsibility of making your own decisions and accepting the consequences of those decisions. Your team will work with you to the extent you choose to make sure SDS is working for you.

Q: Are there services that I am not able to self-direct?

A: Yes. Services that require special skills or that are bundled within a package of services (such as are included as part of the care you receive from a CBRF or Adult Family Home) are not available for self-direction. Ask your team for details.

Q: If I choose the SDS option, do I have to arrange for all of my services and hire all of my own caregivers?

A: No. You can choose to direct all or just some of your services. For example, you may want to hire your neighbor to help you with grocery shopping only, but let your team arrange for the rest of your services. Your individualized service plan will indicate which services you choose to direct.

Q: I want to hire my own caregivers, but it sounds like a lot of work. Do I have to know about employment laws and paperwork?

A: My Choice Wisconsin has made the process of hiring your own caregivers easier by contracting with co-employment and fiscal agents who can assist you with various employment related tasks.

Q: Can I have direct access to my individualized service budget? For example, can I open my own checking account with this money?

A: At this time, the federal government does not allow individuals direct access to government funding. However, this does not mean that you can't make decisions about how your individualized budget is spent. By using a co-employment or fiscal agent, you have control over the services you buy and how much your caregivers are paid.

Q: What if I want to raise the amount of money in my SDS budget?

A: Your budget was set by you and your team based on your needs. If your needs change you and your team will address those needs and your budget.



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