



# Guide to a Self-Directed Life

For Individuals Self-Directing Their Medicaid Services



IDAHO DEPARTMENT OF  
**HEALTH & WELFARE**

Idaho Department of Health and Welfare

UPDATED September 2015

## Table of Contents

<b>INTRODUCTION.....</b>	<b>6</b>
How to Use this Guide.....	6
What is the My Voice My Choice Self-Directed Services option? .....	6
<b>HOW DOES SELF-DIRECTION WORK?.....</b>	<b>8</b>
Get Signed Up: .....	9
Choose a Support Broker and a Circle of Support:.....	10
Write your Support and Spending Plan:.....	11
Get your Support and Spending Plan Approved: .....	11
Put Your Plan Into Action: .....	11
What if I decide Self-Direction doesn't work for me? .....	12
<b>YOUR RIGHTS AND RESPONSIBILITIES.....</b>	<b>13</b>
What are my rights?.....	13
Who protects my rights?.....	15
What are my responsibilities in the My Voice My Choice option? .....	15
What is Medicaid fraud or misuse of funds? .....	16
What happens if I do not meet my responsibilities? .....	17
The Agreement to Self-Direct Your Services .....	19
<b>YOUR SUPPORT BROKER.....</b>	<b>20</b>
What is a Support Broker? .....	20
Who can be my Support Broker? .....	21
What does a Support Broker do for me? .....	21
How do I choose the right Support Broker?.....	23
How do I interview people to be my Support Broker?.....	23
Working with my Support Broker .....	24
<b>CIRCLE OF SUPPORT.....</b>	<b>26</b>
What is a circle of support?.....	26
Who should I choose to be in my circle of support?.....	26
How do I find people to be in my circle of support? .....	27

What are natural supports? .....	28
What are paid supports?.....	29
<b>PERSON-CENTERED PLANNING .....</b>	<b>30</b>
What is Person-Centered Planning? .....	30
How do I get ready for person-centered planning? .....	31
<b>INDIVIDUAL BUDGET .....</b>	<b>34</b>
What is an Individual Budget?.....	34
How is my budget amount decided? .....	34
The FEA keeps track of your budget.....	35
<b>SUPPORT AND SPENDING PLAN .....</b>	<b>35</b>
What goes in my Support and Spending Plan? .....	36
What services, supports and goods can I buy with my budget? .....	37
Services you buy with your Medicaid card and not your Individual Budget: .....	38
Services you Self-Direct and buy with your Individual Budget:.....	39
Things that you cannot buy with Medicaid money (Not with your Individual Budget account or your Medicaid card): .....	41
How do I make my budget last all year? .....	42
What paperwork do I need to complete for the Support and Spending Plan?.....	43
How is my plan approved?.....	47
How do I make changes to my plan? .....	48
<b>PLANNING FOR RISKS .....</b>	<b>50</b>
What is a risk? .....	50
What should be in my Health and Safety Plan? .....	51
Things to Think About .....	53
Support Planning for a Community-Wide Emergency or Disaster .....	55
<b>BEING SAFE.....</b>	<b>57</b>
How can I keep myself safe in my home and community? .....	57
How can I be safe with workers in my home? .....	57
Abuse, Neglect and Exploitation .....	59
The Different Kinds of Abuse, Neglect and Exploitation: .....	59
What do I do if I am abused, exploited or neglected? .....	62

Places to report abuse, neglect or exploitation: ..... 63

**WORKING WITH A FISCAL EMPLOYER AGENT (FEA)..... 65**

What can a Fiscal Employer Agent do for me? ..... 65

What do I need to do? ..... 66

Employment Agreements ..... 66

Requests for Vendor Payment ..... 66

Sales Tax on Goods..... 67

Timesheets ..... 68

Employment Taxes ..... 68

What should I do with my monthly budget report from the FEA? ..... 69

What records do I need to keep? ..... 69

Maintaining Records: ..... 70

**EMPLOYER RESPONSIBILITIES..... 71**

Hiring Community Support Workers..... 71

How do I find Community Support Workers? ..... 72

Age limitations for Community Support Workers..... 72

How do I write a job description? ..... 73

Job Description for personal care support for Joe Brown..... 75

Job Description for community support for Cindy Smith..... 76

What is a job application form? ..... 77

How do I interview people for the job? ..... 77

What you need to get from an interview:..... 78

What Not To Do ..... 78

Telephone Interviews..... 78

Face-to-Face Interviews ..... 80

Reference Checks ..... 81

Making a Decision About Who to Hire ..... 81

What is an employment agreement?..... 82

Certification and licensing ..... 83

Can I hire my parent or guardian? ..... 84

Hiring CSW's to Work in a Certified Family Home ..... 85

How do I decide how much to pay for supports and services?..... 86

What does it mean to negotiate? ..... 87

Employment taxes on workers' wages:..... 87

Worker's compensation insurance: ..... 88

<b>THE CRIMINAL HISTORY CHECK .....</b>	<b>89</b>
What is a criminal history check?.....	89
Why is it a good idea to get a criminal history check?.....	89
Do my workers have to get a criminal history check?.....	89
What does it mean to waive the criminal history check? .....	89
How do I waive the criminal history check for my employee? .....	90
Why would I waive a criminal history check? .....	90
Will someone help me decide? .....	91
I want my employees to have a criminal history check. What should I do? .....	91
<b>BEING A GOOD BOSS: MANAGING YOUR SUPPORT WORKERS .....</b>	<b>93</b>
Clear Communication .....	93
Code of Conduct.....	93
How do I train my Community Support Workers? .....	94
How do I tell my workers they are doing a good job or need to do better?.....	95
Guidelines for Giving Positive Feedback: "Good Job!" .....	96
Guidelines for Giving Corrective Feedback: "There is a problem we need to talk about." .....	96
Are you happy with your services and supports? .....	97
How can I handle conflicts or problems with my workers? .....	98
What if I need to fire one of my workers? .....	99
How can I keep my workers and myself safe? .....	100
Working Environment .....	100
<b>QUALITY ASSURANCE AND IMPROVEMENT .....</b>	<b>102</b>
What is my part in quality assurance? .....	105
How can I make sure my services and supports are how I want them? .....	107
What if I decide Self-Direction doesn't work for me? .....	107
<b>QUESTIONS, CONCERN OR COMPLAINTS.....</b>	<b>109</b>
What do I do if I have questions, concerns or complaints? .....	109
Who should I call? .....	110
What will happen with my complaint? .....	110

## Introduction

In this section:

- How to use this guide.
- The “My Voice My Choice” Self-Directed Services Option and how it works.
- Step-by-step how to sign up and get started.
- How to change to traditional waiver services if you decide you do not want to Self-Direct your services.
- Main ideas of self-determination.

### **How to Use this Guide**

This guide is to help you know about the My Voice My Choice program. It has information about the things you will need to do to Self-Direct your services and supports including how to manage your Individual Budget, how to choose services, how to hire and manage workers, how to fill out the paperwork that is required and many other things.

We wrote this guide in a way that is easy to understand. This was done for several reasons:

-  So that people with developmental disabilities who read, can read it and use it,
-  So that people who support people who cannot read, can explain it more easily,
-  So that we can all understand.

### **What is the My Voice My Choice Self-Directed Services option?**

My Voice My Choice is the name of Idaho's Self-Directed option for Medicaid services. Anyone who can get Developmental Disability (DD) Waiver services can choose to Self-Direct their services. The My Voice My Choice option was designed to follow the principles (main ideas) of self-determination. Self-determination is about having more control over your life and taking responsibility for your decisions.

Self-directing your Medicaid services and supports can help you to live the life you want and give you more control.

You are in charge of making sure you get what you need. You are in control of how, when and how much you pay for help every day. You can ask friends, family or others to help you. You can learn more about being self-determined in the next section of this guide.

You will not be alone in all of this. There are people who can help you with these tasks. You pay a Support Broker and a Fiscal Employer Agent for their help. You can also get help from a family member or friend you trust. The Regional Medicaid Services office in your area will also help make sure you are healthy and safe.

### **What is My Voice My Choice?**

When you choose 'My Voice My Choice' you will have new responsibilities and you will do some new things that you haven't done before:

- You develop a plan for your services and supports.
- You decide what, when and how you get the services and supports you need.
- You decide how much you pay for the services and supports you get.
- You choose, hire and manage your support workers.
- You buy goods like a wheelchair or medical supplies.
- You must follow your annual Individual Budget and your Support and Spending Plan.

## How Does Self-Direction Work?

In this Section:

- Get signed up.
- Call the Regional Medicaid Services office (RMS) and fill out an application for the DD Waiver.
- Do an assessment with the Independent Assessment Provider (IAP).
- Choose Self-Direction.
- Go to My Voice My Choice training.
- Sign up with the Fiscal Employer Agent (FEA).

If you are eligible for Medicaid waiver services and choose to Self-Direct your services, you get an **Individual Budget** that you are able to use to buy the services, supports and goods you need for one full year. Your budget amount is decided by an assessment that you do with the Independent Assessment Provider (IAP).

You work with a **Support Broker** that you hire to help you direct your services and supports, get the information you need to make decisions and make a plan to spend the money from your Individual Budget.

You write a **Support and Spending Plan** with help from your Support Broker. The plan includes all the services, tasks and goods that you will pay for with your Individual Budget. You can also choose family, friends and people you trust to be your **circle of support** and help you with this planning during **Person Centered Planning**.

**Community Support Services** are the services, tasks or goods listed on your Support and Spending Plan. These are the supports you need each day to reach your goals. Goods are equipment and medical supplies that you buy to help with your disability.

Your Support and Spending Plan will be sent to the Regional Medicaid Services office for approval. Your Individual Budget amount and approval for your plan goes to the **Fiscal Employer Agent** (we will use the letters FEA). The Fiscal Employer Agent keeps track of all the money and will pay for your services and supports with money from your Individual Budget.

**A Community Support Worker** is a person that you hire to help you. A Community Support Worker can be someone who works for a service agency or someone who does not work for a service agency. (We will sometimes just say the word worker or support worker to mean Community Support Worker.)

A step-by-step description is on the next pages.

#### **Step by Step**

- Get signed up.
- Choose a Support Broker and a circle of support.
- Write your Support and Spending Plan.
- Get your Support and Spending Plan approved.
- Put your Plan into action.

#### **Get Signed Up:**

If you get DD Waiver services now, you are already eligible to choose Self-Direction. Call your local Regional Medicaid Services (RMS) office to get started. You will be invited to an information meeting to learn more about the My Voice My Choice option and Self-Direction.

If you decide Self-Direction is right for you, you will do a new assessment with the Independent Assessment Provider (IAP) and start a new plan year. Go to Step 2 to begin.

**If you are new to the DD Waiver these are the steps you take to get started:**

- Step 1** Call the RMS and fill out an application for the DD Waiver. You will be invited to an information meeting to learn more about the My Voice My Choice option and Self-Direction.
- Step 2** You do an assessment with the IAP to determine your needs and if you are eligible for the DD Waiver.

- Step 3** If you are eligible, you can choose the traditional DD Waiver or the Self-Direction option. This is when you would choose Self-Direction.
- Step 4** You get an Individual Budget based on your needs. This is the amount of Medicaid money you can spend to buy the services, supports, and goods you need for one year.
- Step 5** Call the RMS office to set a time for a My Voice My Choice training where you will learn all of the information in this guide.
- Step 6** Sign up with the Fiscal Employer Agent (FEA).

**Choose a Support Broker and a Circle of Support:**

A Support Broker is someone who helps you with every part of Self-determination. They help you write your plan as well as do many other things for you. But the Support Broker is not free. You *hire* a Support Broker and pay them out of your Individual Budget for the hours they work for you.

A circle of support is made up of volunteers, or people you do not have to pay, and they are like your team. They are people who can help you make your dreams happen.

Your Support Broker sends your completed plan to the RMS office. Your Support Broker and circle of support will help you Self-Direct your services and supports.

- Step 1** You interview, choose and hire a Support Broker.
- Step 2** You decide who you want in your circle of support.
- Step 3** You, your Support Broker, and your circle of support talk about what is important to you, what you want for your future, and how you are going to get there (goals). This is called person-centered planning. You write all this down in your My Voice My Choice Workbook.

**Write your Support and Spending Plan:**

The Support and Spending Plan lists your goals, what you are going to do to reach your goals, what other people in your life can do to help you, and what services, supports, and goods you plan to buy with your Individual Budget. Use the My Voice My Choice Workbook to write your plan.

- Step 1** You and your Support Broker use the information from your My Voice My Choice Workbook to write the support part of your Support and Spending Plan.
- Step 2** You decide who you will pay to help you (provide services and supports) and how much you will pay them.
- Step 3** This information goes into the spending part of your Support and Spending Plan.
- Step 4** Your Support Broker sends your completed Support and Spending Plan to the RMS office.

**Get your Support and Spending Plan Approved:**

Before you can buy services and supports, your Support and Spending Plan must be approved by the RMS care manager.

- Step 1** The care manager will do one of these things:
  - 1. approve your plan,
  - 2. ask for additional information ,
  - 3. suggest changes to your plan,
  - 4. or deny your plan.
- Step 2** The FEA will be notified after your Support and Spending Plan is approved.

**Put Your Plan Into Action:**

After your Support and Spending Plan is completed and approved, it is time to put it into action.

- Step 1** You complete an employer packet with the Fiscal Employer Agent (FEA) and your Community Support Workers complete employee packets.

- Step 2** You send the FEA all required paperwork, including all employment agreements.
- Step 3** You begin your supports and services as you listed in your Support and Spending Plan and employment agreements.
- Step 4** The FEA will send you a monthly budget report to help you keep track of your budget account. You supervise your workers. You can have help with this from your Support Broker and your circle of support.
- Step 5** If your needs change and you need to change your plan, you talk to your Support Broker and circle of support, have a person centered planning meeting, and send the plan changes to the RMS care manager for approval.
- Step 6** Every year you do an eligibility assessment with the IAP and write a new Support and Spending Plan. This is called annual re-determination.

### **What if I decide Self-Direction doesn't work for me?**

If you choose Self-Direction and then decide that it is not working for you, you can stop using this option and return to traditional waiver services. You tell your Support Broker and circle of support that you would like to stop Self-Directing your services and get your services through the traditional waiver model.

The Regional Medicaid Services office will follow steps to help you change to traditional waiver services. The RMS office will work with you and your circle of support to write a 120 day transition plan so that you can get the services and supports you need to live in the community. A plan developer will work with you to write a new plan showing the change in services.

You will not have a Support Broker, hire your own workers, or work with a Fiscal Employer Agent in the traditional waiver services model. You will work with a service provider agency to get the help you need each day. You still use your Medicaid card for medical services, like doctor visits, and to buy equipment and medical supplies.

## Your Rights and Responsibilities

In this section:

- Basic rights.
- Your rights in the My Voice My Choice option.
- Who to ask about your rights.
- Where to call to find someone who can protect your rights.
- Your responsibilities in the My Voice My Choice option.
- Other duties.
- Medicaid fraud or misuse of funds.

Every person has rights. A right protects you and makes sure that you get the services and supports you need. Some rights say you can make a choice, as long as your choices do not harm yourself or somebody else. When you use your rights, you take control of your life.

### *What are my rights?*

You have the right to be treated with respect. You have the right to be treated like a valuable and important person. You have a right to **humane care**. This means:

-  You have a safe and comfortable place to live.
-  You have enough food to eat.
-  You live in a community with people you care about.

You have a right to **privacy**. Privacy is deciding for yourself what you want to share and who you want to share it with. A right to privacy means:

-  You do NOT have to share what is personal.

-  You do NOT have to tell private thoughts to anyone.
-  You do NOT have to share your personal things.

You have a right to be **free from harm**. You have a right to be safe and not be hurt or treated badly. This means that nobody has the right to:

-  Scare you, tie you down, or hurt you.
-  Stop you from talking or going somewhere important.
-  Refuse to help you when you need it.
-  Give you a medicine you don't need.

You have the right to make **choices about your life**:

-  Where to live.
-  Where to go to school.
-  Where to work.
-  How you want to be part of your community.
-  Who you want to live with and spend time with.
-  What services and supports you need.

You also have the right to:

-  Decide who is part of your circle of support and who helps you to make your Support and Spending Plan.
-  Decide what services and supports you want in your Support and Spending Plan.

You have these basic rights:

- Humane care
- Privacy
- To be free from harm
- To make choices about your life, like where to live, where you work, who you want to be around and what services and supports you need
- What services and supports are in your plan
- Who provides those services and supports

-  Choose who provides your services and supports.
-  Look at information written about you.
-  Keep and spend your own money.

We have not listed all of your rights in this guide. What if you are not sure that something is your right? People who may be able to help you understand your rights would be family members, your guardian, your Support Broker, people in your circle of support, or staff at the Regional Medicaid Services Office.

### **Who protects my rights?**

What if somebody says you can't do or have something you want? Disability Rights, Idaho, formerly Co-Ad Inc., will help you understand your rights and help make sure your rights are protected. Call Disability Rights Idaho at this toll-free number: 1-866-262-3462. Idaho Legal Aid can help you know what is your right by law if you are being unfairly denied. You can call Idaho Legal Aid at: (208) 743-1556. Self-determination means being able to make your own decisions. It also means that you take responsibility for your decisions and for the important things you need to do to make sure you get the help you need.

**It is up to you to take responsibility for yourself.**

### **What are my responsibilities in the My Voice My Choice option?**

These are the things you must do when you Self-Direct your services:

1. Agree to the main ideas of self-determination.
2. Be part of a person-centered planning meeting.
3. Help plan and write your Support and Spending Plan.
4. Decide the amount you will pay your workers.
5. Write, sign and follow the employment agreements for your Support Broker and Community Support Workers. Give copies of those agreements to the FEA.

6. Make sure your employment agreements list the kind of support you are paying for, how much you are going to pay your worker and how many hours and how long you will get that support or service.
7. Look at all timesheets and invoices to make sure that you got the service or support that is listed.

Other duties you have:

- Follow the Support and Spending Plan approved by Medicaid.
- Follow your Health and Safety Plan to make sure you are safe.
- Work with a Support Broker.
- Work with a Fiscal Employer Agent (FEA).
- Make sure your Community Support Workers know how to do the job you hire them to do and have the skills they need to support you in a safe way.
- Keep records of the supports and services that you get, like timesheets and receipts.
- Make sure you are not spending more money than is in your budget for the year.
- Tell Medicaid if you are happy or unhappy with your services and supports and how they are provided to you.
- Make choices that do not harm yourself or anybody else.

**What is Medicaid fraud or misuse of funds?**

You are responsible to make sure you use your Individual Budget for the services and supports listed on your Support and Spending Plan. You must keep a record (timesheet) or receipt that shows the kind of service or good, number of hours provided, how much you paid for the service or good and other information.

Medicaid fraud is when you break the rules about how you can use your Medicaid benefits. Your budget for Self-Directing your services is a kind of Medicaid benefit.

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 do. You must only sign a timesheet or invoice for services and

supports that have already been done. Do not sign a timesheet for a service or support you did not get. Do not sign a blank timesheet. Another example of fraud would be if you sign an invoice (bill) for a service or good you did not get and then send it to the FEA to be paid.

You are responsible to know Medicaid rules. If you break the rules, you could lose your Medicaid benefits. Medicaid can also take you to court. You may have to pay Medicaid back for those funds.

To protect yourself from fraud or misuse of funds:

- Keep a record of all the services and supports that you get.
- Save all of your My Voice My Choice program paperwork.
- Look at every timesheet for your workers and every invoice or bill to make sure it is correct.
- Talk to your Support Broker or Regional Medicaid Services office if you think somebody is giving you wrong information or doing things that are against the law.

If you think that someone who is getting Medicaid benefits from the state is not following the rules or you think a service provider is getting paid for services they have not provided, you should report this to Medicaid. Call (208) 334-2020 or call the toll-free Medicaid fraud and abuse hotline at (866) 635-7515.

### **What happens if I do not meet my responsibilities?**

If you can't follow your responsibilities for Self-Directing your services you might be taken off the Self-Directed Option and moved back to the traditional way of getting services. You will still get the support you need but you won't be able to Self-Direct your services.

Medicaid will not allow you to keep Self-directing your services if:

1. You are not willing to work with a Support Broker and a Fiscal Employer Agent.
2. You do not follow your Support and Spending Plan.
3. You do not follow your Health and Safety Plan.
4. You make choices that put your health, welfare and safety in danger or you make choices that endanger or harm others.

**If your health and safety are not in immediate danger:**

- If the Regional Medicaid Services office decides you may not be allowed to keep Self-Directing your services for any of the reasons above, you and your Support Broker will get a letter saying that you might be removed from the Self-Directed Option unless you take care of health or safety concerns.
- The letter will list the concerns you need to take care of and the date you need to give a plan of correction to RMS staff. You will have 10 days to write how you are going to change things to make sure you are healthy and safe, including any back-up plans if you need them.
- The RMS staff will look over the plan of correction to see if you list changes that will take care of health and safety concerns. They will approve the plan if it will correct the problems or they will deny the plan if your health and safety would still be in danger. The RMS staff will make sure the changes you list in the plan of correction are put in place to keep you safe.

**If your health and safety are in immediate danger:**

- If the Regional Medicaid Services office decides not to allow you to keep Self-Directing your services because your health or safety is in immediate danger, you will be removed from the Self-Directed Option.
- Medicaid staff may authorize community crisis supports for you if needed. They will work with you to identify a plan developer who can help you write a 120 day transition plan. This plan lists the services and supports you need to live safely in the community.

If you are removed from the My Voice My Choice option, you can still get the supports and services you need. You just will not be allowed to Self-Direct your services and supports.

It is up to you to take responsibility for yourself, know the rules and follow the law.

**The Agreement to Self-Direct Your Services**

Before you can start Self-Directing your services under the My Voice My Choice option, you have to sign a document called the “Agreement to Select Self-Directed Services.” This document lists rules you will have to follow.

- Make sure you are eligible for Medicaid and DD Waiver services.
- Go to training to learn how the My Voice My Choice option works.
- Follow the rules listed on page 20 of this guide.
- Make choices that do not harm yourself or anybody else
- Follow your approved Support and Spending Plan.
- Follow your Health and Safety Plan.
- Do not pay rates for services and supports that are more than the market rate.
- Use your Individual Budget for services and supports that help you meet your goals you talked about during person-centered planning.
- Stay within your annual budget amount.
- Work with a Support Broker and a Fiscal Employer Agent.
- Make sure your workers have the skills they need.
- Keep records on the services and supports you get.
- Review and sign timesheets or invoices.
- Buy all goods and services through the FEA as listed on the Support and Spending Plan with written vendor or employment agreements.
- Follow Support Broker and Community Support Worker employment agreements.
- Report abuse, neglect or Medicaid fraud to the authorities.

## Your Support Broker

In this section:

- What is a Support Broker?
- Who can be your Support Broker?
- What a Support Broker does for you.
- How to choose, interview, and hire a Support Broker.
- Working with your Support Broker.

### **What is a Support Broker?**

A Support Broker is someone you hire to help you:

-  Find the people in your life that you trust to be in your circle of support.
-  Get the information you need to understand what choices you have for your services and supports.
-  Decide how you want the money from your Individual Budget spent to get the supports and services you need.
-  Get the workers to support you at home, at work, or in the community.
-  Find others who can help you, like your family, friends and neighbors.
-  Connect to your community, find a job, join a club, or be a volunteer.
-  Make sure that people listen to you and respect your choices.

The rules say every Support Broker:

-  Must sign up with the FEA and give them required paperwork.
-  Must have a criminal background check.

- ☞ Must have an employment agreement with you.
- ☞ Must be approved by the Department to be a Support Broker.

### **Who can be my Support Broker?**

- ☞ a friend
- ☞ a relative like a brother or sister or aunt or uncle
- ☞ a teacher
- ☞ an interested person you trust

You can get a list of qualified Support Brokers from the Medicaid office or website. The website for Self-Direction is: [www.selfdirection.idaho.gov](http://www.selfdirection.idaho.gov).

### **Who cannot be my Support Broker?**

- ☞ your parent or guardian
- ☞ your husband or wife
- ☞ a service provider agency

### **What does a Support Broker do for me?**

A Support Broker can help you choose and set up the supports and services you need to live the life you want and reach your goals. They should know how to use the supports that are already around, or find new supports, to help you be part of your community.

Some things that your Support Broker must do for you:

- ☞ Help make person-centered planning happen for you.

A Support Broker should be very good at listening to what you say about how you want your life to be.

-  Help you write a Support and Spending Plan that tells what you need and want for supports and services in your life.
-  Give the Support and Spending Plan to Medicaid for approval.
-  Help you keep track of your budget and look over the reports from the Fiscal Employer Agent (FEA).
-  Fill out paperwork about how you feel about the quality of your supports and services and send it to Medicaid.
-  Help you with your annual re-determination meeting, update your plan and fill out paperwork.
-  Help you meet your responsibilities under this option and make sure you are healthy and safe.

Some things your Support Broker might do for you:

-  Help you find people for your circle of support.
-  Help you negotiate rates of pay for the Community Support Workers that you hire and keep the records of the supports provided by each of your Community Support Workers.
-  Help you understand your employer responsibilities and solve problems that may happen with your Community Support Workers.
-  Help you find the things you need in your community and different ways of getting supports and services.

A Support Broker will not:

-  Be a paid personal care support staff for you at home or work.
-  Tell you what to do or speak for you.

### **How do I choose the right Support Broker?**

The Support Broker works for you. You get to pick your Support Broker. You need to think about what you want your Support Broker to do for you. You will want to find someone who you feel comfortable talking to and working with. Someone who knows your community well and understands what you want to do in your life. You may already know someone you think would be a good Support Broker.

If they want to do this job for you, they need to fill out an application, have the application accepted by Medicaid and learn about Self-Direction. If you do not know anyone to this job for you, Medicaid has a list of qualified Support Brokers.

To choose the right Support Broker will take some work. You might want to think about some of these things to help you decide what kind of person would be a good fit to be your Support Broker:

-  What kind of relationship do you want with your Support Broker?
-  How do you want your Support Broker to work with your family and friends?
-  What are things that you do not want your Support Broker to do?
-  How often should your Support Broker visit or call you?

### **How do I interview people to be my Support Broker?**

The first step is to tell the Support Brokers you interview about your goals and needs. This will help Support Brokers understand what you expect them to do in the job. Then ask questions to learn more about them.

When you interview Support Brokers, make sure you get answers to all your questions before you decide who you will hire. Choose the person that gives you the best answers to your questions. You might want to ask a friend or relative to help you interview Support Brokers and hear what they think.

Possible questions to ask the Support Brokers you interview:

-  Do you have experience working with people like me?
-  Do you have experience helping people make the kind of changes I want to make?
-  How many other people do you work with right now?
-  What if I need more time from you and you do not have that time to give?
-  How would you help me with my budget?
-  What do you think it would be like to work for me?
-  How have you been an advocate for the people you work for?
-  What do the people you support now think about you as their Support Broker?
-  Do you have any questions about me and the services and supports I need?

**You decide how much help you want from your Support Broker.  
You pay the Support Broker for the hours they work for you.**

### **Working with my Support Broker**

Once you find a good Support Broker, you need to decide how you will work together. An employment agreement is paperwork that you and your Support Broker fill out that describes what kinds of things your Support Broker will do for you, how many hours per week or month they will work, how often you will meet together, and how much you will pay them.

It is important to let your Support Broker know how much you appreciate him or her when they are doing a good job. But never be afraid to say when something is wrong.

If you want to change your Support Broker, that is okay. If you decide to fire your Support Broker you will need to hire a new one. If your Support Broker decides to quit, they need to tell you 30 days before they stop working for you (this is called "giving you notice.") They must help you find a new Support Broker and help you and your new Support Broker write a service transition plan that has your updated Support and Spending Plan in it.

## Circle of Support

In this Section:

- What is a circle of support?
- Who should I choose to be in my circle of support?
- How do I find people to be in my circle of support?
- Natural Supports
- Paid supports

### **What is a circle of support?**

A circle of support is like a team - your team. You choose who will be in your circle of support. These are people that you trust to think about how YOU want your life. They are people you can ask for advice. They listen to what you say and respect your decisions. They also support you to find ways to do the things you want to do in your life.

A circle of support should be people who can help you make your dreams happen. Even just one other person helping you is better than trying to plan your future alone and your Support Broker can help you find people to be in your circle of support.

### **Who should I choose to be in my circle of support?**

You might choose family members, friends, neighbors, or anyone who knows you well and knows what you want to do with your life.

Your circle of support SHOULD BE:

-  People you feel comfortable with.
-  People who agree with the ideas of self-determination.

-  People who think you can make the decisions about your life and respect your choices.
-  People who will give you the information and the time you need to make good decisions.
-  People who respect you and your life choices.
-  People who can think of new ways to get things done.
-  People who will help you get your life set up the way you want.
-  People who can help you make your dreams happen.

Your circle of support can HELP YOU:

-  Write down your dreams and goals for your life.
-  Write your Support and Spending Plan and be part of your person-centered planning.
-  Find the services and supports you need in your community.
-  Find ways to make your budget last all year.
-  Make sure that you are getting the services and supports you need in the way that you want to get them.
-  Make sure that you are safe and healthy.

**How do I find people to be in my circle of support?**

If you do not have a lot of people in your life that you are close to right now, you might want to ask people from your community.

You can call an independent living center or self-advocacy group in your community to see if there is someone who wants to get to know you and help you with your planning. An independent living center

works with people who have disabilities to help them to make connections and get what they need to live as independently as they want to.

A self-advocacy group is people who have disabilities who practice speaking out for themselves and being self-determined in their lives. They sometimes have meetings and do activities together.

**Even just one person helping you is better than trying to plan your future alone.**

### **What are natural supports?**

Sometimes you have to pay for supports, sometimes you don't. When you hire somebody to do a job, you pay them for their time. But other times, you might have a friend or a family member who can help you for free.

Natural support is help that you don't have to pay for. Natural supports are everywhere. They might be your family or friends or people you meet in your community. There are times that your family or friends help you out with something and times when you help them too. You are giving each other natural support when you help each other because you want to and nobody is getting paid.

Your circle of support is a kind of natural support. People you choose to be in your circle do not get paid to be part of your circle of support.

Examples of natural support:

-  A friend gives you a ride someplace you need to go.
-  A family member comes to your house to help you when you are sick.
-  Your neighbor takes care of your pets when you are on vacation.

-  You bring in your neighbor's mail when they go on vacation.
-  At your job, your co-workers help you learn a new task.
-  You help a friend in their garden.
-  A friend from church takes you grocery shopping.
-  A family member takes you to run errands.

### **What are paid supports?**

Paid supports are services and supports that you pay for with your Individual Budget.

Examples of paid support:

-  You pay your Community Support Worker to help you get dressed.
-  You pay to ride the bus or hire a taxi.
-  You buy a wheelchair or other kind of equipment.

During person-centered planning with your circle of support, it is good to talk about the natural supports in your life. When you write your Support and Spending Plan, it will have all of the services and supports that you have to pay for with your Individual Budget.

It is important to make sure that your budget will last all year to pay for the services you need. If you have more natural supports in your life, you may be able to make your budget last longer and pay for more things.

Your circle of support and your Support Broker can help you to find more natural supports in your life.

## Person-Centered Planning

In this section:

- You are the leader of person-centered planning.
- Questions to ask yourself.
- How to get ready for person-centered planning.
- What kinds of help do you need?
- Risk Information Tool

### **What is Person-Centered Planning?**

We all have hopes and dreams for the future. Some we can work for on our own, many take support from others. Person-centered planning helps you think about what your hopes and dreams are (your life goals) and what kinds of support you need to reach your goals. Part of it is talking about what you like to do and can do well. It is also finding out what things get in the way of doing the things you like to do.

This is a chance to make changes in your life and work towards your goals. The most important thing about person-centered planning is...

**YOU are in charge!**

Your Support Broker will help you with the person-centered planning process and to write your plan. You can have your circle of support help you do this planning too. To help you decide what support you need, think about what it would be like to have enough support that you are able to do the things you need and want to do.

You can use the "My Voice My Choice Workbook" to help you think about how you want your life to be and any changes you want to make in your life. It will help you to answer questions about yourself like:

-  What is important to you?
-  What kinds of things do you like to do each day?
-  Who do you like to spend time with?
-  What things do you want to do in your community?
-  Where do you want to live?
-  What goals do you have for your life?

**You are the person who will make choices and decisions about your life.**

It will also help you to think about:

-  Things you can do by yourself.
-  Things you need help to do.
-  Natural (unpaid) supports you have in your life.
-  Kinds of supports and services you need.

### **How do I get ready for person-centered planning?**

Person-centered planning starts with asking yourself what your needs are. Think about things you are interested in, what talents and skills you have and what goals you have for your life. Some of the things that you may want to think about to get ready for person-centered planning:

-  What needs does your assessment from the Independent Assessment Provider (IAP) included?
-  What is your life like now?

-  Where do you live? What kind of place do you live in?
-  What do you do during the day?
-  What kind of support do you have?
-  What is good about the people who support you now?
-  What is really important in your life right now?
-  What kind of changes do you want to make in your life?
-  Are there things you do now that you would like to do more often?
-  Are there people you would like to spend more time with?
-  Do you want to live someplace different?
-  Do you want to be more involved in social activities or events?
-  Do you want to get a job or change the job you have?
-  What kinds of support do you need?
-  Do you need help with personal care, like bathing or dressing?
-  Do you need help with cooking or cleaning?
-  Do you need help with managing money and paying bills?
-  Do you need help to get to the places you want to go?
-  Do you want to learn something new and need training or a class?

During person-centered planning, you can fill out a Risk Identification Tool form. This form will help you talk about important things you need to plan for to keep you safe and healthy.

## Individual Budget

In this section:

- How your Individual Budget amount is decided.
- The Fiscal Employer Agent (FEA) keeps track of your budget account.

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

An Individual Budget is money from Medicaid that you will be able to use to buy services, supports and goods listed on your Support and Spending Plan. This amount will be all you get for one year (12 months).

### **How is my budget amount decided?**

The Independent Assessment Provider (IAP) will do an assessment with you to find out if you are eligible for waiver services. An assessment means that someone will ask you questions, fill out forms and get other information about you. Eligible means that you can get Medicaid-paid services. If you are not eligible, you are not able to get services and supports that are paid for by Medicaid money. This assessment finds out what kinds of support you need because of your disability. Your Support Broker will use the assessment information during your person-centered planning to work with you on goals. It also decides the amount of your budget for one year. You will get a letter that tells you your Individual Budget amount.

Every year you will have to do an assessment with Medicaid staff to make sure you are still eligible for waiver services. This is called annual re-determination. If your needs do not change, your Individual Budget should stay about the same for the next year. If your needs have changed from the last assessment, then you need to make sure Medicaid staff know about the changes and if you need more or different services and supports. You decide how to use your budget to make sure you get the services and supports you need. The budget amount is the money you have to use for services and supports for one full year.

**The FEA keeps track of your budget.**

You will pay the Fiscal Employer Agent to keep track of your Individual Budget. The FEA will pay your support workers for the number of hours they worked and pay any invoices (bills) for other goods and services on your Support and Spending Plan with the money in your account. Your account balance (the amount left in your account) will become smaller each time the FEA pays someone for the services and supports they have provided to you.

The FEA will send you reports each month to let you know how much of your Individual Budget is left in your account.

You pay the FEA for fiscal management services. Some things the FEA will do for you:

- Pay your workers.
- Pay invoices or bills for goods and services.
- Provide you reports about your budget account.
- Provide Medicaid reports about your budget.

## **Support and Spending Plan**

In this section:

- Your Support and Spending Plan and what goes in it.
- Services, supports, and goods you can buy.
- How to make your Individual Budget last all year.
- Paperwork you must complete for your Support and Spending Plan.
- How your plan is approved.
- How to make changes to your plan.
- Planning for risks and emergencies.
- Writing a back-up plan.

### **What goes in my Support and Spending Plan?**

Your Support and Spending Plan lists all the services, supports and goods you need to be involved in your community, live as independently as possible, and reach your goals. This is the plan you must follow through the year to buy the services and supports you need with your Individual Budget.

Your budget has to last all year. It is important to think about all the support, services and goods you will need during the year when you write your Support and Spending Plan. You decide how much you pay for services and supports. You may decide to spend more of your budget on support that is very important to you.

**What services, supports and goods can I buy with my budget?**

You can use your Individual Budget from Medicaid to buy only the services, supports and goods you listed on your Support and Spending Plan. Services and supports are work done to help you do things like have a job, make dinner, take care of personal needs, or get around town. Goods are equipment and medical supplies that you buy to help with your disability.

In the My Voice My Choice option, there are services, supports and goods that you are allowed to buy with your Individual Budget and there are other services, supports and goods you buy with your Medicaid card instead. There are certain things that you cannot buy with Medicaid money – not with your Individual Budget or your Medicaid card.

The purchase of “goods and services” supports you in increasing your independence, or in substituting for human assistance. “Goods and services” may also decrease the need for other Medicaid services.

An annual plan must not include both a request to purchase individual goods and services as a substitute for human assistance and a request for the same type of assistance from a person.

If you have previously been approved and purchased goods and services to be a substitute for human assistance, you should not request the assistance of a person for this same assistance without written documentation to justify.

If Services are provided in a Certified Family Home (CFH), you may not pay a CSW for the services covered under the requirements of “Elements of Care” (IDAPA 16.03.19.170.01-07). These requirements include supervision, assistance with activities of daily living (i.e. bathing, washing, dressing, toileting, grooming, eating, communicating, continence, managing money, mobility and associated tasks), recreation, medical arrangements, furnishings and equipment, activity supplies in reasonable amounts and arrangement for

transportation in reasonable amounts for activities into the community. The Elements of Care are requirements of home certification that must be provided without additional charge to the participant.

**Services you buy with your Medicaid card and not your Individual Budget:**

-  Medical services like doctor visits or hospital stays.
-  Pharmacy (medications).
-  Medical therapies not about your disability.

In certain circumstances, a Support and Spending plan may identify the need for two (2) CSW's to complete the same task at the same time during any part of the support schedule. A Care Manager may authorize this request when there is attached documentation that supports all of the following:

- The Participant's health and safety cannot be assured without a second CSW. (What are the barriers to health and safety without the use of the second CSW?)
- The Support and Spending Plan costs are within the participant's Individual Budget.
- The use of the second CSW provides for the participant's needs without using a more costly support.

The "Two CSW Form" was developed for use when two CSWs bill at the same time for the same task. The form must be attached to the Support and Spending plan. The use of two CSW's must also be noted within the My Support Plan sections of the plan and on the employment agreements for each CSW.

Care Managers will approve this request on a case by case basis. They will submit the "Two CSW Form" along with the Support and Spending Plan Authorization.

The FEA will use the “Two CSW Form “as a trigger to by-pass their security protocol. In these instances, paper time sheets **must be** sent and it requires a manual review of **all** the time sheets being submitted for that participant.

***Services you Self-Direct and buy with your Individual Budget:***

- **Support Broker Services**
- **Fiscal Management Services**
- **Community Support Services** in these areas:

***For each category there are goals identified, include qualifications and skills required by the CSW to carry out the goals.***

-  **Job support:** to help you get a job, learn the skills to do the job and keep the job.
-  **Personal support:** to help you stay healthy, be safe and get help for daily care of yourself and your home.
-  **Relationship support:** to help you have good relationships with your family, friends, or others and to get more natural supports (unpaid supports) in your life.
-  **Emotional support:** to help you with behaviors that are a problem for you or get in the way of reaching your goals.
-  **Learning support:** to help you learn new things or get better at things you already know how to do.
-  **Transportation support:** to help you get to where you need to go. Medical transportation (transportation to and from medical appointments) should be arranged through AMR.

- **Transportation Support Services (TSS)** An hourly rate includes both the mileage rate and hourly wage paid for any direct service being provided while driving.
  - **Transportation Mileage Reimbursement (TSM)** Mileage is paid separately and can be billed at the same time as an hourly wage service when the hourly wage is being paid for a direct service while driving
-  **Adaptive Equipment:** that you need to get around or to keep you healthy and that helps you to do things on your own.
-  **Nursing Services:** from a licensed nurse;
-  **Skilled Support:** from professionals like speech and language therapy, occupational and physical therapy, counseling, mental health services and more. These services must help you with your developmental disability

**Things that you cannot buy with Medicaid money (Not with your Individual Budget account or your Medicaid card):**

-  Services, goods or supports for someone else besides you.
-  Costs or fees like attorney's fees, bank fees, etc.
-  Insurance payments
-  Room and board payments (rent).
-  Personal items that aren't related to your disability.
-  Home modifications that add more space to your home.
-  Home modifications for somebody else's home.
-  Costs for travel, hotel or meals that have to do with training for you or your workers.
-  Experimental treatments.
-  Membership costs or dues (like a club or gym), unless the service or support you get through membership is directly related to your disability.
-  Vacation costs that are not direct services.
-  Fixing your car, except to fix things that help with your disability (like a lift for a van).
-  Tickets and costs to go to sporting or other recreational events.
-  Animals and their related costs, except service animals like guide dogs for the visually impaired.

***How do I make my budget last all year?***

When you get your Individual Budget amount, it is for one whole year (12 months). It is important to plan for the whole year when you think about the services, supports, and goods you need. If you need some kind of services and supports every day, figure out how much of that service you need each month and how much it will cost. When you finish your Support and Spending Plan (SSP), you will add up how much all of the services and supports you need every day, week, or month cost for the whole year. This amount cannot be more than your annual Individual Budget.

All hourly wages budgeted in the SSP are “before employer taxes” are withheld, often called the “gross wage”. Employer taxes will be computed for you by the FEA and charged against your Individual Budget.

The percentage paid for each employee will vary over the course of the year depending on individual income and tax factors, but will typically range between approximately 9.8% - 15%. This percentage will change as state and federal rates change. Taxes are typically set in December to take effect the next month, in January, for the coming year. SSP budgets will have to be monitored to make sure there is room for this slight fluctuation in “gross wages”.

The following are examples of typical taxes you, as the employer, will pay on your Community Support Worker’s wages:

State unemployment tax (SUTA)	Medicare tax
Federal unemployment tax (FUTA)	Social Security tax

For the first three (3) years, your tax rate will stay the same. After that period, the rate can vary each year with the annual rate set in late December. Prior to developing your SSP, you will need to contact the FEA to determine your employer tax rate.

Below are several examples:

1. If you wish to pay your CSW \$12.00 an hour, contact the FEA to determine the percentage of employer taxes that will be withheld. If the FEA reports that your employer tax rate for this employee is 12.5%, the amount that would need to be budgeted in the SSP would be \$13.50 an hour. The employee will be paid \$12.00 an hour.

$$12.00 \times .125 (12.5\%) = 1.5 \quad 12.00 + 1.50 = 13.50$$

2. If you wish to pay your Support Broker \$16.00 an hour, contact the FEA to determine the percentage of employer taxes that will be withheld. If the FEA reports that your employer tax rate for this employee is 13.7%, the amount that would need to be budgeted in the SSP would be \$18.19 an hour. The employee will be paid \$16.00 an hour.

$$16.00 \times .137 (13.7\%) = 2.19 \quad 16.00 + 2.19 = 18.19$$

This is a good time to think about any natural supports you have in your life or that you might be able to find in your community. Natural supports are help that you don't have to pay for. If you have more natural supports in your life, you may have more money in your Individual Budget you can use for services and supports that you have to pay for.

**What paperwork do I need to complete for the Support and Spending Plan?**

The Support and Spending Plan paperwork has many parts. You will work with your Support Broker to complete the necessary paperwork. Your Support Broker will complete most of the forms listed on the Support and Spending Plan checklist along with your **completed My Voice My Choice Workbook** and send them in to Medicaid. It is important to keep a copy of each of these completed forms for your own records. The My Voice My Choice Workbook includes instruction on how it should be completed. The other required forms are:

## **Support and Spending Plan**

- **Cover Sheet**
- **My Support Plan pages**
  - Goals/Supports
  - Natural Supports
  - Paid Supports
- **My Back-Up Plan**
  - It is very important to have a back-up plan if your health or safety would be in danger. This plan will help your workers and other people who support you know what they need to do to help you be healthy and safe. You will use the My Voice, My Choice Workbook and Risk Identification Tool to develop your back-up plan.
- **Support and Spending Authorization pages**
  - For each support category you will be using this is where the qualifications, supports/services, person/vendor, hours, and wage are listed. Each category is totaled and then all the categories are added and listed at the end of these pages.
- **Support Broker Authorization page**
  - This is where the Support Broker's, required and additional, job duties are listed. The frequency and wage for these duties is listed and total on this page.
- **Fiscal Employer Agent**
  - This section listed the total fees for the FEA.
- **MMCP**
  - This section lists your ancillary costs if you are enrolled in MMCP.
- **Final Support and Spending Plan Authorization page**
  - This page lists the Community Supports Total, the Support Broker total, the Fiscal Employer total and adds them all up for the Grand Total. The assigned Care Manager will complete the grey box.
- **Choice and Consent Statements**

- This is where you sign your name to say you know what is in your plan and agree with it and you accept the responsibilities of Self-Directing your services. There is also a place where you sign your name to say you know you can choose to get your services in the community or in a facility like a group home or nursing home, but you are choosing to get your services and supports to live in your community.

➤ **Additional Plan Documents (As Needed)**

- *Certified Family Home Certificate*
- *Home Alone Time Requests for Certified Family Homes*
  - Requests for “home alone time” are submitted to the Regional Care Manager on the Support and Spending Plan (SSP) or may be requested any time during the plan year using the Support and Spending Plan Change Form (SSPC). The SSP or SSPC must identify a goal for “home alone time” and identify in the ‘Activities’ section of a My Support Plan page what activities the person is able to do on their own that allows them to safely stay home alone (i.e. call 911, call CFH provider on cell phone, exit home without assistance in the event of a fire, go to neighbor’s house for assistance, not answer the telephone or door while alone, able to get a snack to eat on their own, etc.).
  - A back-up plan must be developed that identifies those person(s) the participant can contact for assistance when using ‘alone time’.
  - When evaluating the participant for ‘home alone time’, the Support Broker/Circle of Support may use the following questions to guide the discussion. This list is just an example and is not considered to be all-inclusive of what should be considered to ensure each participant’s health and safety.
    - How has the participant demonstrated an ability to successfully respond to a variety of emergency situations? The Circle of Support should be able to verify the following:
      - Can the participant independently evacuate the residence in the event of a fire?

- Can the Circle of Support provide reasonable details that support the participant is able to demonstrate an ability to appropriately respond to a variety of situations that may present when they are home alone (e.g. telephone rings, a knock at the door, problems when using household appliances, sustains a minor or major injury, etc.).
- Are back-up supports available to a participant while using 'alone time'?
- Does the participant have the ability to recognize the need for and seek emergency help?
- Does this request for 'home alone' time include the participant being able to go out into the community while on 'home alone time'?
  - If 'no', does the participant have a history of compliance when it comes to following directions (e.g. not leaving the home by themselves)?
  - If 'yes', Support Broker/Circle of Support should be able to provide reasonable details to support the participant is able to demonstrate an ability to navigate the community in a safe and effective manner (e.g. does the participant understand 'stranger danger', how and who would they contact in an emergency situation while in the community, are they at risk for exploitation, do they have a history of behaviors that would put them or the community at risk if they are out and about on their own, etc.).
- If the participant wishes to increase the number of hours of "home alone time" approved on the annual SSP or SSPC form, the increased number of hours must be requested and approved through an updated SSPC form prior to increasing the number of hours a participant spends in 'alone time'. This change form would not go to Consumer Direct.
- *Transition Plan*
  - A transition plan is needed if your eligibility notice indicates you may not qualify for waiver services the next year.

- *Physicians Orders*
  - If you are requesting AEQ, Nursing or other services your primary physician would need to order.
- *Voided Receipts*
- *License and Certifications*
- *Guide Training Documents (For Initial Plans Only)*
  - Guide Training Certificate
  - Agreement to Self-Direct Signature
  - Privacy Notice Signature
- *Guardian Paperwork (For Initial Plans or New Guardians)*
- *2<sup>nd</sup> CSW form*

**Your Support Broker will help you fill out the paperwork to complete your Support and Spending Plan.**

### **How is my plan approved?**

You and your Support Broker will send your completed Support and Spending Plan to the Medicaid office. They will look to make sure you did these things in your plan:

- You listed services, supports and goods you are allowed to buy.
- The costs for services and supports are not more than your Individual Budget.
- You wrote a Back-up Plan for any risks or barriers you identified on the "My Health and Safety Plan" worksheet.
- You listed how much each service or support will cost.

- Your Support Broker and the Fiscal Employer Agent are listed on the Support and Spending Plan Authorization sheet.
- Your Support and Spending Plan paperwork is typed.
- You filled in every line or box on the Support and Spending Plan paperwork - even if you put "N/A".
- You signed and dated the Choice and Informed Consent statement.

**After Medicaid staff looks at your plan they can do one of these things:**



Approve the plan - you will get an approval letter.



Recommend changes to the plan.



Deny all or part of your plan.

You can appeal the denial (say that you don't agree, in writing, to Medicaid). You have 28 days to file an appeal.

**How do I make changes to my plan?**

If your needs change and you need different services or you need more support and services, then you need to make a change to your Support and Spending Plan. You and your Support Broker write down the changes on a plan change form and give it to the Medicaid office for review and approval.

They will look for things like:

-  Is the support or service one that you can buy under this option?
-  Does the support or service have any risks that you did not write a back-up plan for?
-  Can you pay for this new support or service without going over your budget amount?

**After reviewing your plan change, Medicaid can decide to do one of these things:**

-  **Approve the change**
-  **Recommend other changes**
-  **Deny the change**

## Planning for Risks

In this section:

- What is risk?
- How to decide what risks you have in your life.
- What should be in a Health and Safety Plan.
- Planning for emergencies.
- Being Safe - steps you can take.
- Abuse, neglect and exploitation.
- How to report if you are being abused, neglected or exploited.

### **What is a risk?**

Risk means there might be some danger or there could be a chance you might get hurt or lose something important to you. It is important for every person to think about things that can go wrong if they don't get the help they need.

When you think about risk, you also need to decide what kinds of safety plans you need to make sure that you are safe and healthy. You will write these risks and safety plans down on the My Health and Safety Plan page of your My Voice My Choice workbook.

If you need help thinking about possible risks, you can fill out a worksheet called the "Risk Identification Tool" with your Support Broker or circle of support. This tool can help you complete your My Health and Safety Plan and plan for risks.

Here are some things to think about to decide what kind of risks you have in your life. This will help you to make a plan for things to keep you safe and healthy. You might feel good about taking care of these things by yourself or you might feel like you want some help.

-  What do you do to stay healthy?
-  Do you have a regular doctor or dentist?
-  Does anyone help you when you need to make a medical decision?
-  Do you take medicines like your doctor told you to?
-  Who takes care of you when you are sick?
-  What do the people who help you need to know about your health and medical care? (examples: you might choke or have a seizure)
-  Do you ever do things that might hurt your body or make an accident happen?
-  Do you feel safe at home?
-  Do you feel safe in your neighborhood and community?
-  What would you do if something dangerous happened like a fire, an earthquake or a flood?
-  If somebody tried to hurt you, what would you do?
-  Who would you go to for help?

### **What should be in my Health and Safety Plan?**

Your Health and Safety Plan lists things people need to know to help you be safe and healthy every day. It includes things about your health that people need to pay attention to like problems with eating or drinking, therapies, medications, and allergies. It is important that you stay healthy and safe.

Your “My Health and Safety Plan” provides you with a tool to write down the things others need to know about you when you are at home, at work or in the community that would put you at risk if there isn’t a plan to keep you safe. This might include things like:

- ☞ I like to walk out of the store without paying for things I put in my shopping cart or in my pocket.
- ☞ I don’t always eat the right things and my diabetes gets out of control.
- ☞ I forget to pay my rent and utilities and spend all my money on eating out.
- ☞ I get busy and forget to take my medicine when I’m at work.
- ☞ If I eat anything with wheat in it I have an allergic reaction.

If you want other ideas about the things you should think about to keep you safe, the Risk Identification Tool can help you to review the most common risk factors.

It is also important to remember to ask people who know you best what they think needs to happen to help keep you healthy and safe. Sometimes they will think of things you didn’t think of yourself. This could include your Support Broker, your circle of support or other people you see on a regular basis.

Once you have completed your My Health and Safety Plan, you will need to write a My Support Plan to go along with each of the identified risks. This My Support Plan will say who will provide the help and what they will do.

**It is a good idea to carry a card with important information in case of an emergency.**

In case of emergency:  
My name is Joe Smith  
I have cerebral palsy  
I am allergic to penicillin  
Please call Mary Brown at 555-2121  
My doctor is Dr. James Street -  
555-7767

**Things to Think About**

1. Signs that your life or health is in immediate danger:

- chest pain
- shortness of breath
- bleeding or injury
- infection that is getting worse
- a sore changes color or has drainage
- other (you may know other things about your body and health)

2. If you live in a rural area, the emergency response phone number may not be 911. Check with your local police department to find out the number to call in your area in case of an emergency.

3. If your worker does not come when they are supposed to: Decide how long you will wait before you call another worker. Make sure all your workers know to call you when they cannot come to work and any rules you have about being late or not showing up.

4. If you do not get in contact with a back-up worker: Try to call your back-up workers a second time and tell them that none of the others are available. Decide when it may be getting dangerous for you without help and if you need to call 911 or another emergency number. Only call 911 in an emergency - not for times when you just need regular help.

5. Is there information that you want police officers, fire fighters, paramedics or other 911 responders to know about you?

Contact your local police department to find out how to give disability-related information to 911-responders. Keep important information about you, your disability, medications, health and medical needs and insurance handy at all times. Make sure your workers know where to get this information.

You might want to carry a card or small piece of paper with you that has important information about you on it and put it up in your home where everyone can see it. Some things to put on this card:

- Your diagnosis - your disability, or medical needs.
- All the medicines you take and how many times each day.
- Any allergies you have.
- Health conditions that might happen (like a seizure) and what to do.
- Emergency contact information.
- Name and phone number of your doctor.
- Insurance information.

It is important to write down the names of people who will help you in an emergency and people you can call if you are sick or if something bad happens. By each person's name put their phone numbers (home, cell and work) so that you know how to contact to them when you need to.

If you are not able to make a phone call without help, you need to make a plan for getting the help you need in an emergency. If there will be someone supporting you all day, every day, then each of your support people need to know what to do in an emergency. It is important to write this down so that anyone who is in your home or helping you can follow the plan when they need to.

### **Support Planning for a Community-Wide Emergency or Disaster**

It is a good idea to think about having a plan for what to do in a community-wide emergency or a disaster. Kinds of disasters or emergencies that might happen in Idaho are severe wind, thunder or winter storms, floods, wild fires and things like crime or terrorism. A good plan will help you get the support you need during a community-wide emergency. Contact your city or county government for more information on being prepared for a disaster.

Things to plan for in a community-wide emergency:

<p>👉 A Community Support Worker may not be able to come to your home.</p>	<p>☞ Keep a list of back-up workers, their names and phone numbers. Talk to a neighbor who has a four-wheel drive vehicle and could get your workers to you if needed.</p>
<p>👉 If the electricity or water goes out, you might not be able to use your heating system, water, electric appliances, life-sustaining electrical equipment, or adaptive devices.</p>	<p>☞ Plan for back-up power sources or have a different place to stay if the utilities are out for a long time.</p>
<p>👉 Telephones may not be working and you might not be able to call your workers from your home phone.</p>	<p>☞ Think about getting a cellular phone and program your workers numbers into it or ask a neighbor who has a cellular phone to check on you.</p>
<p>👉 If roads are closed, you may not be able to use your regular transportation to get where you need to go.</p>	<p>☞ Keep extra water, food, important medication and other supplies so that you will be ok if you cannot leave your home for several days. Plan for other kinds of transportation.</p>

 You may need to leave your home or your workplace (evacuate).

 Plan how you can safely and quickly leave your home with worker support if needed. Make sure you know your workplace emergency plans and they understand your needs.

## Being Safe

### *How can I keep myself safe in my home and community?*

Being safe means that you are safe from somebody else hurting you, safe from having an accident, and safe from losing something important to you. There are things that you can do to be safe in your home and when you are out in the community.

### *How can I be safe with workers in my home?*

Community support workers work closely with you in your home. No matter how nice a person is, it is important to start some habits to protect yourself and your property so there is less question or suspicion if something goes missing.

It is important to have ways to protect yourself and your belongings. Here are some ideas:

-  Tell your worker exactly what and how you like things done. You may want to write it down.
-  If you have a specific way of doing something or schedule you should write it down.
-  Put things in a safe place. Always lock your jewelry and other valuables.
-  Do not have workers help with your money, unless that is part of their job description. Keep cash, checkbooks, and credit cards in a safe place.

- Tell workers exactly what to do and how you want it done.
- Put valuable things in a safe place
- Keep your cash, checkbook, and credit cards in a safe place.
- Write rules about using your car, telephone or personal things.
- Keep track of medications.
- Write an emergency plan and have emergency supplies easy to get to.

-  Do not have workers buy things with your debit card or let them know your pin number or social security number.
-  If you have a worker buy things, get a receipt and make sure you get correct change.
-  Do not let workers have access to your bank accounts.
-  If you use a signature stamp, keep it with you at all times and do not let anyone take it or use it without your permission.
-  Do not sign papers if you do not know what they are.
-  Make and stick with rules about using your phone, food, utilities, or personal things.
-  Pay attention to your medications. Keep medications in a safe place and keep track to make sure none are missing.
-  Make an emergency plan with phone numbers and put it someplace that is easy to find.
-  Have every day and emergency supplies in their places at all times and let your worker(s) know where to find them.

Having your Community Support Workers do a criminal history check before they begin working for you is another way you to help keep yourself safe. The report from the criminal history check will tell you if that person was convicted of a crime.

You can take some simple steps to keep yourself and your property safe. Keep track of your credit cards, cash, valuable things, bank accounts, and your medication.

## **Abuse, Neglect and Exploitation**

What is abuse?

If somebody is hurting you, talking or acting mean or disrespectful to you, touching you in a way that makes you feel uncomfortable, or taking or using your things without permission - that is called abuse. There are different kinds of abuse and there are things you can do to get help if somebody is abusing you.

Idaho State laws protect vulnerable adults. A vulnerable adult is someone who has a disability and needs help from other people to be safe and healthy. To be safe, it is important to know what abuse is and what kinds of abuse might happen to a person.

### **The Different Kinds of Abuse, Neglect and Exploitation:**

You own your body.

#### **Abuse**

It is important to know the different kinds of abuse so that you can report if someone is hurting you:

- physical abuse
- sexual abuse
- emotional abuse
- financial abuse or exploitation
- neglect
- confidentiality

Anything that happens to your body should be under your control. Even if people help you with personal care needs and they have to touch your body to help you - you are the one who says how things should be done and how your body should be touched. Tell people in your life what things make you feel uncomfortable and what is not ok with you.

- Physical abuse is when someone hurts your body.
- Sexual abuse can be physical (your body) or verbal (saying things) that have a sexual purpose.
- Emotional abuse could be if someone says mean things to you, says they will hurt you, or makes you feel bad about yourself.
- Financial abuse could be if someone uses your money or things without asking you first.

- Neglect could be if someone does not give you food, clothing or shelter when you need it.
- Confidentiality means that people keep information about you private and they do not tell other people without asking you first.

### **Physical Abuse**

Physical abuse is when someone hurts your body.

Examples of physical abuse are: hitting, pushing, hair pulling, kicking, biting strangling, touching that is not ok, restraining (tying you down or locking you in a room), giving you too much medication, keeping you awake, driving in an unsafe way, forcing you to eat, drink or take medicines, or trying to kill you.

It is important for you to tell the people in your life what things make you feel uncomfortable and what is not ok with you.

### **Sexual Abuse**

Sexual abuse is physical (your body) or verbal (saying things) that have a sexual purpose. Examples of sexual abuse are:

-  Touching or talking to you sexually or showing you sexual material or body parts when you do not want them to.
-  Touching or talking in ways that make you uncomfortable.
-  Making you touch them in a way that is sexual, or asking you to show them your private body parts, or
-  Asking you to speak to them in a sexual way and you do not want to.

It can also include tricking you to do sexual things or forcing you to get pregnant or have an abortion.

You own your body - anything that happens to your body should be under your control. Even if people help you with personal care needs and they have to touch your body to help you - you are the one who says how things should be done and how your body should be touched and taken care of.

### **Emotional and/or Verbal Abuse**

Emotional and/or verbal abuse could be when someone says mean things about your disability, stops you from making your own decisions, threatens to harm you, threatens to harm your pet or service animal, threatens to harm your family or children, makes you feel bad about yourself, does not let you see your friends or family, is not kind to you, says that you are bad.

### **Financial Abuse/Exploitation**

Financial abuse/exploitation is when somebody uses your money or things without asking you first. Or they use your money or things in a different way from how you told them to. For example, if your support worker does not buy what you told them to with your money, but they spend it for what they want.

Other examples are: not letting you have your money or control over your money, stealing money from you, stealing things from you, or if someone uses your car without asking.

You may hire a worker to help you with your money, bank accounts and to pay your bills. Sometimes workers will help you to buy things and they may get into your personal money with your direction. Other workers should not get into your personal money, bank accounts or belongings in your home, unless you tell them. Be careful with your money, checks, credit and debit cards and other personal items when you have a support worker in your home.

**Neglect**

Neglect is when somebody does not give you the food, clothing, shelter or transportation that you need, does not give you your medications, medical treatment, assistive equipment, or personal care you need.

Neglect is also when somebody leaves you alone without a way to call for help, leaves you in bed all day or does not get you dressed, or leaves you on the toilet or in dirty underwear for a long time.

Neglect can also be when worker does not do what they are supposed to do, or they hurt or do not feed your pets or service animals.

**Confidentiality**

Confidentiality means keeping things private. Information about you and your personal care needs is your private information. It should not be shared with other people without your permission. Your support workers, agency staff, and any other professionals who work with you should ask you first before they talk with other people about your care. This information should only be shared if someone is going to work for you or you asked them to share it. Your worker may ask you to sign a release of information form. If you feel your private information has been shared in the wrong way, talk to your Support Broker or someone else you trust.

**What do I do if I am abused, exploited or neglected?**

If you are hurt by someone in your life you need to know where you can go for help, who will help you get there and who is safe to talk to. Have your Support Broker or someone from your circle of support help write a plan for what to do.

If any type of abuse is happening to you, you need to report this immediately to someone who can help you and who you trust. Tell someone who will tell the authorities. This could be:

-  Your Support Broker
-  The police
-  A family member or friend
-  Adult Protection (see next page)

**Call 911 if you are in immediate danger.**

**Places to report abuse, neglect or exploitation:****What to say in a report:**

-  Tell what happened.
-  Tell who did what.
-  Tell where you were and when it happened.
-  If the person who hurt you was a stranger, give details about what they look like.

**Adult Protection Offices:** (to report abuse, neglect or exploitation)

North Idaho (Coeur d'Alene area) (208) 667-3179 or 1-800-786-5536

North Central Idaho (Lewiston area) (208) 743-5580 or 1-800-877-3206

Southwest Idaho (Boise area) (208) 322-7033 or 1-800-859-0324

South Central Idaho (Twin Falls area) (208) 736-2122 or 1-800-574-8656

Southeast Idaho (Pocatello area) (208) 233-4032 or 1-800-526-8129

Eastern Idaho (Idaho Falls area) (208) 522-5391 or 1-800-632-4813

**Sexual Assault Resources:**

Idaho Coalition against Sexual & Domestic Violence -

Boise: 208-387-0419 Statewide: 888-293-6118

Blackfoot Bingham Crisis Center (208) 681-8713

Boise Women & Children's Alliance (208) 345-7273

Boise SafePlace Ministries 888-776-4443

Bonnars Ferry Crisis Hotline (208) 267-5211

Coeur d'Alene Women's Center (208) 661-2522

Hailey Advocates for Survivors (208) 788-6070

Idaho Falls Rape/Crime Victim Center (208) 521-6018

Lewiston	YWCA Crisis Services	(208) 746-9655
McCall	Support for Women in Crisis	(208) 382-4201
Moscow	Alternatives to Violence	(208) 883-HELP
Nampa	New Valley Crisis Center	(208) 465-5011
Pocatello	Family Services Alliance	(208) 251-4357
Rexburg	Family Crisis Center	(208) 356-0065
Salmon	Lemhi Cty. Crisis Safety Center	(208) 940-0600

**It can take a lot of courage to report abuse, but there are people who can help you if something bad happens.**

## Working with a Fiscal Employer Agent (FEA)

In this section:

- What a Fiscal Employer Agent does.
- What you need to do.
- Monthly budget report from the FEA.
- Records you need to keep.
- Buying goods.
- Vendor agreements.

### **What can a Fiscal Employer Agent do for me?**

The Fiscal Employer Agent is a business that can help you manage the money you have in your Individual Budget account to spend on supports and services. (We will use the letters FEA from now on to talk about the Fiscal Employer Agent.)

The FEA can help you keep track of the money you have to spend on services and supports. They will:

-  Give you a packet of information about your duties as an employer and what paperwork you must fill out.
-  Pay for goods and services that you have approved that are on your Support and Spending Plan.
-  Write checks to the people who work for you according to timesheets that you have approved.
-  Pay the taxes that are required by the government.
-  Keep track of all the money so you can show people who need to know how the money was spent.



Write and send you reports about your budget account that tells you how much you have spent and how much you have left for the rest of the month/year.

### **What do I need to do?**

When you are Self-Directing it is important to keep track of the services and supports you get. Keep records of what you buy, like receipts or invoices. Make sure that your support workers are working the hours their timesheets say they did and doing what the employment agreement says they will do.

### **Employment Agreements**

When you hire a Community Support Worker, you will fill out an employment agreement for each worker or agency you hire. (See the section on hiring workers for more information about this.) A copy of every employment agreement must be sent to the FEA. The employment agreement tells the FEA the name of your worker, what they are going to do for you, when they are going to do it, and how much you are going to pay them.

### **Requests for Vendor Payment**

When you want to buy a good from a particular store, you need to go to that store and ask for a **Voided Receipt** for the items you want to buy. The **Voided Receipt** should be sent to the FEA along with a completed **Request for Vendor Payment** form. This form can be found in the enrollment packet you receive from the FEA. If you can't find the **Request for Vendor Payment** form, you can call the FEA and request the form be sent to you.

Once the FEA has received the **Request for Vendor Payment** form and the **Voided Receipt**, they will review the form to make sure the request is for goods approved on your Support and Spending Plan. If the request is for goods that were approved on your Support and Spending Plan Authorization, the FEA will

make out a check to the store listed on the **Request for Vendor Payment** form for the amount of the **Voided Receipt**. The check will then be sent to you so you can go to the store and purchase the goods you requested. The check stub attached to the top of the check will list the goods that can be purchased with that check. You must only purchase those items listed on the check stub. Once you have purchased the goods from the store, attach the receipt for the goods to the check stub. You must keep both the receipt and the check stub so Medicaid can make sure the goods you bought with the check match up with the goods listed on the check stub.

It is important you keep all receipts and check stubs in a safe place so you can easily find them to show to Medicaid when they are doing quality assurance reviews.

**IMPORTANT:** You can't go out and buy a good yourself and ask the FEA to pay you back. You must always submit a Request for Vendor Payment form and Voided Receipt to the FEA first if you want to purchase a good or service out of your budget.

### **Sales Tax on Goods**

If you are requesting payment for a good that requires a doctor's order, your good will be tax exempt. The **Voided Receipt** you receive from the store for goods requiring a doctor's order shouldn't include sales tax. If you are not sure if a good requires a doctor's order, ask your health care professional or the store where you want to buy the item. They should be able to tell you.

If you are requesting payment for a good that does not require a doctor's order, you will have to pay sales tax on that good. The current sales tax in Idaho is 6%. The **Voided Receipt** for goods that do not require a doctor's order should include 6% sales tax.

IMPORTANT: Remember to include both the cost of the good and the 6% sales tax when you are figuring out how much money you should set aside in your budget to pay for those goods that don't require a doctor's order.

### **Timesheets**

It is important for you to keep track of the hours your Community Supports and Support Broker work for you. The hours they work should be recorded on a timesheet. Timesheet can be a paper timesheet but more often than not they are completed, signed and submitted electronically. When a timesheet is complete and correct, you will sign it. When you sign the timesheets you are making it official that the worker did work those hours and that they can be paid for the work they did.

The timesheets will be sent to the FEA. When the FEA sees that you have signed the time sheet, they will pay your worker. That is why it is very important to make sure you sign completed timesheets only. You must never sign a timesheet that is blank or not correct. Make sure the timesheet lists the hours your worker did work and what kind of support they gave you.

If a timesheet exceeds the amount authorized for a certain support category, the FEA will deny that timesheet.

When a timesheet cannot be paid, the FEA will contact you to let you know a timesheet has been denied and the reason why.

### **Employment Taxes**

The FEA will take care of all the paperwork that goes along with setting you up as an employer and your community support workers as employees.

The FEA will also send the government the taxes you owe as an employer.

**What should I do with my monthly budget report from the FEA?**

When you spend money from your budget to buy services and supports, the FEA keeps track of the balance in your budget account. A balance is the amount of money left in an account after bills have been paid. Every month the FEA will send you a report listing all of the services and supports they paid for and your account balance. You and your support broker must look over the report that the FEA sends you every month. You can make sure that your workers were paid on time and were paid the right amount of money by looking at copies of the timesheets you sent to the FEA at the same time you look at your budget report. You will also be able to see if you are on track and that your budget is going to last all year long.

You can have another person that you trust help you and your Support Broker look over the report.  
**Your Support Broker must review your monthly reports.**

**What records do I need to keep?**

You should keep a copy of:

- Your My Voice My Choice Workbook
- Your Support and Spending Plan
- Your Health and Safety Plan, Back-up Plan and the Risk Information Tool (if applicable).
- All completed timesheets for workers.
- Copies of any Requests for Vendor Payment Forms and Voided Receipts submitted to the FEA.
- Any invoice or bill from any other service provider.
- Signed employment agreements you have with each of your workers.
- Your worker's resume or job history and references.
- Contact information for each of your workers.

- Contact information for your service provider agencies.
- Written job evaluation forms for your workers.
- Your eligibility notices.
- Copies of any Criminal History Check Waivers you have submitted.

**Maintaining Records:**

As an employer, you must keep service and employment records, such as your service and support plans, service and support documentation sheets, outcome reviews and summaries, service and employment agreements, employee hiring documentation, employment timesheets, employee/employer correspondence and receipts for a minimum of five (5) years regardless of its form or media. To meet this requirement, it is recommended that records, communications and agreements be made in writing and copies be made and retained. Following a five (5) year period records may be disposed of in a confidential manner, such as by shredding.

## **Employer Responsibilities**

In this section:

- Hiring Community Support Workers.
- How to find Community Support Workers.
- How to write a job description.
- Job application form.
- How to interview people for the job.
- Employment agreements.
- Criminal history check.
- How to decide how much to pay for services.

In My Voice My Choice, you get to decide who works for you and how much you are going to pay them. But you also have many new responsibilities when you are an employer. You are the person who has to find, interview, hire, manage, and (when needed) fire your employees. You must do all the required paperwork so that your workers can get paid.

### **Hiring Community Support Workers**

In My Voice My Choice, you choose who does work for you. The person you hire to help you is called a Community Support Worker. A Community Support Worker can be someone who works for a service agency or someone who does not work for a service agency.

You get to choose workers who make you feel comfortable. You can choose workers who you think will do a good job for you and help you in the way that you want to be helped.

### **How do I find Community Support Workers?**

You might already know someone who you would like to hire to provide support or do certain kinds of work. It could be an agency worker who you know well and have worked with in the past. It could be a friend or relative who has the right skills to do the job.

### **Age limitations for Community Support Workers**

- A CSW that is 17 years of age or older may provide supervision, direct services and chore type services.
- A CSW that is a minor, under 17 years of age, may provide chore type services that are not direct support to the participant.

If you can't think of anyone in your life right now, then you may need to find, interview and hire your workers. Places you can look for Community Support Workers:

- ↳ Job service office or employment agencies
- ↳ Internet
- ↳ Ask people you know
- ↳ Independent living centers
- ↳ Regional Medicaid Services office

If you do not find the workers you need that way, you may want to place your own ad. Advertising is a way to put out a message that you want to hire someone to work for you. Where you advertise depends on the kind of worker you are trying to find. Putting an ad in some places, like a newspaper, will have different costs.

It may be safer to place an ad on the internet so that you can talk to applicants through email before giving them too much personal information. It is not a good idea to use your home telephone number and address in your advertisement.

**How do I write a job description?**

Before hiring a worker, they should understand what you want them to do. A good way to tell them is to write down what you want them to do and what skills they will need to do these things. This is called a job description.

The job description should be clear and have the basic information about the job. You should do this before you start interviewing applicants. The job description does not need to be long or complicated.

**Main Parts of a Job Description**

**The purpose of the job** - how you expect a Community Support Worker to fit in with your life. You may also want to introduce yourself, say what kind of job you do, or the type of activities you like.

**The relationship between you and your support worker** - and anyone else such as family members. You should make clear that you will be the employer (boss) and your support workers are directly responsible to you. You are in charge.

**The main duties** - it is a good idea to list the things you need done every day, and another list of things done only some of the time.

**Skills the worker needs to have** - if you need a person who knows how to do certain things (like take care of a G-tube or lift and move you), put that in the description. It is good to write down what training you will give them. Also list any training they will need to get from someone else to be able to do the job.

**Here are some questions to think about when you write a job description:**

- ↳ What kind of work do you need them to do?
- ↳ What are the duties of this job?
- ↳ What personal care do you need?  
(For example: dressing, cooking, housekeeping, driving and transfers)
- ↳ What kind of a person are you looking for in a worker?  
(For example: someone who likes animals, smoker or non-smoker, able to speak another language)
- ↳ What experience or skills do they need to be able to do this job?
- ↳ What are the times you want this person to work?
- ↳ How much will you pay this person?

**Note:** This person needs to have a Social Security number or a permit to work in this country. You will need to make sure they have this. If you need help writing a job description, ask your Support Broker, a friend or a relative to help you. There are some examples of job descriptions on the next pages.

**Job Description for personal care support for Joe Brown**

I need help every morning to get ready for work. I can make my own breakfast, but I sometimes need reminders about eating healthy breakfast foods. The purpose of this job description is to tell you about my support needs.

I need you to be on time and reliable. If you want to take time off, I will need at least two weeks notice to make other arrangements for my support. Please ask me any questions you need to make sure you know how to give me support the way I want it done.

Weekday Morning Care - 6:30am to 8:00am:

Greet me and help me get ready to shower.

Make sure that the water temperature is not too hot or too cold.

Help me shampoo my hair.

After the shower, help me brush my teeth and shave.

Help me to get dressed.

I may sometimes need help to make my breakfast.

My ride to work will arrive at 8:00am.

About You:

I need you to be patient and kind and speak to me in a respectful way. I like people who are honest that I can count on.

### **Job Description for community support for Cindy Smith**

I am a young woman who wants to be active in my community. I need help with money and learning how to talk to strangers. I would like to go to the YMCA for swimming, my book club meetings, shopping for food, and have fun. The purpose of this job description is to tell you about my support needs.

I need you to be on time and reliable because I get upset if my routine is disturbed. If you want to take time off, please let me know at least two weeks in advance so I can make other arrangements. Feel free to ask me any questions about what I need.

#### **Weekly support needs:**

I swim for exercise every Monday and Thursday afternoon. I need help to get ready for the pool and a ride to the YMCA. I belong to a book club that meets every Friday morning. I will need a ride to the meeting at the community center.

Besides the book club, I also want to go out and do something two times each week. I want to do something on Saturday and on Wednesday. I need you to help me plan and budget for my fun time.

Videos, movies, MacDonald's and community events in the park are what I like to do. If you have ideas about other things happening in the community that I might like, please tell me about them.

I don't have much money, so maybe sometimes we can go to the park for a walk. Help me learn how to meet other people. I want to make lots of friends and be happy.

#### **Main duties:**

Transportation: Help me to get places in the community.

Social support: Teach me to greet and talk to people I meet in the community, order food in restaurants, check in at the gym, and take part in discussions with my friends.

#### **Skills required:**

Know what social and recreational activities are available in the community. Be outgoing, patient and kind. It is important that you are trustworthy, reliable and flexible.

### **What is a job application form?**

When somebody is interested in applying for the job, you can send them a job description and a job application form. Application forms have information about the applicant that helps you to find out more about the person before you decide if you want to interview them or not.

Application forms give you a first idea about possible support workers. The applicant's answers will help you to decide if they have a good attitude and the skills needed to do a good job.

You should only have questions on the form that are about the job you want them to do. You can ask applicants if there are any hours they are not able to work and if they have any personal duties that may get in the way of doing their work. You should not have questions on the form about what religion the person follows, how old they are, if they are married or not, if they have children or what race they are.

The application form should have a place for the applicant to list references. A reference is the employer (past or present) or a personal friend or family member of the person applying to work for you.

### **How do I interview people for the job?**

Interviewing is one of the most important tasks that you do as an employer and one of the most difficult. There are two main reasons why you should interview applicants for a job:

1. An interview will tell them more about the job and what they will be doing: things like the hours and how much they will be paid.  
The interview also helps the applicants to decide whether the job is one that they want to do.
2. An interview will help you find out if the applicant is someone you would want working in your home, doing personal things for you, and with you.

#### **An interview can tell you:**

- If the person is right for the job.
- More about the person, their skills and experience.
- If they want to do this job for you.

**What you need to get from an interview:**

-  Find out if the person is right for the job.
-  Get extra information about their skills and experience.
-  Find out more about them, what they think, and how they will do in new situations.
-  Find out why they want to do this job for you.

You also need to tell the applicants about the hours you want them to work, any rules you have and find out if they can work on holidays etc.

**What Not To Do**

Do not ask discriminatory questions. Do not ask any personal questions which have nothing to do with the job, especially about politics, religion, age, private life, race, children, or their partner's work and other personal things.

**Telephone Interviews**

After you have put out an advertisement, be ready to get phone calls about the job. Keep the job description and the job application near the phone along with a paper and pen to take notes. When someone calls you about the job, talk to them to see if they are a good fit. Make sure you write down the person's name and telephone number. Have a list of questions and ask each person the same questions.

A telephone interview can help you decide if you want to meet an applicant in person.

Telephone interviews can be a way to get some early, basic information about a person and also let them ask you questions about the job.

**Example Interview Questions:**

- What about your last job did you like or dislike?
- What is your experience with people who have disabilities?
- Do you have any personal duties that would make it difficult to do this job?
- Are you able to work flexible hours?
- Are you able to work weekends? Nights?
- Are you able to work when I go on vacation?
- Would you be willing to use your car during this job?

1. Take notes during your conversation so you can look at them later.
2. Tell the person the exact job duties, pay and times you want them to work.
3. Ask the caller if they can perform all of the duties you need them to help you with. For example, heavy lifting or other physical activity.
4. Talk about any special equipment you use they need to know about.
5. At the end of the conversation, ask the caller if they have any questions about the job and answer them as best you can.
6. If you think they might be a good fit for the job and they do too, set-up a date, time and place to meet with them.
7. Make sure you write down their name and a telephone number where they can be reached.

### **Face-to-Face Interviews**

When you meet an applicant in person, you may want to interview them in a public area, such as a library or restaurant, if you do not want this person to know where you live. It can be helpful to have someone else there for support during the interview. If you would like, ask a friend, relative or your Support Broker to be there.

When you set-up a time for the interview with the applicant, tell them to bring a Social Security card or other permit to work in this country and bring a valid driver's license if driving will be required for the job.

#### **Guidelines for face-to-face interviews:**

- meet the applicant in a public place.
- have someone you trust there to help you.
- tell the applicant to bring a Social Security card or other permit to work in the U.S.
- ask questions about their experience and skills.
- tell them about the job duties and what you expect them to do.
- thank the applicant and tell them when you will decide who you are going to hire.

There are certain questions that you may want to ask, but the most important thing is to get the applicant to tell you more about themselves. This will give you some idea about what they are like as a person.

Talking to the applicant about your needs will help both of you decide whether they are a good match for the job. Look over your care plan and job description with the applicant to make sure they are comfortable doing everything you need them to do. Talk about how much you will pay, the work schedule, how they will get to work, and if they will be able to change their work time

in case your schedule changes. Ask the person if they have any questions.

Thank them for coming and let them know the date you will make a final decision about who you are going to hire for the job.

### **Reference Checks**

When you are done with the interviews, make a list of the people you may want to hire. Next, you can call references - the employer (past or present) or a personal friend or family member of the person applying to work for you. When you call the references, tell them who you are and why you are calling.

References can tell you about what kind of work this person has done before, how well they did their job and if they can be counted on to do what they say they will do. Take notes on what the references say.

### **Making a Decision About Who to Hire**

When you decide who is the best person for the job, call them and make an offer to hire them. As soon as they have accepted the job, you will need to complete an employment agreement with your new support worker.

#### **Some questions you might ask a reference:**

1. What did this person do for you?
2. Did they come to work on time?
3. Did they come to work rested and well-dressed?
4. Did they have the skills needed to do the job?
5. Were they reliable?
6. Were you happy with their work?
7. Why did they stop working for you?
8. Would you hire them again?

### **What is an employment agreement?**

#### **An employment agreement has:**

- Information about you
- Information about the worker
- A description of the service they will provide
- A description of the job duties
- A list of the skills needed for the job
- Where the job will be done
- How much you will pay

An employment agreement is between an employer (you) and an employee, like your Support Broker or a Community Support Worker. This agreement includes information about you, the worker, the job and the terms of what, how, when and where the work will be done. It also includes how much you will pay your worker.

#### Examples of things in an employment agreement:

- Names of the employer and employee
- The effective date on the employment agreement is the date employment starts through the end of the plan year.
- Job title and a short job description of service, tasks or goods as listed in your Support and Spending Plan.
- The skills they need to have to do the job. The information below should be included in the qualification section of the employment agreement.
  - The normal place of work and if the work may be in more than one place.
  - Specific supports and services to be provided by CSW
  - Specific qualifications demonstrating specialized skills, abilities, experience and /or training to show the CSW has the competence to support the participant to live as independently and safely in the community as possible.
  - How much notice you will give before firing someone.

- How much notice they will give you before quitting the job.
- You may also want to include:
  - Any trial period - if you want to "try out a worker" before they are hired for good.
  - Training that the worker will need to get and how it will happen
  - Health and safety needs
  - If transportation is a service on your plan, what vehicle will be used?
    - When the CSW will drive your car, you should write down when this will happen and how it will happen. When the CSW is using their own car, you should make sure that they have car insurance. This is called "proof of insurance" and they should give you a copy.
- Employment Agreement Calculations section must include the following information:
  - One specific Service per box
  - Code that describes the Service
  - Calculate the hours per year of the specific service
  - Wage per hour ( do not include employer taxes or other costs)
  - Total Annual Cost for the service
- All sections of the Employment Agreement must be complete or will not be accepted by the FEA.

### **Certification and licensing**

Some workers must be certified or licensed to do a special job. For some kinds of jobs, state law says that a person must have a certificate or a license that shows they have the training and skills needed to do the job. Some jobs that a person has to be licensed or certified to do:

- Psychologist
- Counselor (mental health)
- Licensed Practical Nurse

- Nurse
- Certified Nurse's Aide
- Occupational Therapist
- Occupational Therapy Assistant
- Speech/Language Pathologist
- Physical Therapist
- Respiratory Therapist
- Social Worker

If you hire one of these people, you must make sure they have the license or certificate they need to do that job.

**Can I hire my parent or guardian?**

Your parent or guardian can be a paid Community Support Worker in the My Voice My Choice option. But, they cannot be your Support Broker or Fiscal Employer Agent. If you decide you want to pay your parent or guardian to help you, there are some rules you need to follow:

1. The service they give you must follow the definition of a community support service listed on page 42.
2. The service or support they give you must be listed on your Support and Spending Plan Authorization.
3. You cannot pay them more than you would pay another support worker to do the same job.

You may choose to hire your parent or guardian to be one of your Community Support Workers. But...**Your parent or guardian cannot be your Support Broker or your Fiscal Employer Agent.**

4. Your guardian can not be paid to meet the responsibilities listed in the Agreement to Select Self-Directed Services.
5. Your guardian can not be paid to meet their responsibilities listed in the guardian/conservator agreement.
6. If you live in a Certified Family Home with your legal guardian, the service they give you cannot be the same service or support you get under the room and board payment (rent, utilities, food) or something that your guardian is already supposed to do for you under their guardianship agreement.
7. Your circle of support must have at least one person who is not your family member.

**If you hire your guardian, the guardianship agreement must be added to your Support and Spending Plan when you send it to Medicaid for approval.**

**Hiring CSW's to Work in a Certified Family Home**

**Substitute Care**

- Community Support Workers (CSWs) coming into the home are considered Substitute Care providers when the person identified on the CFH certificate as the CFH provider is not in the CFH and the CSW is responsible for providing care and supervision to a resident while in the CFH. CSWs that meet the definition of a Substitute Care provider must be CPR certified, complete the Assistance with Medications course if they are assisting the participant to take medication, and complete a Criminal History Background Check. IDAPA 16.03.19.300.SHORT-TERM CARE AND SUPERVISION.
- It is also considered to be Substitute Care when someone residing in the CFH home not identified on the CFH certificate is responsible for providing care and supervision to a resident in the CFH when the certified person is absent from the home.

- CSWs will not be considered Substitute care providers when they go into the home and the certified person is present in the home and is available to provide regular care and supervision.
- CSWs will not be considered Substitute care providers if the supports they are providing occur in the community.
- Substitute care providers may provide care and supervision to a resident in a CFH for up to thirty (30) consecutive days. This rule is specific to those situations when the CFH provider is away from the home 24/7 for up to 30 days. CSW's coming into the home for only parts of the day will not fall under this rule.
- CSWs who provide four (4) hours per week or less of supervision only to a resident of the CFH, in the CFH, do not need to meet the CPR, Assistance with Medications course and Criminal History Background Check requirements.

### **How do I decide how much to pay for supports and services?**

The supports and services you get must fit within your Individual Budget. You cannot spend more money than you have. You need to be very careful about how you spend the money in your budget.

In the My Voice My Choice option you decide how much you are going to pay your Community Support Workers and other people who you get services from. It is a good idea to find out how much people usually get paid to do a kind of service.

Community Support Workers are sometimes paid by the job (like mowing the lawn), by the session (like a computer lesson), or paid by the hour (a dollar amount for each hour they work). This is their rate of pay. If you don't know how much to pay a person to help you with a certain kind of service or support, ask your Support Broker and your circle of support.

**What does it mean to negotiate?**

To negotiate means to bargain with someone or agree after talking about what you both need and want. When you negotiate, you talk to your Community Support Worker or other service provider and decide together how much you will pay them to give you a certain kind of service.

Your Support Broker, someone from your circle of support or a person you trust can help you to negotiate rates if you want them to.

It is a good idea to pay your worker a starting wage that is less than the most you can pay them. After they have worked for you for a while, you might decide that you want to pay your Community Support Worker more because you like the way they support you, they have been doing a very good job and you feel comfortable with them. You can pay them a little more for each hour. This is called "giving a raise."

**Employment taxes on workers' wages:**

Keep in mind that as an employer it costs more to employ someone than just their wages. By law, you have to additionally pay one-half of your employee's Social Security and Medicare payment, as well as federal and state unemployment taxes. These taxes are figured as a percentage of your employee's payroll and do not change from one employee to the next. That means if you hire someone to provide hourly services, the amount of this must be added to that employee's hourly wage before you list the hourly cost on your My Spending Plan Worksheet.

To figure out what your employee's services will cost you per hour when adding on your employer's share of taxes, please remember to contact the FEA to be sure the amounts are correct.

**Worker's compensation insurance:**

The State Insurance Fund, which is the largest provider of worker's compensation insurance policies in Idaho, agrees that the company will look at any request for this insurance on a case-by-case basis.

**Workers Compensation Insurance:**

- The Internal Revenue Service (IRS) classifies employers under the Self Direction Option as a "Household Employer". This classification is exempt from the Workers Compensation Requirement.
- If you believe your circumstances warrant purchasing Workers Compensation, the Participant is considered the employer not the FEA.

**Two Options to apply for Workers Compensation Insurance:**

1. Purchase the policy from a carrier that is large enough to underwrite their own policies.
  - The State Insurance Fund will not underwrite policies for persons using Self Direction Option.
2. Have the policy underwritten through the "High Risk Pool" This is managed by NCCI Holdings Inc. contact them for information at 1-800-622-4123 or e-mail at [www.ncci.com](http://www.ncci.com)
  - All major carriers are required to participate in this system.
    - To qualify for the pool system the participant must have made three (3) other attempts to purchase coverage and received three (3) denials. An Agency or Agent can assist in getting these denials.

## The Criminal History Check

### **What is a criminal history check?**

A criminal history check is when the Department of Health and Welfare takes finger prints on someone you want to hire. The Department uses the criminal history check to find out if that person was convicted of any crimes that might be a risk to your health or safety. For example, a person may have done a crime like stealing, having illegal drugs or abusing or hurting someone.

### **Why is it a good idea to get a criminal history check?**

Your Community Support Workers may be working in your home and helping you with personal things when nobody else is around. A criminal history check is a way to make sure a person has not broken the law or committed a crime that is very serious. It is one way to guard your personal safety and your home and belongings. There is less risk for you if you have your workers get a criminal history check.

### **Do my workers have to get a criminal history check?**

No. In the My Voice My Choice option you can decide to waive a criminal history check for a Community Support Worker unless they are a CFH provider or substitute CFH provider.

### **What does it mean to waive the criminal history check?**

It means you are choosing to hire someone without a criminal history check even though the Department's rules would require it if they worked for a service provider agency instead of you.

A criminal history check is a way to make sure a person has not broken the law or done a crime that is very serious. It is one way to guard your personal safety and your home and belongings. There is less risk for you if you have your workers get a criminal history check.

**How do I waive the criminal history check for my employee?**

You fill out a form as part of the employment agreement that says who you want to hire and why you do not want them to get a criminal history check. You describe how you will make sure you will be healthy and safe if you choose not to have the Department check their criminal history.

When you sign this form you are agreeing not to bring a lawsuit against the Department of Health and Welfare if problems come up when you hired someone without knowing their criminal background.

On the form, you are saying that you understand there may be a risk when hiring someone without requiring them to get a criminal history check.

**Why would I waive a criminal history check?**

Your circle of support and your family can help you decide about having a criminal background check on a worker.

You can waive a criminal history check if you decide you know the person well enough and trust that they will never hurt you or take advantage of you.

Your circle of support and your family can help you decide about having a criminal background check on a worker.

Sometimes people choose to waive the criminal history check for relatives they have known all their lives or for other people who they, their family or their circle of support have known for many years.

When you or your family knows someone for years, then you may already know that they were never in jail for hurting someone and do not take advantage of people.

Other reasons you might choose to waive the criminal history check:

- The support worker is going to do a job for a short time and will not have direct contact with you. An example could be someone you hire to mow your grass, or paint your house.
- The support worker will not be in direct contact with you without someone else there at all times.
- You have a lot of natural supports and people in your life who check to see that you are safe and doing well.
- You have not been abused or neglected in the past.
- You know how to report if you are abused, neglected or exploited.

Sometimes licensed professionals do not have a criminal history check. But their state license might help you feel OK about hiring them without a criminal history check. People like a registered nurse, a physical therapist, occupational therapist or a speech and language pathologist are licensed professionals.

**Will someone help me decide?**

Your circle of support and your family can help you make this decision if you are not sure. There are many reasons it is OK or not OK and they will help you think about all of them. You will make the final decision, but it is good to ask for help.

**I want my employees to have a criminal history check. What should I do?**

Your Community Support Worker will go to this website or call this phone number to start a background check: [www.chu.dhw.idaho.gov](http://www.chu.dhw.idaho.gov). or 1-800-340-1246.

They will fill out information about themselves on a self-declaration form and then schedule an appointment with a Regional Department of Health and Welfare office that can take their fingerprints.

The self-declaration form and fingerprint card are sent to the Criminal History Unit to be processed. It will take some time to check all the agencies and sources of information to finish the background check.

You will get a letter telling you if your Community Support Worker has passed the criminal background check.

Passing a Criminal History Background Check does not mean a person has never been arrested. A clearance only indicates that the person has not been arrested for a highly predatory crime.

Your Support Broker may have access to personal, sensitive information regarding you. Since a Support Broker is a Medicaid provider required to obtain and maintain a certificate, the Department obtains a criminal history clearance prior to issuing the certificate. The Criminal History Unit will issue a clearance letter which will disclose crimes committed that do not prevent a criminal history clearance. You may request a copy of the clearance from your Support Broker.

## Being a Good Boss: Managing Your Support Workers

### Clear Communication

In any good relationship, communication is very important. The best thing to do to keep a good relationship with your workers is to communicate clearly and openly with them. You also have a responsibility to be clear and reasonable in what you expect them to do.

### Code of Conduct

One way of being clear about what you want someone to do for you is to write a job description for the worker (see section on Hiring Workers). Tell all your workers about your daily schedule and how you like them to do things. It is a good idea to write it down before your worker starts.

Writing a "code of conduct" can be a good tool to describe your expectations of how people will act toward each other when they are working for you. It can also list the responsibilities each person agrees to. This is a good place to list your house rules.

Some things that you may want to put into a **Code of Conduct**:

- The rules of the house - it's your home, so you get to say what is ok and what is not ok. For example: smoking, using the telephone, etc.
- Reliability - what employees should do if they have to miss work?
- Any trial period - if you want to "try out a worker" before they are hired for good.
- Being on time - coming to work at the time you set and not being late.
- Breaks - when, how long and how often they can take a break during the time they are working.

- Personal phone calls - when, time limits, long distance.
- Use of your personal belongings (including food and beverages).
- If you will pay for food, drink or travel expenses (like gas or bus pass).
- How you will give feedback to your workers?
- How they should tell you if they have a problem with the job or working with you.
- The need for confidentiality (what you want to be kept private).

### **How do I train my Community Support Workers?**

You might receive many different kinds of supports and services to meet your needs each day. You are the only person who knows exactly how you want the service to be provided. Your worker will have a basic understanding of the kind of support you want after your interview with them, but you may have to give some training or show them how to do the support.

As the employer, you are responsible to give your workers a lot of information about your needs and how you want to be treated. It is important that you do not automatically think that your workers know how to do every task for you. They might not know how you want it to be done. Tell your worker exactly what and how you want them to do things. If you have a specific way of doing something or schedule you should write it down.

When you train your workers, be sure to tell them how to lift you or move you around in a way that is safe for you and for them. You can tell them how you need things done or you can have a physical therapist or an occupational therapist, who knows you and your situation, tell them how to do lift and move you the right way.

If a worker does not have the right skills and enough training to do the job, it can cause problems between you and your worker. You have more risk if your support worker does not know how to do the job in a safe way. It can also make the worker feel uncomfortable about doing some of the things you need them to do. If they know how to do the job well they will be happier about working for you.

Talk to your workers about what to do in an emergency. Include regular/everyday emergencies, like cuts and burns that may need first aid and emergencies that might happen because of your disability.

It usually takes a couple of weeks to set up a regular daily way of doing things with a new worker. Be flexible and patient when giving the new worker information and training but be clear about how you want them to treat you and talk to you in a respectful way.

**How do I tell my workers they are doing a good job or need to do better?**

Feedback is a tool to tell your workers the things you like and dislike about them or their work, and what is working or what could be better. You know when a job is being done well, but it is easy to forget to tell the person that you are thankful for the good job they are doing.

If you do not like how a worker is doing something, talk about it as soon as it happens. If you don't tell them about the problems when you find them, your worker may think that they are doing the work the right way.

You may be uncomfortable telling people negative things. But it can be a good experience, even when you are telling somebody that they are not doing something the right way. You can talk to your worker in a helpful way that will help them know how to do the job better. They can learn from you and feel better about being able to do a good job for you. You may want to ask someone else to be there with you when you talk to your worker.

Try to think of the supports and services you get from your Community Support Worker just like any other service you buy.

**Example:** If you took your television to be fixed and it was not done right, you would talk to the service manager and let him know why you do not feel you got good service and ask that he take care of the problem.

**Example:** If the person who cuts your hair did a really good job, you would let them know how much you like the way they did it.

Just like these services, you need to talk to your workers and tell them about anything you are worried about. You also need to tell your workers when they are doing a good job.

**Guidelines for Giving Positive Feedback: "Good Job!"**

- When a worker does something very well, you can tell them right then they did a good job.
- If you want to evaluate their job performance (tell them how they are doing in all of their job):
  1. Choose a time and place so you will not be interrupted and other people will not hear you.
  2. Tell them how much you like and are thankful for what they did.
  3. Tell them how their work helps you.

**Guidelines for Giving Corrective Feedback: "There is a problem we need to talk about."**

- If a worker doesn't do something the way you like it done, you can tell them right then how to do it the way you want.
- If it is a bigger problem or you want to evaluate their job performance:
  1. Choose a time and place so you will not be interrupted and other people will not hear you.
  2. Talk about the problem, not the worker personally.

3. Tell exactly why the problem causes difficulty for you and why it needs to stop.
4. Ask for the worker's help in solving the problem and talk about their ideas.
5. Decide together what each person will do to solve the problem and make working together a good experience.

**Are you happy with your services and supports?**

You may want to think about how things are going every so often. Some people like to do this every month. Others like to do it just a few times a year. Below is a sample of a form you could use to make sure you are getting the help you want and that it is worth what you are paying for it.

Use the questions on this table to think about your services and what you might choose to change. Just because you are asking questions about your services does not always mean you want to change them. If you are happy with your services and your Community Support Workers, then keep them like you have them.

Question	Yes	Sometimes	No
1. Is my worker here on time, or when I need them?			
2. Are they doing what I asked help for?			
3. Are they following the rules I set up?			
4. Are they honest on their timesheet?			
5. Do they keep their problems to themselves?			
6. Does my worker follow my routine?			
7. Am I getting what I need?			

8. Am I happy with them?			
9. Is everything in my home taken care of?			
10. Do they remember and follow instructions without having to tell them over and over?			

**How can I handle conflicts or problems with my workers?**

Conflict is when two people have a disagreement or bad feelings. The best way to handle conflict is to be assertive. Being assertive is being polite but making sure that the other person understands what you want. Being assertive takes practice.

Sometimes you can ignore something a worker says or does that you do not like because it has nothing to do with your care. But, if your worker is not doing something that the two of you agreed upon in your employment agreement, then you need to say so every time.

If it keeps happening, it is important to document (write down) what the problem is and write down where and when it has happened. Set a time to talk to your worker about the problem and bring out the employment agreement that you both signed. Make sure that you keep a record that you and your worker talked about the problem.

If you give your worker feedback and talk to them about what you would like them to change and you still have problems, there are things you can do.

- **Ask your Support Broker to be at a meeting between you and the worker to solve your problems.**
- **Ask someone from your circle of support to help you meet with your worker.**
- **Fire the worker and hire someone else.**

Never threaten to fire someone just to get them to do work. If you decide to fire them, you do not need to talk to them about the problems anymore. If you back down or do it as a threat or punishment, you will lose the worker's respect and your control over them.

**What if I need to fire one of my workers?**

One of the responsibilities of being an employer is to fire an employee who is not doing their job. Firing an employee is usually not a comfortable experience.

If you talk to your worker about problems and you try to correct the problem but the worker does not change what they are doing, then you might want to fire the worker and hire someone else.

**How to fire a worker:**

1. Set a date and time for the termination (day they are fired).
2. Have someone else with you, a family member, friend or someone you trust.
3. Have the paperwork and employment agreement out at the time.
4. Make a list of anything the worker may have such as keys to your home and ask them to give them back to you right then.
5. Have your back-up plan ready to go before termination.
6. Let the worker know that this is not working out as you hoped and that you do not need them to work for you any longer.
7. If they want you to tell them why, remind them of the times that you talked to them about them about the problem and the feedback you gave them about this issue. Do not get into an argument.
8. Tell them when they will get their last paycheck.

9. If they become angry or offensive, ask them to leave now.
10. Call and tell your Fiscal Employer Agent that the worker has been terminated and what day they worked last.

### **How can I keep my workers and myself safe?**

All employers should provide a safe working environment (this is the place that your workers will be working for you, usually your home). Many people get hurt at work every year, but most of these accidents can be avoided by doing a few simple things. People who employ Community Support Workers are the same as everyone else, and have to make sure their workplace is as safe as they can make it.

When you train your Community Support Workers, be sure to tell them how to lift you or move you around in a way that is safe for you and for them. Your workers have a responsibility to take care of their own safety and must tell you about any problems they might have with a work task or using equipment in your home. You should not take any risks you don't have to. Don't ask too much of your support worker and ask them to tell you if they think of a better way to do something.

### **Working Environment**

When you employ support workers in your home, that home becomes a work environment for them. You should take extra care to make sure that your home is safe and that any problems or unsafe items are removed, changed or fixed.

### **Things to think about:**

- Cracked or broken electric plug-ins or sockets with too many plugs in it should be fixed or changed.
- Open fires like fireplaces should have screens and workers should know how to use them.

- Flammable furniture - workers need to know that some furniture may catch on fire easily if around a cigarette, a flame or too much heat.
- Household appliances like heaters or stoves that are broken should be fixed or changed.
- All medicines should have labels.
- Household cleaners should have labels.
- Someone can trip on worn carpets or loose rugs - they should be fixed or taken away.

## Quality Assurance and Improvement

In this section:

- What quality and assurance mean.
- Roles in quality assurance:
  - Medicaid
  - Support Broker
  - Fiscal Employer Agent
  - Circle of Support
  - Your part
- How to make sure your services are how you want them.
- If you decide Self-Direction is not for you.
- Why you would have to stop Self-Directing your services.  
Questions, concerns and complaints.

**Quality** is the measure of how good something is or how much you value it. One person might think something is very good and somebody else might think that the same thing is not so great. That means quality is a very personal idea - it is different for every person.

**Assurance** is making sure that something is what it is supposed to be and doing what it is supposed to do.

**Improvement** is making something better. To make sure a program, like the My Voice My Choice option, is working well for people, there are different ways to check if people are getting what they need and rules are followed.

Different people and agencies are responsible for parts of quality assurance.

The Idaho Division of Medicaid will check to see that:

- People who are self-directing their services have qualified providers to give them supports.
- People are safe.
- Support and Spending Plans are filled out correctly.
- People are getting services and supports that are allowed under the My Voice My Choice option.
- Public money used to buy these services is being used according to the law.
- People have the information they need to Self-Direct their services.
- People are getting the services and supports they need to reach their goals and live the life they want.

The Fiscal Employer Agent has to make sure that:

- There is a signed employment agreement for your Support Broker and each one of your Community Support Workers.
- You know what to do to buy goods from a business.
- You approved all timesheets or invoices before they can be paid.
- You are buying services that are on your Support and Spending Plan.
- You get a report about your budget account to help you keep track of the money spent for supports and services.

- All forms required by the government are filled out with the right information and sent to the right office.
- All taxes required by the government are paid on time.
- Public money used to buy these services is being used according the law.

Your Support Broker has to make sure that:

- You have a person-centered planning meeting to write your support and spending plan.
- Your Support and Spending Plan is completed and submitted to the Regional Medicaid Services office and includes services and supports that you chose.
- You are able to review and understand reports from the Fiscal Employer Agent (FEA).
- You are able to meet your responsibilities in the My Voice My Choice option and that you are healthy and safe.

Your circle of support should check with you to find out if:

- You are safe.
- You are getting the services and supports you need and the way you want them.
- You get the help you need to work to reach the goals you have for yourself.
- You have the life you want.

The quality of your life is better when you are happy with the support and services you get.

When you tell Medicaid about how things are going for you in Self-Direction, it is a chance to make the system work better for you and for other people.

**What is my part in quality assurance?**

You have responsibilities for quality assurance too.

1. Your part will be to meet your responsibilities as listed on page 20-21.
2. Your part will also be about the quality of your life and making different choices when the need arises. Quality of life is about how happy you are with the support or services you get and if you would like to change anything. It is important that you have something to say about your life.

The Division of Medicaid has a responsibility to find out if you are happy with your life and the services and supports you are getting under the My Voice My Choice option. There will be times when someone will ask you questions to find out what's happening in your life to see what your life is like and if you are happy with things.

**What will happen with the information I give about quality?**

The information will be shared with the Department of Health and Welfare so that your services and supports can get better and the whole system of support for all people will be made the best it can be. The information can be shared with any other people you choose.

**What about the questions I will be asked and keeping the information private?**

Quality of life is all about what you really think. It's ok to be honest and speak up for yourself. It is very important for you to tell how you feel about things. There are no right or wrong answers to the questions about the quality of your life or your services and supports.

You make sure your services are how you want them:

- Tell your workers how you want the job done.
- Tell your workers if they did a good job or if they need to change how they do something.
- Make sure your workers have the skills to do the job or can get training.

If you don't like a question, you don't have to answer it. If you don't want something to be told to anyone else, you can say so and it will be kept private. But if you share anything about someone hurting you, that is something that must be shared with the right people, so that it can be stopped.

### **Examples of questions about quality of life**

- Are you able to tell someone about what you want?
- Do you decide what you do every day?
- Do you choose what services you get and what people help you?
- Do you tell your support workers what to help you with?
- If you don't like what your support workers are doing, who do you talk to about the problem?
- Are support workers polite and respectful to you?
- Are you reaching your goals?
- Are you able to do things on your own as much as you would like to?
- Are you happy with what you can do for yourself?
- Do you get to the places you need to go when you want to?
- Do you go places for fun?
- Do you want to work?
- Do you have friends and people who care about you?
- Do you feel that you are a part of your community?
- Are you living where you want to live?
- Does anyone ever do mean things to you?
- What would you do if something bad happened?

Quality of life is about what you think about your life and how things are going for you.

You have a responsibility to speak out for yourself. That is how people will know if something needs to be changed or could be better.

- Do you feel safe?
- Are you healthy?
- Do you have a regular doctor and dentist?
- Do you know someone who can help you get what you want or stand up for your rights?
- Are you happy with your services? Support Broker?
- Are you happy with your life?

**How can I make sure my services and supports are how I want them?**

When you are the employer of Community Support Workers, you have a responsibility to tell your workers how you want the job done. You also tell them how well they are doing their work for you. The section on being a good boss tells ways to give your workers feedback (tell them how they are doing) and this will help them to do a better job for you.

Another good way to make sure you get services the way you want is to write down what you need someone to do in a job description. If you have an agreement with a provider agency to give you services, then you should write down in the agreement, exactly how you want the service to be done.

If you are having a hard time changing something about your services on your own, you should ask your Support Broker or your circle of support to help you make the changes you need.

**What if I decide Self-Direction doesn't work for me?**

If you choose Self-Direction and then decide that it is not working for you, you can stop using this option and return to traditional waiver services. You tell Regional Medicaid Services office that you would like to stop Self-Directing your services and get your services through the traditional waiver model.

The Regional Medicaid Services office will follow steps to help you change to traditional waiver services. The Regional Medicaid Services office will work with you and your circle of support to write a 120 day transition plan so that you can get the services and supports you need to live in the community. A plan developer will work with you to write a new plan showing the change in services.

You will not have a Support Broker, hire your own workers, or work with a Fiscal Employer Agent in the traditional waiver services model. You will work with a service provider agency to get the help you need each day. You still use your Medicaid card for medical services, like doctor visits, and to buy equipment and medical supplies.

**What if you decide this doesn't work for you?**

- You may return to the traditional developmental disabilities waiver to get your services and supports.
- Tell your Support Broker and circle of support that you would like to stop Self-Directing your services and get your services the traditional way.
- Then you have a plan developer write a new plan showing the change in services.

## Questions, Concern or Complaints

### *What do I do if I have questions, concerns or complaints?*

When you begin to Self-Direct your services and supports you might have questions, concerns or a complaint about the process (how it all works), about your community supports and services or your workers. It is important for you to know who to call and how to report your questions, concerns or complaints.

Although a question may turn into a concern or complaint, there are some differences that might help you decide when and how to call and report.

- *Question* - means you want to know about how something works, you want to know about a support, or about the service system.
- *Concern* - means that something is happening that is bothering you or something is causing you to worry that something might happen.
- *Complaint* - means something is causing you to feel unhappy, upset, or pain.

There are certain types of complaints that are very serious and need to be reported immediately. They are:

- **Abuse** - someone causing you physical pain, injury or mental injury on purpose.
- **Neglect** - someone who is supposed to be helping you does not give you food, clothing, shelter, or medical care you need to stay alive and be healthy, or you not being able to take care of yourself.
- **Exploitation** - someone using your money, belongings, or resources for themselves and not how you want it to be used.

**Who should I call?**

- Tell your Support Broker first and they can help you decide who to call, for information, concerns or complaints. This website will have information about the My Voice My Choice option and Self-Directing your services:

[www.selfdirection.idaho.gov](http://www.selfdirection.idaho.gov)

- If your Support Broker is the person you have a concern or a complaint about, then you will need to call your Regional Medicaid Services office yourself or get someone you trust to help you.
- If your concern or complaint is about abuse, neglect or exploitation, it is very important that you report that as soon as possible. You can report this directly to the Department of Health and Welfare or to Adult Protection. If you cannot make the call or are afraid to make the call, you can ask someone you trust to help you.

**What will happen with my complaint?**

When you tell Department of Health and Welfare or Regional Medicaid Services (RMS) staff you have a complaint they will get more information from you. An RMS staff person might do some of these things to find a solution for the complaint or problem:

- Talk to people in person or on the telephone or visit the place of the problem to get more information.
- May work with other agencies to get information or a solution.
- Will report abuse, neglect and exploitation to the right authorities.
- Will follow laws about confidentiality (keeping your personal information private).

"One of the greatest things you have in life is that no one has the authority to tell you what you want to be. You're the one who'll decide what you want to be. Respect yourself and respect the integrity of others as well. The greatest thing you have is your self-image, a positive opinion of yourself. You must never let anyone take it from you."

-Jaime Escalante, Educator

**"It might seem hard to do,  
but we won't grow unless we try.  
Just spread your wings,  
and see how far you can fly."**