

# Is Self-Direction Right For Me?

Presented by Alison Giangregorio- A Parents Perspective



This presentation was prepared by Alison Giangregorio, Independent Oasis LLC ©01/01/2024

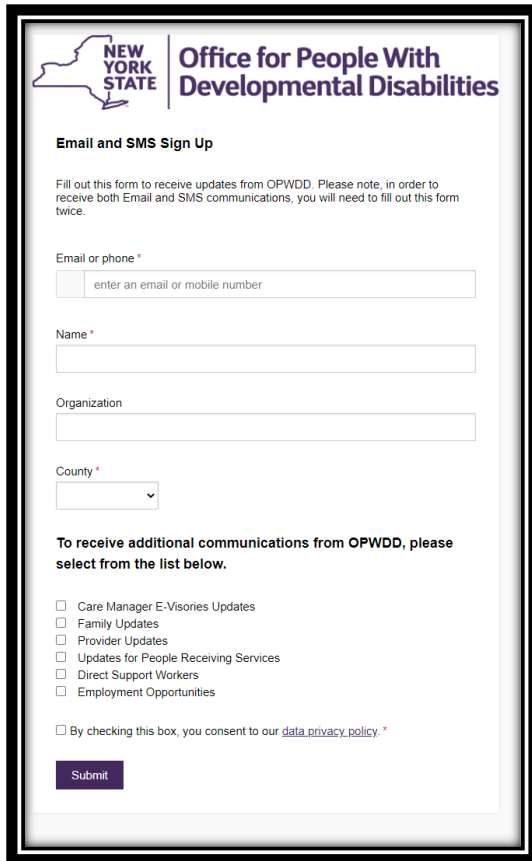


# Disclaimer

The information in this presentation is dated as of 4/2024- This information is based on the Long Island DDRO

**Sign up for OPWDD updates:**

<https://public.govdelivery.com/accounts/NYOPWDD/signup/15127>



The screenshot shows the 'Email and SMS Sign Up' form for the New York State Office for People With Developmental Disabilities. The form includes a header with the state logo and the office name. Below the header, there is a title 'Email and SMS Sign Up' and a paragraph of instructions. The form contains several input fields: 'Email or phone \*' with a placeholder 'enter an email or mobile number', 'Name \*', 'Organization', and 'County \*' with a dropdown arrow. There is a section for selecting communication preferences with five checkboxes: 'Care Manager E-Visories Updates', 'Family Updates', 'Provider Updates', 'Updates for People Receiving Services', and 'Direct Support Workers'. Below this is a checkbox for consent to the data privacy policy. A purple 'Submit' button is at the bottom.

## WHY?

Be the best advocate you can be!

We are all Stakeholders

Turnover in Care Managers

Opportunities to provide feedback to NY State

Learn about upcoming changes within OPWDD

# I Do Not Have Any Services! How Do I Begin?

- Contact the Front Door in your Region - Self-Direction

## Long Island

### **Front Door Office Long Island**

631-434-6000

Counties served: Nassau, Suffolk

## New York City

### **Front Door Office Queens**

718-217-6485

### **Front Door Office Brooklyn**

718-642-8576

### **Front Door Office Manhattan**

646-766-3220

### **Front Door Office Bronx**

718-430-0757

### **Front Door Office Staten Island**

718-982-1913

# I Do Not Have Any Services!

## How Do I Begin? (Con't)

- *Service Access Program assists with initial OPWDD eligibility, lite touch of services can be obtained through the Family Support Services Grant Book - [Home \(lifssac.com\)](http://lifssac.com)- process ends.*
- You will have a phone interview and a DDP2 will be completed, the score generated by this report will establish the Personal Resource Account (PRA): - explains DDP2, CANS, CAS assessment
  - [Assessments | Office for People With Developmental Disabilities \(ny.gov\)](#)
- Self- Direction - you will need the HCBS Wavier once initial eligibility is approved. You will select a Care Coordination Organization (CCO): prepare the documents to **APPLY for the HCBS Waiver**.
  1. Advance Care Alliance NY (ACA)- [www.acany.org](http://www.acany.org)
  2. Care Design NY - [www.caredesignny.org](http://www.caredesignny.org)
  3. Tri County Care - [www.tricountycare.org](http://www.tricountycare.org)
  4. Partners Health Plan - [www.phpcares.org](http://www.phpcares.org) (Medicaid and Medicare)
- Two Different Plans you can have: [Care Management | Office for People With Developmental Disabilities \(ny.gov\)](#)
  1. Basic Plan that only integrates your HCBS services ONLY
  2. Health Home, more robust service delivery model.

# What is Life Plan?

## The “MOST” Important Document!

- **The Life Plan** - **PRESCRIPTION of ALL SERVICES** *Must describe the individual, their interests, wishes for the future and ALL supports needed for an individual including their challenges! **YOU MUST READ** and make sure that the Life Plan is accurate and each time something changes, you **MUST MAKE SURE** that the Care Manager updates. **ONLY SIGN** that you agree with the Life Plan once you have seen a **COMPLETED corrected copy!***
- **Section I (Narratives)**- A Valued Outcome “justification” is needed for everything that you want to accomplish in your self direction plan, without a Valued Outcome “justification” the Fiscal Intermediary **will not reimburse!**
- **Section II** – Provider assigned goals. “What the staff will work on” This will generate the Staff Action Plan by the Broker, “How the staff will work on the goal”
- **Section III** - Individual Safeguards/Individual Plan of Protection(IPOP) List all safeguards needed across all setting for an individual.
- Your Life Plan will include coordination of your developmental disability related supports and your other services, like medical, dental and mental health.

# What is required to Self-Direct?

- Eligibility for services through the Home and Community Based Waiver (HBCS) - Notice of Decision (NOD)  
[http://www.health.ny.gov/health\\_care/medicaid/program/longterm/omrdd.htm](http://www.health.ny.gov/health_care/medicaid/program/longterm/omrdd.htm)
- Selecting a Broker -Review and Sign - OPWDD Checklists (six)
- Selecting a Fiscal Intermediary- important to review the rules of the FI that you are selecting, ask review their Memorandum of Understanding (MOU)
- Self-Direction Information Session Training – certificate\*\*
- Create your Circle of Support
- You and your family **TAKE THE LEAD!**

**\*\*Each DDRO region may require vary in their requirements**

# What Happens When I Find a Broker? What do they need?

- A contract is signed with selection of the Fiscal Intermediary.
- Broker then contacts Care Manager for the following documents:
  1. Notice of Decision, Approval for Self –Direction
  2. The Six Signed Checklists
- The Broker submits required paperwork to the Fiscal Intermediary and requests to begin the **Start-Up Budget** process.

**The Broker is not allowed to begin working with the family until approval is given.**

An approval will be generated from NY State giving an effective date to begin the Start-Up process.

# What Questions Should You Ask a Broker Before You Sign a Contract?

- Are you an Agency Broker or an Independent Broker?
- Will you still be my broker once we launch?
- Which Fiscal Intermediaries are you with and what is their fringe rate?
- How accessible are you when I have questions?
- How long will you take to get back to me?
- How much do you cost per year, once my plan launches?



# What is a Fiscal Intermediary (FI)?

When selecting a (FI) it is VERY IMPORTANT that you understand the (FI) agency

specific rules: Review the Memorandum of Understanding (MOU) before you select an FI. By signing the FI MOU you are agreeing with “THAT FI” agencies interpretation of the OPWDD guidance. The FI agency is responsible to ensure that your plan is Medicaid compliant. A Fiscal Intermediary needs to follow the minimum standards of OPWDD rules and can add additional best practices procedures. **Not all Fiscal Intermediaries have the same rules. You must READ the FI Policy and Procedures document!**

- Approve the services you use in self-direction
- Fingerprinting and background check for staff
- Pay your staff
- Pay you for reimbursable items
- Track expenses – monthly

# Some questions to consider when selecting a Fiscal Intermediary!

- Do you have a minimum of car insurance that is required for staff to take my loved one into the community?
- What type of training does my staff need to complete?
- What are the maximum rates I can pay my staff?
- What is your approval process for classes, are there additional forms for me to fill out?
- What is the deadline for me to have my monthly expenses submitted to the FI and how long does it take to be reimbursed?
- How often do you reimburse?

# What is a Fringe Rate?

- Fringe pays for non-direct staffing costs, including Paid Time Off (PTO)
- Fiscal intermediaries have a separate pooled account to hold these funds, “*everyone pays fringe!*”
- The fringe rate **WILL be charged to your budget** for each hour a staff person works fringe is charged.
- Part time and full-time staff, fringe will be charged.

# In the Meantime...

You should:

- Visit the OPWDD website to educate yourself on what Self-Direction is. <https://opwdd.ny.gov/types-services/self-direction>
- Have a general understanding what it means to be Self- Directed **BEFORE** you begin the process.

**THEN**

- Look for a Start-up Broker. Ask your Care Manager for a current Broker list. Your Care Manager can assist you in interviewing a Broker **BEFORE** you sign any contract.

# Go to OPWDD's Website - Download

## Individual Goods and Services (IDGS)

[addendum-a-4-idgs-chart\\_050622.pdf \(ny.gov\)](#)

Guidelines for Providers- Print out, keep for reference

[Self-Direction for Providers | Office for People With Developmental Disabilities \(ny.gov\)](#)

# Begin Developing the Plan

- Once the Start up is approved by OPWDD
- Meet with your Start-Up Broker
- Establish your Planning Team and who you want to be part of your Circle of Support
- Develop a Person-Centered Plan which includes the Valued Outcomes and justification of the budget lines you are seeking to use.
- Discuss your expectations of what you wish to do with self-direction
- Discuss the challenges and Safeguards needed in the Life Plan
- Develop a Self-Directed Budget



# What is My Role?

## *Self-Direction Participant and their Circle of Support*

- You are the “managing employer”. You determines job duties and schedules. Is responsible for hiring, training and firing of staff.
- You submit monthly expenses along with proper documentation to the Fiscal Intermediary according to the rules set by that Fiscal Intermediary
- You sign off on staff time sheets and expense forms. Signing any documentation is confirmation of a service that was provided. Anything else is **Medicaid Fraud.**