



# Self – Direction 101

Person Centered Care Services Inc

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## Who We Are:

**Our Mission:** *Person Centered Care Services is a not for profit organization creating social change within communities by supporting people with disabilities on their search for identity and acceptance.*

**Our Vision:** *To reconfigure humankind. To be genuine and authentic to human beings; disabled and non-disabled. Creating a society of belonging and helping one another to live a good life.*



## Who We Are (continued):

**Our Strategy:** *To help a person build comprehensive supports that will engage and propel them to lead the life they want to live.*

**Our Impact-** *Providing support to the Staten Island community and the greater NYC area to help create and facilitate relationships resulting in a more diverse community while providing services to people with disabilities to engage and be a part of their community.*



# Core Values:

**support** *Our responsibility as human beings is to support ourselves and one another.*

**eQuity** *To participate in community is to have active citizenship. To be a participating citizen, one must have opportunities which are equitable; which accommodate the differences all human beings have.*

**aCCeptance** *One of the most vital components of having a quality of life is love. It's okay to tell someone you love them; more importantly, it's okay to show them. To accept another for who they are and what makes them human can be a most validating experience; it is self-empowering.*



# Agenda

- ✓ What is Self-Direction ?
- ✓ What happens when you self-direct ?
- ✓ Who can self-direct ?
- ✓ Key Members of the self-direction team
- ✓ Self-Direction Budget and services
- ✓ Review
- ✓ Resources



# Self-Direction

- “Self Direction means that you, the person with developmental disabilities, may choose the mix of supports and services that work best for you, how and when they are provided, and the staff and/or organizations that provide them.” -OPWDD, Introduction to Self Direction
- Self Direction provides the person the chance to make decision about supports and services they need.
- Self Direction offers more choice and flexibility over the supports and services.
- A person does not need to Self-Direct all of their services. They can receive “Traditional,” and “Non-Traditional” services.
- ▶ Example: Traditional - Day Habilitation vs. Non-Traditional - Music Class



# What happens when you Self Direct?

People who Self Direct accept responsibility and take on a direct leadership role in managing their supports and services.

- Responsibilities include but are not limited to:
  - ✧ Hiring staff
  - ✧ Setting staff's schedule
  - ✧ Arranging for backup staff
    - ✧ Training staff
    - ✧ Terminating staff
  - ✧ Evaluating staff performance
    - ✧ Meeting deadlines
    - ✧ Managing a budget
  - ✧ Reviewing / approving documentation



# Who can Self-Direct their services?

- Anyone who is eligible for OPWDD services and enrolled in the Home and Community Based Services (HCBS) Waiver can choose to Self-Direct their services.
- Self-Direction may be right for you if you want more flexible supports and services. In order for Self-Direction to be effective, family members and/or designees will have to make a commitment to abide by specific requirements. These requirements can be time consuming.



# Speak with your Care manager (cm)

- You will want to speak with your Care Manager and express your interest in Self Direction.
- The next step would be to attend a Self-Direction Information Session at your local Developmental Disabilities Regional Office (DDRO). In Staten Island, these meetings are held:
  - ▶ Every 3<sup>RD</sup> Thursday of the month
  - ▶ Held virtually
  - ▶ Times vary (schedule set by DDRO)
- ▶ At the end of the workshop, you will be provided with a certificate of completion, which is required to be submitted to the DDRO in order to obtain budget approval\*
- You will then want to make sure the Developmental Disabilities Profile (DDP-2) is active and current. The DDP-2 is an assessment which is a part of determining your Self-Direction budget amount. The DDP-2 assesses a person's needs in the areas of medical, sensory/motor, cognitive/communication, behavior, self-care/daily living skills and clinical services. The DDP-2 scores are valid for 2 years. You can confirm with your Care Manager whether or not this assessment is active and current.



# Why do I need a Support Broker ?

- It is necessary to have a Support Broker for Self-Direction.
- The Broker is responsible for the following:
  - ✧ Facilitating the Circle of Support meetings
    - ✧ Generating a budget for services
  - ✧ Educate on services and community resources
  - ✧ Develop habilitation / staff action plan, if applicable
  - ✧ Communicating with the members of the Circle of Support

The Broker is paid through the budget. However, a parent can be an unpaid Broker. They must meet the same qualifications as a paid Broker.



# Finding a Support Broker

Finding a Broker will be the next step. A listing of Independent / Agency Brokers can be obtained from the DDRO or your Care Manager

The Care Manager can assist with finding a Broker who meets your needs.

- ✓ Interview Brokers. Every Broker offers a different level of assistance.
- ✓ Once a Broker is hired, you will sign a contract (Broker Agreement) with that Broker that outlines his/her duties and how he/she will support you.

After you have found a Broker, they should assist you to find a Fiscal Intermediary agency.



# Finding a Fiscal Intermediary (FI)

You will then need to choose an agency for your Fiscal Intermediary. They serve as “employer of record.”

The Fiscal Intermediary or FI is an agency that provides administrative and billing support to a person who chooses Self-Direction.

Each FI has a different procedure for accepting new cases.

The Fiscal Intermediary is responsible for the following:

- ✧ Completing background checks and training for self-hired staff
- ✧ Billing Medicaid or New York State for services in the budget
  - ✧ Paying staff and tracking expenditures
- ✧ Providing monthly statements to the Self Direction participant
  - ✧ Review documentation submitted for reimbursements



# Next steps

Once you have established a Broker and FI then your Broker will request a Start-Up budget through OPWDD.

When your start-up is approved, the Liaison (from OPWDD) will send you an approval letter.

After you receive the approval letter, you can now start working with your Broker to develop a complete Self-Direction budget.

# Circle of Support

The Circle of Support (COS) is a group of people chosen by the Self-Directing participant to help create a support system. This group will help identify goals and needs. The COS is **REQUIRED** to meet at least 2 times per year. Additional meetings can be held at the request of the Participant/Designee

The Circle of Support **MUST** include:

- The person Self-Directing services/designee
- Broker
- Care Manager (CM)

Other people may include:

- Family and friends
- Any person whom can be considered an advocate for the person
- FI





# Budget Authority

<b>Direct Provider Purchased Services</b>	<b>Agency-Supported Self-Direction</b>	<b>Self-Hired Self Direction</b>
<ul style="list-style-type: none"><li>▪ “Traditional services”</li><li>▪ Provided by voluntary provider agencies</li><li>▪ Billed to Medicaid by the provider at the provider’s rate</li><li>▪ Must be reflected in the budget</li></ul>	<ul style="list-style-type: none"><li>▪ Person Self-Directing exercises employer authority</li><li>▪ The voluntary provider agency is the employer of record</li><li>▪ An agreement is created detailing the agency’s &amp; person Self-Directing’s responsibilities.</li><li>▪ Billed to Medicaid by the provider at the provider’s rate</li></ul>	<ul style="list-style-type: none"><li>▪ Person Self-Directing exercises employer &amp; budget authority</li><li>▪ Person self-hires staff to provide Community Habilitation, SEMP and/or Respite</li></ul>



# Self-Hired Community Habilitation

Community-based experiences help to shape identity and provide a unique view of the world. Community Habilitation offers those we support a wide range of services and resources to help facilitate community integration and social capital. As with all other supports and services, ensuring a more fulfilled life is at the core of the program.

# Self-Hired Respite

A temporary relief from the demands of daily caregiving, the Respite service provides families with supports in the home to increase health and wellness and family connection. This service often enables families to better meet the physical and emotional needs of their loved one(s).





# Employment Supports

- ▶ **Pathway to Employment Program:** Based on existing skills and interests, Pathway to Employment offers opportunities to help identify a career or vocational direction. Through consistent supports with job readiness, such as building a resume or understanding work-appropriate relationships, people learn to transition into the working field and build a life filled with purpose.
- ▶ **Supported Employment (SEMP):** A more focused guidance and support, Supported Employment provides the supports people need to obtain and maintain paid competitive jobs in the community. Our highly qualified staff work with each person to ensure that the transition into this level of employment is successful and that necessary job coaching is provided to maximize long-term employment.
- ▶ **Employment Training Program (ETP):** A unique opportunity to work in an internship setting, the Employment Training Program (ETP) offers people the chance to learn on the job and develop invaluable skills to help them achieve their career goals. Every internship offered through the Employment Training Program leads to permanent employment at a local business in the community, easing the burden of a city-wide job hunt. Throughout the duration of the internships, wages will be paid through ETP while the person learns the skills necessary to succeed in that field of work.
- ▶ **\*\*Each agency may have their own assessment process in order to determine eligibility\*\***



# Individual Directed Goods and Services (idgs)

- ▶ IDGS are services, not otherwise provided through OPWDD's HCBS Waiver or through the Medicaid State Plan.
- ▶ A person can manage their IDGS to fully purchase or contribute towards the purchase items or services that meet the following criteria:
  - Are related to a need or goal identified in the Life Plan
  - Are for the purpose of increasing independence or substituting for human assistance and/or promote opportunities for community living and inclusion
  - Are able to be accommodated without compromising the participant's health or safety
  - Are provided to or directed toward the benefit of the person
  - **All goods and services are subject to the approval of the FI**



# Individual Directed Goods and Services



- Community classes
- Health club, organizational memberships
- Household related items and services
- Transportation
- Camp
- Aquatic, art, massage, music, play therapy, etc!



# Other Than Personal Services (OTPS)

OTPS Categories	OTPS Excluded
<ul style="list-style-type: none"><li>▪ Phone service (cell or land line)</li><li>▪ Internet</li><li>▪ Software</li><li>▪ Staff activity fees</li><li>▪ Personal transportation</li><li>▪ Clothing (\$250 annual cap)</li><li>▪ Utilities</li><li>▪ Other goods and services that increase independence and/or health/safety</li></ul>	<ul style="list-style-type: none"><li>▪ Medical visit co-pays and anything related to medical services</li><li>▪ Common <u>house hold</u> supplies</li><li>▪ Rental cars</li><li>▪ Repairs (should be covered by lease or homeowner)</li><li>▪ Experimental therapies</li></ul>



# Housing Subsidy

- People over 18 who chose to live independently may be able to include a Housing Subsidy in their budget.
- Rental, lease or mortgage must be in the name of the person who is Self-Directing.
- If in a shared living environment, the person Self-Directing must have clear tenancy rights.
- The amount is calculated based on the person's income and Housing and Community Renewal (HCR) payment standards.
- Same rules and regulations as Individualized Services and Supports (ISS).
- If receiving housing subsidy, unable to receive Family Support Services, Family Reimbursed Respite or Self Hired Respite.

\*\*Additional criteria must be met in order to qualify for a Housing Subsidy\*\*



# LIVE IN CAREGIVER (LIC)

- LIC in an unrelated care provider who resides in the same household as the Self-Directing person and provides supports to meet the person's physical, social and/or emotional needs, so they can safely and happily reside in their home.
- LIC **can-not** be related to the person Self Directing by blood or marriage.
- The service covers the LIC's room and board (rent, food, and utilities).



# Paid Neighbor

- ▶ Stipend paid to neighbor to be “on - call” to assist a person who lives independently. If the paid neighbor is called upon to provide direct services, he/she is paid an hourly wage for the delivery of Self Hired or agency supported Community Habilitation
- ▶ Monthly Stipend can not exceed \$ 800.00 per month
- ▶ The specific duties are defined in a contract signed by the paid neighbor and the Fiscal Intermediary
- ▶ The paid neighbor staff person cannot be a family member of the person
- ▶ Paid neighbor must meet all requirements for background checks and training that would be required of a Self Hired staff



# FAMILY REIMBURSED RESPITE (FRR)

- FRR is capped at \$3,000 annually.
- FRR is to provide relief to the caregiver in addition to, or instead of Direct Provider Purchased, Agency Supported, and Self-Hired Respite.
- The person hired providing FRR services does not have to be processed with the FI agency.



# LET'S REVIEW!

- ▶ The Steps to Self-Direction:
  - Attend a Self-Direction Information session at your local Developmental Disability Regional Office (DDRO).
  - Your Care Manager (CM) will submit a request for Self-Directed services through the Front Door.
  - Hire a Support Broker and FI.
  - Determine your Self-Direction Budget
  - Work with your Broker to develop your SD budget. Your Care Manager (CM) should be included in all meetings.
  - Your Broker will submit your SD Budget for approval.
  - Hold your launch meeting!



# Resources

## **Office of Persons with Developmental Disabilities Website**

<https://opwdd.ny.gov/>

### **Eligibility**

<https://opwdd.ny.gov/eligibility>

# Questions





# Stay Connected!



## Follow Us!

If you have any questions,  
please contact:

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