




**SETTING UP ARRANGEMENTS THAT  
SUPPORT SELF-DETERMINATION**



PLAN FOR  
SELF-  
DIRECTED  
SERVICES  
WEBINARS

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Beginning – GOOD Person-  
Centered Planning

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Building a Budget

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Setting Up an Arrangement

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Arrangement Oversight and  
Responsibility

# OVERVIEW

Person has decided to direct some or all of their services

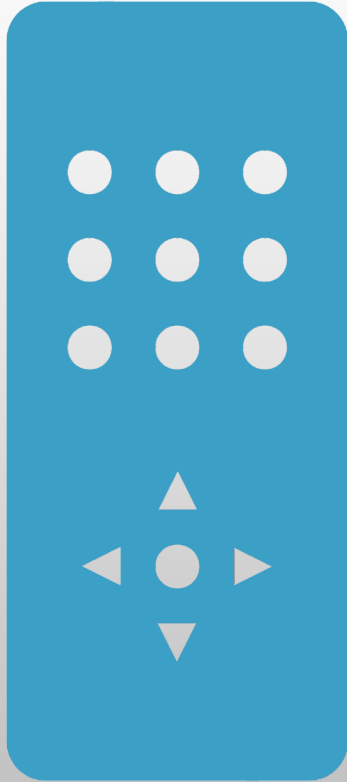
The individual budget has been finalized

Person knows what authority and control they have

This will guide attendees through the setup of the arrangement (when they do not already have staff in mind)

# CONSIDERATIONS

- THE EMPLOYEES ARE NOT CMH CONTRACTED
- THE BUDGET AND EMPLOYEES ARE NOT CMH MANAGED
- CONTROL OVER AMOUNT, SCOPE, DURATION, LOCATION AND PROVIDERS IS WITH THE INDIVIDUAL
- RISK MITIGATION HAPPENS BEFORE ISSUES OCCUR, NOT AFTER






# NEEDED CONSIDERATIONS BEFORE START OF ARRANGEMENT

- TYPE OF ARRANGEMENT
- CHOICE OF FMS
- WHICH SERVICES WILL BE PURCHASED
- HOW WILL INDIVIDUAL BUDGET BE USED TO MEET GOALS OF IPOS
- USE OF SD AGREEMENT FOR RISK MITIGATION
- INFORMATION AND ASSISTANCE
  - ROLES AND RESPONSIBILITIES
- EMPLOYER RESPONSIBILITIES – SKILL DEVELOPMENT – SOFT AND HARD SKILLS OF BEING EMPLOYER

# READY TO START?

- SEND EMPLOYER PAPERWORK TO FMS
  - EIN APPLICATION
  - FMS AGREEMENT
  - POWER OF ATTORNEY
  - CONSENT FOR WORKMAN'S COMP





**MAKE SURE  
TO TRAIN  
EOR ON  
IPOS**

CMH switches to more of a  
supportive role

A Broker can help with any  
and all of the following



# JOB DESCRIPTION

- WAGES AND BENEFITS
  - (ALREADY APPROVED IN BUDGET)
  - MILEAGE
  - TRAINING
  - PAID TIME OFF
  - OVERTIME
  - RETENTION BONUS
  - SALARY
  - HEALTHCARE
  - CELL PHONE REIMBURSEMENT





# TRAIN ON FLSA

THESE ARE NOT CMH  
EMPLOYEES



# JOINT EMPLOYMENT RULES

THE BIGGEST FACTORS IN WHETHER AN ENTITY IS A JOINT EMPLOYER ARE:

- CONTROL OVER WHAT THE WORKER IS PAID,
- CONTROL OVER HIRING AND FIRING,
- CONTROL OVER WORKER TRAINING,
- CONTROL OVER WORKER PERFORMANCE, INCLUDING SCHEDULING AND MANAGING WORK.

# PREPARE FOR INTERVIEWING

Know	Know specifics – what shift, how many hours, main work
Make	Make interview questions
Help	Help define person as an individual not just a job

## Job Ad

(sells the job)

Needs to catch people's eye,  
have a wow factor

Title that pulls people in

Paragraph to summarize most  
interesting points of the job

Describe the atmosphere of  
the home, the role, location  
and perks that are attractive  
to applicants



## Job Description

(Just describes position)

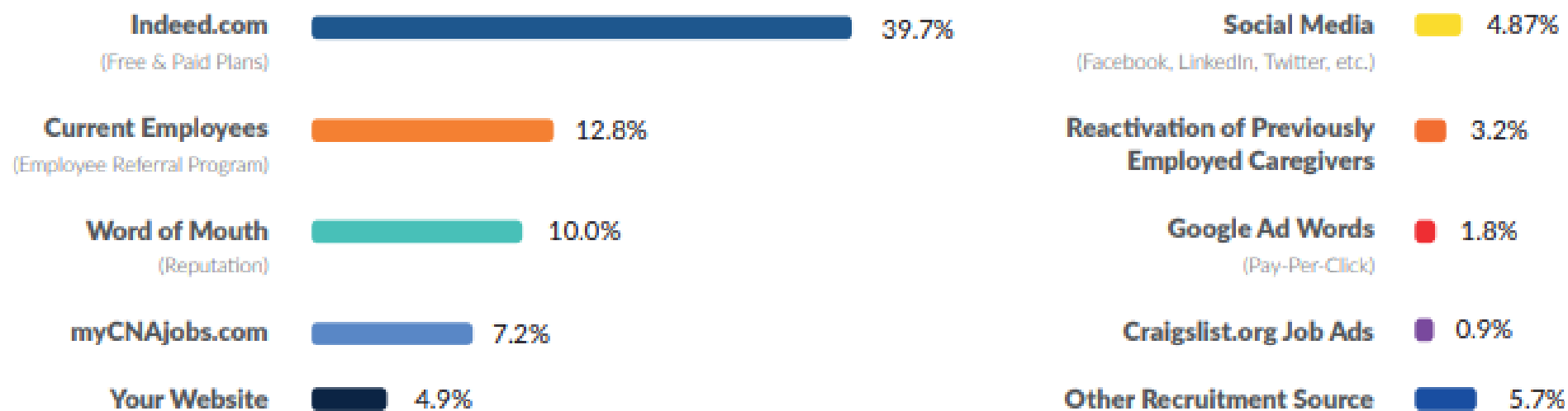
More boring,  
straightforward

A Title that accurately  
describes the position

Paragraph to summarize  
the position

Define success in the role,  
give concise list of must-  
have responsibilities and  
qualifications

## Top 10 Professional Caregiver Recruitment Sources/Methods for 2022



 **The Annual HCP  
Benchmarking Report**

From a list provided, survey participants were asked to select their top two most effective professional caregiver recruitment sources and methods used in 2022.

## Drives More Applicants

Ad Type: Evergreen



**We're Hiring!**

Calling all Caregivers!

## Drives More Hires

Ad Type: Specific Need



**We're Hiring!**

HHA – 2nd Shift  
FT in Scranton, PA

# ADVERTISE JOB OPENING

- **COMMUNITY JOB BOARDS**
- **SOCIAL MEDIA**
- **ONLINE JOB POSTING SITES**
  - INDEED
  - CARE.COM
  - MIWORKS
  - HANDSHAKE



# JOB POSTING

## **NOW HIRING: Direct Care Worker**

**Work in a fun environment with paid time off and flexible scheduling! Theater lover seeks assistance to achieve dreams.**

**The Position:** In search of a care worker who will support a young lady to achieve her dream of going to college. The ideal candidate will be someone who enjoys theater, can help navigate college life, can drive and can work compassionately in times of distress.

The pay range we're offering is 14.31-18.27/hr.

### **Requirements:**

- Care worker must be able to pass a background check (including sex offender and central registry)
- Be 18 or older
- Must be able to communicate and document effectively
- Must be able to bend, push, pull and lift up to 50 pounds, and perform personal care activities

### **Responsibilities:**

- Care worker will assist, train, guide and teach skills around some basic hygiene, personal boundaries, reciprocal relationships and time management.

The Location: Lansing, MI. This is a great place to work because, there is a good public transportation system, access to a wide variety of entertainment and leisure options, local colleges and government resources and diverse shopping opportunities.

### **Why Should You Apply?**

- You will make a difference and improve possibilities for this woman's life
- This young woman is goal driven and fun to be around
- You will be able to spend much of your work time at a university, the theater and other community businesses
- You will work with great staff and a great boss
- There is paid on the job training
- Opportunity for raises, PTO, and flexible scheduling





## **DIRECT CARE SUPPORT**

EMPLOYER - SARA JONES

### **JOB DESCRIPTION**

UNDER THE DIRECT SUPERVISION OF SARA JONES, THE DIRECT CARE STAFF WILL BE RESPONSIBLE TO PROVIDE HANDS ON SERVICES TO ASSIST SARA AND ENHANCE HER PERSONAL CHOICES. ALL DIRECT CARE STAFF WILL BE TRAINED TO PROVIDE VERY SPECIFIC SERVICE TO SARA. THIS JOB REQUIRES DIRECT CARE STAFF TO BE PATIENT, COMPASSIONATE AND HAVE A WILLINGNESS TO PROVIDE HANDS ON CARE.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

THIS POSITION IS HANDS ON WORK IN THE COMMUNITY PROVIDING SARA WITH COMPASSIONATE CARE INCLUDING THE FOLLOWING ACTIVITIES, OTHER DUTIES MAY BE ASSIGNED:

### **DIRECT CARE STAFF RESPONSIBILITIES**

- A. DISPLAY A STRONG WORK ETHIC, MAINTAIN HONEST TIMESHEET CALCULATION, ADHERE TO TRAINING REQUIREMENTS AND SHOW UP FOR SHIFTS ON TIME AS SCHEDULED.
- B. COMPLETE TRAINING TO ENSURE YOU UNDERSTAND WHAT YOU ARE SUPPOSED TO ACCOMPLISH DURING YOUR WORK SHIFT
- C. TREAT EVERYONE WITH DIGNITY AND RESPECT, THIS INCLUDES ALL PEOPLE WHO ENTER OR WORK AT SARA'S HOME.
- D. ENSURE MANDATED REPORTING OF ALL SUSPECTED ABUSE, NEGLECT AND GENERAL WRONG DOING TO THE OFFICE OF RECIPIENT RIGHTS AND THE CMH.
- E. MAINTAIN THE CONFIDENTIALITY AND PROTECT SARA'S RIGHTS.
- F. WHEN ASKED, ACTIVELY PARTICIPATE IN OFFICE OF RECIPIENT RIGHTS INVESTIGATIONS; REFUSAL TO ENGAGE THE OFFICE OF RECIPIENT RIGHTS IS GROUNDS FOR TERMINATION.
- G. PROVIDE ASSISTANCE AND SUPPORT TO INDIVIDUALS INCLUDING BUT NOT LIMITED TO:
  - A. DOCUMENT ALL SERVICES PROVIDED TO OUR CONSUMERS IN THEIR HOMES AND IN THE COMMUNITY
  - B. PREPARE (COOK) NUTRITIOUS MEALS BASED ON THE MENU, SARA'S PREFERENCE AND GROCERY ITEMS PURCHASED BY SARA.
  - C. ASSISTS SARA WITH BATHING, TOILETING, PERSONAL CARE NEEDS AND ACTIVITIES OF DAILY LIVING ACCORDING TO THE INDIVIDUALIZED PLAN OF SERVICE AND THE TRAINING SARA PROVIDES.
  - D. SUPPORT SARA WITH HER MEDICAL NEEDS SUCH AS BUT NOT LIMITED TO: ADMINISTERING MEDICATION; EATING SPECIFIC DIET; DRINKING SPECIFIC SUPPLEMENTS; ATTENDING MEDICAL APPOINTMENTS
  - E. CLEAN THE HOME BASED ON THE CHORE CHART PROVIDED BY SARA AND USE THE CLEANING SUPPLIES PROVIDED
  - F. WASH AND DRY CLOTHES AND LINEN WITH SARA ACCORDING TO THE INDIVIDUALIZED PLAN OF SERVICE
  - G. ASSIST SARA TO PARTICIPATE IN ACTIVITIES RELATED TO HOBBIES, PHYSICAL THERAPY, SOCIALIZATION, AND CHOSEN ACTIVITIES AS DIRECTED.
  - H. ASSIST SARA WITH COMMUNITY INTEGRATION GOALS BY PROVIDING APPROVED TRANSPORTATION TO CLASSES, WORSHIP SERVICES, AND ENJOYABLE OUTINGS WHEN NECESSARY.
  - I. RESPECT THE SARA'S HOME. NOTIFY SARA WHEN YOU NOTICE SOMETHING IS NOT RIGHT, BROKEN, MISSING OR DESTROYED.
  - J. COMMUNICATE WITH SARA TO ENSURE SUPPLIES AND EQUIPMENT ARE AVAILABLE TO DO YOUR JOB.
- H. PROVIDE CPR/FIRST AID AND SEEK EMERGENCY MEDICAL SERVICES (EMS) WHEN NECESSARY
- I. ENSURE ALL ACTIONS AS AN EMPLOYEE ARE DONE IN ACCORDANCE WITH BEHAVIORAL HEALTH POLICIES AND CONSISTENT WITH THE PRINCIPLES OF SELF-DETERMINATION.

# **JOB DESCRIPTION**

## **DIRECT CARE SUPPORT**



# JOB DESCRIPTION PART 2

DIRECT CARE SUPPORT

## **JOB REQUIREMENTS**

### **ELIGIBLE EMPLOYEES WILL:**

1. BE 18 YEARS OLD WITH A HIGH SCHOOL DIPLOMA OR EQUIVALENT
2. SUBMIT TO AND RESULT IN A CLEAN CRIMINAL BACKGROUND CHECK
3. COMPLY WITH ALL TRAINING REQUIREMENTS

### **SKILLS AND ABILITY REQUIREMENTS:**

#### **LANGUAGE SKILLS:**

- HAVE THE ABILITY TO WRITE AND READ INDEPENDENTLY. BE ABLE TO COMPREHEND INSTRUCTIONS, CORRESPONDENCE AND MEMOS. BE ABLE TO EFFECTIVELY COMMUNICATE IN ONE-ON-ONE AND SMALL GROUP SITUATIONS.

#### **MATHEMATICAL SKILLS:**

- HAVE THE ABILITY TO PERFORM ADDITION, SUBTRACTION, MULTIPLICATION AND DIVISION.

#### **REASONING ABILITY:**

- MUST HAVE THE ABILITY TO SOLVE PRACTICAL PROBLEMS AND DEAL WITH A VARIETY OF VARIABLES IN DIFFERENT SITUATIONS.

#### **PHYSICAL ABILITY:**

- WHILE PERFORMING THE DUTIES OF THIS JOB, THE EMPLOYEE IS REQUIRED TO STAND; WALK; AND SIT. EMPLOYEES WILL USE THEIR HANDS TO HANDLE, OR FEEL OBJECTS, TOOLS, OR CONTROLS; REACH WITH HANDS AND ARMS; CLIMB OR BALANCE; STOOP, KNEEL, CROUCH, OR CRAWL; TALK, HEAR; AND SMELL, WITH ACCOMMODATIONS, IF NECESSARY.
- THE EMPLOYEE MAY OCCASIONALLY HELP ASSIST IN LIFTING AND/OR MOVING UP TO 50 POUNDS.

# THE INTERVIEW(S)

THE MOST IMPORTANT QUALITIES (SOFT SKILLS) THE EOR WILL BE LOOKING FOR IS TRUSTWORTHINESS AND COMPASSION.



## SAMPLE QUESTIONS

- WHAT DO YOU CONSIDER YOUR KEY STRENGTH?
- HOW WOULD YOU DEFINE A RELIABLE EMPLOYEE?
- WHAT ARE YOUR CORE VALUES?
- WHAT DO YOU CONSIDER EFFECTIVE COMMUNICATION SKILLS?
- WOULD YOU DESCRIBE YOURSELF AS A TEAM PLAYER?
- TELL ME ABOUT A TIME YOU HAD A POSITIVE IMPACT ON SOMEONE
- GIVE ME AN EXAMPLE OF A TIME WHEN YOUR COMPASSION HELPED SOMEONE STAY CALM AND POSITIVE
- DESCRIBE A TIME WHEN SOMEONE SHOWED COMPASSION TO YOU AT WORK
- ASK ABOUT ETHICAL DILEMMAS AND HOW THE CANDIDATE HANDLED THEM
- WHAT'S ONE TIME YOU FEEL YOU MADE A DIFFERENCE IN SOMEONE ELSE'S LIFE?

# HIRING

- EOR HIRES START AT \$X/HR PENDING BACKGROUND CHECK



# PAPERWORK – AGREEMENTS

Self-Directed  
Services  
Agreement

Financial  
Management  
Service  
Agreement

Employment  
Agreement

Purchase of  
Service  
Agreement

Medicaid  
Provider  
Agreement

Agency  
Supported Self-  
Directed Services  
Agreement

# AGREEMENTS

## Self-Directed Services Agreement

The purpose of Self-Directed Service Agreement:

- Describe the responsibilities of the PIHP/CMHSP, including ways that the PIHP/CMHSP can support the individual in creating and using self-directed services
- Describe the authority and responsibilities of the individual
- Describe how the agreement, the IPOS, or the individual budget can be changed
- Describe the financial management service arrangements

# AGREEMENTS

## Financial Management Service Agreement

The provisions of this Agreement:

- Explains the role of the financial management service in supporting self-direction for individuals
- Describes the duties of the PIHP/CMHSP
- Describes the duties of the financial management service
- Include the method for how CMH would like FMS will approve timesheets



# AGREEMENTS

## Employment Agreement

The provisions of this Agreement:

- Describe the nature of self-directed services, the nature of the employment relationship, and the structure of service authorization and payment mechanisms
- Detail the employee's compensation and benefits
- Outline the rules and regulations affecting the employee's employment
- Explain the importance of the Medicaid Provider Agreement
- Outline the requirements that the employee must meet

# AGREEMENTS

## Purchase of Service Agreement

The provisions of this agreement:

- Describe the duties required of the service provider
- Detail the service provider's compensation and benefits
- Outline the rules and regulations affecting the provision of services
- Explain the importance of the Medicaid Provider Agreement

# AGREEMENTS

## Medicaid Provider Agreement

The purpose of this agreement is:

to define the roles and responsibilities of the above name parties and to assure compliance with federal Medicaid requirements.

# AGREEMENTS

## Agency Supported Self-Directed Services Agreement

The purpose of this contract is:

to define the roles and responsibilities of the parties in the use of the Agency Supported Self-Determination provider's services to assure the opportunity for individuals who directly hire workers who provide services and supports to them.

# CREDENTIALING/ STAFF QUALIFICATION TRAINING

## Initial Credentialling

Blood Borne Pathogens

Emergency Preparedness

Basic First Aid

Recipient Rights

IPOS Training (includes bene  
specific emergency  
procedures)

# EOR WILL COMMUNICATE



Specific wage to FMS (best practice – use form)



Start Date to employee



Training schedule to employee

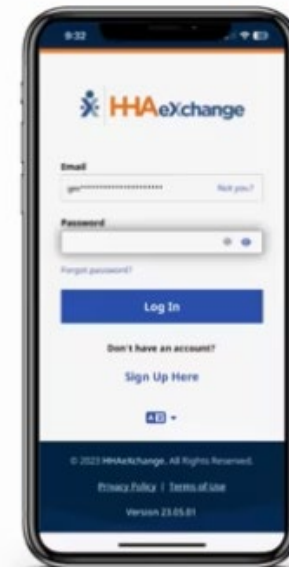


Specific preferences and needs of how employee should provide services

# MAKE A SCHEDULE FOR EMPLOYEES

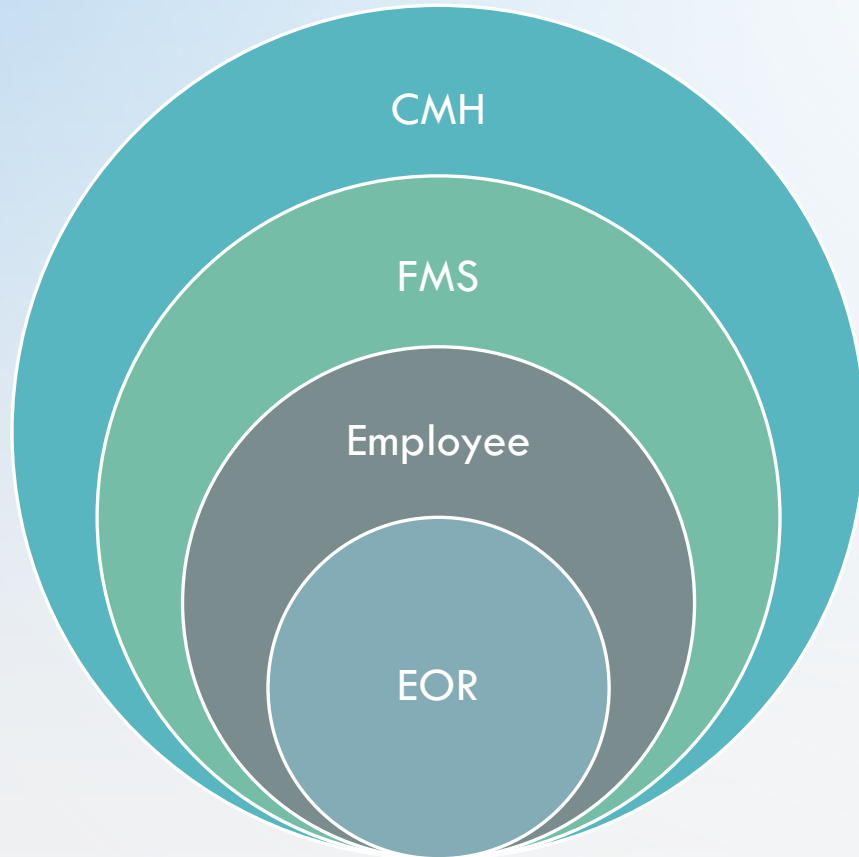
- (FUTURE) USE HHAX'S APP- CARE CONNECT
- OR PAPER IS FINE
- PLAN AHEAD, ESPECIALLY IF YOUR SCHEDULE CHANGES FREQUENTLY

## HHAeXchange+ Mobile App





# ROLES AND RESPONSIBILITIES OF ALL



## CMH

- Support and Oversight

## FMS

- Fiscal Employer Agent

## Employee

- Quality Service while ensuring health and safety

## EOR

- Control, Manage and Run Arrangement



**WHAT  
QUESTIONS  
DO YOU  
HAVE?**



# PRESENTED BY:

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