

The ABC's of Self Directing Services through the Home and Community Based Service Program

The Arc of Illinois

Ligas Family Advocate Program

Welcome:

- Shirley Perez, Ligas Family Advocate and Family Support Network Program Director & Parent
- Tasha Whiteside, Director of Illinois Operations, ACES\$ Services
- Eileen Morrissey, Director of Family Support Services, Envision Unlimited

Key goals:

- Understanding the role of an ISC (Independent Service Coordination Agency), SDA (Self Direction Assistant), and the Fiscal Agent as they relate to Medicaid Home based Waiver funding in Illinois
- Identifying key responsibilities of a Personal Support Worker
- Navigating the role of employee and employer of record within Home Based Services
- Familiarizing yourself with the basic guidelines of the Home Based Waiver Program
- Using the Personal Plan to address the needs of an individual with a developmental disability within the available budget
- Exploring the role of ACES\$ and payroll services
- SDA's role in service navigation and family support

Reminder

- If you have questions as the webinar moves forward, type them in the chat box and they will be addressed at the end of the training.

Shirley Perez, The Arc of Illinois

- Shirley Perez, The Arc of Illinois
- Program Director: Ligas Family Advocate Program & Family Support Network
- Mother & Participant family in HBS/Personal Support Worker (PSW)

Purpose of Home-based Services

- **What is the Purpose of Home-Based Services?**
 - The purpose of Home-Based Services (HBS) is to purchase needed services that will help you continue living safely and successfully in your own home or with your family. HBS is a "self-directed" program in that individuals, guardians and families have the responsibility to arrange and manage their own services and supports.

Understand the Key Components of Home Based Services

- **Individual** – Person receiving Waiver funding and Support Services
- **Personal Support Worker** – Person hired by individual or family to provide support services
- **Employer of Record** – Person identified to monitor/manage PSW and keep records of time, training, and services provided
- **Access Services** – Fiscal Agent for state of Illinois; manages payroll and provides paychecks to PSW
- **Self Direction Assistant (SDA)** – Assist in record keeping and submission of payroll to ACCE\$
- **Independent Service Coordination** – Gateway to developmental disability services; assists with difficulties, develops Personal Plan, addresses Crisis Needs. The ISC is your first point of contact for most questions about DD services.

We will revisit each of these in detail later

The key difference between Home-based and CILA is who manages the services

Home Based Services

- An individual with a disability (and their parent or guardian if needed) will DIRECT their own services. They will be in charge of hiring, training, and maintaining the services that they want and need.

CILA Services

- An individual with a disability prefers to have a Developmental Disability provider manage all of their support services. They will receive services without managing them.

You can move from self-directed services to provider directed CILA services but must work with your ISC and show why the Home-based Services Program no longer meets your needs.

What is the Home-Based Services Program?

- An individual with an intellectual or developmental disability, who has been selected from the PUNS list and approved for funding, decides that they want to be in charge of managing their own services. They, in partnership with their parent or guardian when needed, will:
 - Decide who they would like to hire for personal support services
 - Train their Personal Support Worker (PSW)
 - Schedule their Personal Support Worker
 - Identify an “Employer or Record”
 - Set the pay rate for their PSW
 - Partner with ACES\$ Services to manage payroll for their PSW
 - Consider the use of a Self Direction Assistant (SDA) for assistance with planning and paperwork
 - Services are provided in the family home or a home of your choice, as well as in the community; services provided are based on your Personal Plan

Home-based Services Budgeted Monthly Allotment

- **HBS** provides a monthly budget that you can use to purchase needed services and supports, as identified in your Personal Plan.
- **Your HBS monthly budget does not come to you in cash or a check but is a set amount available for you to purchase services.**
Remember that HBS is to be used for your personal benefit Consumer - not for the benefit of your family, guardians or service providers.
- The AHBS provides a monthly allotment in the amount of 3 times (current) SSI per month. This is the amount that is currently paid (not the amount the recipient may be receiving!)
- That current monthly amount for adults is $771 \times 3 = \$2313.00$
- \$2313.00 is max funding for services per month
- For children the formula is $771 \times 2 = \$1,542$ - max funding for services per month for children



Building a plan that meets your needs:

- DD Services
- Natural Supports
- Community Resources

- **Think through:**

- What do you need assistance with in your daily life?
- What can you do on your own?
- Are you able to spend time alone? Do you like to be alone?
- Who helps you with your needs now?
- Do you prefer to live in your family home or on your own (alone or with a roommate of your choosing)?
- What activities are you involved in? What activities do you want to be involved in?
- Do you have a job? Do you want a job? What kind of support do you need to be successful at work?
- Do you have ongoing medical needs?
- Do you need help managing money and paying bills?
- How do you get to where you want to go?

What are your Natural Supports?

Consider how you might utilize Home Based Support

- In-Home Support
- Community Day Services
- Behavior Counseling
- Employment Supports
- OT/PT/ST
- Nursing
- Home Accessibility Modifications
- Non-Medical Transportation
- Personal Support Worker (support to participate in community activities, daily living needs, teaching adaptive skills, job support)
- *NOTE: These are examples, NOT a complete list. For more information see DHS/DDD website.*

Key Resources to explore

- Illinois Consumer Handbook for Home-Based Services
 - http://www.dhs.state.il.us/page.aspx?item=101181#a_toc29
- ABE Illinois: Assistance with healthcare, food, cash assistance
 - Abe.Illinois.gov
- Social Security
 - www.ssa.gov/applyonline/

Tasha
Whiteside,
Acce\$ Services
(Fiscal Agent)

- Director of Illinois Operations
- Responsible for payroll operations, enrollments, and client care for over 8,000 Illinois families utilizing HBS



ACES\$ Financial Management Services

- Is the largest financial management services provider that is also a non-profit Center for Independent Living
- Provides a Consumer-directed payroll management solution for people on Medicaid waivers and their personal support workers (PSWs)
- Serves programs in Colorado, Illinois, Maryland, Oklahoma, Pennsylvania, Virginia, Wyoming and Washington



What Is Self-Direction?

The Consumer (the Employer) has the freedom to:

- Recruit, hire, train and manage their own PSWs
- Decide the services they need to live their best independent life
- Determine their PSWs' schedule

ACES\$, the FMS provider, takes care of payroll details:

- Processing timesheets and paying the PSWs
- Withholding and filing federal and state employment taxes



Enrollment

Fast & Easy Personalized Enrollment

Consumer/Employer can choose:

- In-person
- Online (with phone support, as needed)
- Mail/Fax (with phone support, as needed)

In-person enrollment and training guarantees:

- Paperwork is completed correctly the first time
- The rest of the process is swift, efficient and less overwhelming



Enrollment

Employer/Consumer Enrollment Packet Process

ACES\$
Enrollment
Agent
completes
packet within
48 hours.

Tax
Department
applies for
*EIN#
*UC Code.

Upon receiving
the EIN# and
UC Code,
Employer or
SDA are
notified.

A welcome
packet is
mailed to the
Consumer/
Employer.



Enrollment

PSW Enrollment Packet Process

ACES\$ Enrollment Agent completes packet within 48 hours.

Fingerprinting documents are sent to the PSW. The PSW has 10 days to comply.

Results can take 5 to 7 business days longer if there's a criminal history.

Once a clear background is received from IDPH, the PSW is eligible to start work.



Service Authorizations (SA)

Used to authorize changes, such as:

- Update to Monthly Budget
- Termination of Services
- Self Direction Assistants Switch
- PSW Changes *
- Employer Changes *

*additional information or paperwork may be required

Submitting Service Authorizations:

- Scan and email to budgetsIL@mycil.org
- If scanning is not possible, fax to 570-558-5570



With our user-friendly FMS portal page, you can:

- Enjoy faster timesheet processing
- See your budget and timesheets in real time
- Receive instant notifications of potential issues before they become problems



Electronic Visit Verification (EVV)

Part of The Cures Act

Every Self-Directed HCBS Waiver Program will now require EVV be implemented.

- All visits from PSWs will be recorded and approved electronically.

Two main methods of visit capture:

- Mobile Visit Verification application
- Interactive Voice Response (IVR) technology



Consumer Service

Why We've Been Voted #1 for Customer Service in States We Serve With More Than One FMS Provider

- When you call ACES§ Illinois, you talk to a knowledgeable member of our Springfield or Tinley Park team — not a call center.
- We develop personal relationships with those we serve.
- Our in-state locations are ADA compliant and accessible via transit lines.
- We offer our services in both English and Spanish. Our language line offers additional translations



Consumer Service

Contact Us Today!

1-877-223-7781 | support@mycil.org



Eileen
Morrissey,
Envision
Unlimited

- Director of Family Support Services
- QIDP
- Experience in Home-based services since program inception
- Currently SDA for over 150 families

Role of Self Direction Assistant (SDA)

- Designs an array of habilitation and support services to meet the participant's needs balanced with program requirements
- Writes or updates the service agreements or service authorizations
- Works with the Fiscal employer agency (ACES\$) to monitor expenditures of funds
- Assist families with completion and understanding of annually legal rights within the program
- Assist with crisis funding, vehicle modification, home modification when requested by families
- Assist families with obtaining products and services related to the individuals disability
- Advocate for the client; day program, therapy, dentists, doctors

Other key services of SDA

- Works with fiscal employer agency to determine that PSW are qualified and competent
- Ensures participant's health, welfare and safety
- Mandated reporters, APS, DCFS
- Documents individual's progress in QIDP notes monthly
- Ensures that at least 3 home visits per year occur with participant
- Maintains record of services (case file)

Ongoing Monitoring

- Visiting the individual face-to-face **at least three times** per year (approximately once every four months); all three visits must be in the home for children or adults who do not attend a day program
- Family allocating a minimum of 3 hours monthly for SDA services from the budget
- Providers negotiating additional hours if necessary

Ongoing monitoring

- Completing and updating Service Authorizations for domestic employees (PSWs) and faxing to Acces\$
- Updating Service Authorizations as needed when there are changes to: monthly service cost maximum, hours, pay rates, and/or tax rates
- Helping families submit employee timesheets if needed

Person Centered Plan

- Is a single, comprehensive document that prioritizes and structures the delivery of all services and supports across environments
- Provides for supports and coordination for the participant to access school-based services (if applicable), generic resources, and Medicaid State Plan services
- Includes relevant and timely assessment information, including individual preferences, abilities, and needs
- Contributes to the continuous movement of the participant toward the achievement of the participant, family or guardian's preferences
- Assist families in making choices
- Is based on assessed needs and individual preferences, including an annual ICAP or other functional assessment tools
- Is based on principles of community inclusion and self-determination

Envision SDA Contact Information

- Eileen Morrissey, Director of Family Support Services, QIDP
 - (773)358-6941
- Verdine Williams, QIDP
 - (773)358-6943
- Marquette Jordan, MSW, QIDP (800)716-8690(fax)
 - (773)358-6944

Key reminders

- The Independent Service Coordination Agency (ISC) is your gateway to services. Contact them with questions specific to your needs. Stay in frequent contact with the case manager at the ISC and notify them of any changing needs.
- The Arc of Illinois Ligas Family Advocate Program can assist you by providing accurate information, support, and guidance as you work to develop a plan that meets your individual needs.
- Familiarize yourself with the Illinois DHS Consumer Handbook for Homebased Services:
<http://www.dhs.state.il.us/page.aspx?item=101181>

Support and Resources

- If you need more information or guidance about any part of the Home-Based Services program, your sources of support include your:
 - Independent Service Coordination (ISC) Agency
 - Fiscal/Employer Agent (F/EA)
 - Self-Direction Assistance (SDA)
 - Natural Supports
 - The Arc FSN/Ligas Family Advocate Program

Questions?

- Shirley Perez: shirley@thearcofil.org
- Tasha Whiteside: Twhiteside@mycil.org
- Eileen Morrissey: Emorrissey@envisionunlimited.org