



INTRO TO SELF DIRECTION

What is Self-Direction?

- Self-Direction is a service model for people with developmental disabilities that promotes personal choice and control over the delivery of Waiver and State plan services.
- OPWDD has a broad range of options available for Self-Direction, allowing a person the ability to develop a plan that is customized to best meet their interests and needs.

Employer Authority

The person self-directing their services is responsible for:

- • hiring staff
- • setting staff's schedule
- • arranging for backup staff
- • training staff
- • firing staff

Budget Authority

The person makes choices about the goods and services he/she wishes to receive and selects who is paid to provide them or how they are purchased.

A person who chooses to have Budget Authority can receive and budget for services that are Direct Provider Purchased, Agency Supported, or Self-Hired.

What is a Broker?

The Broker is a professional that is responsible for:

- • providing support to a person who chooses to take on Budget Authority
- • educating the person and their family on Self-Directed service options
- • assisting with developing and maintaining a Self-Direction budget
- • writing the Habilitation Plans
- • assisting the person with creating their Circle of Support
- • facilitating Circle of Support Meetings
- • other support tasks

Brokers can be independent contractors, or may work for an agency.

OPWDD pays the Broker for working with you on your **initial** self-directed plan.

A list of Brokers can be obtained from the DDRO Self-Direction Liaison.

https://opwdd.ny.gov/opwdd_services_supports/opwdd_services_supports/self-direction-liaisons_list

What is a Fiscal Intermediary?

The FI is a non-profit agency that serves as “employer of record” for Self-Direction plans with Budget Authority.

The FI is responsible for:

- • performing background checks on staff
- • collecting service-related documentation
- • paying for or reimbursing budget-approved goods and services
- • providing payroll/benefit services
- • monitoring and reporting on the yearly budget

What is a Circle of Support?

The Circle of Support (COS) is a group of advisors chosen by the self-directing person to help create a support and spending plan by identifying goals and needs. The COS is required to meet at least four times per year.

A Circle of Support must include:

- The person self-directing services
- Broker
- Care Manager

Other members may include:

- family members, friends
- teachers, paraprofessionals, guidance counselors
- staff supporting the self-directing person
- anyone the self-directing person trusts to provide guidance

Community Habilitation

Trained specialists provide individualized skills training in the home and the community. Focus is on enhancing a person's independence in areas of self care, social skills development, money management, safety, household tasks, community integration, and job success

Respite

Respite provides temporary relief to caregivers who provide primary care and support for someone with a developmental disability.

Supported Employment

SEMP provides job-skills training, resume development, interview preparation, application assistance, intensive job-coaching and follow-along support to people who wish to obtain and maintain competitive employment

Live In Caregiver

The LIC is a care provider who resides in the same household as the individual and provides as-needed supports to address the individual's physical, social, or emotional needs in order for the individual to live safely in his or her own home. The LIC may not be related to the individual by blood or marriage. The LIC cannot be someone who has control or authority over decisions regarding the individual's resources.

- A portion of additional costs incurred by the individual that can be reasonably attributed to the LIC for room and board will be reimbursed. Room and board includes rent, utilities and food.
- The individual must reside in his/her own home or leased residence.

It is important to be aware of and comply with the applicable labor laws relating to caregivers living in an individual's home.

Individual Directed Goods and Services

IDGS are services, equipment or supplies 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 of items or services that meet the following criteria:

- Are related to a need or goal identified in the person-centered care plan/Individualized Service 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 participant

Other than Personal Services OTPS

People who are self-directing their services with Budget Authority may choose to use up to \$3,000 from their budget for additional goods and services that are not Medicaid-fundable.

OTPS are 100% State funded and must meet the following criteria:

- relate to a valued outcome in the person's plan
- increase independence and/or the ability to live safely at home
- other resources must first be explored and exhausted (including community based and Medicaid funded resources)
- cannot be on the OTPS Excluded Items List

Housing Subsidy

People over 18 who choose 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 Homes and Community Renewal (HCR) payment standards.
- Same rules and regulations as ISS.
- If receive housing subsidy, unable to receive Family Support Services or Family Reimbursed Respite.

Family Reimbursed Respite

Respite that is in addition to, or instead of, Respite that is Direct Provider Purchased, Agency Supported, and Self-Hired.

- Designed to be used as needed by a parent/caregiver of someone who is self-directing.
- FRR is capped at \$3,000 annually.

Steps to Self Direction

Steps to Self-Direction

- Attend a Self-Direction Information session at your local Developmental Disability Regional Office (DDRO).
 - Register online - opwdd.ny.gov/node/6911. Note: Some DDROs do not mandate this.
- Your Care Manager will submit a request for self-directed services through the Front Door.
- Determine your Self-Direction Budget amount by completing the DDP-2 with your Care Manager or the Front Door.
- Hire a Support Broker and FI
- Work with your Broker to develop your SD Budget
- Your Broker will submit your SD Budget for approval
- Hold your launch meeting

Note: These steps assume that a person is already OPWDD eligible and enrolled in the HCBS Waiver