

## SELF-DIRECTED SERVICES NEW ARRANGEMENT COVERSHEET

Thank you for considering Self-Determination and Self-Directed services (SD). As an employer you have the flexibility to hire your own staff and design a schedule that meets your needs, within the authorization limits. This packet outlines essential information about self-directed services and responsibilities you will take on as the employer. Please take some time to review and keep this packet handy for future reference.

### Contacts

In addition to your Case Manager/primary clinician, the following contacts may be helpful to you.

#### OnPoint Self Determination Coordinator

Mallory Mickevich, BS, QIDP  
540 Jenner Drive, Allegan, MI 49010  
Cell: 269-569-0992  
Fax: 269-673-2738

[selfdetermination@onpointallegan.org](mailto:selfdetermination@onpointallegan.org)

The OnPoint SD Coordinator can assist you with any questions and concerns you may have while setting up the arrangement and throughout services. SD Coordinator will assist you in tasks such as developing the Individual Service Budget.

#### GT Customer Service

Phone: 877-659-4500

GT is the fiscal management service provider that will work with you. GT can provide assistance regarding the employer and employee portal/application, employee paychecks, tax information, and service note corrections, including location codes.

### Review and Save These Documents

- **Brochure** – This provides an overview of self-determination versus self-directed services.
- **ARC Hiring and Managing Direct Care Workers** – This document provides employers with tips on things such as finding, hiring, and managing staff.
- **Employer Roles and Responsibilities** – This outlines your role as the employer and what responsibilities you are expected to withhold during the self-directed arrangement.
- **SD budget allowable expenses** – This lists items that can be included in the individual service budget (ISB), within budget limits. Think about what you might want included.

### Complete and Bring to Kick-off Meeting

- **GT Independence Employment Application** – Interview potential staff and have them complete this application if you would like to move forward with hiring. All staff must be over 18 years of age.
- **Credentialing and Recipient Rights Release (CC-RR form)** – Each potential staff should complete this document as part of the background check process.
- **Central Registry Check (CRC form)** – This document should be completed by each potential staff working with individuals under the age of 18.
  - Must be a “wet signature” that matches the driver’s license signature. (A copy of the state issued ID will be taken when application is gone over with the SD Coordinator).

## Schedule and Attend Kick-off Meeting

Attend this meeting along with the staff you plan to hire, SD Coordinator, Case Manager.

**Date/Time:** \_\_\_\_\_

**Location:** \_\_\_\_\_

**During this meeting the following will take place:**

- Review with Case Manager: Services recommended in the IPOS.
- Review with SD Coordinator: What to expect during the onboarding/enrollment process, roles and responsibilities, options within job descriptions, SD agreements, and individual service budget.

**Bring to the meeting:**

- Completed and signed Employment Application
- Completed and signed CC-RR form
- Completed and signed CRC form (if applicable)
- Copy of employee State issued ID (a copy can be obtained at the meeting if needed)

## Schedule and Attend Enrollment Meeting

Attend this meeting along with the staff you plan to hire, SD Coordinator, GT Enrollment Specialist.

**Date/Time:** \_\_\_\_\_

**Location:** \_\_\_\_\_

**During this meeting the following will take place:**

- Review and sign with SD Coordinator: Employment Agreement, Medicaid Agreement, SD Agreement, Individual Service Budget (ISB), & Job Description.
- Review and Sign with GT Enrollment Specialist: Employee tax documentation & Pay information

**Bring to the meeting (copies can be made during the meeting if needed):**

- EIN number if you have a business or previous SD arrangement. Contact the IRS business tax assistance # 1-800-829-4233 if one was previously assigned to you and you cannot recall the number.
- Guardianship or POA paperwork (ensure it's not expired), if relevant.
- Birth certificate of client if a minor
- Employee State Issued ID
- One of the following for the employee: Social Security Card, Birth Certificate or Passport
- Employee bank account and routing number for direct deposit (or a pay card can be activated).

## Final Steps

- **IPOS Training** – Your Case Manager/primary clinician will train you, the employer, on the Individual Plan of Service (IPOS) and provide you the IPOS training form. You will be responsible for training all employees, prior to them working, and log the training on the IPOS training form.
- **Approval Letter** – You will receive a letter from the OnPoint Self Determination Coordinator informing you when staff can begin working. Staff cannot begin working until this approval letter is received.
- **Celebrate!!!** Create a schedule for staff to work. Now that staff are working you, as the employer, will be responsible to monitor employee time, documentation, etc.