



This checklist outlines the responsibilities of Circle of Support members in supporting people who have decided to self-direct some or all their Office for People With Developmental Disabilities supports and services. Circle of Support members are chosen by the person self-directing their services and help to implement the person's Person-Centered Plan and Self-Direction Budget. This checklist is a guidance document and does not replace policy, regulation, or other service rules.

Circle of Support members will assist with:

- Making sure the Care Manager is invited to all Circle of Support meetings and strongly encouraged to actively participate.
- Making sure the rights and freedom of choice of the person self-directing are not compromised and are respected and valued.
- Making sure the person self-directing can openly communicate their emotions, concerns, and preferences without fear of retaliation or harm. This includes providing them with the necessary support to help them have these conversations.
- Making sure that a Support Broker is chosen and helps the person self-directing their services make changes to their Self-Direction Budget.
- Making sure that the Circle of Support meets regularly during Self-Direction Budget development and then at least twice a year once the Self-Direction Plan/Budget has been approved.
- Making sure that the Circle of Support shares responsibility for helping the person live with the fewest restrictions while protecting the health and safety of the person.
- Making sure that the Circle of Support helps the person consider Supported Decision Making or, alternatively, assigning power of attorney and health care proxy to a trusted relative or friend.
- Helping the person self-directing their services to manage their approved Self-Direction Budget and find fair prices for their purchases of goods and services.
- Making sure that the Care Manager, Fiscal Intermediary, Support Broker and Developmental Disabilities Regional Field Office Self-Direction Liaison are notified of any issues with the Self-Direction Budget and/or the services included in the approved budget.
- Making sure that the person self-directing their services or the person they choose completes and submits all required documentation to the Fiscal Intermediary in a timely manner.

- ❑ Making sure that the person self-directing their services or the person they choose receives and understands the monthly fiscal expenditure reports from the Fiscal Intermediary.
- ❑ Telling the Self-Direction participant that they can designate a Circle of Support member to act as the lead in all interactions with the Fiscal Intermediary agency.
- ❑ Making sure that the Memorandum of Understanding between the Fiscal Intermediary and the person self-directing their services has been signed. This Memorandum of Understanding outlines each person's responsibilities in the Self-Direction model.
- ❑ Making sure that the Support Broker Agreement states the Broker compensation, duties, and what they will provide as part of the Self-Direction Plan/Budget.
- ❑ Making sure that a member of the Circle of Support will communicate with the Developmental Disabilities Regional Field Office Self-Direction Liaison and Care Manager regarding any problem with the Circle of Support and/or potentially serious Self-Direction issues.