



This checklist lists the responsibilities that you and/or the person you choose to help you will need to take care of when choosing to Self-Direct your Office for People With Developmental Disabilities supports and services. Self-Directed plans are created by you and the people who know you best, also called your Circle of Support or Planning Team. The steps shared below will change on a person-by-person basis. This checklist is a basic guide and does not replace policies, regulations, or other service guidelines.

You and/or the Person you choose to help will:

- Understand Self-Direction is a way to get services that requires you to take part in the creation of your Life Plan and choosing the supports and services you want to self-direct. You will review your Self-Direction Budget and service plans at least twice a year with your Life Plan reviews. You can also have a person of your choice review them with you.
- At least twice a year, meet with your Circle of Support to review your Self-Direction Budget, get more supports and services (if needed) and make any needed changes to your Life Plan. These meetings can take place with your Life Plan reviews, but you can also meet more often if needed.
- Make sure that your Support Broker Agreement is complete, up-to-date, and sent to your Fiscal Intermediary. Support Broker Agreements should be updated as needed.
- Responsibly manage your approved Self-Direction Budget and look for fair prices when buying goods and services. It is important to reach out to your Circle of Support, Care Manager, Fiscal Intermediary, and Support Broker if you need help with this.
- Carefully review the Monthly Expense Reports generated by your Fiscal Intermediary and work with your Circle of Support and Support Broker to use these reports to help manage your spending within your approved Self-Direction Budget.
- Make sure all needed service documents, such as staff time sheets, monthly summary notes, invoices, travel logs, and any other documents needed for self-directed services, is completed by you or the person you choose to help you. Documents must be signed and dated by you, or the person you choose to assist you, and then sent to your Fiscal Intermediary as agreed upon in the Memorandum of Understanding (MOU) between you and your Fiscal Intermediary. Sending these documents to your Fiscal Intermediary quickly will help payments be made on time.
- Your Fiscal Intermediary can help you with hiring staff if needed, but you will need to follow your Fiscal Intermediary's hiring practices, including getting criminal background checks of staff.
- Make sure that self-hired staff have access to and attend any special trainings to help meet your specific needs. The Fiscal Intermediary is responsible for getting staff agency-required trainings, including Incident Reporting. Your Fiscal Intermediary and Developmental Disability Regional Field Office Self-Direction Liaison can help to get additional staff trainings.

- Make sure any changes to your Self-Direction Budget are shared with your Support Broker, Care Manager, Circle of Support, and Fiscal Intermediary who can help you with filling out the correct form(s) if you need it. You should keep copies of completed forms and all versions of your Self-Direction Budget. It is important to remember your Life Plan and Self-Direction Budget must always match. Changes to your Self-Direction Budget will likely lead to changes to your Life Plan.
- Make sure you let your Fiscal Intermediary, Support Broker and Care Manager know about any long-term travel plans, out of state travel, and/or hospitalizations as soon as possible.
- Let your Care Manager know about whether you are happy with your Self-Direction services and let your Care Manager and the Fiscal Intermediary agency know as soon as possible if you have any “reportable incidents” to report, such as abuse, neglect, or injury.
- Make sure your Fiscal Intermediary knows of any concerns about your staff, firings, payroll issues or upcoming staff leave of absences as soon as possible.
- Make sure your Support Broker and Fiscal Intermediary are notified of any changes in your Care Manager or Care Coordination Organization so they can better help you.
- Make sure your Fiscal Intermediary knows about any changes to your designee (the person you choose to help you with decisions and planning).
- Let your Care Manager, Fiscal Intermediary, and Support Broker know if your Medicaid status changes. They may be able to help prevent a break in services.
- Let your Care Manager, Fiscal Intermediary and Support Broker know if your contact information changes, including your phone number, address and email address.