

Consumer-Directed Services in Virginia's Mental Retardation and Developmental Disabilities Waivers



Module 2 How Do CD Services Work?

In this module we talk about how CD services work or the process for CD services.

Trainer's Notes:

This module gives an overview of the process for consumer-directed or CD services. The explanation here is basic and gives a general idea of how CD services work. It is not necessary to give specific steps (for any of the waivers) or be too technical in how each individual waiver works.

It is important to remind participants throughout the training event that the terms consumer-directed services and CD services mean the same thing.

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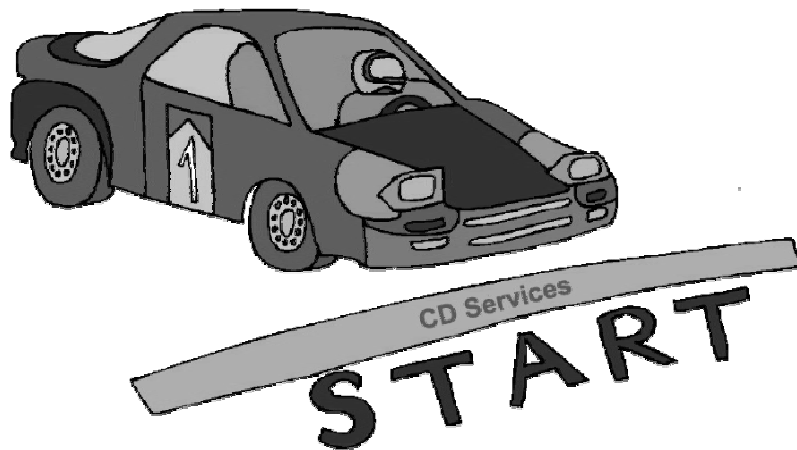
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Trainer's Notes:

Tell the audience who developed the materials and who funded the development of the materials. Use your own words and discretion in how you present this information.

Getting Started



Let's look at how CD services work in Virginia's MR and DD waivers. Here is what happens if you choose CD services.

Getting the Thumbs Up!



Before using CD services, you first need to be approved for waiver services. Getting approved for waiver services is called **ELIGIBILITY**. Eligibility is different from one waiver to another.

Trainer's Notes:

Be sure everyone understands the term "eligibility." Have a simple definition ready for participants. For instance, you may explain that when people are eligible for Medicaid waivers it means that:

- They have been asked for and have given information about themselves.
- It has been checked by someone in government.
- The information shows that they may receive waiver services, they are "eligible."

You may want to ask how many participants are on a waiver already. If they are that means that they have been found eligible for waiver services.

Once you are eligible



you start working with a case manager.

Once you are approved for waiver services, you begin working with a case manager. Today, case managers on the DD Waiver are called support coordinators, but soon they will be called case managers like they are for the MR Waiver.

If you are on the DD Waiver, you are given a list of case managers or support coordinators. On the DD Waiver, you choose your support coordinator or case manager.

If you are on the MR Waiver, your local Community Services Board provides your case management services.

Trainer's Notes:

Ask participants if they have case managers or support coordinators. Emphasize to participants that case managers and support coordinators do the same things, and that in the near future, support coordinators will be called case managers.

Your case manager helps

with your
plan of care.



You, your case manager, and others you ask (such as family members), help you to put together your plan of care. The waiver plan of care is called a Consumer Service Plan or CSP. The CSP tells what supports and services you need, both waiver and non-waiver. Your plan comes from your needs and from things that you prefer or like, as much as possible.

Your case manager works with you and helps you with all of your service and support needs. Your case manager checks your Consumer Service Plan regularly and makes changes to it as your needs change.

Trainer's Notes:

Stress to the participants that the terms "Consumer Service Plan", "CSP", and "plan of care" all mean the same thing.

Ask the participants if they have ever attended a meeting where a plan for them has been made. What was the meeting like? Were there many people there? Did they like having a plan made with them?

Be prepared to explain what a plan of care is and how important it is in waiver services.

See Handout 2A

Your case manager explains



about agency-directed and
consumer-directed services.

How do you learn about your choices? Your case manager tells you about agency-directed and consumer-directed services and describes the differences. You may have agency or consumer-directed services or both in your Consumer Service Plan.

Trainer's Notes:

Ask participants what types of services they have now. Explain that with CD services they can have some of the same types of services, but their CD employees will work for them and not an agency.

Your case manager



helps you to
find a
CD services
facilitator.

If you choose consumer-directed services and you are on the MR Waiver, you need to hire a CD services facilitator. Your case manager gives you a list of names and telephone numbers of the CD services facilitators in your area. Your case manager can **help** you choose a CD services facilitator but the choice is yours.

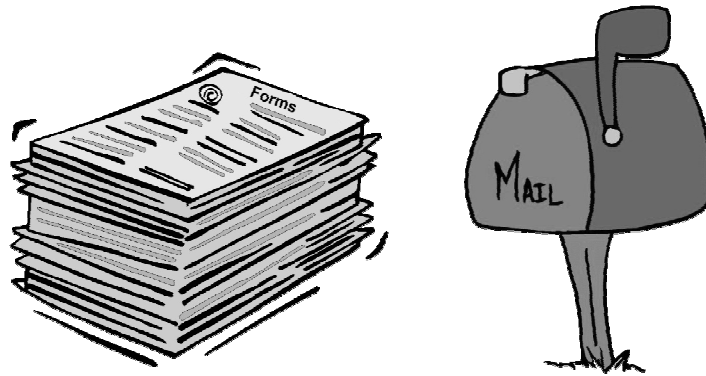
You may want to call and interview (ask questions) people on the list to see if they are the best person to help you before you choose someone to be your CD services facilitator. Your family or case manager can help you call and interview people if you need help. Don't be afraid to ask for help at anytime, particularly if you need help in choosing your CD services facilitator.

If you are on the DD Waiver, your need to hire a CD Services facilitator is about to change. Soon it will be your choice to hire a CD services facilitator to help you with your CD services, or you may choose to have your case manager help you. Your case manager can tell you when this change happens.

Trainer's Notes:

Ask participants if anyone has already chosen a CD services facilitator. Have them tell the group their experiences in selecting a CD services facilitator. Did their case manager or family help? Was it easy or difficult to do? If no one has had the experience of selecting a CD services facilitator, be prepared to talk a little about the process.

Your case manager



prepares and sends in forms.

Your case manager prepares and then sends in your forms related to your Consumer Service Plan (CSP).

It is your case manager's job to see that all of the paperwork for your CSP gets done right and on time, and that your CSP has all the signatures that are needed.

Trainer's Notes:

Remind participants that although there is a lot of paperwork for which the case manager is responsible in developing the plan of care (Consumer Service Plan, or CSP), the plan comes from each individual's needs and preferences (things that he or she likes) as much as possible. It is important for individuals and family members to make clear to the case manager and others helping to make the Consumer Service Plan just what those needs and preferences are.

Your CD services facilitator



helps you become an employer.

When you choose CD services, one of the first things your CD services facilitator does is to help you decide who is the CD employer. It may be you or you may want/need help and a member of your family (for example your mom or dad) may be the CD employer for your CD services.

Your CD services facilitator helps whoever is the CD employer understand all that has to be done to be a good employer. For this training, let's say that you are the CD employer and let's talk about how the CD services facilitator helps you.

Remember, the job of your CD services facilitator is different from the job of your case manager. Your CD services facilitator helps you be the best employer you can be. Let's look at some of the things that he or she does with you and for you.

Trainer's Notes:

It is important to explain the difference between the case manager and the CD services facilitator and make sure that participants understand these different jobs. Explain again the change in the DD Waiver and the fact that the individual can choose the case manager to do the jobs of the CD services facilitator and the case manager.

Your CD services facilitator



helps you to
get the CD
services you
need.

Your CD services facilitator helps make sure that you get the approved consumer-directed services you need. These are described in your Consumer Service Plan.

Your CD services facilitator helps you decide about the kind of help you need and teaches you how to find the right people to hire.

See Handout 2B

Your CD services facilitator



trains you to be a good employer.

Your CD services facilitator trains you to be an employer. Your CD services facilitator teaches you and your family (if needed) about hiring, training, supervising and firing or letting go (if necessary) your CD employees. Your CD services facilitator does this training using the *Employee Management Manual*.

When you choose CD services, your CD services facilitator gives you a copy of the *Employee Management Manual*, goes over it with you, and describes the things you need to do to be a good employer.

If you need help with writing a job description, interviewing, or training your consumer-directed employees, your CD services facilitator tells you how to do those things.

If you need more help after you have been trained, tell your CD services facilitator. It is your CD services facilitator's job to give you the help you need. He or she visits you at your home or in the community and can be reached by telephone.

Trainer's Notes:

Have a copy of the *Employee Management Manual* to show the participants. Explain that training provided by their CD services facilitator helps them to understand the information in the manual.

Your CD services facilitator



helps you to
get the
CD employees
you need.

You and your CD services facilitator look at your CSP, choose the kind of help you need, and put it in a job description to use for hiring, training, and supervising your consumer-directed employees.

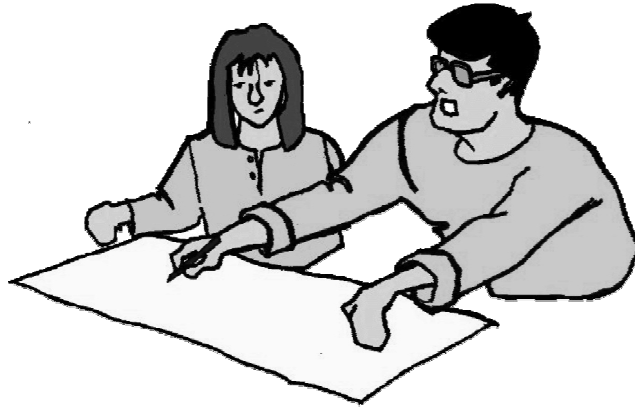
Your CD services facilitator teaches you how to train your consumer-directed employees. He or she may also help you train your consumer-directed employees if you need the help. Your CD services facilitator shows you how to tell your consumer-directed employees what you want them to do. As you get new consumer-directed employees, your CD services facilitator can go over the training again if you need it.

Trainer's Notes:

Explain the term supervise and make sure that participants know what this means. You might ask if any of them have had a supervisor at their job. What did that person do to help them do a good job?

Make sure that participants know the CD services facilitator is there to help them be a CD employer. It may be scary for some people to take on the new responsibilities of being an employer. It is important that they know that help is available.

Your CD services facilitator



helps you with plans and paperwork.

Your CD services facilitator helps you with plans and paperwork.

Your CD services facilitator can help you complete the paperwork you need in hiring, supervising, and firing or letting go (if necessary) your consumer-directed employees. The CD services facilitator can help you make sure that your consumer-directed employees are coming when you want them to come and that you have support all of the times during the day when you need it.

Your CD services facilitator can also help make sure you get your consumer-directed employees' timesheets signed and sent to the fiscal agent, the people who pay your CD employees.

Although you can get help from your CD services facilitator, remember **you are the employer** and it's your job to be the employer for your consumer-directed employees.

Your CD services facilitator



helps you
do criminal
record checks.

You complete the paperwork to do a Criminal Records Check on each of your consumer-directed employees. Your CD services facilitator helps you do this paperwork, if you need help. Your CD services facilitator takes care of payment for these Criminal Records Checks, mails the paperwork, and gives you the results. This check tells you if any of your consumer-directed employees have broken certain laws. Criminal Records Checks are done to protect you or to keep you safe.

Your CD services facilitator



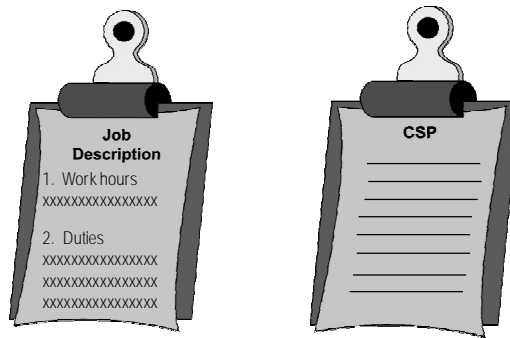
NO

tells you who
you can't
hire.

Remember you can't hire your husband or wife, or your parent(s) if you are under 18 years of age, to be your consumer-directed employees.

Your CSP

Your Job Description



Services and Supports
provided by your CD employees

Your needs and services are described in your Consumer Service Plan. You use this plan to help you write a job description that tells your CD employees what to do for you. Then your consumer-directed employees can give you the support you need.

You are responsible



for supervising your CD employees.

As the CD employer, you need to supervise the work of your consumer-directed employees. That is one of your responsibilities or jobs. Your CD services facilitator is available to help you learn how to supervise your CD employees if you need help.

Your CD services facilitator also visits you and your CD employees to help you make sure they are doing their job. Talk to your CD services facilitator and let them know how things are going. If there are problems with your CD employees, let your CD services facilitator know right away.

Trainer's Notes:

Explain to participants the importance of supervision by giving some simple examples of things that consumer-directed employees should be doing, such as showing up on time, being respectful, and completing the tasks described in the job description. Discuss with participants how little issues can become big issues if they don't supervise their consumer-directed employees.

See Handout 2C

You are responsible

for your CD
employees
time sheets.



Every two weeks your consumer-directed employees give you their timesheets. The timesheets list the hours your consumer-directed employees worked during the past two weeks. You need to look at the timesheets to make sure the times are correct and sign the sheets so your consumer-directed employees are paid. You should only sign timesheets if they are correct. You should also decide on who will mail in the timesheets.

You as the CD employer are responsible for making sure timesheets are right. Your CD services facilitator may help you make sure that your consumer-directed employees are coming when you want them to come and that you have support all of the times during the day when you need it. This has been described in your CSP. Ask for help from your CD services facilitator, if you need it, to make sure timesheets are right.

When you use CD services



you have a
fiscal agent who
helps you with all
CD services
money matters.

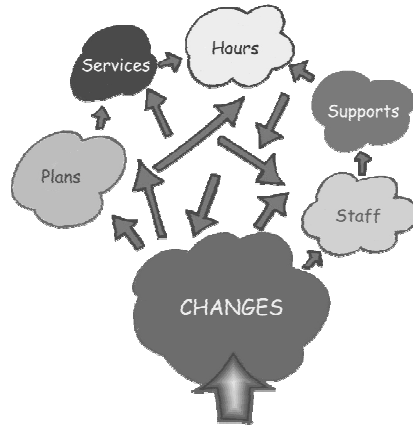
You do not have to take care of money matters on your own. You have a fiscal agent. The fiscal agent is an agency or business that works like a bank and takes care of all CD services money matters. So, once the timesheets are signed by you and your employees and sent in, consumer-directed employees are paid by the fiscal agent. The fiscal agent pays your consumer-directed employees for you, making sure that payment is for the number of hours approved in your Consumer Service Plan. The fiscal agent also makes sure all hiring and tax rules are followed.

Trainer's Notes:

Explain to participants that although their CD employees work for them, actually paying CD employees and handling money is taken care of by the fiscal agent who currently is the Department of Medical Assistance Services (DMAS).

See Handout 2D

You may need changes to your CD services



From time to time.

Consumer-directed services are flexible. Over time you change. As you change, your supports and needed services may change. For example, if your consumer-directed employee is helping you to get ready for work and your work hours change, your consumer-directed employee's hours of work may change.

Another example would be if you move. In another location, you may need to hire new CD employees who live closer to where you now live.

When changes are needed, everyone (you, your case manager, your CD services facilitator and your CD employees) talks to each other and works together to make your CD services work well.

Trainer's Notes:

Ask participants if they can think of other examples of how their lives might change and they may need to change their CD services. You want to have examples ready if the participants have trouble starting the discussion.

As a CD employer you
have a team to help you



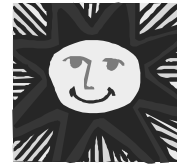
but you are in charge.

Work with your case manager, your CD services facilitator, and your CD employees to make your consumer-directed services as good as they can be. Know what your jobs are and ask for help when you need it. Remember, you are in charge of your CD services. You are the employer.

Trainer's Notes:

Stop here and ask if there are any questions about the process, repeat parts if needed. Let participants know that the process works best when everyone works together.

Share your thoughts with us...



1. **Who is the CD employer in CD services?**
2. **Who are some of the people who can help you with your CD services if you have a question or problem?**
3. **What are some of the choices that you can make with CD services?**
4. **Who is in charge of hiring, training, supervising, and firing or letting go of your CD employee?**
5. **What other information about CD services would you like?**

As part of our work, we are collecting ideas from you to help us improve both the information provided and the ways it is presented. Your answers to these few questions will help us.

Trainer's Notes:

As part of our work on CD services at the Partnership, we are evaluating how to make the information provided and the way it is presented better. We ask that you use the questions on the slide each time you use the materials to see how well participants are understanding the information provided and if they are interested in additional information.

Please read each question to participants individually or in the group setting and take notes on their responses. Sheets with the questions are included in the self-addressed envelopes that are in your trainer's notebook. Please send these notes to the Partnership following your presentation.