



The Arc[®]

Ohio

Support Broker Training

- ▶ Supporting Self Direction

Support Broker

- ▶ A Support Broker is considered an agent of the individual, and assists with responsibilities regarding participant direction.
 - ▶ Duties include assisting the individual with negotiating rates and selecting providers and with communication/coordination between the individual, their Service and Support Administrator (SSA), as well as the Financial Management entity (FMS).
 - ▶ Chosen by the individual and may be paid or unpaid.
 - ▶ Must have at least an Associate Degree or two years of experience providing one-to-one support to someone with developmental disabilities.
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Support Broker

- ▶ Legal guardians, as well as family members who reside with the individual, may serve as Support Brokers– but only on an unpaid basis.
- ▶ All persons who wish to serve as a Support Broker, whether paid or unpaid, must successfully complete the Support Broker training established by DODD.
- ▶ The following *cannot* be a Support Broker:
 - County Boards
 - County Board employees
 - SELF waiver providers (and their employees)
 - Contractors/related entities of SELF waiver providers.

Self Directed Services

- ▶ This training Will Not certify you to be a Support Broker.
 - ▶ Not everyone needs a formal Support Broker, and self directed waivers Do Not require everyone to have a Support Broker.
 - ▶ **But...** Everyone needs help from time to time and this training will give you pointers on how to Support individuals participating in Self Directed Services as an Authorized Representative.
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If I am not a Support Broker, what Authority do I have?

- ▶ Children and Adults must be able to Self Direct or have someone in their lives to support them prior to participating in Waiver Self Directed Services.
 - ▶ Parents of children under the age of 18 are automatically the decision makers for their minor children.
 - ▶ Legal guardians of adults (over the age of 18) are appointed by a judge to make decisions but they must take their ward's preferences and choices into consideration.
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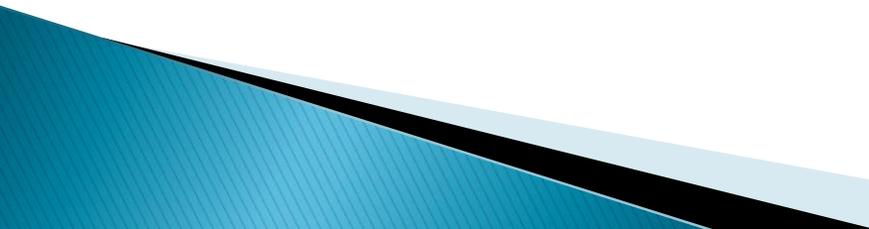
If I am not a Support Broker, what Authority do I have?

- ▶ The DD Bill of Rights gives Ohioans with DD the legal right to have an advocate or Authorized Representative assist them.
 - ▶ State law also provides a method by which an individual in the DD system can designate an Authorized Representative to speak on his/her behalf
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If I am not a Support Broker, what Authority do I have?

- ▶ **Team** is defined as the individual and the group of persons chosen by the individual with the core responsibility to support the individual in directing development of his or her Individual Service Plan (ISP).
- ▶ The team includes the individual's guardian or adult whom the individual has identified, as applicable, the Service and Support Administrator (SSA), direct support staff, providers, licensed or certified professionals, **and any other persons chosen by the individual to help the individual consider possibilities and make decisions (Authorized Representative).**

If I am not a Support Broker, what Authority do I have?

- ▶ The Service and Support Administrator (SSA) is the primary point of coordination and remains responsible for drafting the Individual Service Plan (ISP) and authorizing payment for Waiver Services even with Self Directed Services.
 - ▶ The SELF Waiver is **currently** the only DD Waiver with a Support Broker service, but we expect Self Direction to be added to all the DD Waivers.
 - ▶ Advocacy and Authorized Representation is critical among all DD Services.
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Advocacy

- ▶ Supporting an individual in self direction is a form of Advocacy
- ▶ As an Advocate/Authorized Representative, you are representing someone else, not yourself.

Know the Facts

- ▶ To gain and maintain credibility, it is critical that you have the all of the facts on both sides of any issue.
 - ▶ Having this information at your finger-tips will help you in conversations with government officials, the media, other advocates, and the general public.
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Use the Facts

- ▶ Any position you take should be grounded in the facts.
- ▶ It is often helpful to put your facts into one-pagers that you can distribute.

Have a Clear and Concise Message

- ▶ Government officials, the press and the general public do not have time for long-winded conversations or documents—you need to get to your point quickly and concisely.
 - ▶ Remember to watch out for the jargon and acronyms used in different fields—you want everyone to understand the issues you are raising.
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Nurture Relationships and Work Collaboratively

- ▶ Advocacy is a joint venture– you need to find your allies and work with them.
 - ▶ Your chances of success are much greater when there are large numbers of organizations and people on your side.
 - ▶ Whenever possible, be sure you and your allies have consistent data and the same messages.
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Advocacy

- ▶ Negotiate and Develop skills to get the best deal you can.
- ▶ Make your voice heard! Advocacy is not the place for being shy.

Say Thank You

- ▶ Remember that everyone is busy and their time is valuable.
 - ▶ Keep your meetings short and always say thank you afterwards.
 - ▶ When your advocacy is a success, always thank everyone who helped you achieve your victory!
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Advocacy

- ▶ Always keep the person you are advocating on behalf of, informed and at the center of every discussion.

Self Directed Service Categories

- ▶ **Financial Management Service (FMS)** – *Currently Morning Star Financial Services* – helps individuals:
 - Understand billing and documentation responsibilities.
 - Perform payroll and employer-related duties (e.g., withholding and filing federal, state, local, and unemployment taxes)
 - Purchasing worker's compensation or other forms of insurance
 - Collecting and processing worker timesheets;
 - Calculating and processing employee benefits
 - Issuing payroll checks
 - Purchase approved goods and services
 - Track and monitor individual budget expenditures

Self Directed Service Categories

- ▶ **Budget Authority** is a component of participant direction that allows individuals (or their Authorized Representative) to allocate their budget or waiver services and to manage their budget accordingly. Budget Authority must be used for at least one service.
- ▶ **Employer Authority** (If an independent provider is chosen)
 - **Common Law Employer**
 - The individual is the legally responsible and liable employer of staff selected by the individual.
 - **Co-Employer**
 - The individual enters into an agreement whereby a third party is the co-employer of staff selected by the individual. The co-employer performs necessary payroll functions as spelled out in the ISP. The individual directs the staff, and, is considered the “managing employer”

Self Directed Service Categories

Participant Directed Goods and Services

- ▶ Item/Service is required to meet the needs and outcomes identified in the ISP.
 - ▶ Item/Service assures health and welfare.
 - ▶ Item/Service is the least costly alternative that reasonably meets assessed need.
 - ▶ Item/Service is not otherwise available through the waiver or state plan.
 - ▶ Item/Service is not available through personal funds or other resources.
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Self Directed Service Categories

Participant Directed Goods and Services – Continued

- ▶ Item/Service is for the direct benefit of the individual in achieving at least one of the following outcomes:
 - Improving cognitive, social or behavioral functioning;
 - Maintaining the ability of the individual to remain in the community;
 - Enhancing community inclusion and family member involvement;
 - Developing or maintaining personal, social, or physical skills;
 - Decreasing dependency on formal support services; or
 - Increasing independence

Who Can Provide Self Directed Services?

- ▶ Traditional Agency Providers
 - ▶ Independent Providers
 - ▶ Generic Services
 - ▶ If a Business' primary customer is people with disabilities, they must be certified by the Ohio Department of DD (DODD). If a business' primary customer is not people with disabilities, they do not need to be certified.
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Questions?

The Arc of Ohio is always available to help you
Please call or email us with any questions

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