



Individual/Family Directed Services EOR Roadmap to Success



**WHAT FOLLOWS ARE THE CORE EOR TASKS AND THE RELATED FORMS*
THAT WILL BE PROVIDED ON A THUMB DRIVE OR
THE FIRST ON-LINE RESOURCE PORTAL**

Learn About the Innovations Waiver

Complete the Relevant FIRST On-Line Training Modules

- waiver goals
- eligibility criteria
- services and limits
- the ISP
- the 8P manual and service definitions
- Innovation Waiver “service tree” – the players!

Learn About the EOR Self-Directed Model

Complete the Relevant FIRST On-Line Training Modules

- models of service delivery
- choice, control and responsibility
- self-determination and the dignity of risk
- challenges and opportunities

Organize Your IFDS/EOR

Set-Up EOR Binder/File Folder*

- copies of individual MCO plan documents, including MCO budget

Create/Obtain - IFDS/EOR Documents

- Short Range Goal Plan*
- Service Grids* or Electronic Health Record
- Customize the training information on the New Staff Training Form*
- Create participant face sheet with key information for DSP to carry with them (electronic/paper)
- MAR (if applicable)* and Seizure Action Plan (if applicable)*
- Emergency Medical Action Plan*

*denotes that FIRST has developed a form for this task/activity

Select and Work with a Financial Services Agency (FSA)

- Complete Enrollment Forms for Employer (EOR)
- Complete Hire Packets for each Employee
 - **Acumen** (Vaya, Partners, Cardinal, Sandhills) <https://www.acumenfiscalagent.com/north-carolina/>
 - **GTI** (Vaya, Sandhills) <https://gtindependence.com/>

Hiring Staff

- employment and other laws

Set-Up Staff Binder(s)/File Folder(s)

*NOTE: the table of contents for these binders/files has been prepared for EORs**

- required employee documents
- employee credentialing
- confidential/personal documents

Create/Obtain Staff Forms

- FSA hire documents (*link provided*)
- reference check*
- staff expectations*
- emergency contact form*
- attestation form*
- supervision plan*
- get the “good-to-go” employee confirmation from FSA

Orientation/Training - New Staff

Train Staff - Nine “Core Competencies”*

- communication
- person-centered
- client rights
- health and safety
- professionalism
- communication
- crisis prevention
- cultural competency
- documentation requirements

Train Staff - Specialized Courses - FIRST and other organizations provide these courses

- CPR/First Aid (bi-annually)*
- Medication Administration* (if appropriate)
- Seizure Training* (if appropriate)
- Avoiding Restraint*

*denotes that FIRST has developed a form for this task/activity

Employee Related EOR Tasks

Schedule Staff

- Create schedule (*google calendar works well*)
- Schedule must match ISP (*i.e. weekly, monthly*) cannot exceed 84 hours weekly for adults and 54 hours weekly during school year for children.

Staff Service Documentation

- Review staff service documentation (grids/EHR)
- Must be timely (24 hours for initial note and 7 days for corrections) after 7 days not billable

Pay Staff

- Review time documentation (paper or portal)
- Approve time documentation (paper or portal)
- Submit forms for training pay (as appropriate)
- Submit forms for staff bonus (as appropriate)

Develop an EOR Budget

- Compare Waiver Budget and IFDS Budget

IFDS/EOR Ongoing Tasks

Monthly Supervision

- Meet with each employee
- Meet with your CCM
- Contact with your IFDS Community Navigator

Annual Staff Training

- Certain core competencies and specialized courses*

Monitoring and Reconciliation

- Track utilization of staff hours of services
- Review monthly FSA statement
- Compare FSA statement with IFDS/EOR Budget Tool (monthly)
- Review progress on short range goals (quarterly)
- Vaya self-assessment (quarterly)
- Create Medication Administration Record Forms (MARS) (monthly)

Annual IFDS/EOR Tasks

- Participate in annual plan of care development
- Develop short-range goal plan*
- Create service documentation grid sheets*
- Update emergency form(s)*
- Maintain binder/file folder system*

*denotes that FIRST has developed a form for this task/activity

Develop Budget and Revise if Necessary

- Use FIRST budget tool*
- monitor budget against FSA budget reports

Become Connected

- Join Provider and Stakeholder Mailing Lists of your MCO
- Join FIRST Mailing List
- Join FSA Mailing List
- Join NC-DHHS Mailing Lists (*Consumer, Family Advocacy Team*)
- Attend Webinars of NC-DHHS and MCO
- Attend FIRST EOR Club Meetings (virtual)

Stay Up-To-Date (*news and changes*)

- Clinical Coverage Policy 8P
- Records and Document Manual
- Innovations Waiver
- NC State General Statutes 10-A & 122-C
- MCO IFDS Handbooks
- MCO, Medicaid & NC-DHHS Websites

Access Other Resources – this is not an all-inclusive list!

8P Clinical Coverage Policies

July 2019 Innovations waiver

NC Innovations renewal changes (07/02/2019)

Records and Documentation Manual

Records Retention Overview

Communication Bulletins from NC-DHHS

Verification of Education (Joint Communication Bulletin J319)

Audit Tools

*denotes that FIRST has developed a form for this task/activity