



Overview, Steps and Components in the FIRST IFDS/Employer of Record Training



The opportunity to provide services through the Employee of Record (EOR) option became available in the Innovations Waiver in 2016, as part of the Individual Family Directed Services (IFDS) delivery model. It is a very challenging undertaking, as the EOR has to meet all the same requirements that a traditional provider agency undertakes except national accreditation. *There is not one manual or document that outlines all of the requirements!* In fact, there are dozens of reference materials and thousands of pages of information. As a traditional provider agency, FIRST meets those expectations every day. We have created a training program that covers all the requirements for you, as an Employer of Record (EOR), to run your individual provider agency.

In a traditional agency, the QP is responsible for ensuring that the right staff provide the right services through the right schedule while completing the right documentation at the right time—plus make certain staff paid—all in an environment that is constantly changing! It is a lot for a parent or guardian to undertake, especially for those working another job. If you are up for the challenge of acting as the QP as well as the chief cook and bottle washer, you can expect a thorough orientation from this EOR training program.

Trainers will be available for questions during the entire process, and will meet with the trainee at least monthly face-to-face. Instruction is a blend of synchronous and asynchronous learning activities. After the training is completed, FIRST staff will be available to assist you in preparing for annual plans, brainstorming potential solutions to challenges, and providing regular continuing education about the waiver, EOR activities and issues. However, we cannot ensure the success of your provider agency.

The training is designed so that the entire program can typically be completed over a three-month period of time. The initial learning module, *Overview of Self Direction*, is followed by subsequent modules that contain self-directed learning activities with the important concepts indicated by the homework and quizzes.

The goal in each module is to guide you in learning how to search for information, provide practice in problem-solving, and identify topics where you need more specific support. *That skill set is critical to being an effective EOR.* The instructional materials will be presented via an online training platform, with information, links, materials and questions.

As needed or requested, but at least monthly, the trainer will review your progress and answer questions. You must pass the quiz and complete your homework in each unit in order to complete the training to be an EOR. *If you do not successfully complete the training, you may still be able to self-direct your family member's services with support of a representative, who is also required to pass the EOR training program.*

The complete EOR training program includes:

First Steps

1. The family/recipient/CCM completes a referral form at: <https://firstwnc.org/refer> and speaks with a Community Navigator/IFDS Educator at FIRST about the EOR program.
2. This is followed by completing the **Overview to Self-Direction module**. This provides information about the role and responsibilities of the EOR as well as the benefits and challenges to self-direction. FIRST staff will register you and send the link to the on-line training platform. FIRST provides a certificate to download upon completion of the overview course. *Since it is offered at no charge, you will not need to request authorization/approval from your CCM.*
3. After completion of the Overview course and a meeting with the trainee, if it is confirmed that there is a good match with EOR program requirements, the family/recipient *asks the CCM to get authorization* for the EOR training*. These modules are offered via the same online training platform and are listed below. Trainers will be available for questions during the entire process.
4. It is important to know that, in order to be successful in the FIRST training program, the EOR *must* have a Gmail account (preferably one dedicated to the EOR/member (i.e. NAME.EOR@gmail.com), an internet connection, and a computer. The FIRST IFDS training is a hybrid program: online learning and meeting with the trainer. At least monthly, but more often as needed, the trainer will meet with you face-to-face to review progress, homework and quizzes, and answer questions.
5. Continued support for EORs is available through group meetings and a resource library including samples and other information to help you with your provider agency. Additional training modules are available to cover advantage topics and concepts.

Training Modules include:

- **Introduction to the Innovations Waiver**
- **The Employer of Record Model of Service**
- **Organizing Your Small Provider Agency**
- **The Financial Services Agency**
- **Finding & Hiring Staff**
- **Staff Orientation & Training**
- **Staff Scheduling & the EOR Budget**
- **Budgeting Terms & Tools**
- **Goal Writing & Service Documentation**
- **Quality Assurance Activities**
- **Add-On Services to Support EORs**
- **Knowledge is Power**
- Certificate of Completion
- **EOR 2.0 - Ongoing Training & Support**

Next Steps

1. FIRST requests and receives a copy of the following documents from the CCM:
 - ISP Update, MCO Budget Update, Annual ISP, SIS Assessment, Risk Assessment, Crisis Plan, Guardianship Papers.
2. FIRST sends the following documents to the trainee and the LRP/Individual via Docu-Sign:
 - Consent for Treatment, Authorizations to Disclose Private Health Information, Short-Range Goals and Supports Agreement

3. FIRST receives *authorization* from the MCO for 3 units (3 months)* of IFDS/EOR Training.
4. When forms are signed and returned, FIRST completes the enrollment for the new EOR Trainee into our online training portal, comprising seven learning modules.
5. The EOR trainee finishes each module, takes quizzes and sends completed homework to the assigned FIRST trainer. The trainer will answer questions, review homework and tests during the process.
6. The trainer will send access to subsequent module(s). Each module along with homework must be completed to satisfaction of the trainer.
7. If appropriate, FIRST may recommend that a Representative be appointed and complete the EOR training.
8. FIRST confirms that the EOR has successfully completed training after all modules, homework and tests are completed, monthly meetings are attended.
9. The FIRST IFDS/EOR trainer and the IFDS/EOR candidate meet to review a list of “attestation questions” and the trainer issues a certificate of completion when assured that all skills have been demonstrated successfully.

*There are three times the EOR trainee will ask the CCM for authorizations for FIRST training