



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**

Orientation to Self-Direction – Is it Right for You?

Complete the Relevant FIRST On-Line Training Module

- self-direction defined
- responsibilities in self-directing waiver services
- compare AWC and EOR models
- employer authority



Introduction to the Innovations Waiver

Complete the Relevant FIRST On-Line Training Module, Quiz and Homework

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

The Employer of Record Model of Service

Complete the Relevant FIRST On-Line Training Module, Quiz and Homework

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

Organizing Your Small Provider Agency

Complete the Relevant FIRST On-Line Training Module

- set-up EOR binders

Create/Obtain - IFDS/EOR Documents

- copies of individual MCO plan documents, including MCO budget
- short range goal plan*
- service grids* or electronic health record (EHR)
- customize the training information on the New Staff Training Form*

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

- 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*

The Financial Services Agency (FSA)

Complete the Relevant FIRST On-Line Training Module

- complete enrollment forms for employer (EOR)
- complete hire packets for each employee
 - **Acumen** (Vaya, Partners) <https://www.acumenfiscalagent.com/north-carolina/>
 - **GTI** (Vaya, Sandhills) <https://gtindependence.com/>

Finding & Hiring Staff

Complete the Relevant FIRST On-Line Training Module

- employment and other laws
- RADSE requirements and forms

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

- 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

Staff Orientation & Training

Complete the Relevant FIRST On-Line Training Module

- train staff - nine core competencies*
 - communication
 - person-centered
 - client rights
 - health and safety
 - professionalism
 - communication
 - crisis prevention
 - cultural competency
 - documentation requirements

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- 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* (annually)

Staff Scheduling & the EOR Budget

Complete the Relevant FIRST On-Line Training Module

- 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
- approve time documentation
- submit forms for training pay
- submit forms for staff bonus

Budgeting Terms & Tools

Complete the Relevant FIRST On-Line Training Module

- compare waiver budget and IFDS budget
- create EOR budget
- the real cost of each hour of staff pay

Goal Writing & Service Documentation

Complete the Relevant FIRST On-Line Training Module

- create action plan
- develop short-range goals
- documentation requirements

Quality Assurance Activities

Complete the Relevant FIRST On-Line Training Module

- incident reports
- out-of-state travel form
- health and safety checklist/innovations
- medication administration plan
- seizure action plan
- emergency action plan
- back-up staffing plan

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

- planned restrictive interventions
- be audit ready

Add-On Services to Support EORs

Complete the Relevant FIRST On-Line Training Module

- Community Navigator
- Financial Support Services
- Individual Goods & Services
- Natural Supports Education
- Specialized Consultation

Knowledge is Power

Complete the Relevant FIRST On-Line Training Module

- additional resources from LME/MCOs
- on-going tasks in the EOR
- knowledge and organization equals power

FDS/EOR Ongoing Tasks

Monthly Supervision

- meet with each employee
- meet with your CCM
- contact with your FIRST Community Navigator

Annual Staff Training and Evaluation

- certain core competencies and specialized courses*
- annual performance review

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)
- self-assessment – quarterly (Vaya)
- create Medication Administration Record Forms (MARS) (monthly)

Annual IFDS/EOR Tasks

- FIRST meeting plan preparation powerpoint
- 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

Other Resources

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

MCO/LME Individual and Family Directed Services Employer Handbook

Appendix K Reporting Form

A Credo for Support (YouTube Link)

Natural Supports Information

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