

Glossary of Self-Direction Terms

Approve: To confirm that all hours a worker puts on their timesheet or with EVV are accurate. This is the responsibility of the member and/or their representative.

Background Check: A report of what a person has done in the past as part of the process of deciding whether or not to employ them. This usually is administered by the Financial Management Services (FMS) provider to make sure the person meets all requirements.

Case Manager: Someone who helps make sure the member gets the services they need. They are sometimes called the Support Coordinator, Service Coordinator, or Service Manager, depending on the state. They work to understand the member's needs, preferences, and long-term goals. Additionally, they review service plans and provide continued health and safety monitoring of members to ensure self-direction is working well for the member.

Circle of Support: Individuals surrounding the member, such as family, friends, and neighbors, who have the member's best interest at heart. The member may wish to have some of these individuals involved in the service plan development.

Discrimination: Choosing not to hire a qualified person based on certain characteristics, such as age, race, color, religion, national origin, sexual orientation, sex, marital status, number of children, whether they are pregnant or may become pregnant in the future, or whether they have a disability. This action is illegal.

Employer: The person who is responsible for hiring, training, and potentially firing workers. This person is responsible for approving and

submitting time sheets and explaining how services should be provided. The employer is usually the member or their representative.

Electronic Visit Verification (EVV): A federally mandated way to record the date, time, and place where workers provide services to the member. Usually, the worker checks in and out on a smartphone or landline, in order to guarantee the worker is where they need to be to provide the service.

Financial Management Services (FMS): The agency that performs administrative and payroll tasks on behalf of the member. The FMS provider will also make sure the member is meeting all federal, state, and local requirements as an employer. FMS providers monitor the member's budget to ensure proper spending and utilizations.

Hire: To select a worker to provide services, and confirming the worker meets all requirements.

Job Description: A summary of the expectations the member has for their worker. This is provided to potential workers when they are applying.

Member: The person who receives services.

Managing: Handling employer responsibilities. This includes showing workers how to perform tasks and approving timesheets. Managing workers is the responsibility of the member and/or their representative.

Overtime: A worker works overtime once they work more than 40 hours in a week. For each hour over 40 worked, the employee will receive a higher rate of pay, usually "time and a half." Sometimes employees are not allowed to work overtime.

Physical Abuse: Any action that intentionally causes physical harm to the member, including hitting, grabbing, or other forms of violence.

Provide: To perform services in a member's service plan.

Representative: A person, selected by the member, who will perform all or some tasks of the Employer of Record. This is often a family member who lives with the member, and this individual usually cannot be paid to provide services.

Self-Direction: A way for individuals to receive services such that they have control over what services are provided, how services are provided, and who provides them. Self-directing usually includes hiring, training, and firing workers. It provides more choice and control than regular services and requires more responsibility.

Self-Directed Service Plan: The breakdown of services a member can receive, developed by the member, case manager, and their circle of support. This plan will detail how many hours or "units" of service the member is authorized for and should be tailored towards the member's goals.

Sexual Orientation: A person's identity in relation to whom they are attracted. For more information, see **Discrimination**.

Support Broker: Expert advisors who can help the member learn to self-direct and can help them with challenges they experience along the way. Not all states have support brokers. Sometimes this role is performed by the case manager.

Threatening: An action implying that the member will be put in danger, including physical abuse, neglect, or other forms of exploitation.