

Self Direction Quarterly Meeting

Wednesday, July 24, 2024

Agenda

- Welcome and Opening Remarks
- Self Direction Handbook
- Announcements



Self Direction Advisory Group

- **The Self Direction Advisory Group creates opportunities for dialogue and collaboration between OCDD and self-directed individuals/family members.**
- Members selected to represent based on:
 - Regions
 - Stakeholders types (support coordinators, LGEs, self direction employers, etc...)
 - Regional attributes (i.e. rural vs. non-rural)
- Initial focus - identify issues/concerns
 - Advisory group ranked issues/concerns through a survey
 - Survey results identified Self-Direction Handbook updates as the highest priority

Identified Priorities

Sections Reviewed:

- EVV and Beneficiary Hospital Stays
- Service Documentation
- Employer Responsibilities
- SC Responsibilities
- Fiscal Employer Agency (FEA) Responsibilities

Electronic Visit Verification (EVV)

General Information

- Must use EVV to check in and out of shifts in real time
- Required to select 1 of 3 EVV options
 - FOB
 - Mobile App
 - Landline
- May choose more than one option
- Clock in/out for a single shift must use the same EVV method
- Employer responsible for making sure employee uses EVV

Electronic Visit Verification (EVV)

Changes made to the EVV section of Self-Direction Handbook:

- Added information and links regarding FOBs
- Added language about prohibition of providing services while beneficiary is hospitalized
- Provided guidance on what is needed if staff works prior to admission or after discharge from hospital

Service Documentation

- Service log/progress note is the single documentation required
- Documentation completed by the employee at time of activity or service
- Employer must review documentation
- Support coordinator will review documentation at quarterly meeting
- Documentation must be retained in the beneficiary's home for review by support coordinator, state or federal agencies

Service Documentation Content

Identified information required in the service log/progress note:

- Name of beneficiary
- Name of employee
- Date of service
- Time of service if EVV is not used
- Clear information on activities that took place during shift
- Progress towards goals identified in the plan of care
- Checklists alone are NOT adequate documentation

Employer Responsibilities Added

- Recruiting, managing, and supervising employees (hire through termination)
- Arranging all necessary training required to support beneficiary per plan of care
- Ensure employees provide services outlined in plan of care
- Attending plan of care meetings
- Ensuring provider documents are prepared for the plan of care
- Review and sign the Employer Attestation and follow the requirements outlined in the attestation

Support Coordinator (SC) Responsibilities Added

- SC should ensure that the employer understands the budget and the CPOC year
- SCs will hold a review meeting with the beneficiary and the support team every quarter (3 months)
- Support team is defined as service providers other than self-direction (day habilitation, vocational, home health, etc.)
- Review service logs/progress notes

Fiscal Employer Agents (FEA) Responsibilities

- Provide system training on time maintenance system
- Provide training on EVV System
- Process employment info, such as background checks/exclusion and retain for record keeping
- Current FEAs are Acumen and Morning Sun

Next Steps

- Next advisory meeting will be on **August 14**
- Sections of the manual to be reviewed:
 - Glossary
 - Chapter 1
 - Chapter 2



Announcements

- Letters to recoup funds paid to DSWs while beneficiary hospitalized
- Employer Attestations



THANK YOU

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