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**CHAPTER 3: FISCAL/-EMPLOYER AGENT**

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**BENEFICIARY REQUIREMENTS**

Beneficiaries/employers participating in self-directed option must:

1. Be enrolled in a 1915c home and community--based services (HCBS) waiver program administered through:
  - a. Office of Aging and Adult Services (OAAS)-Community Choices Waiver (CCW); or
  - b. Office for Citizens with Developmental Disabilities (OCDD):
    - i. Children's Choice Waiver (CC);
    - ii. New Opportunities Waiver (NOW); and
    - iii. Residential Options Waiver (ROW).
2. Be able to participate in the self-directed option without a lapse or decline in quality of care or an increased risk to his/her health and welfare;
3. Complete the mandatory training including rights and responsibilities of managing his/her own services and supports offered by the support coordinator;
4. Understand the rights, risks, and responsibilities of managing his/her own care, and managing and using an individual budget, or if unable to make decisions independently, have an authorized representative who is listed on the beneficiary's plan of care (POC) who understands the rights, risks, and responsibilities of managing the care and supports of the beneficiary within the individualized budget; and
5. Be able to participate in the development and management of the approved individualized service plan (ISP)/POC. The beneficiary's annual budget is determined by the recommended service hours listed in the beneficiary's comprehensive plan of care (CPOC) to meet his/her needs and individual includes a potential amount of dollars within which the beneficiary or his/her authorized representative exercises decision-making responsibility concerning the selection of services and service providers;
6. Follow all rules and requirements pertaining to the self-direction program as

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outlined in the OCDD Self-Direction Handbook or the OAAS Self-Direction Handbook.

**Beneficiary Criteria**

To qualify for the self-directed option, beneficiaries receiving NOW, ROW, CC, and CCW with the ability to self-direct services may receive referrals from the their support coordinator to include fiscal/-employer agent (F/EA) services in the POC.

**Medical Necessity**

All self-direction services must indicated by the POC and support coordinator assessment as medically necessary.