Self-Direction Self-Paced Training: Introduction to Operations

November 2025

Department of Medicaid

Access, Inclusion, and Reasonable Accommodation

Ohio Department of Medicaid (ODM) is committed to providing access, inclusion, and reasonable accommodation in its services, activities, programs, and employment opportunities in accordance with the Americans with Disabilities Act (ADA), Title VI of the Civil Rights Act, and other applicable laws. To request an interpreter, written information in a language other than English or in other formats (large print, audio, accessible electronic formats, other formats), or a reasonable accommodation due to a disability, please contact ODM's Civil Rights/ADA Coordinator at 614-995-9981/TTY 711, fax 614-644-1434, or email: **ODM_EEO_EmployeeRelations@medicaid.ohio.gov**. Requests should be made at least three business days prior to the scheduled event.

If you believe ODM has failed to provide these services or discriminated in another way, you can file a grievance with ODM's Civil Rights Coordinator and/or file a civil rights complaint with the U.S. Department of Health and Human Services (HHS) Office for Civil Rights. Further information on these processes and ODM's compliance with civil rights and other applicable laws can be found in our **Notice of Nondiscrimination**.

Unless ODM's Civil Rights/ADA Coordinator approves in advance, individuals may not record the meeting using the recording function in Teams, GoToMeeting, Zoom, or any virtual meeting platform used by the department, nor may individuals utilize artificial intelligence (AI) technologies to transcribe meetings.

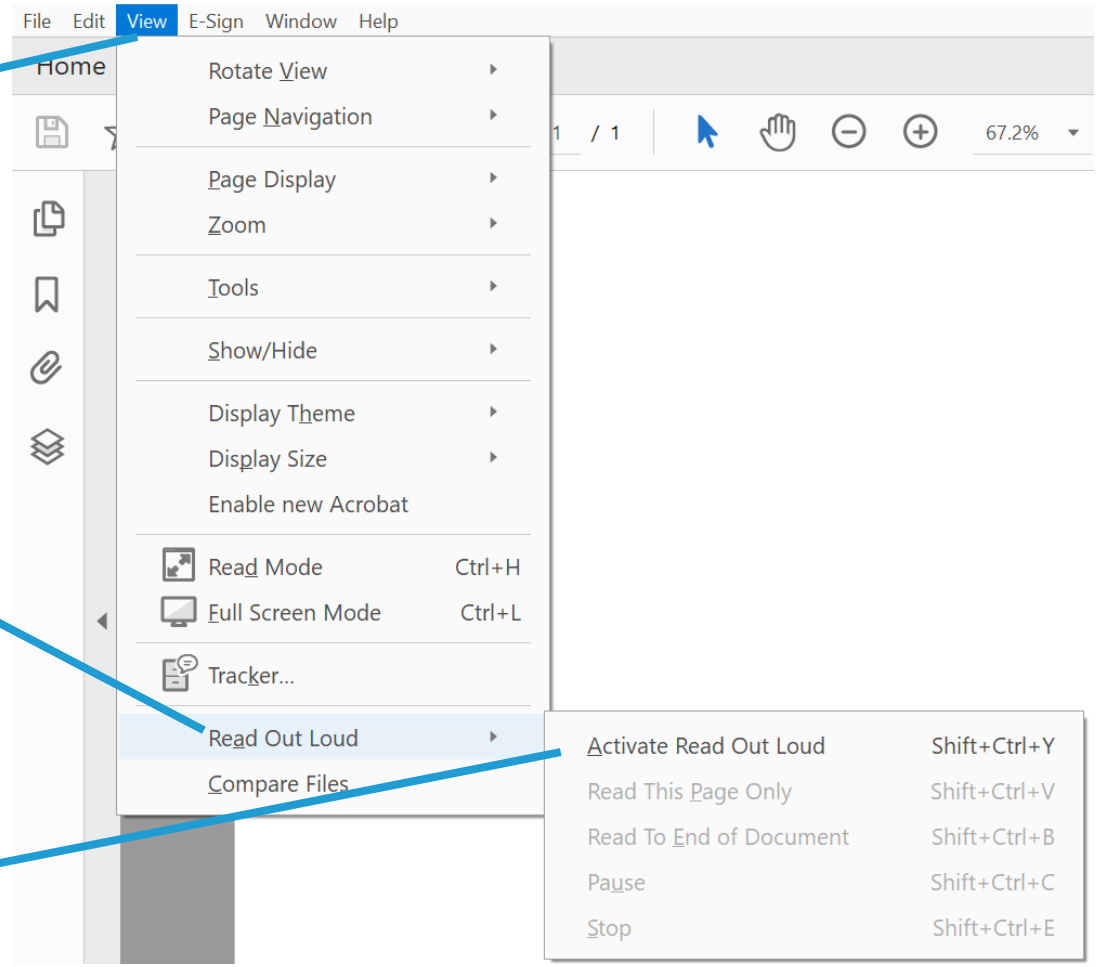
Welcome and Housekeeping

If you need the self-paced training read aloud, you can do so in Adobe Acrobat by following the steps below.

Step 1. Hover your mouse over the View button at the top of the screen.

Step 2. Hover your mouse over the Read Aloud button in the dropdown.

Step 3. Select the Activate Read Out Loud button. You can choose to have the whole document read aloud or just the page you are on.



Department of Medicaid

Training Agenda

1. Self-Direction Overview
2. Roles and Responsibilities
3. Service Descriptions

Self-Direction Overview

What is Self-Direction?

- Self-direction is an approach to waiver services that gives Ohioans control over their long-term services and support, allowing them to make decisions around the way certain services are delivered
- Individuals who select self-direction choose the type of care they receive and the caregivers who provide it
- Available services fall under budget authority, employer authority, or both

Benefits of Self-Direction:

- Choice and control
- Empowerment
- Flexibility
- Access to a need-based budget
- Personalized care
- Family involvement

How to Discuss Self-Direction Services with Individuals

- All waiver services are authorized based on assessed need. This includes:
  - The type of service
  - The amount of service
- Once the service needs are identified, individuals have a choice on how to meet those needs. Options for service delivery include:

Provider-Managed	An agency or independent provider arranges, manages, and supplies waiver services.
Self-Directed	The individual or their representative arrange and manage waiver services using the allowed waiver budget.

Self-Direction: Key Information

The following details highlight key aspects that may differ between self-directed care and care managed by a provider.

Enrolling	Self-directed caregiver can **enroll and have eligibility validated by the Financial Management Service (FMS)** instead of applying to ODM. **Existing ODM-enrolled providers can also enroll** to supply self-directed services. Self-directed caregivers enrolling through the FMS can work under **conditional employment** for up to **60 days**, pending the results of a criminal record check.
Payment	Self-directed caregivers will have **weekly checks issued**, based on the timely submission of timecards, **rather than billing ODM or the MyCare plans**.
Taxes and Benefits	Self-directed caregivers have **taxes deducted by the FMS** prior to payment and have employer related expenses accounted for, including Worker's Compensation and Unemployment.
Family Members as Caregivers	**Family members**, including spouses and parents of minors, **can be a self-directed caregiver**.

Types of Authorities

- There are two types of self-direction authority: Employer Authority and Budget Authority
- A person may choose to have either one or both types of authority

Employer Authority	Allows the individual to hire, manage, and dismiss their caregivers.
Budget Authority	Allows the individual to manage the funds for self-directed waiver services.

Budget Authority and Employer Authority

Through **employer authority**, individuals:

- Have direct oversight of their caregivers and can monitor and evaluate performance directly
- Choose caregivers who best match their needs, preferences, and personalities
- Ensure caregivers receive training specific to their needs
- Set their own schedules and care routines, providing greater flexibility and control
- Adjust their care arrangements quickly

Through **budget authority**, individuals:

- Have direct oversight of how funds are spent and allocated
- Determine wages for their caregivers
- Can prioritize spending on services and supports that are most beneficial to them

Overview of Self-Directed Services

Ohio Home Care and MyCare Waiver

- Home Care Attendant
- Home Modifications
- Personal Care Aide
- Self-Directed Goods and Services
- Waiver Nursing

MyCare Waiver Only

- Alternative Meals
- Choices Home Care Attendant
- Home Medical Equipment and Supplies
- Home Maintenance and Chores

Roles and Responsibilities

Roles and Responsibilities: Employer

The individual is the employer. The employer completes the following:

- Identifies, selects, and dismisses caregiver(s)
- Enters into written agreements with caregiver(s) for specific activities and training
- Trains caregivers to meet their needs and verifying training is completed
- Determines caregiver(s) wages
- Schedules services
- Oversees the caregiver(s)' performance
- Approves the caregiver(s)' time sheets and other documents needed for payment as determined by the FMS
- Decides spending within the approved self-directed budget
- Performs or participates in self-direction reviews

Roles and Responsibilities: Employee

The caregiver is the employee. The employee completes the following:

- Enrolls through the FMS, ODM, or Ohio Department of Aging (AGE) as required
- Enters into written agreements with employer for specific activities and training expectations
- Participates in training required by the employer
- Meets ODM's conditions of participation when enrolled through ODM or the FMS
- Documents all services provided
- Utilizes FMS' system for recording time and submitting timecards
- Participates in self-direction reviews
- Electronically reports caregiving visit details to comply with electronic visit verification (EVV) – please note, the FMS is an approved alternate vendor for EVV

Roles and Responsibilities: Representative

A representative is someone the individual chooses to help with employer tasks like:

- Identifying, selecting, and dismissing caregivers
- Developing written agreements for the employer with caregivers for specific activities and training expectations
- Training caregiver(s) to meet the employer's needs and verifying training is completed
- Scheduling services
- Supervising the caregiver(s)' performance
- Approving the caregiver(s)' timesheets and other documents needed for payment as determined by the FMS

Roles and Responsibilities: Financial Management Service

The Financial Management Service supports the employer, caregiver (employee), and care manager. The FMS helps by:

- Validating the caregiver(s)' employment
- Verifying caregiver(s)' eligibility
- Completing criminal record checks when enrolling caregivers
- Supplying the time-keeping and payment system for all self-directed services
- Processing payroll
- Providing information on payment for self-directed services

Roles and Responsibilities: Care Manager

A care manager, also known as a case manager or waiver service coordinator, assists individuals with self-directing their services. Care managers help by:

- Providing information on self-direction, self-directed services, and self-directed budgets
- Supporting the individual to identify a caregiver and representative if needed
- Authorizing services and overtime when appropriate
- Submitting authorizations to the FMS for service payment
- Assisting with self-direction reviews and improvement plans as requested

Service Descriptions

Waivers: MyCare and PASSPORT

Choices Home Care Attendant

- **Approval:** AGE-certified choices home care attendants
- **Authority type(s):** employer authority and budget authority
- **Tasks may include, but are not limited to:**



Medication	Body Care	Errands	Home Care	Community Access
• Reminders only	• Bathing • Dressing • Grooming • Mobility • Feeding • Toileting	• Grocery shopping	• Meal preparation • House cleaning • Laundry • Home maintenance • Chores	• Escort and transportation • Managing transportation • Money management

Waivers: Ohio Home Care, MyCare, and PASSPORT

Personal Care Aide

- **Approval:** ODM-approved personal care aides, FMS enrolled self-directed caregivers, AGE-certified consumer-directed personal care services
- **Authority type(s):** employer authority and budget authority
- **Tasks may include, but are not limited to:**

Medication	Body Care	Errands	Home Care	Community Access
• Reminders only	• Bathing • Dressing • Grooming • Mobility • Feeding • Toileting	• Grocery shopping	• Meal preparation • House cleaning • Laundry • Home maintenance • Chores	• Escort and transportation • Managing transportation

Waivers: Ohio Home Care and MyCare

Waiver Nursing

- **Approval:** ODM-approved waiver nurses, FMS enrolled self-directed caregivers
- **Authority type(s):** employer authority and budget authority
- **Tasks may include, but are not limited to:**

Medication	Body Care	Skilled Nursing	Home Care	Community Access
• Reminders • Organizing • Administering	• Bathing • Dressing • Grooming • Mobility • Feeding • Toileting	• G-tube feeds • Ostomy care	• Meal preparation • House cleaning • Laundry • Home maintenance • Chores	• Escort and transportation • Managing transportation

Waivers: Ohio Home Care and MyCare

Home Care Attendant

- **Approval:** ODM-approved home care attendants, FMS enrolled self-directed caregivers
- **Authority type(s):** employer authority and budget authority
- **Tasks may include, but are not limited to:**

Medication	Body Care	Errands	Skilled Nursing	Home Care	Community Access
• Reminders • Organizing • Administering	• Bathing • Dressing • Grooming • Mobility • Feeding • Toileting	• Grocery shopping	• G-tube feeds • Ostomy care	• Meal preparation • House cleaning • Laundry • Home maintenance • Chores	• Escort and transportation • Managing transportation

Reminders

- It is mandatory to attend a Session 1 interactive training. You should have received an email when you accessed this presentation with registration links. Registration links are also included below:
  - **Option 1:** Wednesday, November 5, 3-4 p.m.
    - Register here: Introduction to Operations: Session 1
  - **Option 2:** Thursday, November 6, 8-9 a.m.
    - Register here: Introduction to Operations: Session 2
- For any questions, please contact selfdirection@medicaid.ohio.gov

THANK YOU!