# A How-To Guide to Starting Self-Directed Services

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| **Person-Centered Planning** | Your Care Manager (CM) will have conversations with you about what you want to achieve in life. Based on those conversations, your CM will tell you about the service options available to help you meet your life goals and develop an Life Plan (LP). This process is called Person-Centered Planning and is at the heart and soul of Self-Direction. Your LPshould be comprehensive and reflect your goals. |
| **Understand Self-Direction** | From the options presented by your CM, you can choose to Self-Direct your services. If you choose to self-direct, you will need to attend a Self-Direction Information Session at your local Developmental Disabilities Regional Office (DDRO). If you are already Medicaid Waiver-eligible, your CM will submit a request for self-directed services through the Front Door. If you are not Medicaid Waiver-eligible yet, you will need to complete a Waiver application and apply to be enrolled in the Waiver, with help from your CM. |
| **Determine your Self-Direction Budget Amount** | When you choose to Self-Direct, your needs will be assessed using the Office for People with Developmental Disabilities (OPWDD) Approved Needs Assessment Tool. It can be done by your CM or an OPWDD Front Door staff. This assessment is also used to determine your maximum budget amount, also known as the Personal Resource Account (PRA). |
| **Hire a Support Broker and Fiscal Intermediary** | If you want to manage your budget with Budget Authority, your DDRO Self-Direction Liaison will give you a list of Support Brokers. You can interview Brokers from this list. Once you hire a Broker, you sign a contract with that Broker that outlines his/her duties and how he/she will support you. You and your Broker will request a Start-up Budget through OPWDD. When your start-up is approved, the Liaison will send you an Approval Letter. You can now start developing a complete Self-Direction budget. You should also interview and select a Fiscal Intermediary from a provided list and ask people who support you to make decisions to be part of your Circle of Support. |
| **Develop your Self-Direction Budget and Plan(s)** | You will work with your Support Broker to develop a complete Self-Direction Budget that includes the supports and services you identified during Person-Centered Planning. Your Broker will also develop Staff Action Plans for any self-directed habilitation services that you choose to hire your own staff for. During this time, you should start looking for potential staff. When you find staff you like, you can begin the hiring process through the Fiscal Intermediary (FI). |
| **Submit Your Budget for Approval** | Once your budget is complete, your Broker will submit it to the Self-Direction Liaison for approval. Once it's approved, you, your family or designee, your CM, Fiscal Intermediary and Broker will receive a letter from the Liaison that lists an effective date. This date is when your budget begins and falls on the first of a month. |
| **Hold Your Launch Meeting** | Once your budget is approved, you'll have a launch meeting to review your budget, self-directed services and plans. Your Fiscal Intermediary, Support Broker, CM, and other team members will all be invited. **CELEBRATE!** |

Prepared by Lower Hudson Families for Self-Direction and OPWDD