

## **Representatives' Responsibilities in a Self-Direction Program**

In Medicaid self-direction programs, individuals may direct many or all of their home- and community-based services, including selecting and managing direct service workers and/or managing a budget (which may also be referred to as a service cost maximum) for needed services. However, if an individual is unable to manage his or her self-directed services or feels apprehensive about doing so, a representative can be chosen. This document outlines representatives' responsibilities and the scope of commitment to this program. [States may add additional representative responsibilities as applicable.]

### **Background**

A representative is typically a family member or close friend who assists the individual in making decisions based on his or her desired preferences. Individuals still direct how and when services are provided, but representatives may offer assistance with some of the other tasks individuals may find daunting (e.g., reviewing and approving timesheets, taking corrective action if a worker fails to perform tasks, counseling a worker to arrive at work on time, etc.). In some instances, a representative may perform all these duties on behalf of the individual.

Not all individuals want or need a representative, but such a person can be very helpful. The case manager should discuss this option with the individual and, if the person agrees that he or she would like this type of assistance, the case manager should work with the individual to identify a potential representative. A representative may also be someone who serves in other roles to support the member – e.g. representative payee or legal guardian.

### **Representative Responsibilities**

It is important for potential representatives to understand the commitment they are agreeing to by serving in such a role. The following is a list of recommended representative responsibilities:

- Serve as the employer or co-employer of the hired worker on behalf of the individual;
- Review and sign timesheets if the individual lacks the ability to review and sign;
- Be part of a team with the lead case manager, support broker, and/or other individuals with administrative responsibility;
- Assess the quality of services provided by workers;
- Demonstrate a strong personal commitment to the individual;
- Understand the individual's needs, goals, preferences, and participate in person-centered planning;
- Agree to a face-to-face visit in the individual's home at least every pay period, and have other regular contact with the individual and his/her worker;
- Be willing and able to meet all program requirements;

- Be at least 18 years of age (*depends on program rules*);
- Be willing to submit to a criminal background check (*depends on program rules*); and
- Follow all program rules and regulations.

A representative cannot:

- Be paid as a representative;
- Be hired as an individual's worker;
- Be known to abuse drugs or alcohol; and
- Have a history of committing physical, emotional or financial abuse.

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