Person Centered Care Services

Self-Direction: Support Broker Training

Updated as of 07.2025

Our Mission and Vision

Our Mission: *Person Centered Care Services is a not for profit organization creating social change within communities by supporting people with disabilities on their search for identity and acceptance.*

Our Vision: *To reconfigure humankind. To be genuine and authentic human beings; disabled and non-disabled. Creating a society of belonging and helping one another to live a good life.*

Our Strategy and Impact

Our Strategy: *To help a person build comprehensive supports that will engage and propel them to lead the life they want to live.*

Our Impact- *Providing support to the Staten Island community and the greater NYC area to help create and facilitate relationships resulting in a more diverse community while providing services to people with disabilities to engage and be a part of their community.*

Our Core Values

support *Our responsibility as human beings is to support ourselves and one another.*

eQuity *To participate in community is to have active citizenship. To be a participating citizen, one must have opportunities which are equitable; which accommodate the differences all human beings have.*

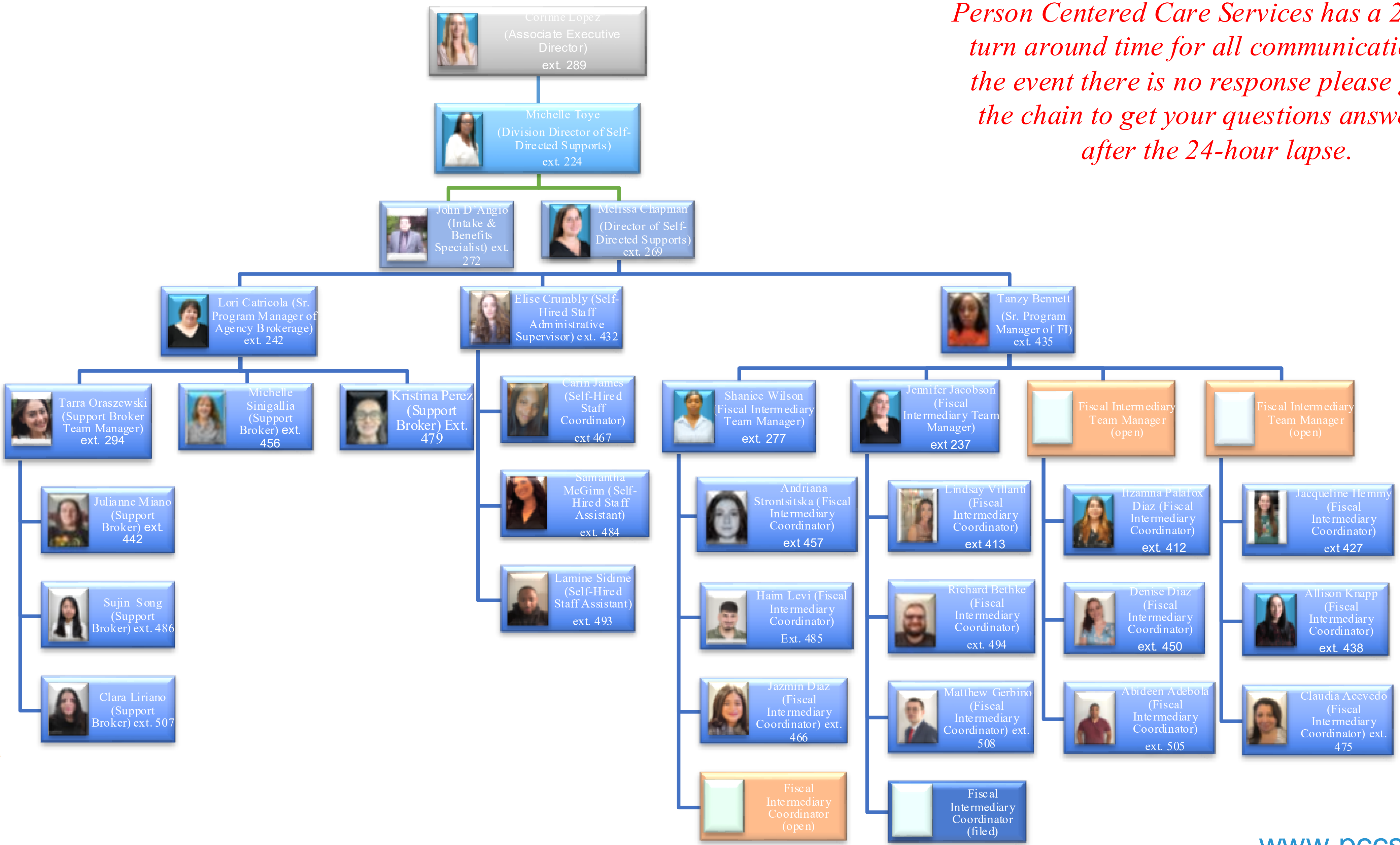
aCCeptance *One of the most vital components of having a quality of life is love. It's okay to tell someone you love them; more importantly, it's okay to show them. To accept another for who they are and what makes them human can be a most validating experience; it is self-empowering.*

GROUND RULES

- We are recording this training for future trainings/sharing with members of Person-Centered Care Services.
- Please turn on cameras to engage in this training.
- All lines have been placed on mute, please use the chat to answer questions or raise hand to be unmuted.
- Please respect all members on this call.
- All personal information should not be shared within the training. If you have a specific question pertaining to a case, please reach out to SelfDirect@pccsny.org.

Departmental Organization Chart (2025)

Person Centered Care Services has a 24-hour turn around time for all communication. In the event there is no response please go up the chain to get your questions answered, after the 24-hour lapse.



www.pccsny.org

Check-IN

- Your name
- How long you have been a Support Broker ?
- What do you enjoy most about being a Support Broker ?

Memorandum of Understanding (MOU)

Before you attend this training, you signed a **MOU** to work as a Support Broker with us. Make sure you review the job responsibilities while working with us, as we have the right to discontinue working with you as a Support Broker if not followed:

Some Key Points:

- ❑ Make sure all Self-Directed Participants file are incompliance, with the following documents:
  - ✓ Staff Action Plan, if applicable (Annual and Review). This should be completed 30 days after the Life Plan/COS meeting. These Staff Action Plan should be Person Centered and include Level of Supervision. ***Do not wait for the finalized Life Plan, please make sure to review & take good meeting minute notes.*
  - ✓ Conduct & Write Meeting Minutes for your Circle of Support within our system. This should be completed before submitting billing for this service. Support Brokers should attend **ALL** Life Plan meetings & create "detailed" meeting minutes
  - ✓ Support Broker Invoices are based off Support Broker Agreement. This should be submitted by the 10^{th} of the following service month.

How to get started?

- Before you request for Fiscal Intermediary Services, please make sure you have the following documents:
  - Notice of Decision 0.9 (NOD 0.9) with Self-Direction & Budget Authority approved.
  - E-mail confirmation that the Self-Directed Participant/Designee attended OPWDD Information Session about Self-Direction Services.
    - This meeting occurs the 4th Thursday of every month. For an updated schedule, please contact SelfDirect@pccsny.org.

How to get started? *Con't*

Any family that wishes to obtain Fiscal Intermediary Supports from PCCS, must be scheduled for, and attend an Intro assessment meeting with the Intake & Benefits Specialist

The following Self-Directed Participant Request form **MUST** be submitted to John D'Angio at JohnD@pccsny.org.

Approximately 2 week after the Intro Meeting takes place an email notification will be sent by the Intake & Benefits Specialist to the support team approving support of the plan.

The email will include an invitation to an upcoming Self-Directed Participant/Designee Workshops information session held by the FI Department. *We strongly encourage for the individual or Designee to attend the training to know about our policies and procedures.* The email will also include a request for the following documentation needing to be provided by the Participants Care Manager, the Support Broker, and the Participant / Designee. There will be an appointed due date of which this documentation must be submitted to the FI Department.

PCCS reconfiguring humankind

"We are a not-for-profit organization creating social change within communities by supporting people with disabilities on their search for identity and acceptance."

Acceptance *Equity* *Support*

Request for Fiscal Intermediary Services

For those Participants/Designees requesting for Person Centered Care Services to provide Fiscal Intermediary Supports, please complete the requested information below. Once complete, please forward to the attention of the Intake & Benefit Specialist John D'Angio @ johnd@pccsny.org

The Participant/Designee and his/her Care Manager will be scheduled for an assessment meeting to speak with the Intake & Benefit Specialist.

Date ______________________________
Participants Name ______________________________
Designee Name ______________________________
Designee Telephone Number ______________________________
Designee Email Address ______________________________
Preferred Language: ______________________________
Self-Directed Participant Wavier Enrolled: ☐Yes ☐NO
Self-Directed Participant Attend SD Info Session: ☐Yes ☐NO
Does the SDP have a NOD 0.9 with Self-Direction Budget Authority ☐Yes ☐NO
If no, Care Manager has submitted one on: ______________________

Care Manager Name ______________________________
Care Manager Telephone Number ______________________________
Care Manager Email Address ______________________________
Care Coordination Organization ______________________________

Broker Name ______________________________
Broker Email Address ______________________________
Broker Telephone Number ______________________________
Is Broker registered with Person Centered Care Services? ☐YES ☐NO

Current Fiscal Intermediary (If Applicable) ______________________________

Thank you for your expressed interest in Fiscal Intermediary Supports with Person Centered Care Services.

How to get started? *Con't*

Once you receive the letter, please make sure to send **ALL** documents within ONE e-mail to our Intake & Benefits Specialist. It is best practice to get these documents prepared prior to the letter being sent. Some of the documents include, but not limited to, the following:

- Current photo of Participant (from the neck up)
- Proof of attendance to a Self-Direction Information Session
- Copy of Medicaid Card (front and back)
- Notice of Decision 0.1 (NOD 0.1)
- CR4 (Tabs report from Choices)
- Current Life Plan (LP)
- Current Level of Care (LOC)
- Developmental Disability Profile 2 (DDP2)
- Current Psychological Evaluation
- Current Psychosocial Evaluation
- Notice of Decision 0.9 (NOD.09), must indicating Self-Direction with budget authority
- Start-up Self-Direction Budget template
- Signed Broker Agreement indication type of Self-Direction Budget (Residential Only, Other Than Residential (OTR), or Both)

Please make sure that the following is correct:

Section IV: Fiscal Intermediary

Agency Name	Person Centered Care Services, Inc.			Corp ID	44720
FI Street Address	150 Granite Ave				
City	Staten Island	State	NY	Zip Code	10303
Phone Number	7183701088	E-Mail Address	SDapproved@pccsny.org		
FI Contact	Michelle Toye				

Developing a Start-up Budget

When completing a start up request, please ensure you:

- ✓ Use and Submit fresh clean template
- ✓ Information on Broker Agreement accurate and complete with signatures.
- ✓ Information on Support Broker Agreement matches the SD Budget Template, alongside all other documents. For example, address on the Life Plan matches Broker Agreement.

A Start-up Budget is approved, now what?

Once start up approval is received by Office for People with Developmental Disabilities (OPWDD):

- An update to life plan will be requested from Care Manager. Life plan must list Start-up Services in the narrative and section IV (Fiscal Intermediary, Support Brokerage) along with the appointed effective date. *Please refer to the CM Listing for more information.*
- Department enrollments for start up services are completed within eVero.
- Participant/Designee will get an e-mail to setup their account in eVero. The Participant/Designee must create their electronic signature to sign any documents in eVero. If not setup within 72hours, the link will expire and must be recreated by the FI Team.
- The Broker is linked to the Participant in eVero. Once linked please make sure to do the following:
  - The SD Start-up Budget will be imported into eVero. This needs to be signed by you as the Support Broker.
  - A Start-up Broker Agreement needs to be created and signed within the eVero .
- Once the Support Broker signs (Budget and Broker Agreement), this needs to be signed by the Self-Directed Participant/Designee.
- Please make sure to inform the FI Dept., that the SD Budget has been signed so we can then OPWDD approve within eVero. This will be the final step so then you can start creating the initial SD Budget within eVero with the Circle of Support Team.

Key Notes about Start-Up

- If the department has not received the requested documents or addendums needed to complete enrollment, the eVero portal will not be set up and the Participant Designee will not be linked to the Support Broker caseload in eVero.
- You are unable to bill for services rendered until Support Broker Agreement & Start-up Budget is approved by Self-Directed Participant/Designee & FI Dept. within eVero

Developing an Initial SD Budget

Once all documents are signed within eVero for the Start-up Request, you can begin developing a Person-Centered Plan for the individuals Self-Direction Budget.

Before submitting an Initial Budget Packet to our Intake & Benefits Specialist please make sure you have the following:

- ❑ Documented all Circle of Support/Pre-planning meeting minutes in eVero.
- ❑ Billed for Services rendered within eVero
- ❑ Completed and Signed a Staff Action Plan, if individual has Self-Hired Community Habilitation and/or Self-Hired Supportive Employment
- ❑ Completed and Signed Initial Budget, as well as Self-Directed Participant/Designee signed
- ❑ PDF Support Broker Agreement completed, and rate matches the Initial SD Budget.
- ❑ Provided Breakdown of Individual Directed Goods & Services (IDGS) and Other Personal Service Items (OTPS)
- ❑ Is the Self-Directed Participant receiving a traditional services, and was this added to the Direct Provider Purchase section of the budget?
- ❑ Did you add the correct contact Information for the Fiscal Intermediary Provider?

**It is highly recommended that the Self-Directed Participant/Designee attend an SDP Workshop to review our policies and procedures. Please e-mail SelfDirect@pccsny.org for an update calendar. In the event, they are unable to attend the scheduled dates please have them reach out to SelfDirect@pccsny.org or assigned Fiscal Intermediary Coordinator for more information.*

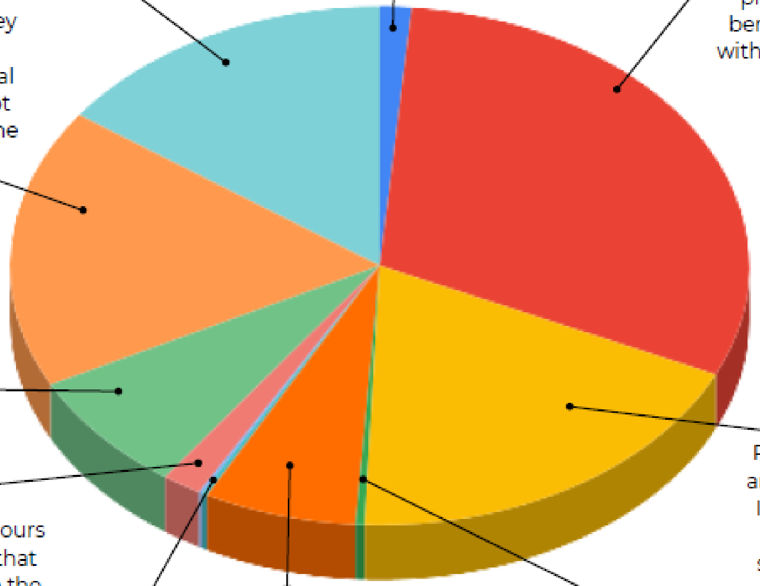
What information is needed in Initial SD Budgets?

Please ensure:

- ✓ Email address on template is listed as sdapproved@pccsny.org
- ✓ Contact information is listed as Michelle Toye
- ✓ Corporation ID - **44720**
- ✓ Review Participants information to ensure accuracy
- ✓ Marital status is complete
- ✓ Date of birth is accurate
- ✓ Tabs numbers are accurate (team reviews Choices to confirm information)
- ✓ Fringe rate is **24%** regardless to the amount of hours
- ✓ Entire support team is cc'd on any email correspondence.
- ✓ Make sure to include IDGS/OTPS breakdowns, PDF Support Broker Agreement, and Staff Action Plan, if applicable.
- ✓ If there are traditional supports in place, adding this into the Direct Provider Purchase line to ensure there is no interruption with services.
- ✓ Are there going to be active Self-Hired Staff? Does the SDP/Designee know who is going to provide this service? If so, has that Self-Hired Staff start the onboarding process (i.e. Online Application and Completion of the Self-Hired Staff Info Sheet)

What is our Fringe Rate?

Our fringe rate is currently **24%** regardless of the number of hours your Self-Hired Staff work.



MTA Tax
Metropolitan Commuter Transportation Mobility Tax (MCTMT) PCCS is required to withhold New York State income tax from wages.

Workers Compensation
Covers any illness or injury sustained in the course of employment that requires medical, surgical or hospital treatment.

Social Security/Medicare
FICA helps fund both Social Security and Medicare programs, which provide benefits for retirees, people with disabilities, and children.

Paid Time Off (PTO)
Based on an employee's FTEs, they either accrue NYC Sick Leave (under 20 hours/week) or Personal Time (20+ hours/week). This is not billable and solely comes out of the fringe.

Holiday Pay
Based on an employee's FTEs, they may be entitled to either 4, 6, or 8 hours of Holiday Pay. This is not billable and solely comes out of the fringe.

NYS Unemployment
PCCS pays applicable State and Federal Unemployment Insurance Taxes and those benefits are available to separated employees who qualify.

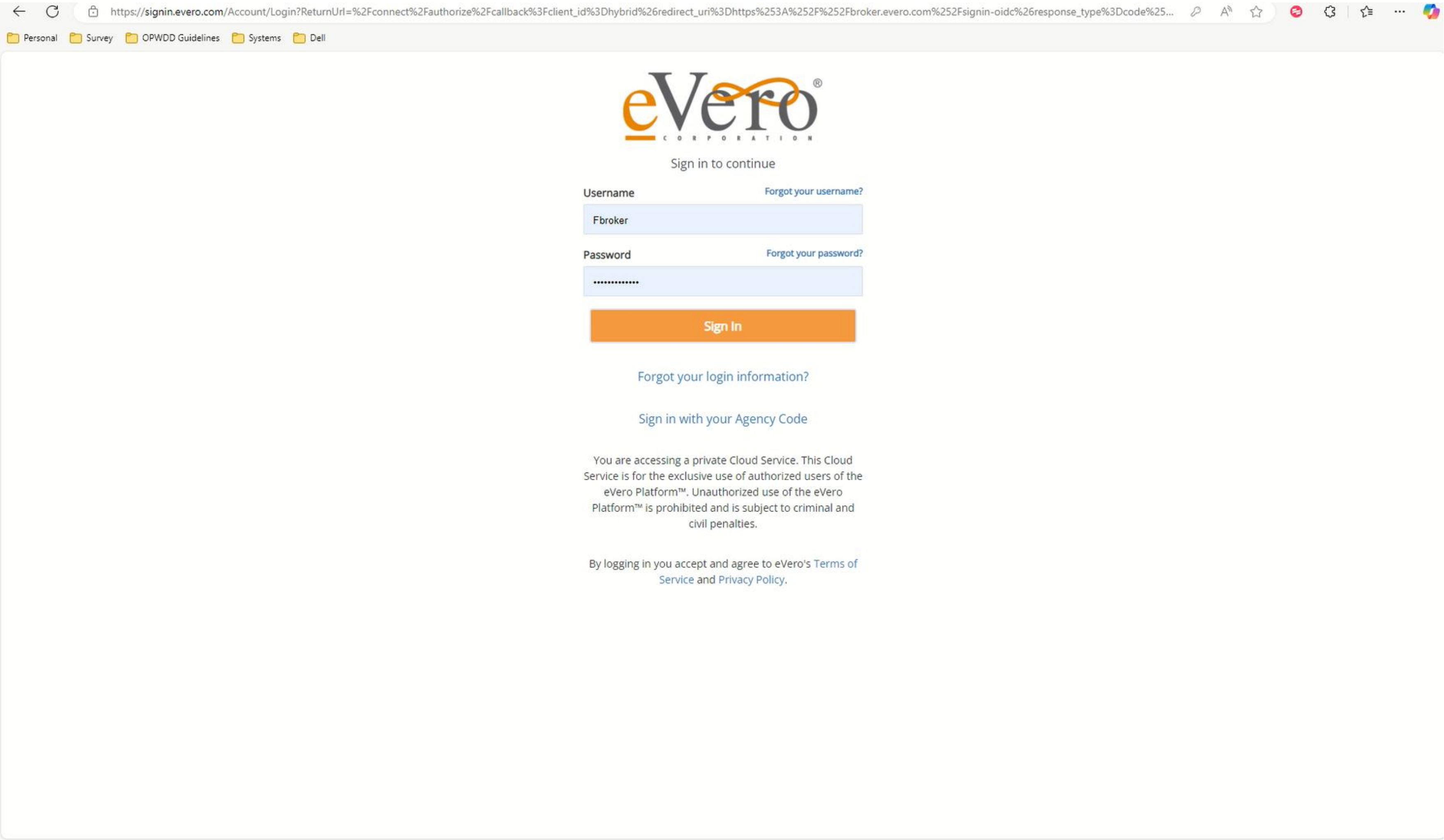
Overtime
When an employee works over 40 hours in a given week, the hours worked that put them into overtime are billed to the budget with the employee's regular rate of pay. The time and a half that is paid to the employee comes out of the fringe.

Medical Insurance
If an employee works 30 hours a week they are entitled to Medical Benefits if they so choose.

Disability Insurance
PCCS is required to provide disability benefits coverage to employees for an off-the-job injury or illness.

Dental Insurance
If an employee works 30 hours a week they are entitled to Dental Benefits if they so choose.

Developing an Initial Self-Direction Budget within eVero



An Initial Budget is approved, now what?

Once an Initial SD Budget approval is received by Office for People with Developmental Disabilities (OPWDD):

- An update to life plan will be requested from Care Manager. Life plan must list **ALL** services in the narrative and section IV & V that are applicable to the Self-Direction Budget (i.e., Individual Direct Goods & Services, Family Reimbursed Respite, etc.) along with the appointed effective date. *Please refer to the CM Listing for more information.*
- Department enrollments for Initial SD Budget are completed within Choices System.
- Once enrollments within Choices, are completed Support Broker MUST sign "Imported," SD Budget and the SDP/Designee must sign for the FI Dept. to OPWDD approve within eVero.
- The Support Broker will create a NEW SUPPORT Broker Agreement, which will have the SDP/Designee sign as well.
- The case will be assigned to a Fiscal Intermediary Coordinator, where they will introduce themselves via. phone and e-mail to the entire team. At this point there will be a scheduled "Launch Meeting," to take place. All parties Self-Directed Participant/Designee, Support Broker, Care Manager, and Fiscal Intermediary Coordinator MUST be present.

Budget Review Process

The FI Dept. reviews budgets each week on Wednesday (Depending on team schedule)

Reviews include:

- ✓ Start up requests
- ✓ Initial budgets
- ✓ New broker agreements
- ✓ Termination forms
- ✓ Cost neutral amendments
- ✓ Full budget amendments (inclusive of transfer budgets)

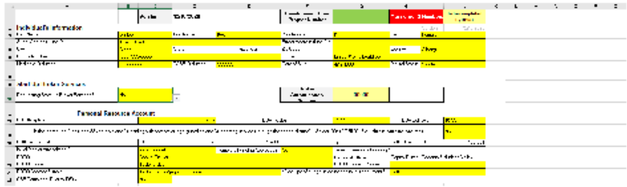
Please note:

- ❖ Budgets for review should be finalized in eVero no later than Tuesday morning. If there is a SD Budget finalized afterward, this will be reviewed the following week. This includes ALL parties' signatures, IDGS/OTPS breakdowns, Staff Evaluations, and Staff Action Plan or Updated Support Broker Agreement if applicable.
- ❖ Budgets will not be reviewed if all documentation is not received.
- ❖ In the event, a budget needs to be reviewed before Wednesday please consult with the FIC as to why it is important. (i.e., SDP is starting Day Hab or running low in funds for CH/Respite.)
- ❖ ALL Start-up Packets, and Initial SD Packets go to John D'Angio at JohnD@pccny.org, and cc'd Sdapproved@pccsny.org.

What can we do to ensure CNBAs, and amendments get approved and not kicked back from the DDRO?

Fiscal Intermediary Budget Review Checklist

- ☐ Determination is made whether the person lives in a certified setting (e.g., IRA or Family Care). If the person does live in a certified setting, "Other Than Residential" is selected for the type of Budget
- ☐ "Yes" or "No" is selected for "CSS Participant Prior to 10/01/14." If "Yes" is selected, this is verified as accurate



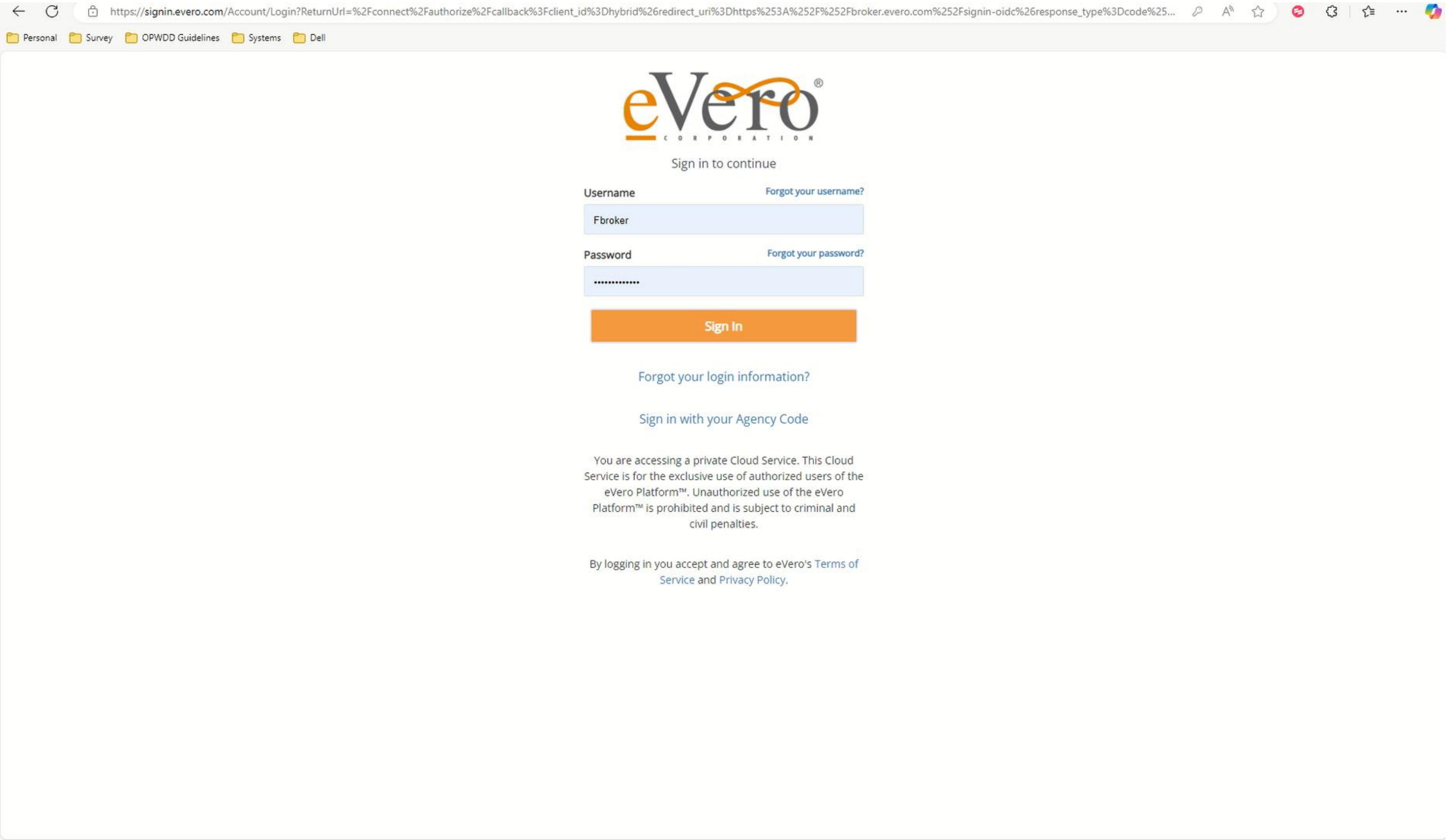
Services Requested (Select "Yes" if the service is being requested and "No" if the service is not being requested)
Lines 23-43

- ☐ Any service requested with a "Yes" response is reflected in the Life Plan
- ☐ "Yes" or "No" has been selected for every Service. No "Please Specify" responses for Services are left
- ☐ If someone without acting in the Support Broker role in an unpaid capacity, the Support Brokerage drop down is "No"
- ☐ Any Service requested with a "Yes" response has information entered in the corresponding Tab
- ☐ If "Yes" is selected for Live-In Caregiver, the person is living independently or has a plan to before this service begins
- ☐ If "Yes" is selected for Live-In Caregiver, the Number of Line-In Caregivers and Number of Individuals Served by the Live-In Caregiver fields are complete
- ☐ If Housing Subsidy and Family Reimbursed Respite are both "Yes," there is justification in the Life Plan and a plan in place to ensure that both services will not be provided during the same time period
- ☐ If Housing Subsidy is "Yes" the person is at least 18 years' old
- ☐ If Self-Hired Respite, Direct Provider Purchased Respite, Agency Supported Respite or Family Reimbursed Respite are "Yes" the person has a primary caregiver who provides daily caregiving
- ☐ If Self-Hired Supported Employment (SEMP), Direct Provider Purchased SEMP, Agency Supported SEMP are "Yes," the SEMP authorization process has been followed (see attached)

Edited: 3/5/2021

- ✓ If doing on a excel file, make sure it is a clean template.
- ✓ Ensure the demographics is completed and matches information in choices.
- ✓ DDP-2 Scores are updated
- ✓ Review the SD Budget or CNBA to make sure it meets all requirements.
- ✓ Review the NYS Reimbursement Rate Reform for DDP price per unit.
- ✓ Use the checklist: https://acrobat.adobe.com/id/urn:aaid:sc:VA6C2:0d702f47-86ba-47aa-b4cf-358f0cce9ac8

Amending a Self-Direction Budget (FBA or CNBA)



Documenting Meeting within eVero

After every Circle of Support Meeting, regardless of Life Plan, or Pre-Planning, or Staff Action Plan review. Meeting minutes are to be documented within the eVero i.e., signed by you as the Support Broker.

**We will not reimburse for services rendered (i.e., Attend a COS meeting) if no meeting minute is within the system.

Within the Meeting Minutes the following is required:

- Date the meeting occurred
- Attendance Sheet of who attended the meeting
- Type of Meeting (Life Plan/Circle of Support)
- Detailed Meeting Minute notes *(where it feels like the person reading the notes was present, and there are no room for interpretation)*. There should be NO N/A listed within the fields.

All Meeting Minutes are approved by the Fiscal Intermediary Coordinator, prior to you linking and signing a Staff Action Plan. We review meeting minutes weekly on Wednesday. If you see something outstanding, please reach out to the assigned Fiscal Intermediary Coordinator, and cc'd their supervisor.

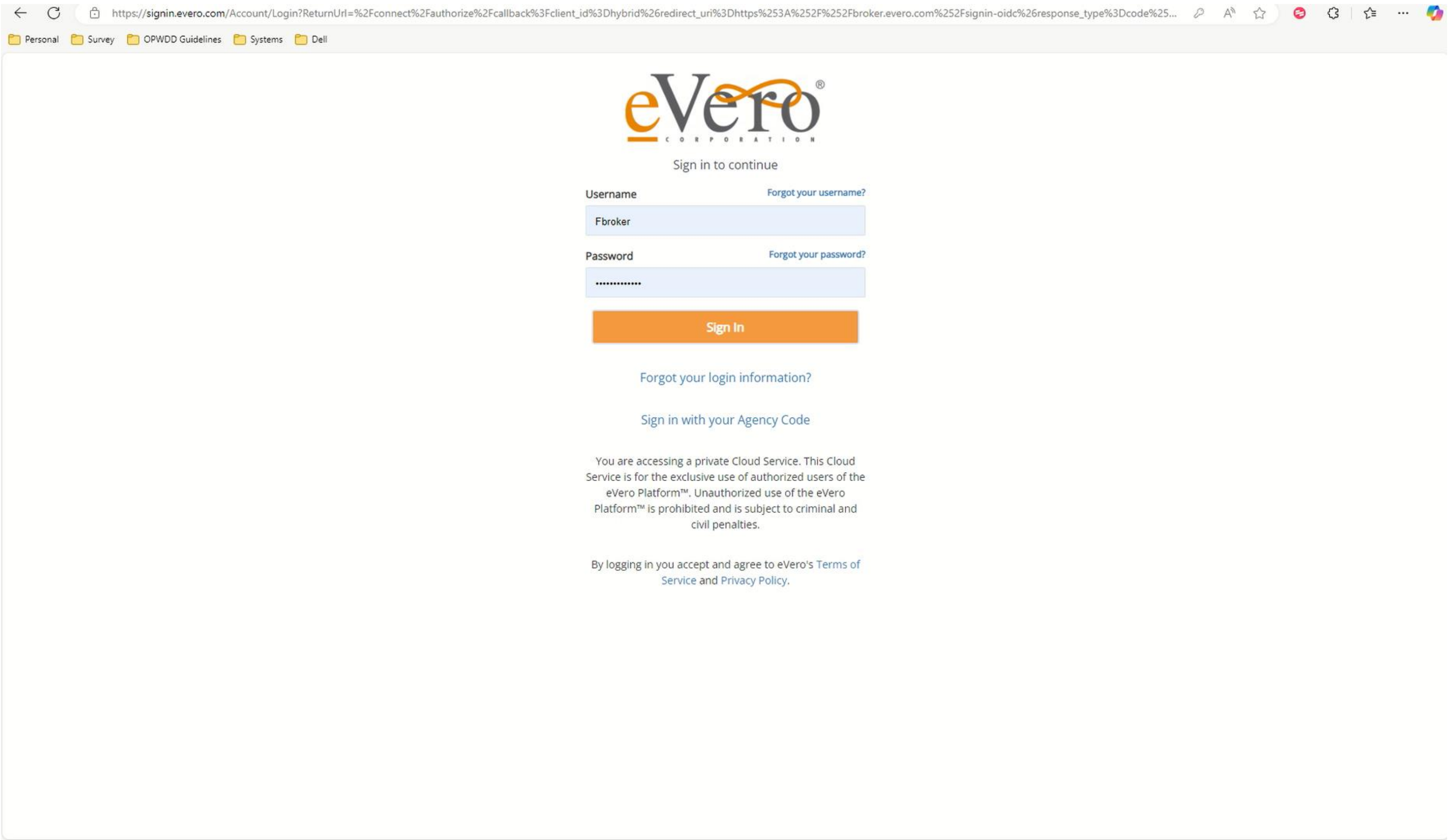
Support Brokerage: Telehealth

[ADM#2021-03 Ability to use Technology to Remotely Deliver Home and Community-Based Services (HCBS) | https://opwdd.ny.gov/adm2021-03-ability-use-technology-remotely-deliver-home-and-community-based-services-hcbs](https://opwdd.ny.gov/adm2021-03-ability-use-technology-remotely-deliver-home-and-community-based-services-hcbs)

- To conduct any meetings virtually, including but not limited to, Circle of Support/Life Plan, Pre-Planning, and IDT it MUST be **approved by the Self-Direction Participant/Designee**.
- If the Self-Directed Participant/Designee agrees to Telehealth Support for Support Brokerage services, this **MUST** be included in the Life Plan as an approved service.
- This **MUST** be entered into eVero as an approved service by the Fiscal Intermediary Department.
- Within each meeting minute note, this MUST be documented correctly. Also mentioned if it was reviewed and still agreed upon to receive Telehealth supports.

What is the difference between In-person vs. Telehealth?

How do I upload Meeting Minutes within eVero?



Creating a Support Broker Agreement within eVero

PDF Version of the Support Broker Agreement

Support Broker Agreement

☐ Check if this Support Broker Agreement is for Initial/Start-Up Support Brokerage

Please type your information into the boxes, save the document and submit. Please complete the entire form.

Section I: Self-Direction Participant

Last Name		First Name		Middle Initial	
Street Address					
City		State		Zip Code	
Phone Number		E-Mail Address			
TABS ID Number		Medicaid ID Number			

Section II: Support Broker

Last Name		First Name		Middle Initial	
Business Address					
City		State		Zip Code	
Phone Number		E-Mail Address			
Broker Authorization Number		Name of Agency*			

* if the Support Broker provides services cooperatively with other Support Brokers (e.g. to provide back-up, additional skills) provide the name of the organization or individual the Support Broker provides services with, or if the Support Broker is independent, please enter "independent".

Section III: Support Broker Hourly Fee*

Total Annual Hours	Hourly Fee	Total Annual Cost

* these amounts may not exceed amounts included in the approved Self-Direction budget

Section IV: Fiscal Intermediary

Agency Name		Corp ID			
FI Street Address					
City		State		Zip Code	
Phone Number		E-Mail Address			
FI Contact					

Section V: Care Manager

Name					
Affiliation					
Address					
City		State		Zip Code	
Phone Number		E-Mail Address			

7/25/24

Support Broker Invoices

All Support Broker Invoices are due to the Fiscal Intermediary Department for review by the 10th of the following service month.

How can I ensure I get paid on time for services rendered with no rejections?

- Support Broker billing needs to be created contemporaneously (**existing, occurring, or beginning during the same time**) to the task. Anything not submitted contemporaneously will be rejected, and will be requested to be changed to "non-billable."
- Not only did I put in my (Daily) Service Documentation and sign, but I signed the (Monthly) Support Broker Invoice.
- Did the Self-Directed Participant/Designee review and sign the invoice?
- Did I complete all task that I am billing for? (i.e. Attend a COS meeting, and therefore meeting minutes are entered).
- Is this plan up-to-date and incompliance?
- Am I very transparent about the services I am billing for, and there is no room for concern/question.

Staff Action Plans (SAP)

Make sure to review the 18-ADM-09R: Staff Action Plan Program and Billing Requirements put fourth by Office with People with Developmental Disabilities (OPWDD.

However, per Person Centered Care Services FI Dept., we require the following:

- SAP must be completed 60 days from the Life Plan/Circle of Support Meeting.
- SAP must be completed **annually** and **reviewed** once within the year.
- SAP must be completed if Self-Hired Community Habilitation and/or Self-Hired Supportive Employment is an approved service within the Self-Direction Budget. If there is no active Self-Hired Staff working, an SAP is required.
- SAP should be listed as 1st of the next month.
- SAP should be written in 1st person narrative.
- SAP should match Life Plan goals/safeguards
- Level of Supports/Supervision needed to be mentioned.
- Methods should be clearly identified and detailed.
- Valued Outcomes should not be the same from year to year. They should be changed if progress is being made, removed if not attainable, or changed different support is required.

Level of Supervision

[ADM# 2022-01 Levels of Supervision (LOS) - https://opwdd.ny.gov/regulations-guidance/adm-2022-01-levels-supervision-los](https://opwdd.ny.gov/regulations-guidance/adm-2022-01-levels-supervision-los)

20-ADM-07-Revised – Attachment 1 February 22, 2022

	1:1 Supervision	Range of Sight or Scan	Periodic Checks	Independent with Staff Present	Independent
1. Staff Assigned to the Individual	One or more staff assigned to one individual (e.g., 1:1, 2:1).	The individual(s) must be within the direct or indirect visual field of staff, as defined in the individual's plan of care (Assigned staff can see the individual(s) when they look around).	Staff observe the individual(s) as specified in their plan (can be visual or audio). This includes the signs of life checks.	Staff member is aware of the location of the individual(s) and is within a planned vicinity to assist the individual(s); no schedule of checks.	Individual does not require a specified LOS.
2. Proximity of Staff to the Individual	Staff must maintain a proximity that allows them the greatest chance to prevent or minimize the impact of the issue for which 1:1 is assigned. If any specific proximity requirements are needed, this should be specified in the individual plan/s.	Assigned staff are generally in the same area as the individual(s) (e.g., room, area of the vehicle), depending on the reason for range of scan, and the individual(s) is/are immediately in the line of sight or with limited range of movement of the staff (e.g., staff turns head or body around) so that the individual(s) can be seen, **as defined in the individual's plan of care.**	On site. Staff must have the ability to visually see, audibly hear or otherwise have a clear awareness of (depending on the reason for the periodic checks) the individual(s) when required, as determined by the plan (e.g., Staff visually checks on/sees the individual(s) within a specific timeframe (15 minutes; 1 hour; 2 hours; 2x per night).	If specific proximity is required, this should be specified in the individuals' plan. e.g., Staff may be strategically located to hear the individual(s) at all times.	As needed
3. Response Time required for staff action	Immediately	Efficiently	As needed	As needed	As needed
4. Ability of staff to provide assigned supervision while performing tasks, duties, and activities other than supervision and/or to supervise more than one individual.	No	Yes, but only if clearly defined in the plan specific to the environment or activity.	Yes	Yes	Yes
Details	See person-centered plans				

How to create a Staff Action Plan within eVero?

Housing Subsidy Info

- If an SDP would like housing subsidy in the SD Budget, the must be approved for the preliminary approval prior to placing within the SD Budget.
- Housing Subsidy are to be recertified annually. It is requested that the FI dept. have all required documents by October 1st of that year.
- Some of the documents required are, but not limited to:
  - ✓ Current Lease
  - ✓ Housing Subsidy Agreement
  - ✓ Q and A Housing Assessment
  - ✓ W-9 of Landlord
  - ✓ Food-Stamps Award Letter
  - ✓ Social Security annual award letter
  - ✓ Wage or tax statements
  - ✓ Utilities paid in the month
- If need more information, please consult with FIC for the “Housing Subsidy Checklist.”

You can review the ADM #2022-03 OPWDD Housing Subsidy Program | Office for People With Developmental Disabilities (ny.gov) for more information.

How do I get paid?

- Did you setup Direct Deposit? As well as provide a W-9 to the Fiscal Intermediary Department.
- Is your “Paid To,’ name correct within your Support Broker Agreement? Did the Self-Directed Participant/Designee sign the Support Broker Agreement?

Systems Use

eVero

- Self-Hired Staff, Self-Directed Participants/Designee, and Support Brokers have access.
- Self-Hired Staff clock in/out
- Document Services, either Daily or Monthly like Monthly Summary Notes
- Input of invoices for reimbursements (ex. Community Classes, FRR, and etc.

Paycom

- Access only granted to Self-Hired staff
- Self-Hired staff can request time off
- Review accrual information
- View paystubs, past hours worked, direct deposit information, tax statements (w-2) and withholdings

Relias

- Self-Hired Staff only granted access
- This is used to complete OPWDD Mandatory Trainings, as well as any other required trainings such as Sexual Harassment Training.

Overview of the eVero Broker Portal

How can I support the Self-Directed Participants/Designee with their eVero portal?

- Make sure to review or attend our Monthly Self-Directed Participant/Designee Workshops? We have a PowerPoint, videos, and the SDP Guide (Version3)
- Within your Support Broker Agreement, do you have checked off about uploading reimbursements? Did you review the information on what is expected?
- Make sure to remind the Self-Directed Participant/Designee about all the Department of Labor Laws, OPWDD Regulations, and PCCS policies that they need to follow. Especially since they are the co-employer.
- Did you know about our Self-Hired Staff Admin Dept.? We have resumes on file to share if needed.
- Did the SDP/Designee let you know about Self-Hired Staff changes? Did they inform the assigned Fiscal Intermediary Coordinator?

How can I support the Self-Directed Participants/Designee with the Self-Hired Staff?

- Make sure to review the Self-Hired Staff PowerPoint, Videos, and FI-SHS Guide!
- Within your Support Broker Agreement, do you have checked off about supporting with SHS? Can you do meetings with the staff and SDP/Designee present?
- Make sure to remind the Self-Hired Staff about all the Department of Labor Laws, OPWDD Regulations, and PCCS policies that they need to follow.
- Did you know about our Self-Hired Staff Admin Dept.? If Self-Hired Staff are looking for additional hours, refer them to us.

Support Broker Office Hours

(Every 3rd Wednesday each month)

2 PM & 6:30 PM

Bring your questions & things you need help with.

This interactive session will be held on the 3rd Wednesday of every month, providing a supportive space to learn, share, and grow.

E-Meet on Microsoft Teams:

Meeting ID: 284 893 464 261
Passcode: oE9C2nq6

Contact:

Email: BrokerSupport@pccsny.org
Phone: 718-370-1088 Ext 242

Resources

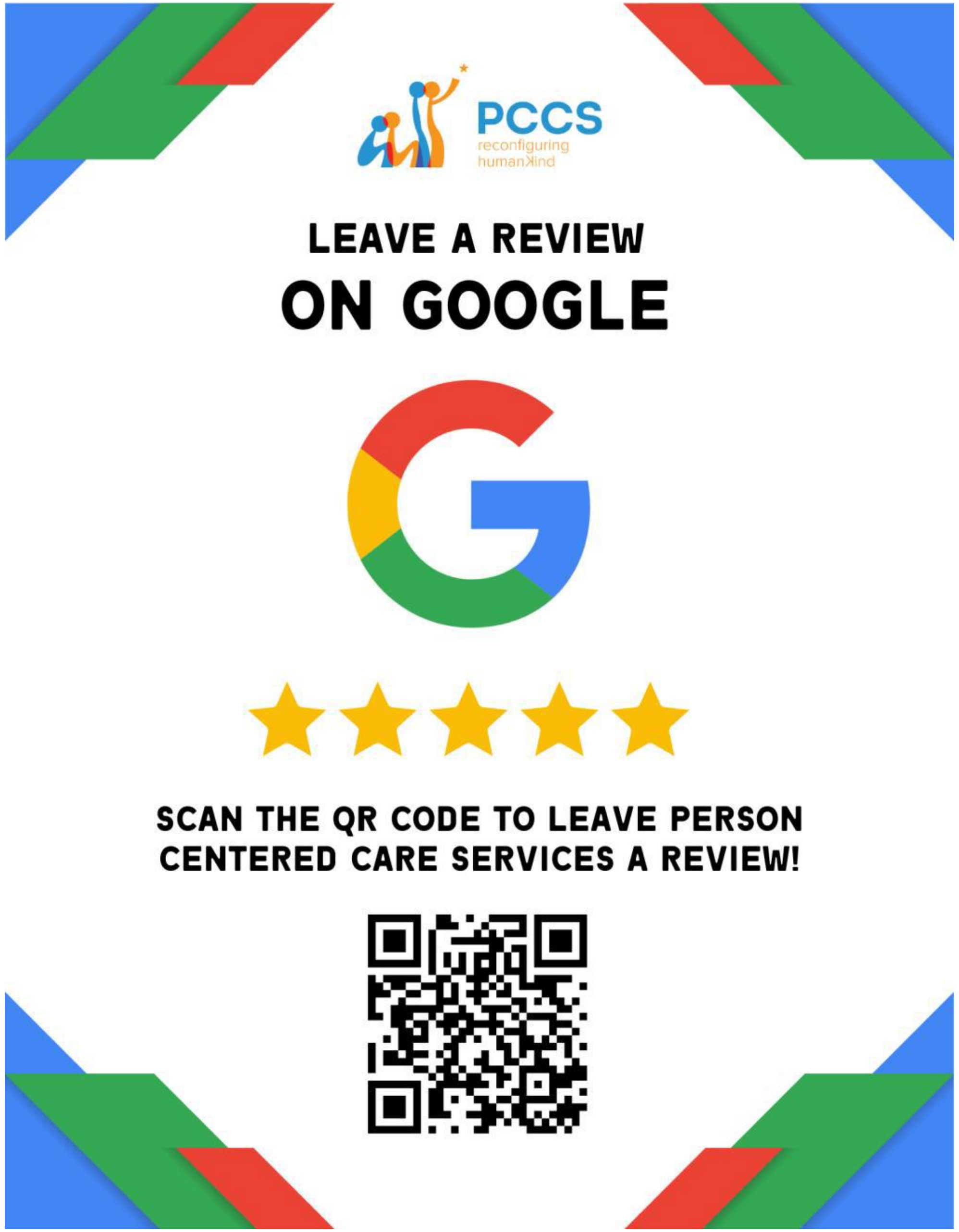
- PCCS Website (pccsny.org)
- OPWDD Website (OPWDD.ny.gov)
- Regulations & Guidance | Office for People With Developmental Disabilities (ny.gov)
- OPWDD SD Guide March 2022
- Department of Labor
- Electronic Visit Verification (EVV) Resource Library (ny.gov)
- Medicaid
- Office of the Medicaid Inspector General (OMIG)
- Unethical Activity Procedures Pamphlet
- eVero: Where Innovative Technology Meets Human Care
- My eVero Portal | eVero Login – Self-Directed Participant/Designee Website for eVero
- The eVeroPortal™ Mobile App for Individuals & Families | eVero – Self-Directed Participant/Designee APP for eVero
- eVeroMobile - eVero's EHR Mobile App – Self-Hired Staff APP for eVero
- Continuing Education & Training - eVero Corporation – eVero Training Videos
- Hiring Self-Hired Staff Toolkit (5)
- Self-Direction Guide (written by Person Centered Care Services) - Version 4
- What should be included within my Life Plan?

Agency Updates

Make sure to join us each month to:

- Participate in team building
- Hear updates from across the agency
- Share info interdepartmentally
- Announce the Peer-to-Peer winners & Staff Celebrations

DO NOT *forget to Nominate another DSP or ADMIN staff who went above and beyond within their role. Both of you can win!!*


PCCS
reconfiguring humankind
LEAVE A REVIEW
ON GOOGLE
SCAN THE QR CODE TO LEAVE PERSON CENTERED CARE SERVICES A REVIEW!


Any
Questions

Together, We Can Do More

Stay connected to PCCS:

@PCCSNY