Fiscal Intermediary:
Self-Hired Staff Guide

If you have questions, please contact your Payroll Assistant/Fiscal Intermediary Coordinator.
If you are unsure who to reach email SelfDirect@pccsny.org

Maintained by Self-Direction Leadership Team
Version 2, Effective April 2026

Table of Contents

FI CHAIN OF COMMAND **4**

TRAINING EXPECTATIONS **4**

SELF-DIRECTED SUPPORT PROFESSIONAL JOB DESCRIPTION **4**

EVERO **4**

WHAT IS EVERO? 4
DOWNLOADING THE EVERO APP & TURNING ON SERVICE LOCATION 4
WHAT IS ELECTRONIC VISIT VERIFICATION (EVV)? 4
EVERO AGENCY SETTING UP E-MAIL 5
ENROLLING YOUR SIGNATURE IN EVERO 5
USING THE APP 5
Entering Agency Code/Username/Password *5*
Selecting App Modules *5*
Service Delivery *5*
What is non-Billable time or Indirect Time? *12*
What happens if an error occurs? *14*
Telehealth Services *17*
OTHER WAYS TO TRACK ELECTRONIC VERIFICATION VISIT (EVV) 20
FOB *20*
Telephony *24*
MONTHLY SUMMARIES 27
Documenting a Community Habilitation Monthly Summary Note (CH MSN) *27*
Community Habilitation Monthly Summary Note (CH MSN) Requirements *31*
ADDITIONAL APP RESOURCES 31
Punch In/Punch Out *32*
Work History *32*
Service Summary *32*
Mileage *32*
Staff Activity Fees (SAF) *35*
Staff Dashboard *36*
COVID-19 Vaccine Info/Test Results *38*
Quick Links *39*
Reporting an Issue *39*
My Pin/Change Password *39*
My MFA (Multi-Factor Authentication) *39*
Other Settings *39*
ALERTS & THEIR MEANING IN EVERO 39
Potential Missed Billing Opportunity *39*
Approaching Overtime *39*
Reached Overtime *40*
Staff Rate Warning *40*
PRA Threshold Warning *40*
Authorized Time Alert *40*
Budget Spending Warning *41*
Self-Hired Community Habilitation Goals *41*

PAYCOM **41**

NEW HIRE TASKS 42
TIME MANAGEMENT 42
Requesting Overtime *42*
TIME OFF REQUEST 42
Requesting Personal Time Off (PTO) *42*
INFORMATION 43
PAYROLL 43
EXPENSES 43
DOCUMENTS 43
CHECKLIST 44
PERFORMANCE 44
PERSONAL ACTION FORMS 44
Personal Action Forms (PAF) *44*
Personal Discussion Forms (PDF) *44*
LEARNING 45
ASK HERE 45
COMPANY INFORMATION 45

RELIAS 45

WHAT IS RELIAS? 45
HOW DO I GET ACCESS TO MY RELIAS ACCOUNT? 45
DASHBOARD: 45
ASSIGNMENTS: LEARNING & TRANSCRIPT: 46
SEARCHING & ENROLLING IN ELECTIVE COURSEWORK: 46
NAVIGATING THROUGH AN ONLINE COURSE 47
IMPORTRANT TRAINING INFORMATION 48
RELIAS APP 49

HUMAN RESOURCES RELATED INFORMATION 49

PERSON CENTERED CARE SERVICES EMPLOYEE HANDBOOK 49

SERVICES/SUPPORT MEASUREMENT 49

ANNUAL/SEMI-ANNUAL GOAL ASSESSMENTS 49

LANGUAGE TRANSFORMATION 49

WHAT IS PERSON-CENTERED LANGUAGE 49
LANGUAGE TRANSFORMATION SAMPLES 49

EMPLOYER (PARTICIPANT/DESIGNEE) RESPONSIBILITIES 50

RESOURCES & FORMS 51

FI Chain of Command

All Self-Hired Staff must reach out to the Self-Directed Participant/Designee for any related questions or concerns, since they are your direct supervisor. If the Self-Hired Staff does not get the guidance needed, the Self-Directed Participant/Designee will reach out to the Fiscal Intermediary Department for further guidance.

Training Expectations

All candidates must be cleared to begin training and work. Staff are required to complete fingerprints, background checks, and the online Relias trainings assigned to them prior to starting direct work with the Participant.

During this time, staff will be provided with the guidelines of their role including but not limited to the expectations of the Fiscal Intermediary Department, Participant, and Person-Centered Care Services (PCCS) expectations. Once staff has completed trainings, the Self-Hired Staff Liaison will inform participant/designee that their staff can begin working.

Self-Directed Support Professional Job Description

Each Self-Hired Staff signs a Job Description within their Paycom account. If a Self-Directed Participant/Designee, ask you do to something outside of what is mentioned within, please reach out to your assigned Fiscal Intermediary Coordinator (FIC) for a further conversation. A Self-Directed Participant/Designee can request for you to sign an additional Job Description, and we ask that you share this with the FIC to place in your HR file.

eVero

What is eVero?

eVero, also known as, EMPOWER is a program where a Self-Hired Staff can document services and review information about an individual who they will be supporting. e**Vero's EMPOWER™** module was purpose-built to tackle the unique management and compliance challenges of Self-Direction, including EVV. The intuitive software platform leverages integrations, automation, and native mobile apps to simplify data gathering and streamline processes. Powerful tools and workflows facilitate rapid and accurate data collection and sharing, meeting tracking, invoice creation, and record-keeping. APIs with payroll and billing systems increase capacity and precision while lowering turnaround time. Find more information on www.evero.com.

Downloading the eVero App & Turning On Service Location

Step 1: Within app store (iPhone or Andriod) look up the app or website
Step 2: Follow the instructions within the download, and turn on service location with the app.

eVeroMobile
formerly known as digitalAGENCY™ Mobile

What is Electronic Visit Verification (eVV)?

Section 12006(a) of the 21st Century Cures Act mandates that states implement EVV for all Medicaid personal care services (PCS) and home health services (HHCS) that require an in-home visit by a provider. This applies to PCS provided under sections 1905(a)(24), 1915(c), 1915(i), 1915(j), 1915(k), and Section 1115; and HHCS provided under 1905(a)(7) of the Social Security Act or a waiver. For more information regarding eVV visit: Electronic Visit Verification

(EVV) | Medicaid.

***Side Note: The eVero app, MUST have the location "ALWAYS ON," to ensure is accurately reflecting the Electronic Verification Visit (evv).*

eVero Agency Setting up E-mail

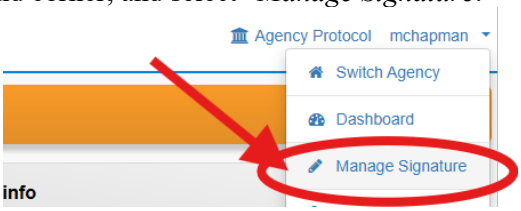
You will receive an email from "noreply@eVero.net" providing you with your username as well as a link to reset your password.

Please note in the email your username will include @pccsny.org (example: jsmith@pccsny.org) as part of your username however, it is not needed when signing into the app. You would simply use (jsmith) as your username-You will follow the prompts to reset your password. Once you have completed the setup, open the app and sign in.

It will require an Agency Code which is PCCS.

Enrolling your Signature in eVero

Go to pccs.evero.com sign in using your username and password for the eVero app.
Click on your name within the right hand corner, and select "*Manage Signature*."



Click to enroll signature.
Click change, use finger to complete signature.

Using the App

Entering Agency Code/Username/Password

The first time the app is used on the device, it will need to be registered to an agency, by a specific user. The user will enter the agency code (provided by eVero), and then the username and password (the same one normally used to enter digitalAGENCY™). The first time this information is entered registers the device. The user will need to enter the username and password in again once the registration process is complete.

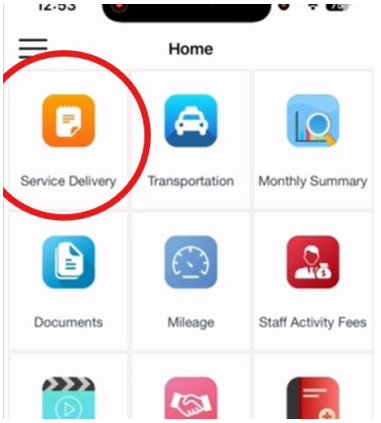
Selecting App Modules

Select the Module from the available ones upon logging in. Each Module will be explained further in this User Guide.

Please note that your tile layout may be different based on your title/role as given by the FI agency. For example, staff only providing Community Habilitation services, would not have access to the "SEMP Note" tile, on Service Delivery and Monthly Summary.

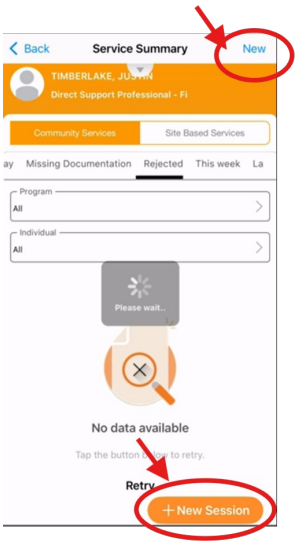
Service Delivery

This app allows you to enter service delivery time (attendance) and response to services at the point of care. The mobile app requires the time to be entered in real-time, and the response to services captured on the same day they were delivered.

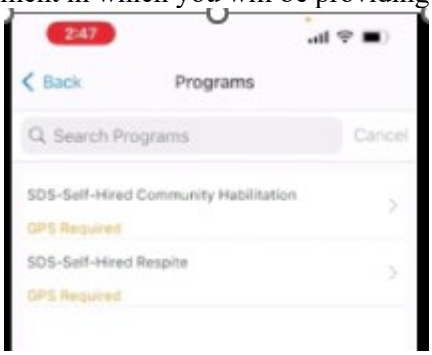


Punching In for the shift

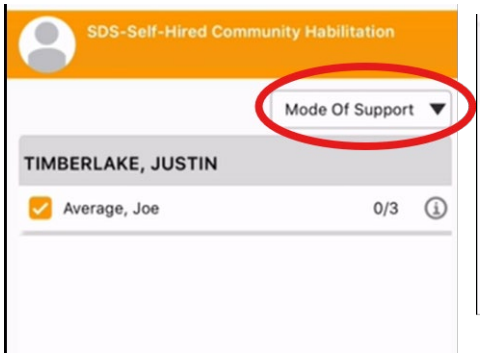
Select "**New**" at the top right corner of the screen or "**New Session**" at the Bottom right corner of your screen

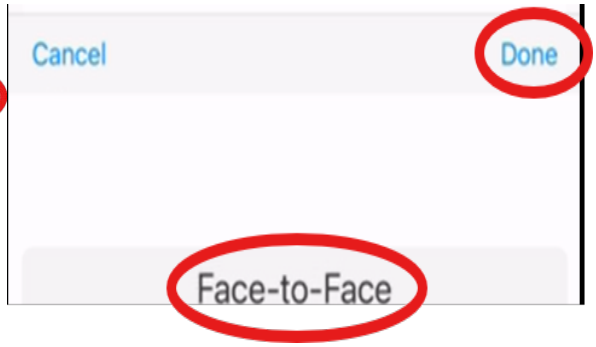


Once NEW is selected, then the programs that you are assigned to will come up on the next screen. At this point, select the department in which you will be providing services to.

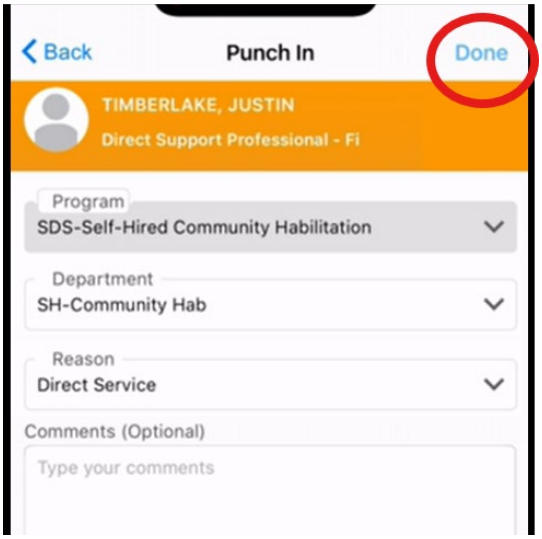


Select **Mode of Support** (i.e. *Face-to-Face*; Telehealth), also ensure the individual(s) name is checked off. Once completed hit **DONE**





Ensure that you have the **Correct Department Selected** either *SH-Community Hab or SH-Respite*. As well as the reason should be "**Direct Service**." Once all is correct, please select **DONE**

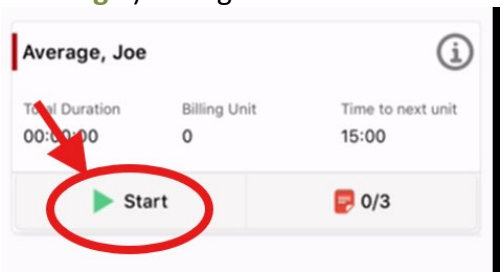


Please Note:

In department, you will see SHS – Community Hab.; SHS – Community Hab. 1:2, and SHS – Community Hab. Weekend. PLEASE ONLY CHOOSE SHS – Community Hab. Unless instructed to do otherwise.

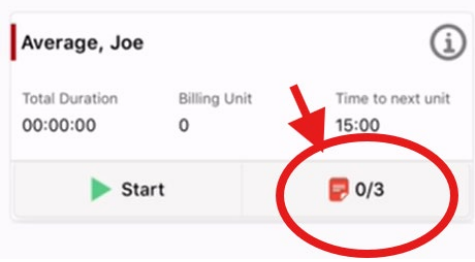
Services cannot be documented against a person who does not have an active current habilitation plan.

Click "**Start**"(**Green Triangle**) to begin the services.

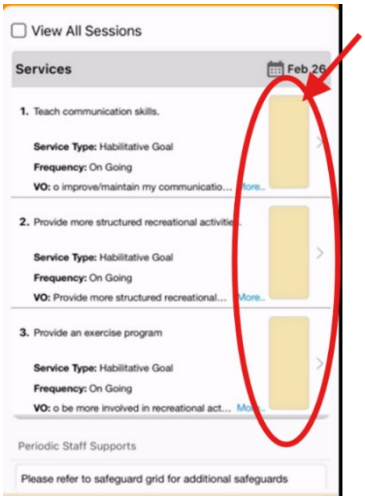


Entering Response to Services with Time/Attendance

Service: Before ending your shift, if you provided Self-Hired Community Habilitation and/or Self-Hired Supportive Employment you must ensure goals are being documented. You would click on the **RED paper icon**, as shown below:

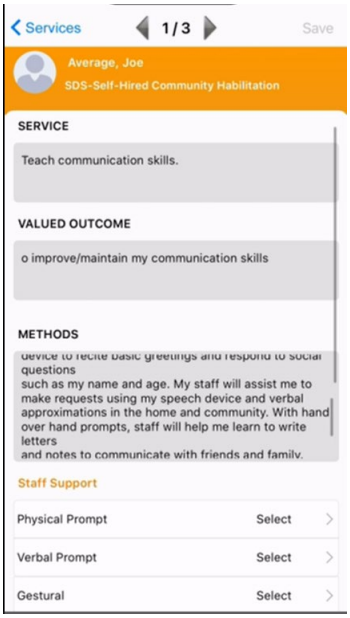


Entering a response to Service: You would click on the **YELLOW box**, on the goal or service you provided and document the *Staff Supports, Individual Response, Service Location, and Comments*. If providing Self-Hired Community Habilitation and/or Self-Hired Supportive Employment you must provide at least one goal. The longer your shift the more goals you might work on.

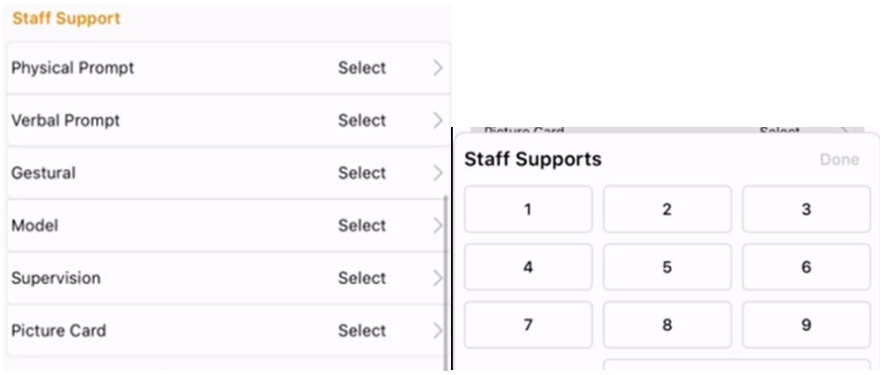


****Please Note**: Entry for response for services can only be made on the date they are being delivered. (i.e., if today is July 8th, that will be the only day available for you to enter a response to service). The Service will be listed at the top, the method below that. If the methods are longer than the box, users can read through them by scrolling with his/her finger within the section.

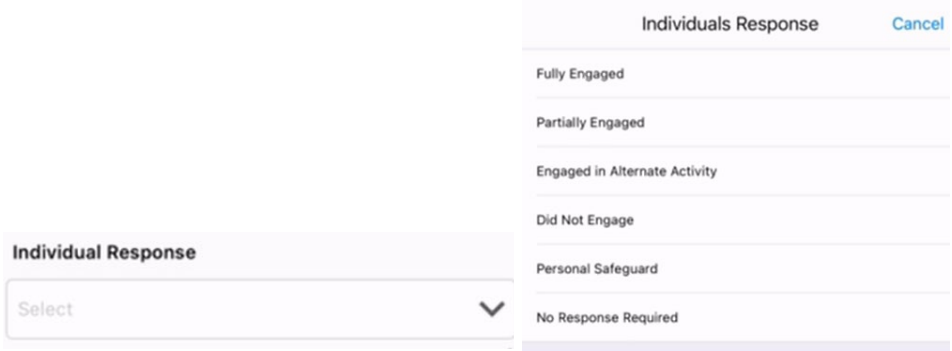
Once select a specific goal you worked on, the following box will appear:



Choose the **Staff Support** (*how did you support this goal with the individual?*) & the **number** of times each might have been

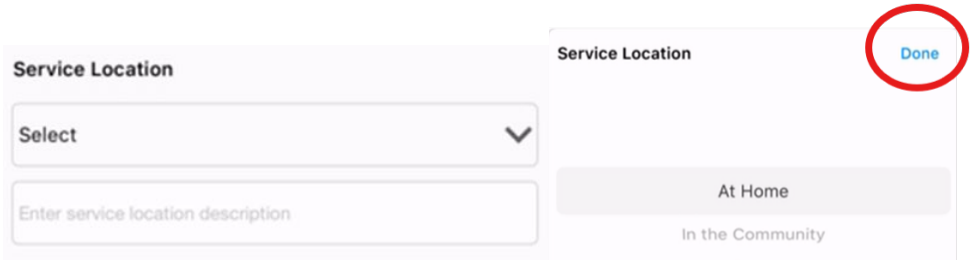


After you will select "**Individual Response**." (*how did the person respond to that goal?)*

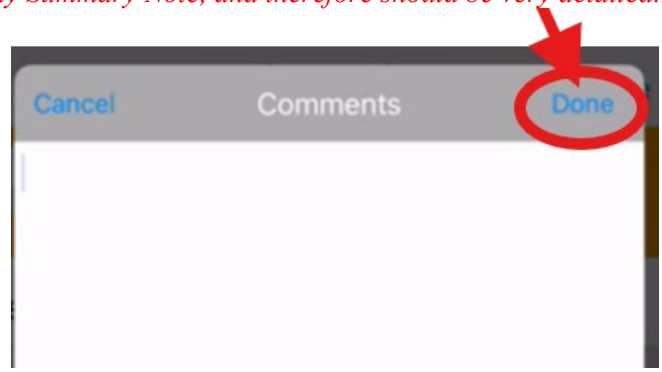


Next you complete the "**Service Location**." (Where did you work on this goal?). Choose either **HOME**

or COMMUNITY. If the Community, please make sure to add the full address. Once completed Select DONE



Make sure to include COMMENTS, in more detail what and how you provide support within this goal. Once completed, select "DONE." ****Side Note**: *This information can help generate an AI Community Hab. Monthly Summary Note, and therefore should be very detailed.*

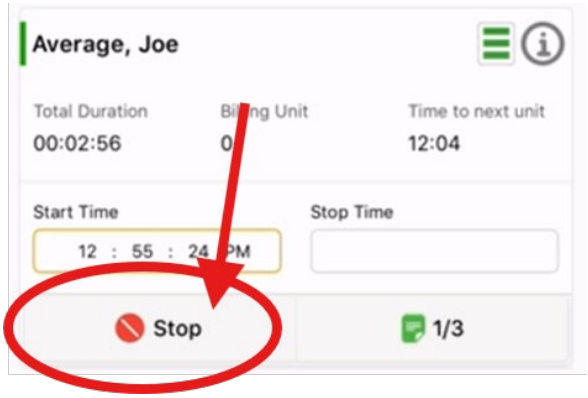


Users may choose to use the device's internal keyboard, or speech to text.

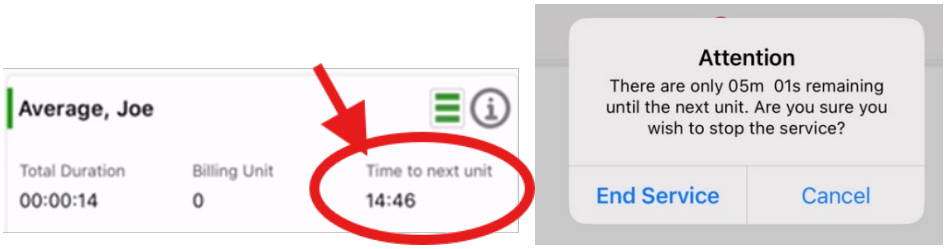
Once all goals have been entered and saved, now you can either continue your shift or close out the day.

Closing out for the Day

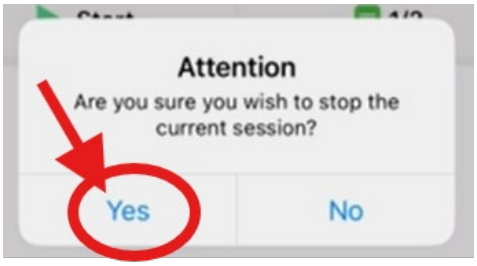
Once the responses/attendance is completed for the day, there are a few things that need to be done. If the program is set up for Services only (no time/attendance was completed on the device), the user will only need to log out (i.e. Respite). If the program is set up for Attendance + Services or Attendance only (i.e., the user created a group of individuals earlier), then the group will need to be ended. Be sure that all individuals have been "Stopped" using the Stop icon. Record all services, as necessary. If an individual has time but no services, the system will prompt you to enter the responses or remove the individual from the group.



The system will automatically track billable units based on the program's billing standards. Below the individual(s) it will give you a running duration of direct time with that person, the current billing unit, and the time until the next unit. This can all be seen at any time while in the app. If you have 7 minutes or less before the next unit, please select "**CANCEL**," make sure to recap the day with the Self-Directed Participant and/or plans within the next shift. Below are screenshots on showing you how you can tell if you are close to add another unit of service:

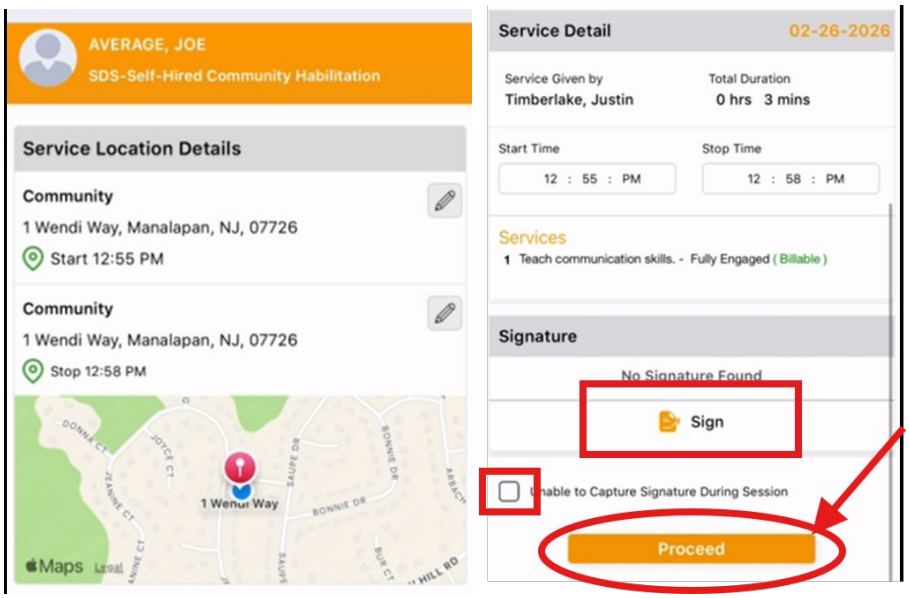


Once you press "STOP," the following message will appear:



If you are ending your shift for the day, you would hit **YES**, and review the following screen. If you are working with the individual and not providing "Direct Service," then you would click **NO**. Please review *NON-Billable Time Section* within this Manual for more information.

Ensure you review all the details that the time, location, and services are all completed.



Before leaving your Self-Directed Participants' location, please make sure to have the Self-Directed Participant/Designee sign off on your shift. Individuals and/or their guardians/advocates can sign off on daily documentation in real time. After a note has been complete, a Service Summary will be presented.

The staff can review the note, and the Individuals and/or their guardians/advocates confirm that everything is accurate by clicking the sign icon to sign off for the day. A pre-populated list of those who can sign off will show, and then a signature can be entered directly from the device via their finger or stylus.

If the Self-Directed Participant/Designee is unable to sign, please check "Unable to obtain signature." They will have to go into their own portal for eVero and sign off on services.

Additional Information

- All hours **MUST** be approved by the Self-Directed Participant Designee by Sunday at 11:59PM. If they do not approve your hours this will result in a delay in payment. It is your responsibility as the Self-Hired Staff to make sure all days worked are signed up prior to the deadline.
- If you notice that your hours are not shown on either Paycom or eVero correctly, please discuss them with the Participant/Designee and they will contact the Self-Direction Department to look further into this matter.

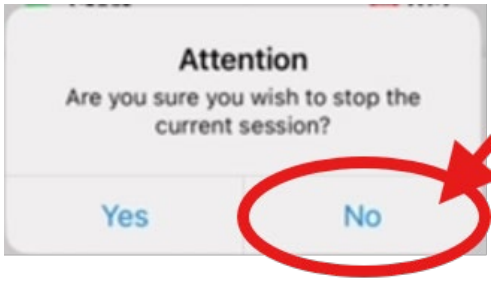
What is non-Billable time or Indirect Time?

Any non-billable time must be entered in the "comment' section of the Self-Hired staff eVero app. An example of nonbillable time would be if Self Hired staff worked on a goal before a Participant attended an activity, such as a Community Class, but did not accompany to assist in that class. If they wait outside until the class concludes, the duration of time they wait outside is considered non-billable.

It is best practice to use non-billable time as needed. For example, if a Self-Directed Participant is attending a Community Class for 2 hours. You might be requested to punch out for the day, and then back in.

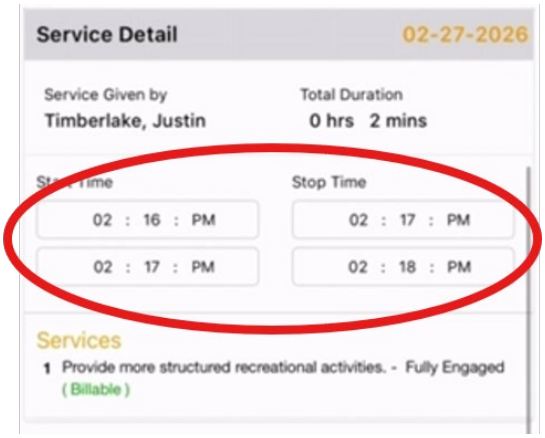
How do I document Non-Billable Time in eVero when pausing direct services?

You would complete "*Punching In for a Shift*," process and in order to pause services you would select "**Stop**," and select "**NO**."



This means you are still punched in and getting paid, but right now you are not providing direct services to the individual. Once the individual is out of the program, and you continue to provide services make sure you select "Start," again and continue the service and working on goals/providing relief.

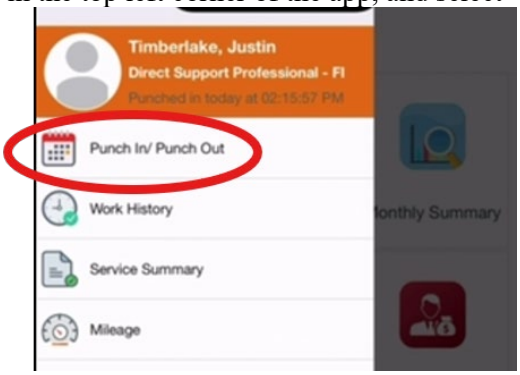
When documenting non-billable time, the hours must be identified within the Comments Section of the goal. For example, if the Participant is in the Community Class from 2:00 pm – 3:00 pm, the non-billable time must be indicated as such. If you are attending the class with the individual, the time is billable, and you can continue to provide direct services. Therefore, you do not have to stop services. You would then continue the shift, and then follow the steps above "*closing the day*." You will know that this was done correctly if you see two or more shifts within the day. See below:



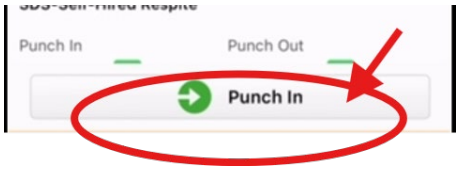
How else can I document Indirect Time?

Completing Required/Voluntary Approved Training (i.e. Annual OPWDD Trainings, or Onboarding Training)
Attending a Meeting (i.e. Life Plan/COS or Staff Meeting)

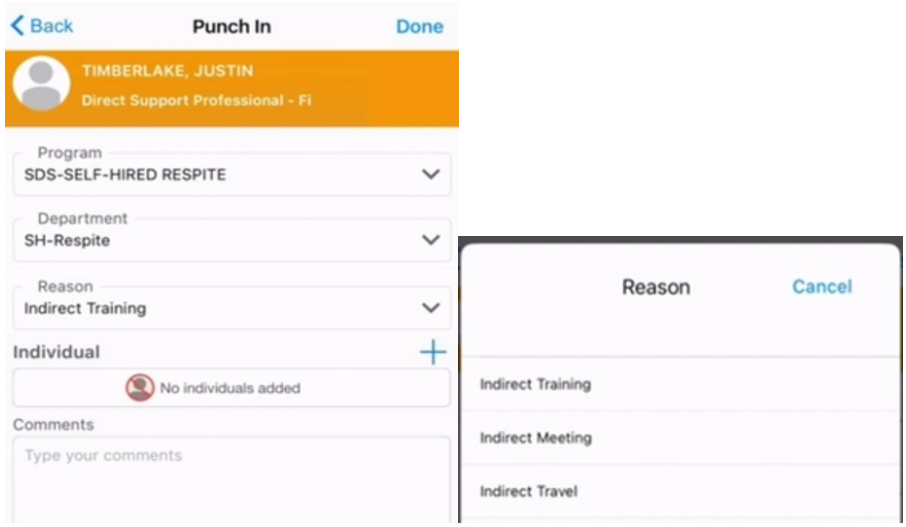
By selecting the "**LINES**," in the top left corner of the app, and select "**Punch In/Punch Out**."



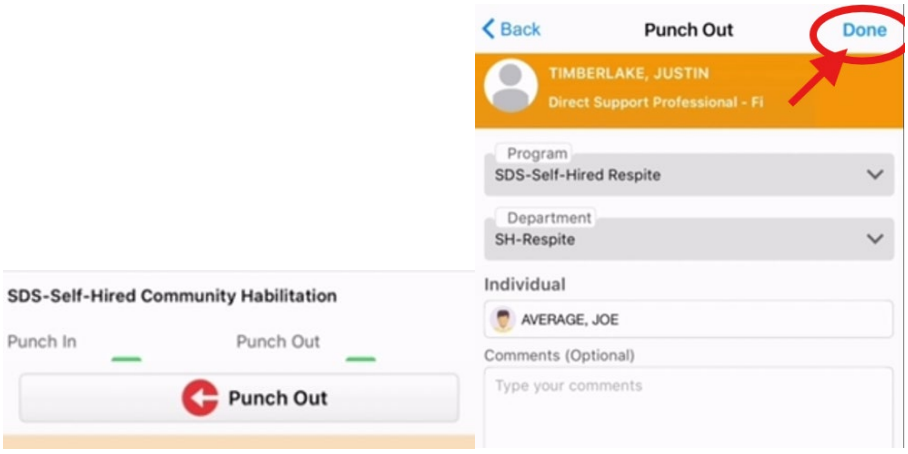
Once this is selected, you will "**Punch In**," and select which Indirect Time you are looking to get paid for. (i.e. Indirect Meeting or Indirect Training)



Once you select the Indirect one you are looking to be paid for, then you can the following screen you want to ensure that the **Program, Department, Reason, Individual, and Comments** are completed prior to hitting **DONE**. The Individual you would select one or more if this is a training you are looking to be paid for. Or if it is a meeting only click the one individual this is pertaining to. In Comments you want to be clear as to either the training completed, or the meeting attending.



After you are done for the meeting or training, you would then select "**Punch Out**,", review the shift and select "**DONE**," this will finalize the shift.



What happens if an error occurs?

In the event the shift is incomplete, the Payroll Assistant/Fiscal Intermediary Coordinator will work with you to

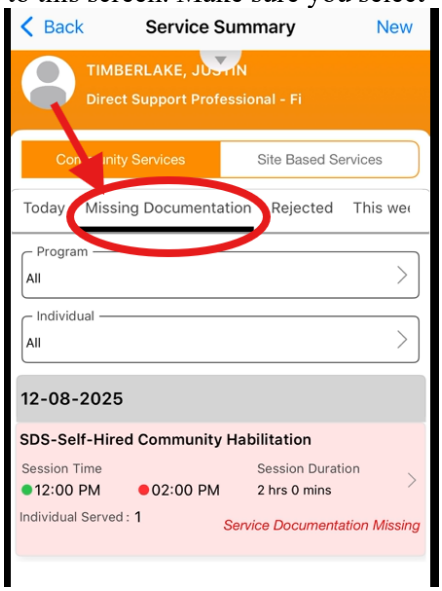
correct. It is your responsibility to report an issue and provide the Missed Time/Service Delivery form for manual entry. This is to be used in an emergency where eVero is not working properly. This form needs to be provided with to the Payroll Assistant/Fiscal Intermediary Coordinator 24 hours after the error occurred. If submitted later, this can result in delay in payment, alongside disciplinary action for not following policy. Please review this section further

In the event you submit 3 or more "Missed Time/Service Delivery Forms," in a given period. The Self-Direction department will reach out to you to see what errors are occurring to assist. In the event you continue to provide the templates after the meeting, this will be addressed with Quality Management (QM) department and can result in an investigation.

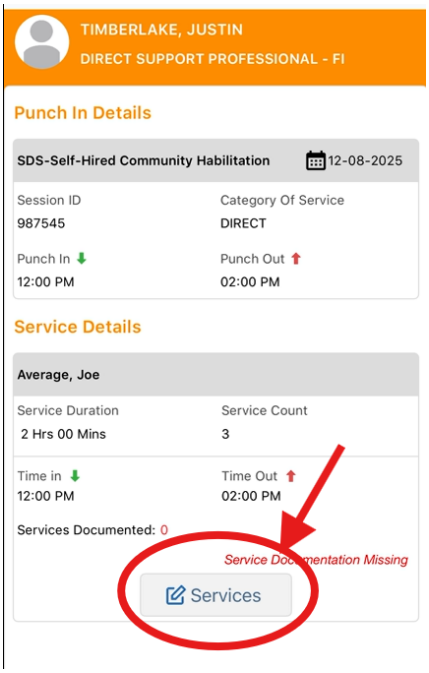
Using the Missed Service Delivery Form

Once the form is sent to the Payroll Assistant/Fiscal Intermediary Coordinator you are responsible for adding the goals worked on within that shift.

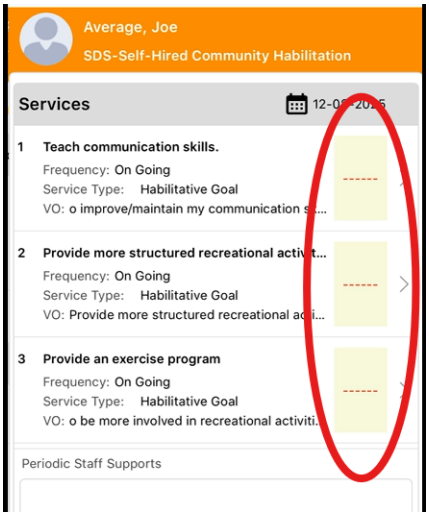
After confirmation is received that the date/hours are within eVero, you will open your eVero app and select Service Delivery which will bring you to this screen. Make sure you select "**Missing Documentation**."



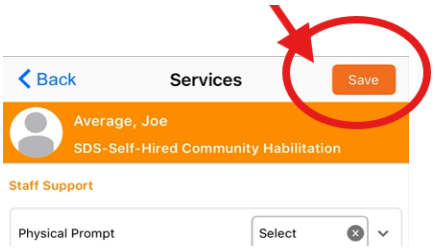
Then you would select the Date, you are missing "**Service Documentation Missing**," as shown above. When you click on the date, the next box will appear for you to select "**Services**."



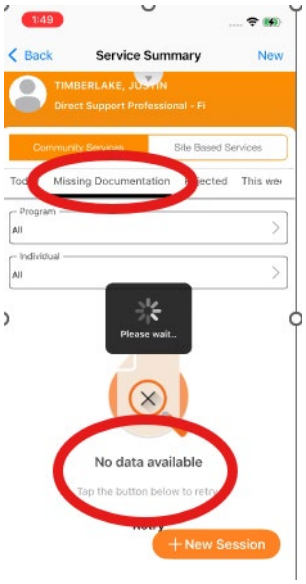
Next you will be able to add the goals into the shift by selecting the "Yellow Boxes," as shown below and would add staff supports, Individual Response, Service Location, and Comments just like you would if you clocked incorrectly.



When all information is completed, make sure to click SAVE, after each goal entered. You will receive "**Saved Successfully**," message to press **OK**.



Finally, after all information has been entered and saved within the "Missing Documentation," there will no more entries in that section which means you completed this successfully.

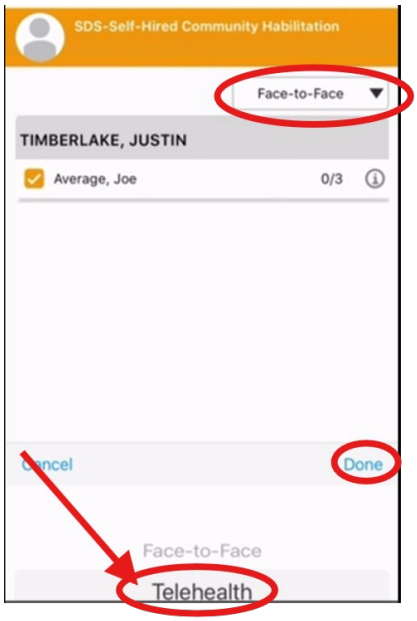


Telehealth Services

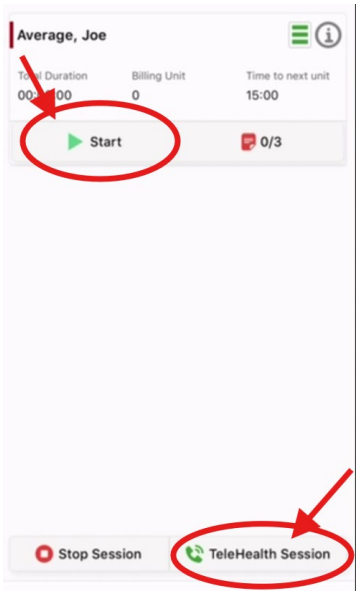
To use Telehealth Services, the Self-Directed Participant needs to reach out to their assigned Fiscal Intermediary Coordinator to be assessed. If approved, you can provide Telehealth supports.

Once approved make sure to download the eVero Connect app, this is the Telehealth mobile app that enables eVero clients to deliver support services to Individuals remotely via compliant 2-way video conferences on mobile devices. After it downloaded please follow the steps below:

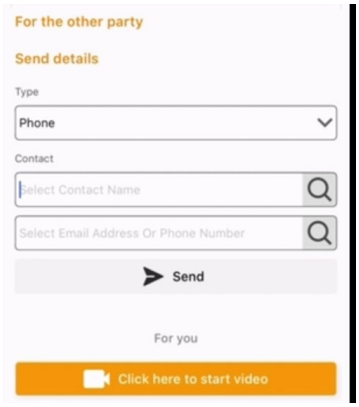
To begin a telehealth video conference call with the person you support, you will login as usual, select the department and punch in as shown in "***Punching In for the shift***" above. However, once you get to "***Mode of Support***," make sure to select "***Telehealth***."



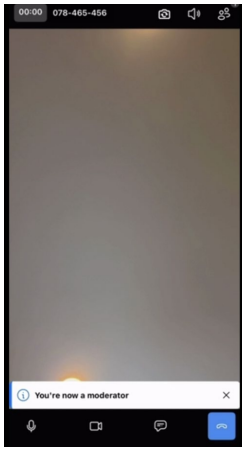
Once you have done the standard steps for logging in continue, until this screen appears, where you will select "**Start**," and then "**Telehealth Session**.



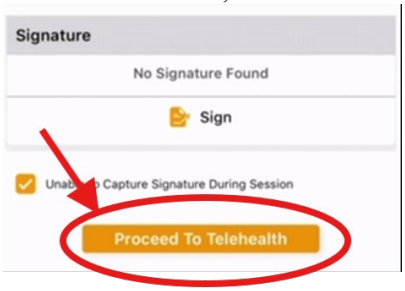
Once you select the Telehealth Session Button, it will as you the Type of Telehealth Session you are looking to provide. If you download the eVero Connect app, you would select eVero Telehealth Video. This would then prompt you to add either the phone number or e-mail of the other party you are looking to connect with. One you "Send," then you can click here to start video.



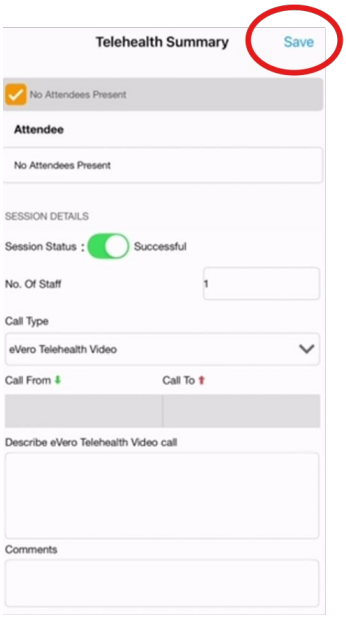
This will automatically redirect you to the eVero Connect app, where it would look similar to Facetime or Zoom call. ***Make sure you have your video on to count this as a 2-way video conference.*



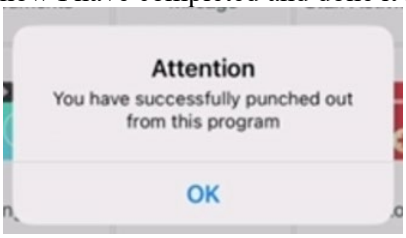
After the session is over, you can end the call, document service as mentioned above in the section "***Entering a response to Service,"*** as it is the same process. Alongside following "***Closing out for the day***." However, instead of proceed it will state "**Proceed to Telehealth**," make sure to click.



The final step will allow you document how the Telehealth Session went, and make sure you complete all areas. For example, if there were additional people for support, Session Status, Call Type, Describe eVero Telehealth Video Call, Comments, checking off the Telehealth was a 2-way video conference, and follow-up plans. Once this is all completed you can select "**Save**."



After I receive this message, I know I have completed and done it successfully.



Other Ways to track Electronic Verification Visit (evv)

As the Self-Hired Staff are required to have access to a smartphone, sometimes staff have difficulty with technology, and with pre-approval from the Self-Direction Department these are other ways one eVV can be tracked.

FOB

Obtaining an FOB

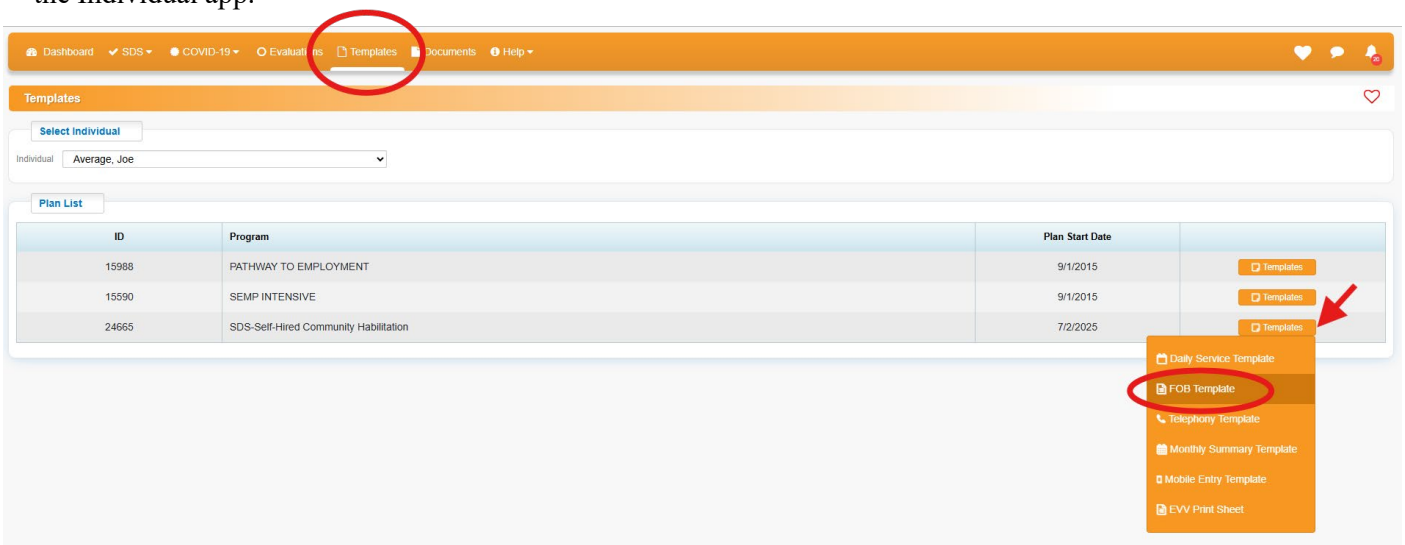
A FOB, or Fixed Object, device is used to place secure, accurate EVV. The FOB will be used for Self-Hired Staff who have difficulty using the eVero app. When you press the button on the FOB, the FOB will display a number. This number is an encrypted 8-digit passcode which reflects the current date and time. If the client chooses to utilize this option to capture EVV, FOB Devices must first be purchased by the agency and installed. This FOB needs to be requested by the Self-Directed Participant/Designee and the FI dept. will determine if they are deemed eligible to receive.

What website do I use?

Myeveroportal.com

Using the FOB, The Paper Option: Creating & Documenting a FOB Session Important

We recommend that the FOB templates are printed and available so the staff can easily record the information and create the backup supporting documentation at that same time. These are available in the Staff Portal and through the Individual app.



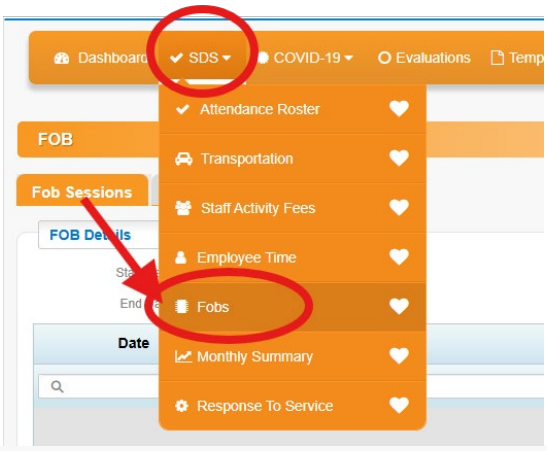
Providing the Service(s)

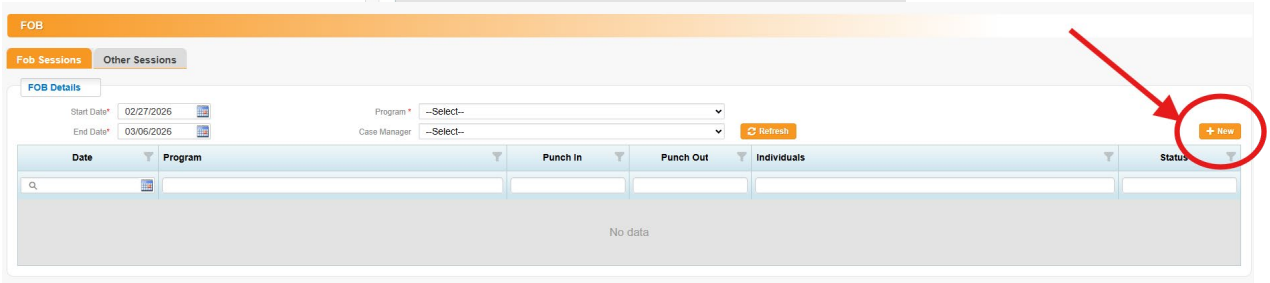
Person providing the service(s) will press the button on the FOB, which will display a number. This number is an encrypted passcode which reflects the current date and time. This information needs to be written down as it will be needed when documenting for the service(s) When the service(s) are complete, the person providing the service(s) will, again, press the button on the FOB, which will display a new number. Remember, this number is an encrypted

passcode which reflects the current date and time. As with the first passcode provided, this will need to be written down as it will be needed when documenting the service.

Documenting for the Service(s):

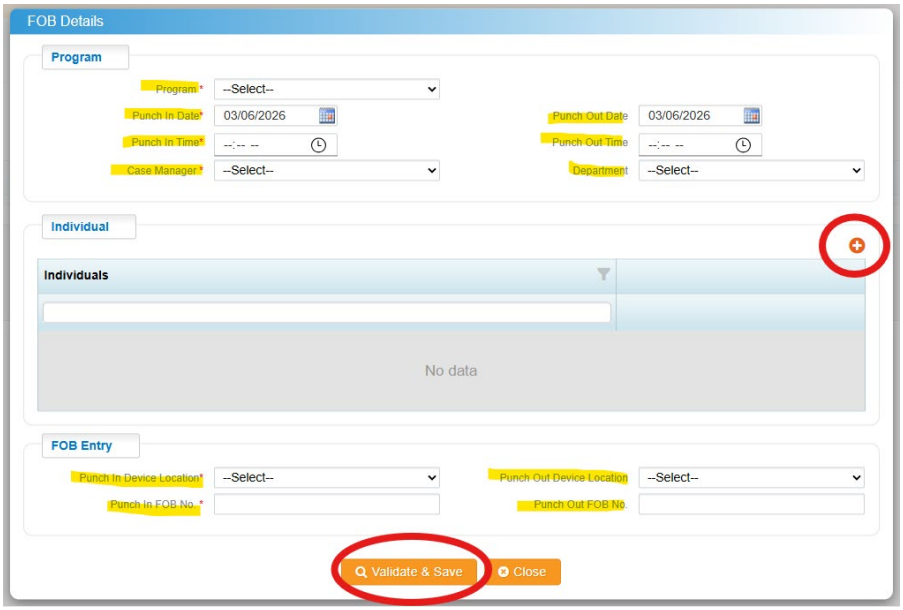
The person who provided the service(s) can create a new session within the FOB Module by clicking the + New button to the upper right of the FOB Details Grid and completing the following steps.



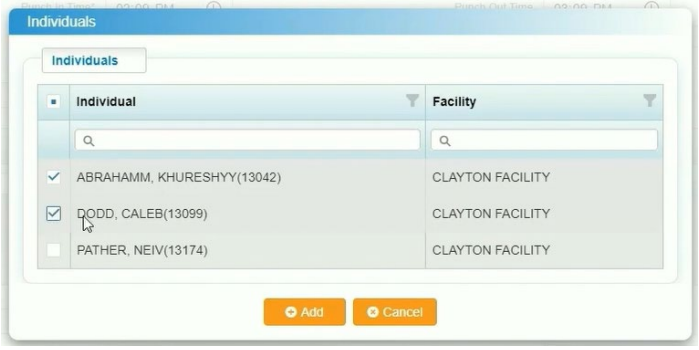


Select the Program from the dropdown Enter in or use the calendar widget to enter the Punch in and Out Dates Enter the Punch in and Out Times Click on the plus sign in the Individual section to display a list of Individuals. Select the Individuals needed to be added to the session and click Add.

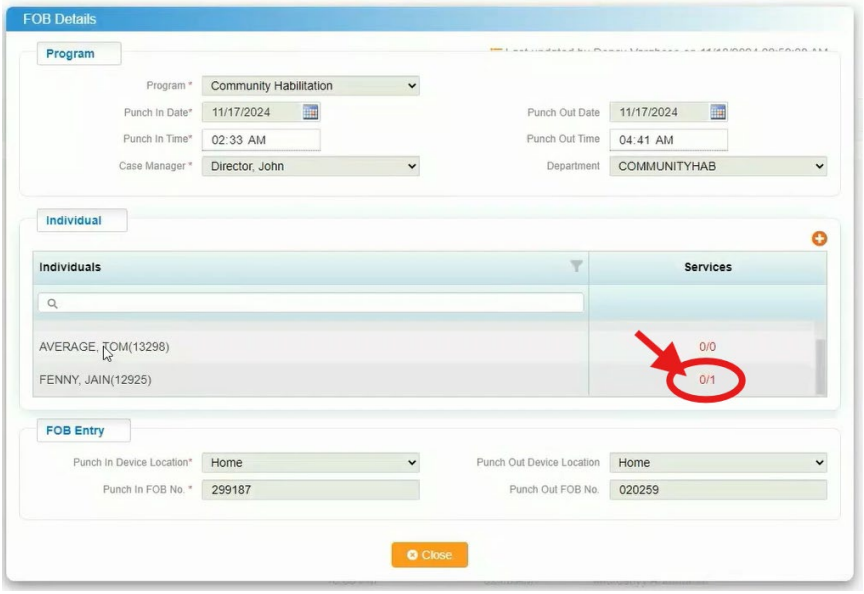
Complete the FOB Entry section at the base of this screen and click Validate & Save when ready, or Close to close this screen without saving.



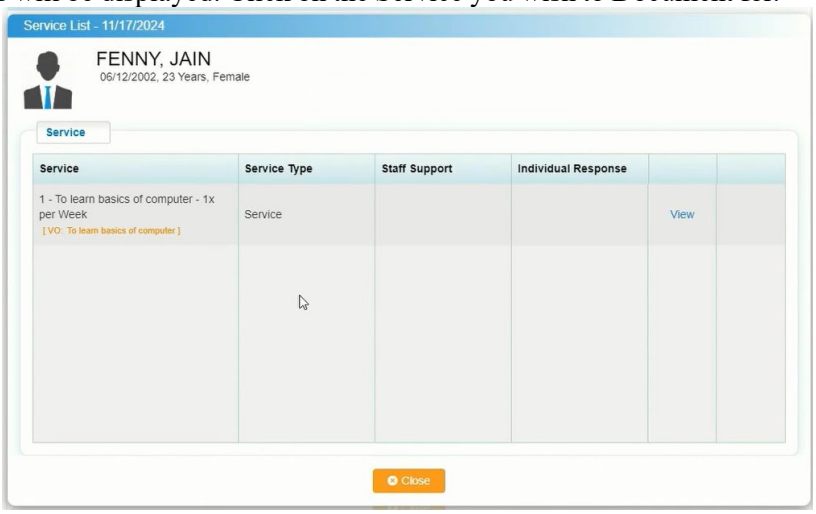
For a group session, if all selected individuals share a common FOB device, then the FOB Device Location will default to the Location specified in the EVV Device Registration Screen (i.e., the Location Nickname).



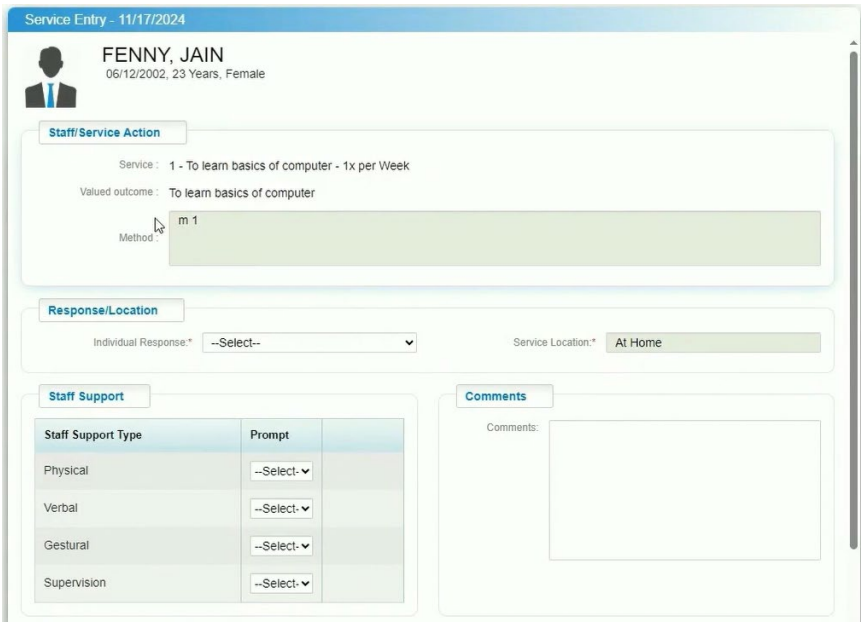
After creating the session, you can document the services provided by clicking on the Service Count within the Services column.



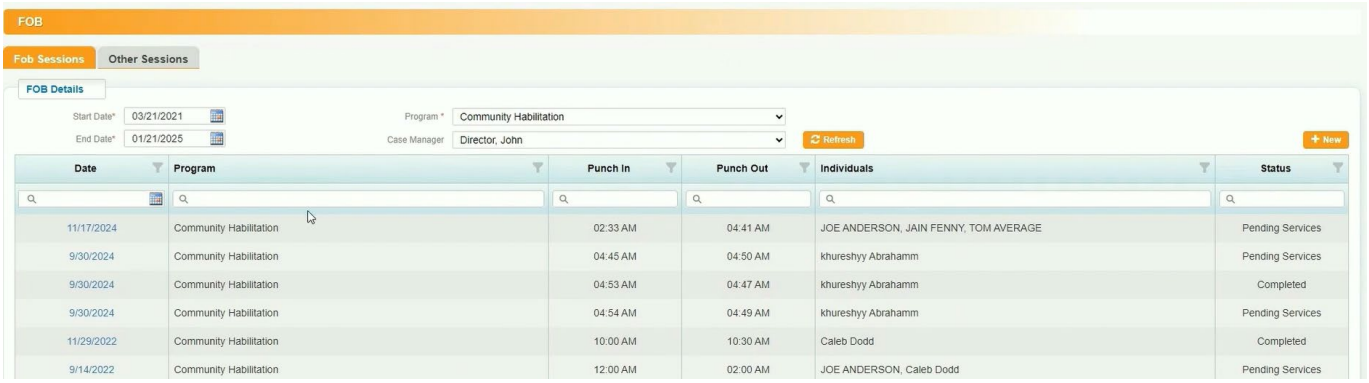
A list of Services will be displayed. Click on the Service you wish to Document for.



Review the Staff/Service Action section and fill in all required or needed fields in the Response/Location, Staff Support, and Comments sections. Click Save to save changes or Close to discard.



Once saved, the user will be redirected to the FOB Details Screen. The Status column found to the right of the grid will indicate the status of the Services documented for whichever sessions fall within the Start and End Date filter. To update the Start and End Date, enter in the date or use the calendar widgets provided then click Refresh.



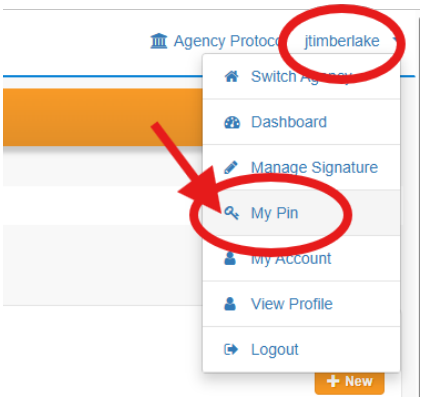
Telephony

If you are interested in using the Telephony option, this must be pre-approved by the Self-Direction Department. This is where you would be able to document services provided by using a landline. This is only allowed if one is unable to get access to a smart device, or technical

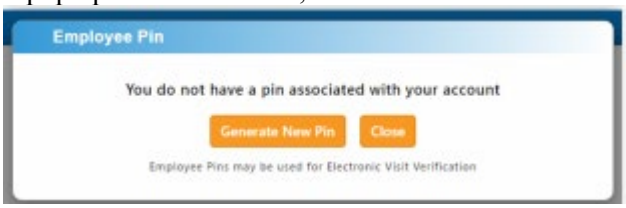
Create Employee Pin

Once logged into the system, the user will need to click on their name at the top right of the screen. When clicked, a drop down will be displayed, and the user will then click on My Pin.

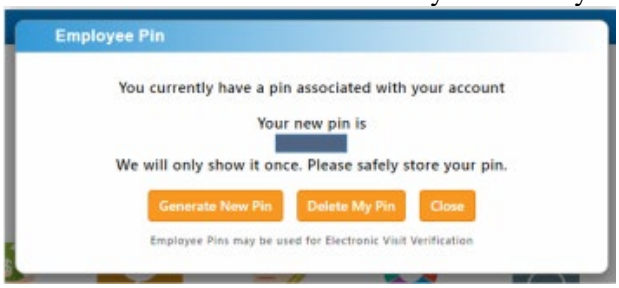
Note: *In this example, the name of the user is JTimberlake*



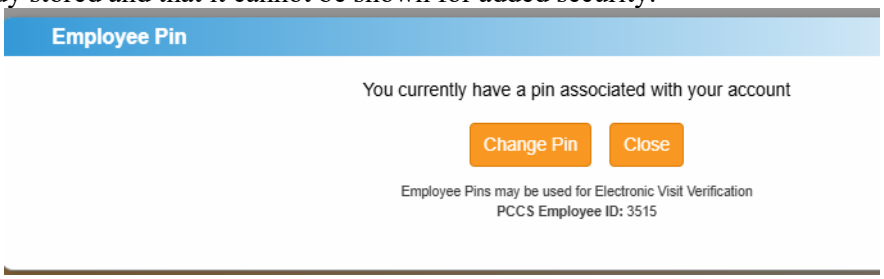
If the user has not yet completed the steps to generate a pin, the Employee Pin pop up will appear that notes that there is not currently a Pin associated with the account. The user will be provided with the options to Generate New Pin or to Close the pop up. To create a Pin, Click Generate New Pin.



When Generate New Pin is clicked, a new pin will be displayed and the pop up will note that the pin has been generated successfully for the account. This pin is only displayed this one time and it is recommended that you safely store your pin for future reference. Click Close once you've safely stored your pin.

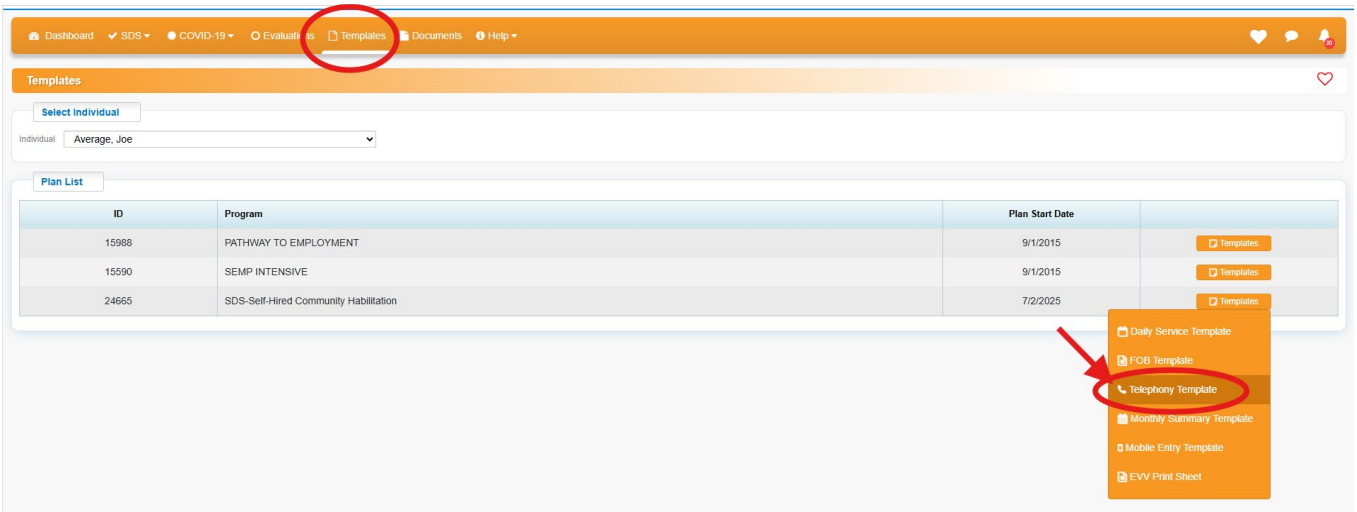


If the user has previously completed the steps to generate a pin, the Employee Pin pop up will appear providing the user with the options to Generate New Pin, Delete My Pin, or to Close. The pop up will note that a pin is already stored and that it cannot be shown for added security.



How to begin Session Using Telephony with Landline?

Prior to punching in and starting your services, please make sure to get the Telephony Template for the program you will be providing services for. This can be found on the myeveroportal.com website, as shown below:



This can also be provided by the Self-Direction Department, if needed. On this form, will have the call in number to start the session, and Program Code, alongside the how to mention goals worked on and prompting.

Stage 1: Start Session
To begin, the user will enter their 6-digit Pin then press pound (#).
If there are multiple programs available, the user will need to identify which program they wish to access by entering that program code, also followed by pressing pound (#).
If there are multiple individuals in your caseload, please enter the Individual ID followed by pound (#). To add additional individuals into the session, press 1. Otherwise, press 2 to finish.
Please confirm your action to start the session. Press 1 to start and 2 to Cancel.

Here is an example:

Program Codes:

Program	EVVCode
COMMUNITY HABILITATION	209
IN-HOME RESPITE	441
SDS-Self-Hired Respite	143
SDS-Self-Hired Community Habilitation	310
Site Based Respite	406

EVV Individual Code: 13788

Stage 2: Confirm Plan
To begin, please enter the 6-digit Employee pin then press pound (#).
If there are multiple individuals in your caseload, please enter the Individual ID and then press pound (#).
Next, please enter the program code and then press pound (#).
If the user has not yet acknowledged the latest plan for the Individual, then the Plan ID found at the top right corner of the Print Sheet must be entered followed by pound (#). Otherwise, press 0 and then pound to continue without entering services.

Note: A new plan ID needs to be confirmed if a new plan is approved. Since the Plan is a printed document, confirmation ensures the staff has the most current printed version.

Stage 3: Capture Service
Once the session is complete, call the number back and complete the Service Documentation Checklist through the prompts and then indicate stop time. To begin, please enter the 6-digit Employee pin followed by pound (#).

Next, please enter the program code followed by pound (#). Otherwise, press 0 then pound to skip the Service Capture.

Next, the user will enter the Response Code, Staff Response Support Code, the Service Prompt Number (i.e., 1, 2, 3), each followed by pound (#) to confirm the entries.

Here is an example:

EVV Serial	Goals and Supports	Key	Primary	Date	
				Initiated	Completed
12	Money Management Skills	HG	--All Staff--	11/01/20	
13	Live Independently	HG	--All Staff--	11/01/20	

Individual response:

Response Code	Response Name	EVV Code
ER	Emergency Service Response	0
F	Fully Engaged	1
P	Partially Engaged	2
N	Did Not Engage Due to Time	3
R	Refused, But Staff Continued To Prompt	4
PS	Personal Safeguard	5
CS	Clinical Service	6
NR	No Response Required	7
O	Other	8

Staff Supports:

Staff SupportType Code	Staff Support Name	EVV Code
Y	Physical	306
V	Verbal	783
G	Gestural	778

If an additional service needs to be recorded, please enter the next Service Code followed by pound (#) to continue, otherwise press 0 to if complete.

***Side Note: To add additional Comments within the day shift you will have to log on to the computer to add.*

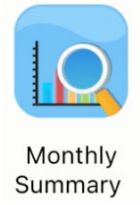
Stage 4: Stop Session
To begin, please enter the 6-digit Employee pin followed by pound (#).

Next, please enter the program code followed by pound (#). At this time, the user will press 1 to Stop Session or 2 to Cancel. The process is complete, and the call can be ended

Monthly Summaries

The Monthly Summary module of the app allows users to write, sign and approve monthly summaries from their mobile device. This module is caseload dependent and requires that users have an established caseload of individuals and/or access to another active caseload. The monthly summary module will allow users to work offline if they lose connectivity. This is to be completed for Self-Hired Community Habilitation and/or Self-Hired Supportive Employment.

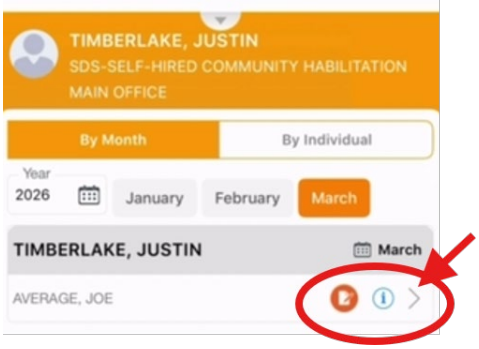
Documenting a Community Habilitation Monthly Summary Note (CH MSN)



Step 1: Click the Monthly Summary icon from your Dashboard screen.

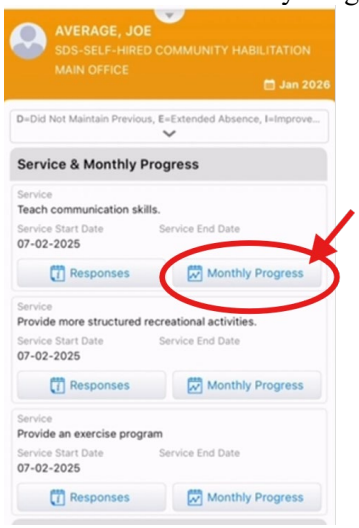
Step 2: Select the Facility and Program for the participant for whom you wish to complete the monthly summary.

Step 3: You can select by month or by individual, make sure to click the document icon that you are completing. You should always be completing the month prior. For example, if the month is now March, you would be completing for February 2026. The system will not allow you to complete it for a month that is not over yet.

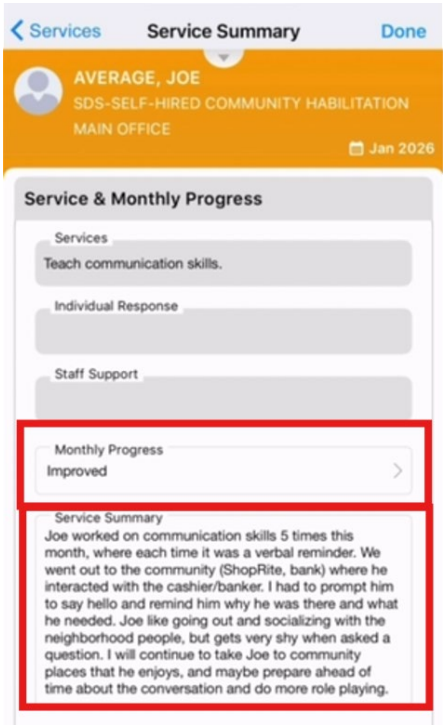


Step 4: Once you select the monthly summary you are working on, you will get the Monthly Summary screen. 1st that will be needed is the "Service & Monthly Progress," section

Within each "GOAL," you would be able to select "Responses," to remind yourself of what occurred, or what other Self-Hired Staff did within that goal. However, you want to select "Monthly Progress," for each goal.



Step 5: When you select Monthly Progress, you will not have to update the Monthly Progress & Service Summary Sections within EVERY goal. After every goal, make sure to select "**DONE**"

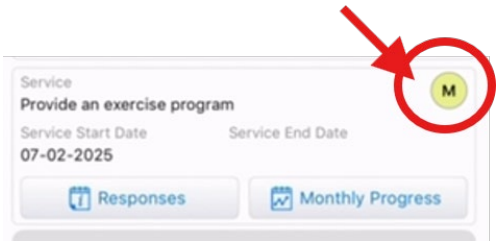


Monthly Progress you want note if the Individual has Maintained or Improved on the goal.

Service Summary make sure you include the following within:

- Summarizes progress toward goals in the Life Plan and Staff Action Plan.
- Should include:
  - What goals were worked on
  - Why the goal matters to the person
  - Describe how the person responded to the support
  - Progress or regression
  - Level of engagement *(Fully Engaged (F); Partially Engaged (P))*
  - Staff supports used *(Verbal (V); Gestural (G); Modeling (M); Physical Prompts (PP); Supervision (S))*
  - Plan to continue supporting goals
  - Barriers or Limitations: Note any circumstances affecting services

**Side Note: You will know the goal was completed when the bubble on the side populates next to the goal itself.



Step 6: Next you need to complete "Issues & Concerns" section, and you would select all that apply and add comments in each section.

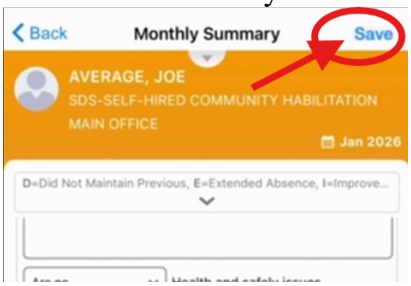


All 3 prompts must be answered. Click the 'Select' drop down menu to make the appropriate selections. In the comment section, you should reiterate you selection in sentence form.
Ex. Joe Average (JA) stated, "I am satisfied with supports and services."
Ex. JA had a significant life event of graduating high school this month! He is feeling excited but also nervous of the unknown as he starts this new chapter.

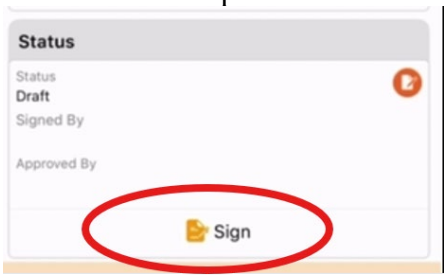
Step 7: Click in the Monthly Summary Note you can write the narrative for the monthly summary. This section **SHOULD** be a detailed report. It should recap everything that was outlined above within the goals. It should focus on the Person's choice and goals, while highlighting strengths and preferences.



Step 8: Click 'Save' in the top right corner to save the summary.



Step 9: Once the monthly summary is complete, staff can sign from the mobile app by clicking on the Sign button in the bottom center of the screen and enter their password to authenticate.



Due Date

Self-Hired Community Habilitation Staff (SHS-CH) must complete a Community Habilitation Monthly Summary Note (CH MSN) by the 10th day of the following month.
Example:
If services were provided in March 2026, the CH MSN must be completed by April 10, 2026.

Note Requirements

The CH MSN must be complete and clearly describe:

- The support provided during the month
- The individual's progress toward their goals
- Any important updates related to the services provided

If a CH MSN is rejected by the Self-Direction Department, the Self-Hired CH staff member is responsible for correcting and resubmitting the note before the 10th deadline.

Late or Missing Notes

If a CH MSN is not completed by the 10th of the month:

- On the 11th, the Self-Direction Department will contact the Self-Hired Staff, the Individual/Designee, and the Support Broker to review the policy.
- A 5-day extension will be provided to complete the note.
- If the CH MSN is not completed by the 15th, the staff member may be suspended from providing services.

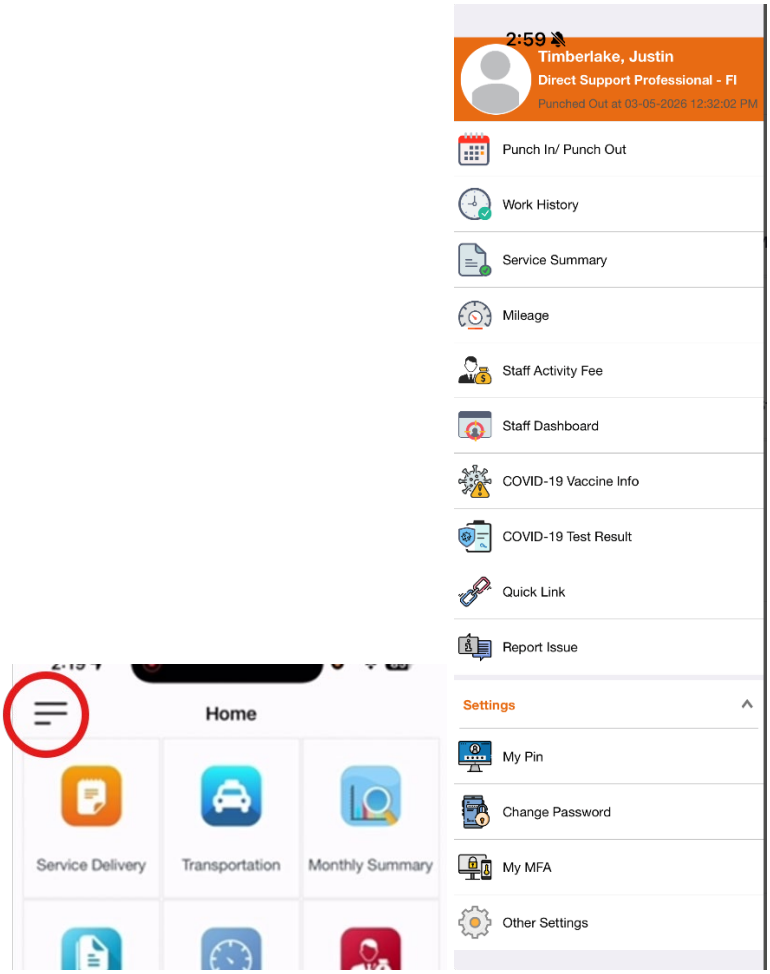
Ongoing Non-Compliance

If late or missing CH MSNs continue to occur, the matter will be addressed through the Employee Life Cycle Process. This process may include performance concerns, corrective action, and possible termination of services.

Staff should review the Employee Life Cycle Policy for additional information.

Additional App Resources

The home page of the app will also provide additional resources that are available. By selecting the icon shown circled below you will have access to the following features:



Punch In/Punch Out

Above in this Manual we spoke about how to punch in & punch out when in a meeting or doing a training. Please make sure to review this section. This should not be used to "Provide Direct Services."

Work History

The work history tab will show the staff's clocked time, and allows for multiple sorting features, based on the information you may be looking for. This tab will show your total hours worked for the past week, month, pay period and previous pay period. By sorting through the fields, you can also identify any missed punches that may have occurred, which allows for follow up with your FI team to correct the time.

Service Summary

Services summary will provide a history of the details worked over the course of a period. This time span can be adjusted by selecting from the drop down to the right. The default to this will be the current date. The documentation is separated by date of service. The initial data shown is the Employee duration (punch in and punch out) and the Service Duration (billable service time). To see further information on what occurred that day tap the service of the day you would like to expand on.

Mileage

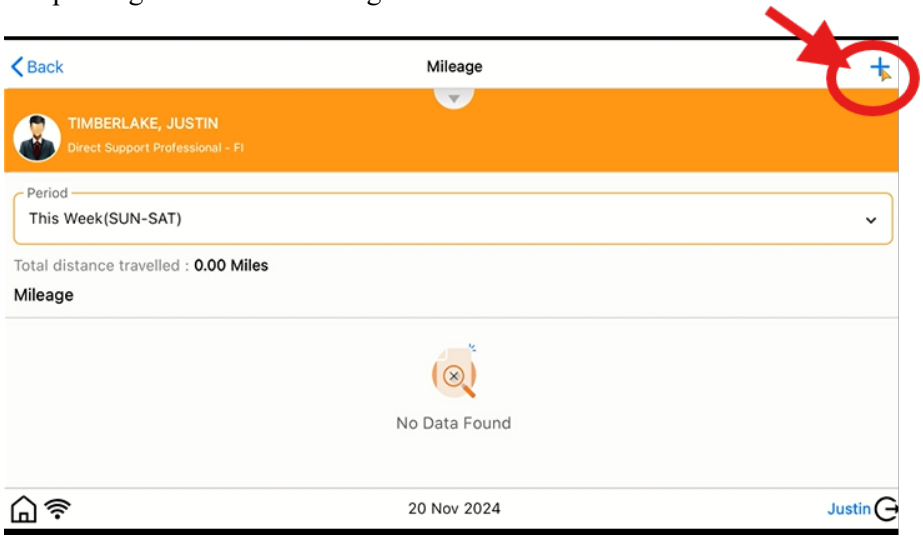
Mileage for services can be captured in real time or after the session has occurred. This mileage documentation will be

tied back to the service date/time that it was provided to the individual. In addition to mileage reimbursement, this section can also be used for other types of travel that require staff reimbursement, such as bus or train tickets. You can input mileage this way or select the "Mileage Icon" on the main screen.

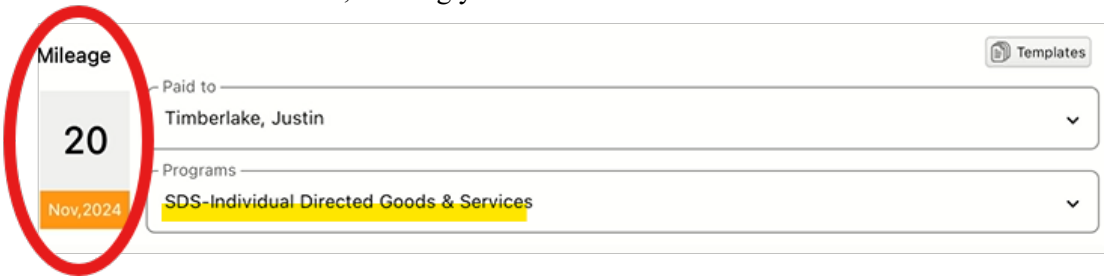


How to input mileage for reimbursement?

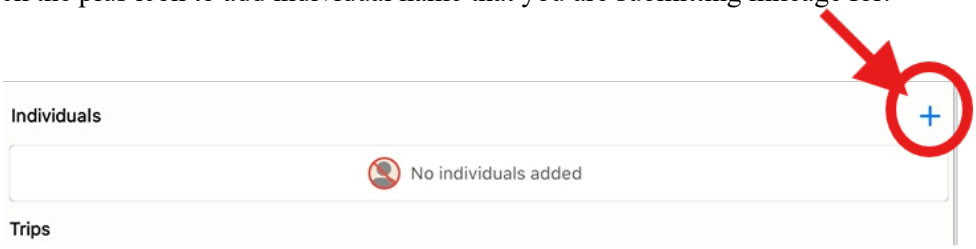
Step 1: Click the plus sign to add new mileage.



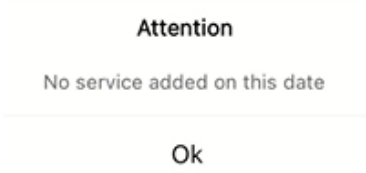
Step 2: Select Date you are requesting mileage for, ensuring the program is "SDS-Individual Directed Goods & Services." With the "Paid To," having you as the Self-Hired Staff Listed



Step 3: Click the plus icon to add individual name that you are submitting mileage for.



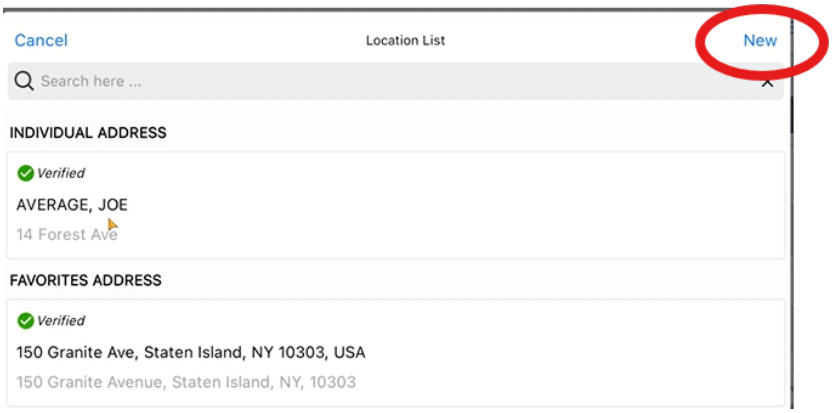
Side Note: If you select the individual name, and receive the message below, it is because you did not provide services on this day/time for us to justify and reimburse for the mileage. Please make sure all Service Documentation is within the system for you to be paid, alongside an error did not occur when you selected the date.



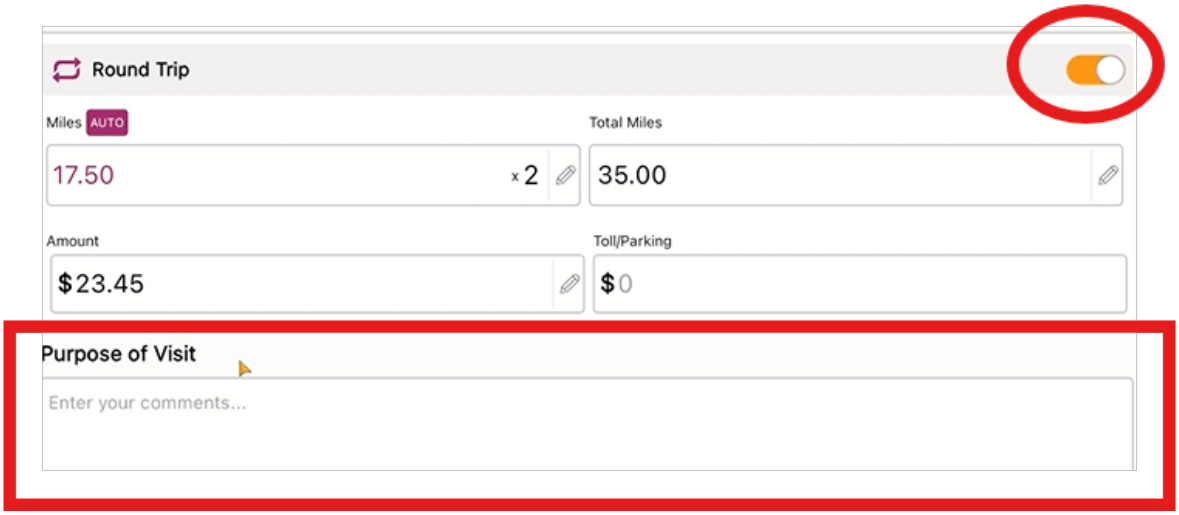
Step 4: Click on starting point to add location



This box then will appear if you have address listed as favorites they will be noted below; however if this is a "**NEW**," location, please select NEW and complete all of the required information. This includes full address and Location Name.



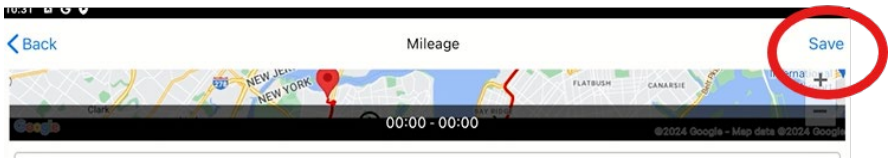
Step 5: Once you added both the starting & ending address this will automatically calucate the mileage. If this a "Round Trip," make sure to select that button and turn on. Otherwise, click on "Purpose of Travel," and add the GOAL/Location within this section.



Step 6: You must ADD attachments if you are requesting the Toll/Parking receipt to show travel outside of New York State. To be reimbursed for these expenses it would be submitted separately under Staff Activity Fee. Please make sure to review this section. If this is something you do over & over again you can add a template.



Step 7: Finally once everything is completed, you would click "SAVE," and now the Self-Directed Participant/Designee must go into their eVero portal and sign the mileage for approval.



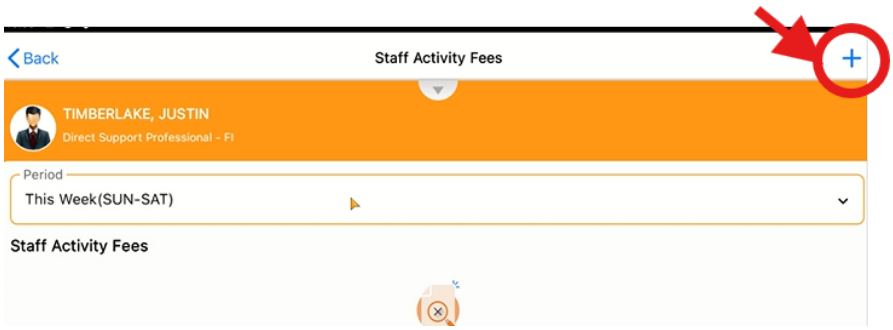
Staff Activity Fees (SAF)

This feature would allow Self-Hired Staff to input all expenses that they have incurred while assisting a Self-Directed Participant work towards a valued outcome.

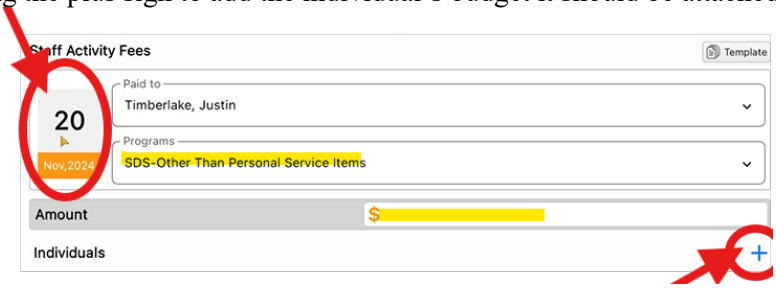


How to submit for Staff Activity Fee expense?

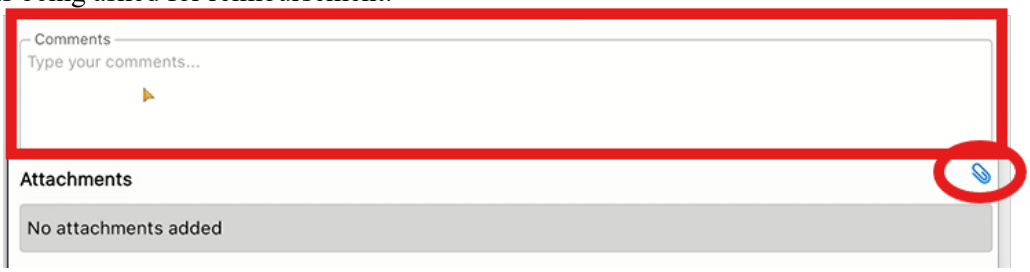
Step 1: Once you select Staff Activity Fee Icon shown above; or within the side drop down. Make sure to select the plus icon



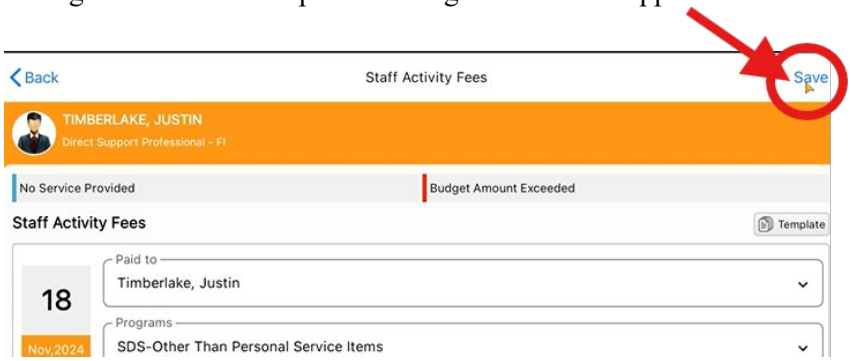
Step 2: Select Date you are requesting SAF for, ensuring the program is "SDS-Other than Personal Service Items." With the "Paid To," having you as the Self-Hired Staff Listed. Alongside making sure the amount you are requesting and selecting the plus sign to add the individual's budget it should be attached to.



Step 3: Then you would add the "Comment," where you will put in the goal you worked on, and reason why you are requesting for this reimbursement. You will ensure that there is an itemized receipt attached, and identifies clearly what is being asked for reimbursement.



Step 4: Finally once everything is completed, you would click "SAVE," and now the Self-Directed Participant/Designee must go into their eVero portal and sign the SAF for approval.



Expense Reimbursement – Quick Guide

To make sure you get reimbursed for an expense, please follow these steps:

- Submit an **itemized receipt**. The receipt must show the date, time, and proof of payment.
- **Identify the item being reimbursed**. If the receipt includes multiple items, circle or clearly mark the item you are requesting reimbursement for.
- **Tax and tip are not reimbursable** and will not be included in the reimbursement amount.
- **Monthly Summary Note Requirement**: Reimbursements will not be processed unless your Monthly Summary Note has been submitted.
- **Tolls/EzPass**: All toll or EzPass reimbursements must be submitted through SAF.

Following these steps will help prevent delays in processing your reimbursement.

Staff Dashboard

In this feature you can review everything about the individual you are supporting. Especially if there are attendance roster hours that are not approved by the Self-Directed Participant/Designee.

When a Staff Action Plan (SAP) and a Level of Supervision (LOS) are updated, the system can prompt you to sign and acknowledge the SAP. When providing Community Habilitation Services this is your job description, and goals you should be working on with the Self-Directed Participant. You will know you have a document to sign when the following screen appears:

When clicking "review now," it will bring you to the staff dashboard above. This will allow you to click on Staff Action Plan, review the document and acknowledge. Should you have any additional questions please contact your assigned

Fiscal Intermediary Coordinator.

**__NOTE__, if there is no finalized Staff Action Plan within the system this can prevent you from working and providing direct services. If this occurs, please make sure to contact your Self-Directed Participant/Designee and assign Fiscal Intermediary Coordinator right away. *Please make sure to review the Staff Action Plan Policy for more information.*

DSP Evaluations

Direct Support Professional (DSP) Evaluations are to monitor and rate how a Self-Hired Staff is performing working with the Self-Directed Participant. Evaluations are done within the eVero system. This will rate DSP on the 7 Core Competencies. This evaluation would be completed 90 days after hire, and annual by their hire date. If a wage increase is also being provided there might be one required.

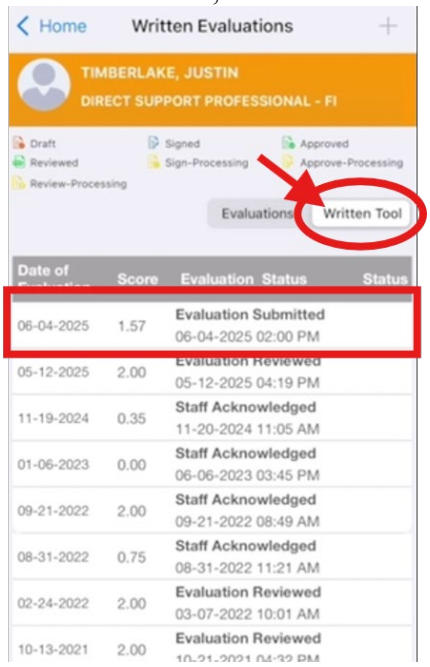
For you as the SHS to complete, the Individual/Designee have to complete 1st within their portal. This must be completed by the deadline to avoid further disciplinary action.

How does a Self-Hired Staff (DSP), review and sign a DSP Evaluation?

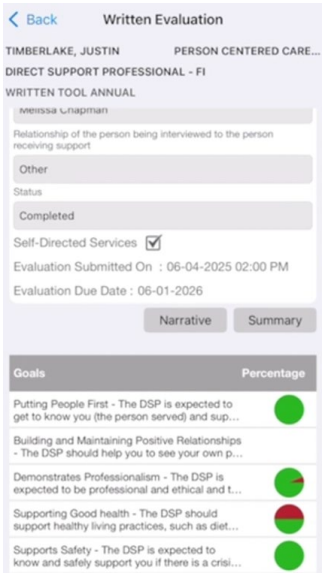
Step 1: Click on the DSP Eval icon or go through or under the Staff Dashboard "DSP Evaluation Pending Action."



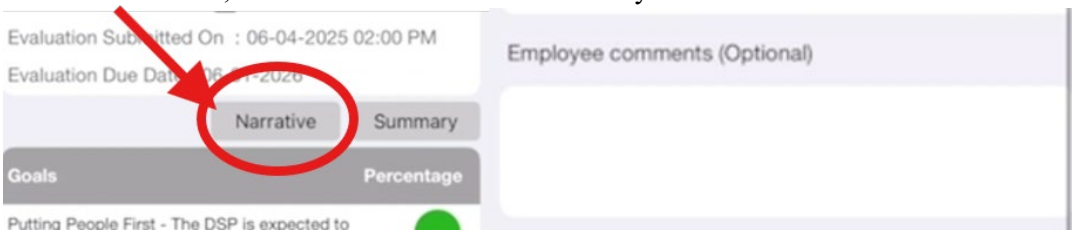
Step 2: Once you are in the app, select "Written Tool," and then select "the most recent evaluation."



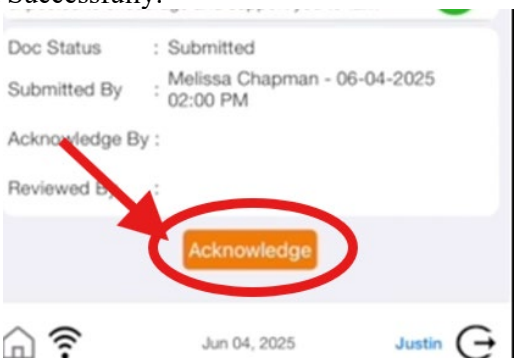
Step 3: The Self-Hired Staff now, will be able to see how the Individual/Designee rated them within each subject area, and review comments as well.



You can also review "Narrative" and "Summary" to see additional comments made. Within Narrative you as the Self-Hired Staff, can make additional comments if you want to.



Step 4: After review of the entire DSP Evaluation you would select "Acknowledge," and then you should receive a message "Data Saved Successfully."



This would then prompt the Self-Direction Department to review and finalize the DSP evaluation.

COVID-19 Vaccine Info/Test Results

Should the Self-Directed Participant/Designee require their Self-Hired Staff to be full vaccinated then this might be provided to HR and uploaded into eVero. However, this is no longer required by Person Centered Care Services.

Quick Links

This feature is currently not being used, and therefore nothing is coming up.

Reporting an Issue

To report any kind of issue that you may have related to using that app, or issues in general, they can be directly reported to your Self-Directed Participant/Designee directly. To report an issue tap "Report Issue" to open the dialogue box. From here you can select the type of issue that you are having from the drop down and can then type in the description of what has occurred, or any other information relevant to the current problem. When complete hit saves, and this will automatically be sent to the Self-Direction Team.

My Pin/Change Password

If you would like to create a PIN or change your password, you can click the icons yourself to complete. My MFA: This is where you can review and set up your Multi-Functional Authentication information if needed.

My MFA (Multi-Factor Authentication)

It is a security process that requires two or more ways to verify your identity before you can log in to a system or account. This helps protect accounts from unauthorized access. You would be able to update this information on where you would like the 2nd verification code to go.

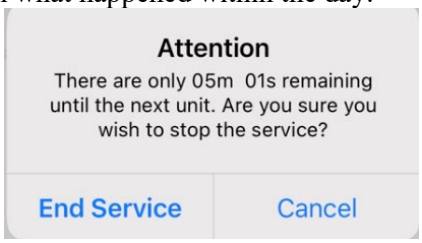
Other Settings

This allow you to approve and consent to text messages, GPS Privacy, and other settings. Alongside more information about the eVero app.

Alerts & Their Meaning in eVero

Potential Missed Billing Opportunity

When receiving this message and the time is less then 3 minutes, it is important to work with the individual for the additional 3 minutes to support with billing. You can recap the day, go over next shifts plans, and make sure the individual is truly satisfied with what happened within the day.



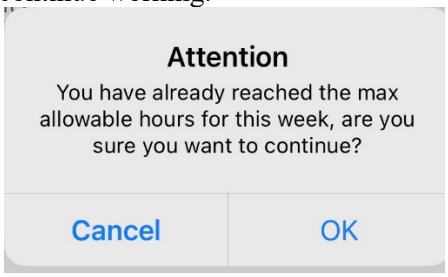
Approaching Overtime

This message show that you might be approaching Overtime, and that is more than 40 hours within a given week. Make sure to review your weekly hours and flex your time if needed, while working with the Self-Directed Participant/Designee. If you are unable to flex, please make sure to follow the Overtime Policy, which can be found on Paycom and more information below.



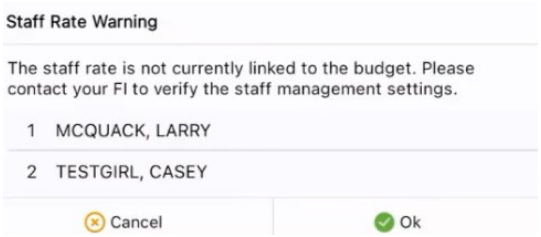
Reached Overtime

This message shows that you are now working more than 40hours in a week. You need pre-approval from the Self-Direction Department to continue working.



Staff Rate Warning

This message shows that there are no more funds within the SD Budget, and therefore you are not able to provide services. Make sure to reach out immediately to the assigned Fiscal Intermediary Coordinator right away to talk about next steps.



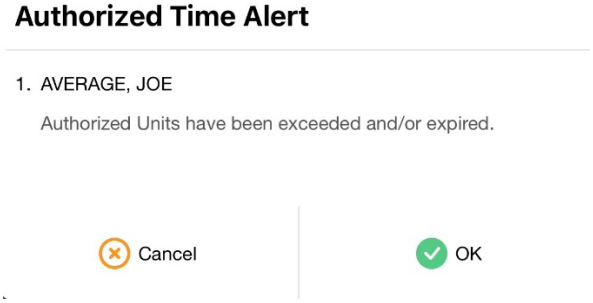
PRA Threshold Warning

This message shows that there is only a certain percentage left within the PRA for you to provide SDS-CH and/or SDS-Respite and reach out to the assigned Fiscal Intermediary Coordinator right away to talk about next steps.



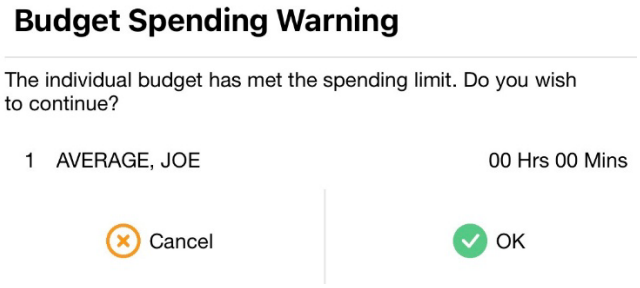
Authorized Time Alert

This message shows that there are no more units within the program you are trying to punch in for. You cannot provide services. You need to speak with the Self-Direction department immediately, alongside the Self-Direction Participant/Designee as they need to work with the Support Broker to amend the SD Budget.



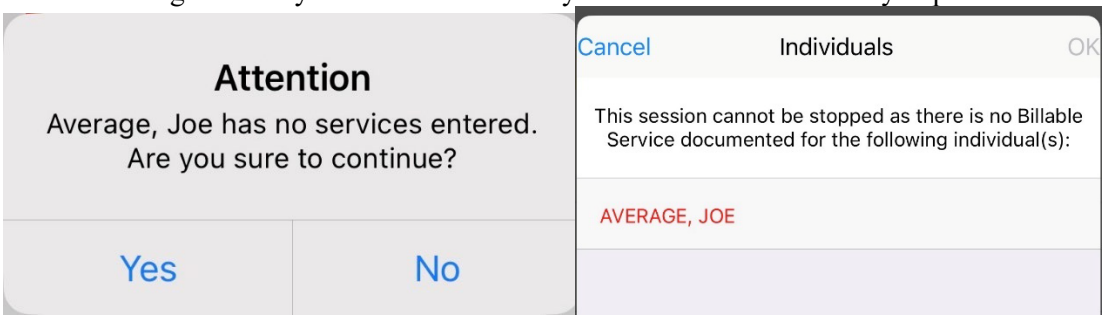
Budget Spending Warning

This message shows that there are no more funds within the program you are trying to punch in for. You cannot provide services. You need to speak with the Self-Direction department immediately, alongside the Self-Direction Participant/Designee as they need to work with the Support Broker to amend the SD Budget.



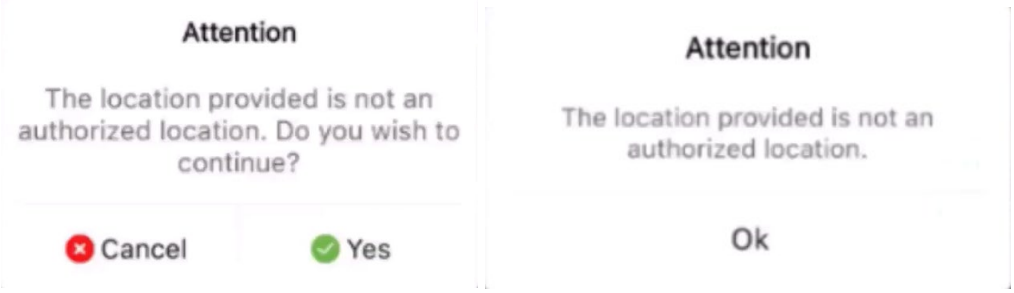
Self-Hired Community Habilitation Goals

This message shows that you provided a service (i.e. Self-Hired Community Hab) and did not document goals. Prior to finalizing the shift you MUST make sure you document the services you provided within this shift.



Approved eVV Location

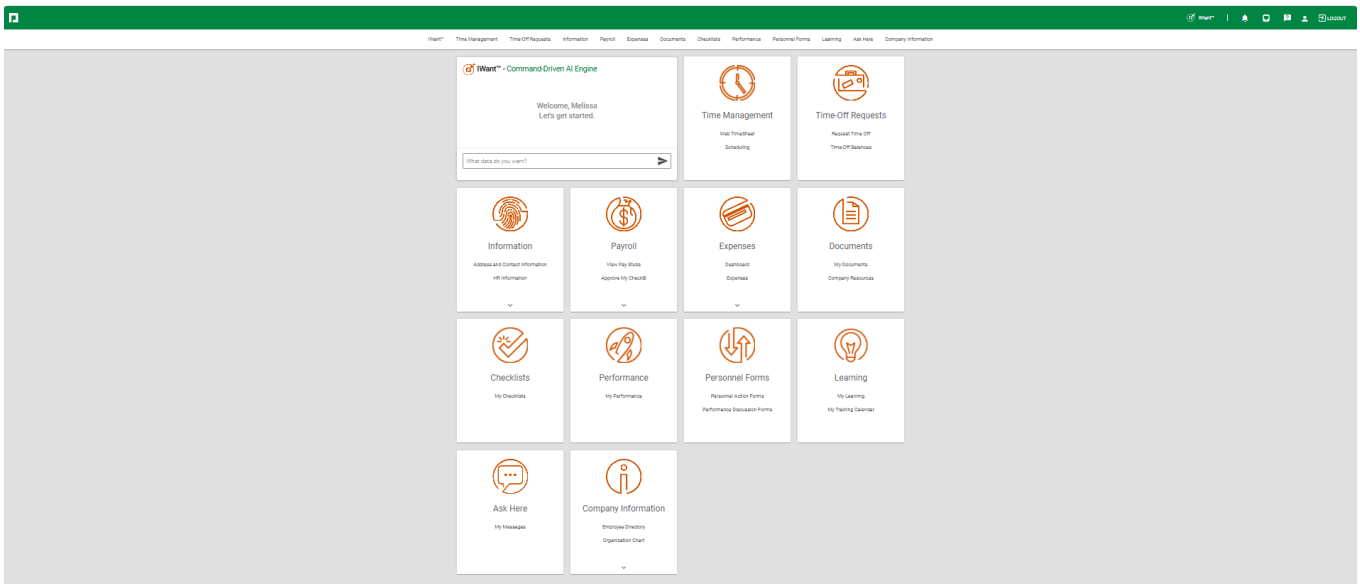
This message shows that you were you are punching in is not an approved Electronic Verification Visit. You should be providing the address to the Self-Direction Dept, and the justification of this location to add into eVero.



Paycom

All Staff are required to complete the onboarding process through Paycom assigned to them prior to getting assigned the New Hire Training within Relias. Failure to do so will prolong the start of working with the Participant.

All employee-related information and tools will be in Paycom by signing into your portal. This can be done by visiting Employee Self-Service ® (paycomonline.net) or download the Paycom app on your smart device.



New Hire Tasks

Once the staff have undergone background checks/fingerprinting, they will be assigned New Hire tasks in Paycom that include documents/checklist in Paycom that are to be completed. For the self-hired staff, be called for New Hire Training they must complete all task to 100%. If three attempts are made, and no action has been taken, this can result of the department removing you from all systems and starting the process again.

Time Management

Within this section, you will not be able to edit. However, you can review your timecard of what was imported out of eVero. This will not be completed until the Tuesday of the Friday pay date. If you see an error, please make sure to reach out to the department right away.

Requesting Overtime

If a Self-Hired Staff need to work over 40 hours within a given week (Sunday – Saturday), they must receive pre-approval from the Self-Direction Department. In the event, they work the hours without pre-approval this can result in disciplinary action.

When is pre-approval needed for Overtime?

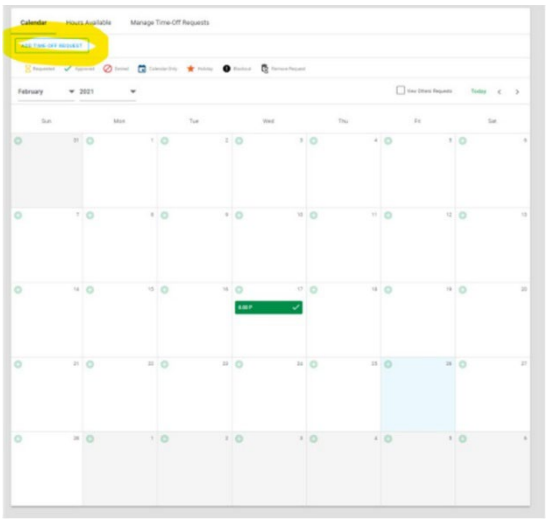
Anything over 40hours, requires pre-approval. Overtime occurs for hours worked, which can include Trainings and/or Meetings. It is the responsibility of Self-Hired Staff to work with the individual/designee on flexing their time when they can.

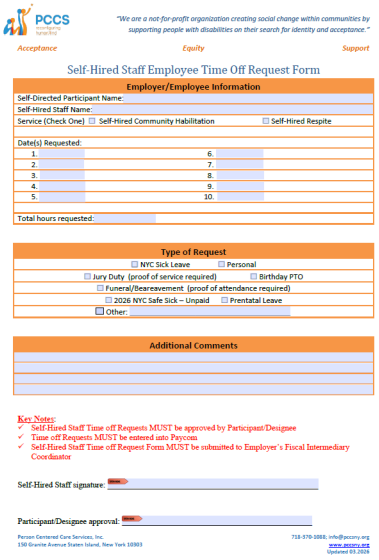
Time Off Request

You can check your accruals (your available time) in Paycom in the field for "Time-Off Request", clicking on "accruals"

Requesting Personal Time Off (PTO)

When in need of some time off, you are to inform your Self-Directed Participant/Designee. You will then provide them with the "Employee Time off Request Form." The Self-Directed Participant/Designee will sign and return the form to the Self-Direction Department Representative. You will also have to request the time off in Paycom by clicking "Request Time Off." (Icon shown above). The request in Paycom and form is needed by the end of week, otherwise entry will be deleted in Paycom.





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

Self-Hired Staff Employee Time Off Request Form

Employer/Employee Information		
Self-Directed Participant Name:		
Self-Hired Staff Name:		
Service (Check One) ☐ Self-Hired Community Habilitation		☐ Self-Hired Respite
Date(s) Requested:		
1.	6.	
2.	7.	
3.	8.	
4.	9.	
5.	10.	
Total hours requested:		

Type of Request	
☐ NYC Sick Leave	☐ Personal
☐ Jury Duty (proof of service required)	☐ Birthday PTO
☐ Funeral/Bereavement (proof of attendance required)	
☐ 2026 NYC Safe Sick – Unpaid	☐ Prenatal Leave
☐ Other:	

Additional Comments

Key Notes:
- ✓ Self-Hired Staff Time off Requests MUST be approved by Participant/Designee
- ✓ Time off Requests MUST be entered into Paycom
- ✓ Self-Hired Staff Time off Request Form MUST be submitted to Employer's Fiscal Intermediary Coordinator

Self-Hired Staff signature:

Participant/Designee approval:

Person Centered Care Services, Inc.
150 Granite Avenue Staten Island, New York 10303

718-370-1088; info@pccsny.org
www.pccsny.org
Updated 03.2026

Information

Make sure that all of your personal information is updated (i.e., Address & Contact Information and Supervisor). Within this section you can review your Job Description, EEO Information, and update any of your account settings (Language, Time Preferences, Login Info)

Payroll

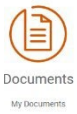
You can access and review your Pay Stubs to ensure accuracy, including verification of all deductions. Additionally, you can set up, update, or change your Tax and Direct Deposit information as needed. The system also allows you to view your current pay rate, end-of-year tax forms, garnishment documentation, and scheduled earnings and deductions.

Expenses

We do not use this as a Self-Hired Staff you are putting this information into eVero under Mileage or Staff Activity Fee. Please review those sections above.

Documents

Go into your portal and click on the Documents Icon



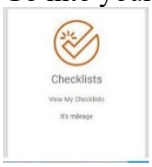
You will then review list of Documents requiring action. Click on the name of document to read and sign off on the document.

Swipe Card Policy	Signed 11/15/2019	N/A	N/A	11/15/2019
USCIS Form I-9	Signed 08/04/2017	Signed 10/15/2019	N/A	10/15/2019
Objection to Service Revision Policy	Signed 10/11/2019	N/A	N/A	10/11/2019
PCCS Employee Handbook	Signed 10/07/2019	N/A	N/A	10/07/2019
PCCS Employee Handbook	Signed 10/07/2019	N/A	N/A	10/07/2019
Evero Software Update Memo	Signed 09/30/2019	N/A	N/A	09/30/2019
CCO Documentation Outreach	Signed 09/30/2019	N/A	N/A	09/30/2019
PCCS QM Plan 2019	Signed 09/30/2019	N/A	N/A	09/30/2019
IRMA Program Codes	Signed 09/30/2019	N/A	N/A	09/30/2019

Important: As you remain a Self-Hired Staff it is important to continue to review and sign off on documents within Paycom. This will provide you with the most relevant information that is going on within PCCS, alongside OPWDD.

Checklist

Go into your portal and click on the Checklist Icon



You will then review list of Checklist requiring action. Click on the name of the checklist to read and sign off on the document.

My Checklists

Show 10 1 - 6 of 6

Checklist Name	Percent Completed	Number of Items	Date Completed
NEW HIRE CHECK LIST do not use	85	7	N/A
New Hire	87	16	N/A
OPWDD Yearly Mandatory Training Path 2019	100	2	04/03/2019
Sexual Harassment Prevention Training 2018	100	2	11/14/2018
myEvolv Mobile Site	100	2	04/04/2018
It's mileage	100	1	08/04/2017

Important: All NEW Self-Hired Staff must complete the FI DSP Pre-Hire Checklist in Paycom before they are called for New Hire Training. Any new staff that has not completed these checklists within 30 days will have their application rescinded and will have to reapply within six months.

Performance

We do not use this section, as your DSP Evaluation can be found within eVero. Please review this section of the manual for more information.

Personal Action Forms

In this section on Paycom, you will see if there are any changes within your Paycom Profile done on the ADMIN side or anything that is being noted within your file to be reviewed by you.

Personal Action Forms (PAF)

Personal Action Forms allow you to see update employment-related information, such as changes to pay, tax status, or personal details. It is important to review your PAFs carefully to ensure all information is accurate and complete, as errors can affect your pay, deductions, and other employment records.

Personal Discussion Forms (PDF)

Personal Discussion Forms (PDF) document conversations related to employment topics, including performance, role changes, or updates to personal information. It is important to review these forms carefully to ensure all details are accurate and reflect the discussion, as they serve as an official record in your employment file. Forms requiring your signature must be reviewed and signed promptly to maintain accurate and up-to-date records.

Learning
Within this section, you will be able to learn more about the Paycom system or any additional training.

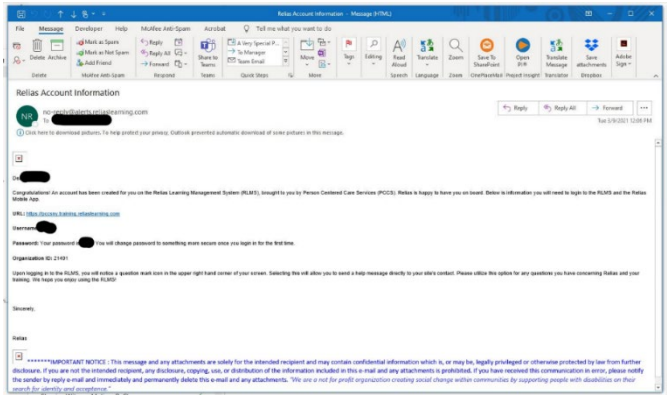
Ask Here
This allows employees to submit questions or requests directly to HR or their manager. It provides a simple way to get guidance, track responses, and ensure issues are addressed quickly.

Company Information
This provides employees with key details about the organization, including policies, contact info, and important announcements. It's a central place to access official company documents and stay informed.

Relias

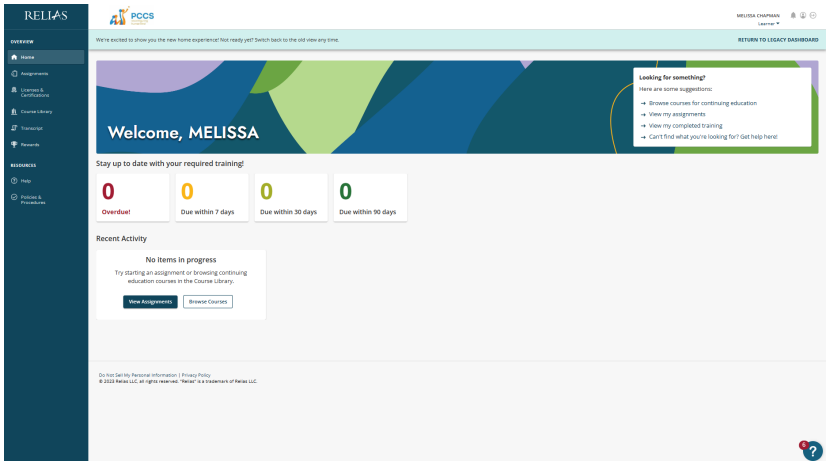
What is Relias?
The Relias Learning Management system is a corporate e- learning platform for healthcare, insurance, and education-related industries, focused on compliance and ease of use. Features of RLMS include automated training enrollment, training plans, a library of over 3,000 pre-built courses as well as the ability to build custom courses, and more.

How do I get access to my Relias account?
To access your Relias Platform training account, go to your organization's training website by typing the URL (site address) into the address bar of your web browser. For example: https://YourOrgName.training.reliaslearning.com. You can also log in on the universal log in page: https://login.reliaslearning.com.You may be asked for your Organization ID here, to route you to the correct profile. You may also receive an e-mail from no-reply@reliaslearning.com. Please make sure to check your spam/junk e-mail.



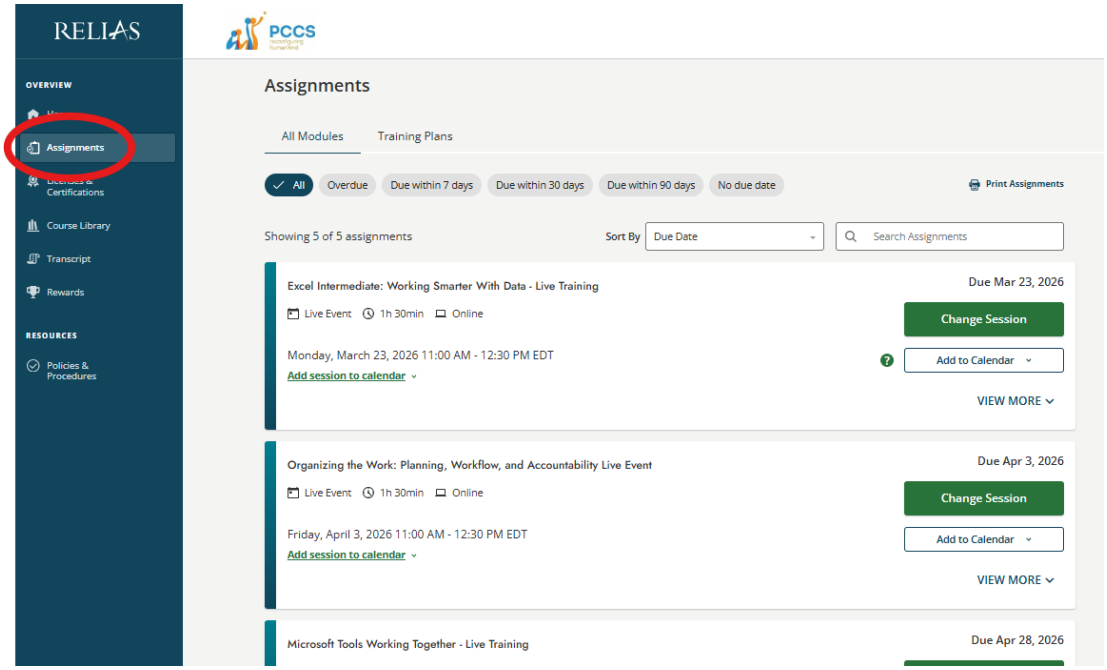
If you need to reset your Relias password, please review the following video:
https://www.youtube.com/watch?v=OqlKGODJaR4

Dashboard:
Your Upcoming Assignments will show on the Dashboard as well, displaying the modules due soonest. For a full view of all Assignments, please go to the Assignments tab.



Assignments: Learning & Transcript:

The Assignments page is the main screen you will use for accessing training within the Relias Platform. This page is divided into two main tabs: "All Modules," & "Training Plans."



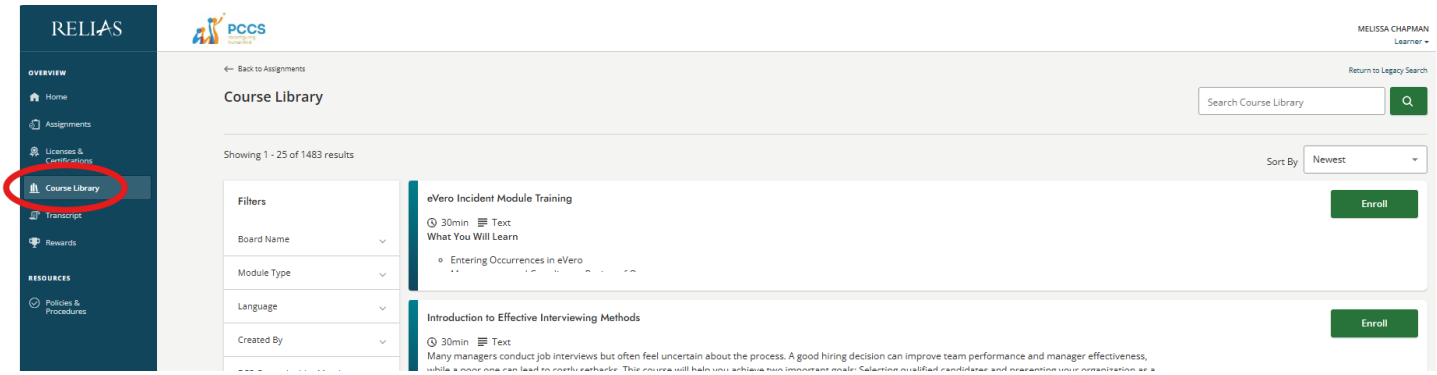
All Modules – Under the this tab is the Current Training enrolled in. This contains assigned and elective coursework that have not been completed yet. Many of the trainings on your Current Training page are grouped into training plans. Training Plans are groups of trainings that have been assigned to you by your organization. To ensure that training is completed on time, please be aware of the following highlights: Assigned coursework that is coming due soon is highlighted in yellow, and assigned coursework that is overdue is highlighted in red. If your company has enabled the feature, you may enter in External Training, from your Learning tab.

Searching & Enrolling in Elective Coursework:

You can enroll yourself in training, however this should be pre-approved by the Self-Directed Participant/Designee. The

Self-Directed Participant/Designee should complete the following survey to ensure they agree to you taking the training and being paid. Staff training for SD Agreement Sheet. In the event they wish you not to take the training, please consult with the Self-Direction Department

If you wish to take an online course or live training that is not assigned to you, click the Courses Library Tab and search for a training that you would like to take.



You may search by any combination of course filters including Keywords, Course Topics, or Licenses& Certifications. The Keyword search will return all courses that contain the entered keyword(s) in either the course title or description. Additional search filter options are available under the "+Filters" button.

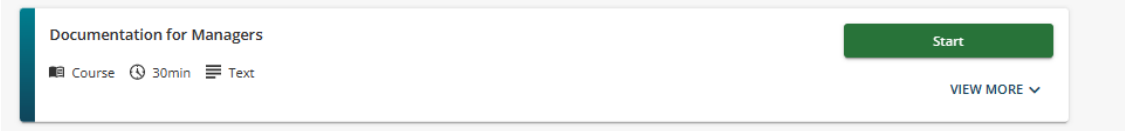
If you have previously entered your professional license or certification information into the Licenses & Certifications tab in the Relias Platform, you will be able to filter and search for Continuing Education (CE)courses according to the license or certification you entered. The Licenses& Certifications filter will provide your entries at the top of the filtered list, and this will allow you to search for courses based on your professional license or certification

If you have not entered in your professional license or certification, you are still able to search for CE courses by choosing the certificate and corresponding accrediting body under the same filter, "All Certificates" section.

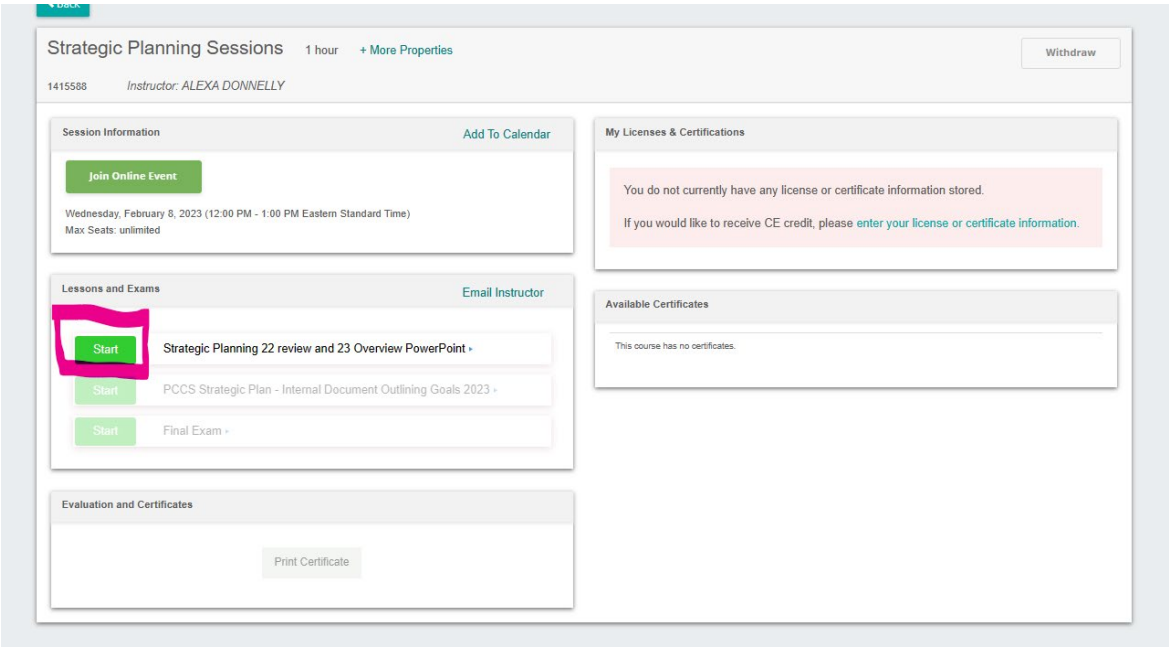
To enroll in your chosen elective training, click the "Enroll" button. Elective coursework will appear at the bottom of your Current Training page. Elective trainings do not have due dates and may be completed at any time.

Navigating Through an Online Course

To access an online course, click on the green 'Start' button on the assignment page.



Next, you will be presented with the course content which is broken down into a lesson, exam, and an evaluation. There may be multiples of each.



To access a course lesson, select the Start (or continue) button to launch the course content. Once you have finished a lesson, you may proceed to the next section until you have completed all parts of the course. There are many courses that are programmed to have the exam unlock only after the lesson has been completed in full. If you have difficulty getting the exam to unlock, please see our Troubleshooting Support section, under the Relias Learning How-To-Manual.

To print a certificate, you must successfully complete the final exam and course evaluation. Completing and passing the final exam may qualify your course as "complete" but will not allow you to print the completion certificate.

**Please note: For the course to be completed you MUST take the Final Exam, alongside the survey for the course if this is required.

IMPORTRANT Training Information

You will be assigned annual OPWDD Trainings & Sexual Harassment Training within Relias that needs to be completed by a due date. Below is a list of the trainings you would need to complete.

Title	Hours
Overview of Abuse and Neglect of Individuals with IDD	1 hour
NY OPWDD Choking Prevention Training	1 hour
Incident Investigations in IDD	1 hour
Fire Safety	0.5 hours
Developing Therapeutic Relationships	0.5 hours
Sexual Harassment: NY Mandated Training	0.5 hours
PCCS Compliance, Safety, and Ethics	0.5 hours

Important Note: Any Staff that does not complete their annual OPWDD Training within the provided time frame will be

placed on suspension. After 30 days of suspension and the Staff still has not completed the OPWDD training, will then be terminated.

You might get a "warning e-mail," from Relias if something needs to be completed by within a certain timeframe. Please make sure to review your account, and e-mails spam/junk to ensure all information is completed in a timely manner.

Relias App

If you would like to download the app for your smart device, please review LINK.

Human Resources Related Information

Person Centered Care Services Employee Handbook

Please refer to the most current & updated PCCS-Employee Handbook for all Human Resources information.

Services/Support Measurement

Annual/Semi-Annual Goal Assessments

The Fiscal Intermediary recommends the utilization of assessments to measure progression of goals and valued outcomes. Through the Goal Achievements Checklist, SD participants/designees can request DSPs to provide an assessment on the person's progress of current goals. The assessment is recommended to be done during annual and semi-annuals updates of Life Plans so goals/outcomes can be revised. **Please note** this is additional resource provided to the participants/designees to obtain accurate feedback and progress on a person's goal.

Upon request, the Fiscal Intermediary Coordinator will provide the participant/designee with the checklist to then be provided to the DSP.

Language Transformation

The language providers use to describe individuals they work with matters. Language not only describes our reality, but also designs it. In our daily lives as well as in our professional roles, our word choices alter moods, self-perception, cognitive processing and affects our physical and mental well- being. Providers' words can be harmful, or healing and we need to pay attention to what we say.

What is Person-Centered language

Person-centered language is language that puts people first. People are so much more than their substance use disorder, mental illness, or disability. Using person-centered language is about respecting the dignity, worth, unique qualities, and strengths of every individual. A person's identity and self- image are closely linked to the words used to describe them.

Utilizing person-centered language emphasizes the person first rather than the illness. A person- centered approach shifts the sole focus toward their unique recovery and individual strengths. It puts the focus on getting to know the person, not just the illness.

Below are some examples of deficits-based and strengths-based terms used in treatment settings. Note that person-centered language is constructed with the use of post-modified nouns (e.g., person does not communicate with words) literally putting the person first in the sentence structure.

Language Transformation Samples

All employees are expected to use "First Person" language at all times when referencing and speaking to the people we support.

Language to stay away from	Replacement Language
Individual	Person we support/ person's name

Consumer	Person we support/ person's name
Attacked	Describe exact behavior (kick, punch, etc.)
Tantrum, out of control, flip out	Describe exact behavior (kick, punch, etc.)
Provide services for people with disabilities	Provide support to people with disabilities
Restricted	Describe exact SCIP technique implemented
Held down	Describe exact SCIP technique implemented
Joe was still agitated, angry, etc.	Joe seemed to still be agitated, angry, etc.
Joe was still angry.	Joe expressed/ stated that he was still angry.
Turned up	Describe exactly what action took place.
SCIP was implemented for a few minutes	Give an approximate duration
My guys	Person we support/ person's name
Clients	Person we support/ person's name
Low functioning	Needs more support
High functioning	Independent
Nonverbal	Does not communicate with words
Verbal	Communicates with words
I think/I feel	Facts only
I told them, I made them, I allowed them	I supported, I assisted, we worked together
Not listening, refusing, avoiding	Disagrees with, does not want to, not a preferred activity
Can't, not able, not capable	Needs more support
Normal, regular	Typical
I have an individual on my caseload	A person I support on my caseload Autistic child Child with Autism
I made him/her	I asked if they would like to/I assisted them to
I told him to	I asked if they would like to/I assisted them to
I had to do it for him/her	I provided support to him/her
I had to force him/her to	I provided support to him/her
He/she refused to listen	He/she did not respond to what I had asked/said
He/she threw a tantrum	Describe exact behavior (kicked, yelled, punched, etc.)
He/she flipped out	Describe exact behavior (kicked, yelled, punched, etc.

Employer (Participant/Designee) Responsibilities

Ongoing	
Monitor goal implementation	▪ Can measure goal/outcome progress through the Goal Achievement Checklist. ▪ This will help determine if goals need to be revised, changed, or discontinued.
Service Documentation	▪ Ensure that self-hired staff are documenting service delivery on the date of service. ▪ Ensure that all required elements of service documentation are included.
Service Delivery	▪ Ensure services are delivered as per the Life Plan. ▪ Ensure your self-hire staff documents service deviations, in which services were not delivered as per the Life Plan.

Self-Hire Staff Training/Instruction	▪ Ensure that your self-hired staff knows goals/strategies to support the person. ▪ Ensure your self-hired staff knows emergency plans, emergency numbers, Behavior Support Plan if applicable, ▪ Ensure your self-hired staff receive required trainings and that training is documented. ▪ Ensure your self-hired staff completed all of Employer of Record trainings as mandated by OPWDD regulations an Labor Laws.
Safety	▪ Develop a Fire and Disaster Plan ▪ Develop a Fire Evacuation Plan to provide to your self- hired staff
Self-Hired Staff Performance	▪ Develop performance guidelines and expectations. ▪ Develop and upkeep personnel files for your self-hired staff. ▪ Develop supervision plans ▪ Address performance issues through guidance, coaching and formal disciplinary actions. ▪ Evaluate and set self-hired staff training requirements. ▪ Arrange training for your staff.
Self-Hired Staff Supervision	▪ Observe work of your self-hired staff at least once weekly ▪ Review your self-hired staff's documentation (time sheets service documentation and monthly summary notes in eVero.
Monthly Expenditure Reports/Budgets	▪ Ensure you review your expenditure report every month located in your eVero portal. ▪ Ensure to review your budgets.
Paid Neighbor	▪ Ensure your contract with your Paid neighbor is updated As needed.

Resources & Forms

eVero ED	eVero Training Platform
PCCS Website/Forms	PCCSNY.ORG
Self-Hired Staff PowerPoint (with additional video)	Self-Hired Staff PowerPoint (03.2026) VIDEO
Employee Time OFF Request	If you want to take time off, ensure to request in Paycom, alongside have SDP/Designee review, sign, and send the form to the FIC for your case.
Missed Time/Service Delivery Form	If you have issues with eVero punching in/out or documenting services, this would be provided to the SDP/Designee to provide to the assigned FIC to manually correct in eVero for you.
Remote: Missed Service Delivery Form	If you provide Telehealth Services and have issues with eVero punching in/out or documenting services, this would be provided to the SDP/Designee to provide to the assigned FIC to manually correct in eVero for you.

2026 Payroll Calendar	This is where you can find the payroll schedule
Systems Use within PCCS	eVero – Digital Agency App; Punch in/out and Document Services; Input Travel and/or Staff Activity Fee Paycom – To review W-2; Timecards; Paystubs; and more... Relias – Training Platform – OPWDD Trainings; NH Training
2025 SD Employee Handbook	This is the agency wide PCCS Employee Handbook all ADMIN and DSP have to adhere to. (*This is currently being updated – Please make sure to review Paycom for the most current version*)
2025-2026: PCCS Employee Benefits Guide	This is the agency wide PCCS Employee benefits all ADMIN and DSP.
Mileage Reimbursement Form	If you are unable to input your mileage reimbursement request right into eVero, this form will be completed and provided to the SDP/Designee to assist with inputting this into the eVero system.
Self-Hired Employment Status Form	Should you no longer wish to work with the Self-Directed Participant, you may provide this form to the individual/designee and/or Self-Hired Staff.
Unethical Activity Procedures Pamphlet	This is a quick tool on the do's and don't when working with a Self-Directed Participant.