



### *Individual and Family Fact Sheet – USING A FISCAL INTERMEDIARY*

March 2003

#### **What Are Individual Supports?**

Individual supports are a flexible way that supports can be created and delivered for people eligible for services through the Department of Developmental Services. People who receive Individual Supports have the authority and responsibility of controlling and managing the funds they receive from DDS. DDS contracts with Fiscal Intermediaries to assist individuals to manage this new level of authority and responsibility in a positive and cost effective way.

#### **What Is A Fiscal Intermediary?**

A Fiscal Intermediary (FI) is an organization that assists you to implement your Individual Support Agreement and to manage financial accountability and employer responsibilities. Fiscal Intermediaries are not service providers. A Fiscal Intermediary is an administrative and fiscal agent that assists you to use the money you get from DDS to pay for the services and supports you need. An FI is not able to make decisions about the amount or type of services you receive. The FI helps you to manage the supports that have already been identified in your plan and budget.

*Your FI will help ensure that funds are well spent and effectively managed.*

#### **What Does A Fiscal Intermediary Do?**

Fiscal Intermediaries work with the service providers you choose. If you choose to hire your own support workers, your FI will help you to manage the paperwork responsibilities that come with being an employer. The FI will assist you to complete employment forms, pay your staff, ensure tax compliance and prepare end-of-year reports. If you choose a provider agency for your supports, the FI pays the provider on your behalf, according to the budget approved with your Individual Support Agreement. The FI will also pay other vendors for special services that you have in your budget. The FI will give you monthly financial reports to let you know if you are spending what you have budgeted on the items you planned, or if you are spending too much and need to make adjustments to stay within your budget.



#### **On Page 2:**

How Do I Get A FI?	2
What If I Change My Mind And Want To Use Another FI?	2
Who Pays For The FI?	2
What If I Don't Want An FI?	2



## ***How Do I Get A Fiscal Intermediary?***

The Department of Developmental Services currently contracts with four Fiscal Intermediary agents: Acumen, Directions, LARC and Sunset Shores of Milford. You can choose the FI that you believe will best help you to effectively monitor and manage the resources in your budget. An FI can also be assigned if you do not want to select one. A positive relationship between you and your FI will help ensure that funds are well spent and effectively managed.

Choose the Fiscal Intermediary that is most likely to help you:

- Have the most choice and control over your supports and services
- With the level of assistance and support you need
- Minimize the administrative paperwork burden
- Follow state and federal tax, labor and Workers' Compensation laws and department policies.

Your DDS case manager or support broker can help you learn more about the services that the different Fiscal Intermediaries provide and to assist with your selection of an FI.

## ***What If I Change My Mind And Want To Use Another Fiscal Intermediary?***

You decide what Fiscal Intermediary service works best for you. You can change your FI at any time. Your case manager or support broker can help you make a change to a new FI so that it doesn't affect your budget or supports.

## ***Who Pays For The Fiscal Intermediary?***

The Department of Developmental Services will pay the Fiscal Intermediary you choose on your behalf. Payment for the FI is part of the supports package DDS provides to you.

## ***Working With A Fiscal Intermediary And Managing My Own Budget Sounds Intimidating And Like It May Be A Lot Of Hard Work For Me. What If I Can't, Or Don't Want To Work With A Fiscal Intermediary?***

If you receive Individual Supports and your budget is over \$5,000, you must have a Fiscal Intermediary work with you to manage your funds. Your case manager or support broker, along with your own network of friends and family, can assist you to work with the FI. Your regional DDS office may have an Individual Support Family Network that you may want to join for additional support and to meet other people who are directing and managing their own supports. Information sessions and other types of educational activities may also be offered in your region. The skills you learn in these sessions can help you to be more confident in directly your own supports and managing your resources.