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Guide to Self-Direction Support Agreement (SDSA)

Welcome! This guide will help you understand the Self-Direction Support Agreement (SDSA). This is an important agreement between the Department of Developmental Services (DDS) and the individual who is self-directing their supports and services and their supporting team.

What is in the SDSA? The SDSA has a list of rules you must follow if you want to manage your own supports. It also lists what you have to do when you self-direct. When you fill out this form, you and your team choose who will do each task. You cannot manage your own services unless you fill out and sign this contract.

When should the SDSA be updated?
People and their team must fill out the SDSA when they begin Self-Directed services. Each year, they should look to see if anything needs to be changed. The Individual Plan (IP) meeting is a good time to check the SDSA. If something changes, the team should review and determine if a new SDSA is needed.

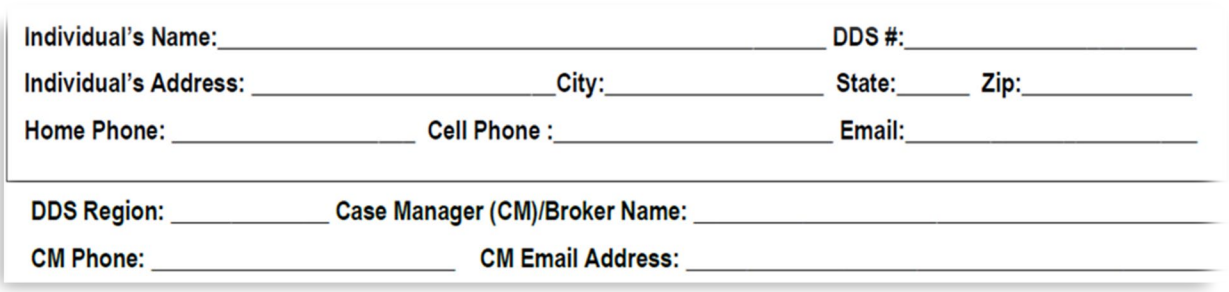
The first page of the SDSA has boxes for you to fill in. Be sure to write in the names for the **Individual, Case Manager (CM),** and **Employer of Record (EOR)**. The Internal Revenue Service (IRS) and Department of Labor (DOL) prefer the EOR to be the individual receiving supports. The team should work together to determine if this is the best way to move forward

If the person has a Representative or an **Individual Goods and Services (IDGS) Supervisor**, fill in those boxes too. *To find out who these people are and what they do, look at the definitions at the bottom of page 1 of the SDSA.*

Please read the definitions on the 1st and 2nd pages of the SDSA to understand what each person in the below list does in self-direction.

- ☑ Individual
- ☑ Case Manager/Broker
- ☑ Employer of Record (EOR)
- ☑ Representative
- ☑ Individual Goods and Services Supervisor (IDGS)
- ☑ Fiscal Intermediary (FI)

The picture below shows what the first information box looks like. This box asks for your information and your case manager's information. Your case manager will help you fill it out.



Individual's Name:_____ DDS #:_____

Individual's Address: _____City:_____ State:_____ Zip:_____

Home Phone: _____ Cell Phone :_____ Email:_____

DDS Region: _____ Case Manager (CM)/Broker Name: _____

CM Phone: _____ CM Email Address: _____

Next, you will see a list of 26 rules made by DDS. These are the rules for self-direction. Anyone who signs the SDSA agrees to follow all these rules. Look at the picture below to see an example. Talk to your case manager to make sure you understand each rule. Make sure you know what you need to do to follow them.

As an individual receiving Self-Directed Supports and/or the Representative for Self- Directed Supports, and/or Employer of Record, I agree to abide by the following Department of Developmental Services (DDS) requirements:

1. To enroll in the DDS Home and Community Based Services Medicaid Waiver.

It is important to read and understand all the rules. Below are some topics these rules cover. Following these rules helps people be good employers.

Training and Compliance

Follow the training rules to make sure everyone is ready for their job and follows the law. Employees must finish their training within their first 90 days of employment.

Financial Management

Make good choices with your DDS budget and keep good records. Using money the wrong way, like for things that are not in your plan or budget, can cause big problems.

Employment and Hiring Practices

Follow the hiring rules to follow the law and keep everyone safe at work. For example, know who you can hire and what to do if a worker is not a good fit.

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Next you will find the **Self-Directed Responsibilities and Requirements**.
In this section, the person and their team pick who will do each job. Use the chart to show who your team picks for each task by checking their box. See the picture below for an example.

Self-Directed Responsibilities and Requirements	Individual	Representative	IDGS Supervisor
A. To complete all forms provided by the FI that are required by federal and state laws to become the employer of record in a timely manner.	☐	☑	☐

If you do not have a Representative or IDGS Supervisor, check all the boxes under Individual. If you want help with these jobs, talk to your case manager about adding a Representative, IDGS Supervisor, or Independent Support Broker to your team.

Congratulations! You finished reading the SDSA! If you have questions about any of the DDS rules or your self-direction jobs, ask your case manager. After your team fills out the SDSA form, your DDS Case Manager will check it to make sure it is correct. When everyone has read the SDSA and agreed to their jobs, they can sign. The picture below shows where to sign on the SDSA. A Representative or IDGS Supervisor only needs to sign if they are on your team.

Individual Signature: _____ **Date:** ____/____/_____
Employer of Record Signature: _____ **Date:** ____/____/_____
Representative Signature*: _____ **Date:** ____/____/_____
IDGS Supervisor Signature*: _____ **Date:** ____/____/_____
*If applicable and identified on page 1.