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Self-Directed Services

Self-directed Medicaid services means that participants, or their representatives if applicable, have decision-making authority over certain services and take direct responsibility to manage their services with the assistance of a system of available supports. The self-directed service delivery model is an alternative to traditionally delivered and managed services, such as an agency delivery model. Self-direction of services allows participants to have the responsibility for managing all aspects of service delivery in a person-centered planning process.

Self-direction promotes personal choice and control over the delivery of waiver and state plan services, including who provides the services and how services are provided. For example, participants are afforded the decision-making authority to recruit, hire, train and supervise the individuals who furnish their services. The Centers for Medicare & Medicaid Services (CMS) calls this "employer authority." Participants may also have decision-making authority over how the Medicaid funds in a budget are spent. CMS refers to this as "budget authority."

Self-Direction Options

States have several options under the state plan and waivers for providing enrollees with the option to self-direct Medicaid services:

- [Home and Community-Based Services State Plan Option- 1915\(i\)](#)
- [Community First Choice-1915\(k\)](#)
- [Self-Directed Personal Assistance Services State Plan Option-1915\(j\)](#)
- [Home and Community-Based Services Waiver Programs- 1915\(c\)](#)

Self-Direction Guidelines

Each Medicaid funding authority has different guidelines but all authorities, share some common characteristics:

- **Person-centered planning process:** CMS requires that a person-centered planning process and assessment be used to develop a person-centered plan. The process is directed by the individual, with assistance as needed or desired from a representative of the individual's choosing. It is intended to identify the strengths, capacities, preferences, needs, and desired measurable outcomes of the individual. The process may include other persons, freely chosen by the individual, who are able to serve as important contributors to the process. The planning process must also include planning for contingencies such as when a needed service is not provided due to the worker being out sick. The contingency or "back-up" plan must become a part of the individual's person-centered plan. As part of the contingency planning process, an assessment of the risks to the individual must be completed and a discussion about how the risks will be addressed must be held.
- **Service plan:** A service plan is the written document that specifies the services and supports that are to be furnished to meet the preferences, choices, abilities and needs of the individual, and that assist the individual to direct those services and supports and remain in the community.
- **Individualized budget:** An individualized budget is the amount of funds that is under the control and direction of the individual. The budget plan is developed using a person-centered planning process and is individually tailored in accordance with the individual's needs and preferences as established in the service plan. States must describe the method for calculating the dollar values of individual budgets based on reliable costs and service utilization, define a process for making adjustments to the budget when changes in participants' person-centered service plans occur and define a procedure to evaluate participants' expenditures.
- **Information and assistance in support of self-direction:** States are required to provide or arrange for the provision of a system of supports that are responsive to an individual's needs and desires for assistance in developing the person-centered service plan and budget plan, managing the individual's services and workers and performing the responsibilities of an employer. Examples of self-directed supports include, but are not limited to: information regarding how a self-directed care program works; individual rights and responsibilities; and available resources; counseling; training; assistance, such as the use of a supports broker/consultant and financial management services (FMS); and access to an

independent advocacy system available in the state. The amount and frequency with which an individual uses the available supports varies by person and circumstance.

Support Guidelines

A supports broker/consultant/counselor must be available to each individual who elects the self-direction option. The supports broker/consultant/counselor supports the individual in directing their services, and serves as a liaison between the individual and the program, assisting individuals with whatever is needed to identify potential personnel requirements, resources to meet those requirements, and the services and supports to sustain individuals as they direct their own services and supports. The supports broker/consultant/counselor acts as an agent of the individual and takes direction from the individual.

Financial Management Services

Financial Management Services (FMS) must be available to assist individuals in exercising budget authority. Individuals can perform some or all of the FMS functions themselves. Typically, however, individuals prefer that the FMS entity performs these functions for them. FMS helps individuals:

- Understand billing and documentation responsibilities
- Perform payroll and employer-related duties such as withholding and filing federal, state, local and unemployment taxes; purchasing workers' compensation or other forms of insurance; collecting and processing worker timesheets; calculating and processing employee benefits; and issuing payroll checks
- Purchase approved goods and services
- Track and monitor individual budget expenditures
- Identify expenditures that are over or under the budget

Quality assurance and improvement: Each state Medicaid agency (SMA) is tasked with having in place a system of continuous quality assurance and improvement. The system must include activities of discovery, remediation, and quality improvement so that the state learns of critical incidents or events that affect individuals, corrects shortcomings and pursues opportunities for system improvement. The SMA also has overall responsibility for monitoring the system performance measures and individual outcome measures. (Note: It is important to check each funding authority for quality requirements, as they vary.)

History of the Self-Direction Option

Beginning in the 1990s, many states began to offer "consumer-directed" personal care services pursuant to section 1905(a)(24) of the Act, the optional state plan personal care services benefit. During the mid-1990s, the Robert Wood Johnson Foundation awarded grants to develop "Self-Determination" programs in 19 states, with self-direction of Medicaid services being a crucial aspect of self-determination. These projects primarily evolved into Medicaid-funded programs under section 1915(c) of the Act, the home and community-based services waiver program.

In the late 1990s, the Robert Wood Johnson Foundation again awarded grants to develop the "Cash and Counseling" (C&C) national demonstration and evaluation project in three states. These projects evolved into demonstration programs under the section 1115 authority of the Act. The Deficit Reduction Act (DRA) in 2005 authorized two more avenues for states to offer the self-direction option, i.e., [section 1915\(i\)](#) and [section 1915\(j\)](#) of the Act. In 2010, the Affordable Care Act, passed by Congress and signed by the President on March 23, 2010, authorized section [1915\(k\)](#) of the Act to offer self-directed services.

Self Directed Services

Related Sites

[Data.Medicaid.gov](#)

[CMS.gov](#)

[HHS.gov](#)

[Healthcare.gov](#)

[InsureKidsNow.gov](#)

[Medicare.gov](#)

Helpful Links

[Site Map](#)

[Web Policies & Important Links](#)

[Privacy Policy](#)

[Plain Language](#)

[No Fear Act](#)

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Sign up



Centers for Medicare & Medicaid Services



A federal government managed website by the
Centers for Medicare & Medicaid Services.
7500 Security Boulevard Baltimore, MD 21244

We are Dedicated to Serving



Over **17,182** Participants
Self-Directing Their Care



Over **21,323** Caregivers
Providing Services

What People are Saying About Us



98% Customer
Satisfaction Rate

“ Being able to choose and hire my own caregiver creates a much more comfortable environment for me in my home. ”

Participant - Michigan

Office Locations:

Headquarters

215 Broadus Street, Sturgis, MI 49091

North Carolina

4000 Wake Forest Rd., Raleigh, NC 27609

Wisconsin

101 W. Main Street, Ashland, WI 54806

Minnesota

860 Blue Gentian Rd. Suite 200, Eagan, MN 55121

Kansas

7300 W110th St, Ste 700, Overland Park, KS 66210

Contact Us:

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Toll- Free Phone: 1-877-659-4500

Customer Service Fax: 1-888-972-3891

Timesheet Fax: 1-855-329-8648

Email: customerservice@gtindependence.com



*Helping people live a life of their choosing
regardless of age or ability.*

www.gtindependence.com

SELF-DIRECTED SERVICES

Learn About the Benefits of Using a Fiscal Intermediary



Receive the care that you need from
people you know and trust.





BENEFITS

- Care is provided based on your schedule
- Direct how you want to receive your care
- Only pay for the services you need
- Receive care in your own home
- Choose who provides your needed supports
- Maintain your independence

GT Independence enables individuals with long term care needs or disabilities to easily hire and employ caregivers legally by handling all required employer and employee paperwork, time tracking, payroll, tax filings and insurance concerns as a fiscal intermediary.

Using the services of a fiscal intermediary can help you receive a higher level of care by making it possible to stay in your own home and receive your care from caregivers that you choose, including family members.

SELF DIRECTED SERVICES GIVES YOU COMPLETE CONTROL OVER HOW YOU RECEIVE YOUR CARE AND WHO PROVIDES YOUR NEEDED SUPPORTS.

GT INDEPENDENCE QUICK FACTS

| | | | |
|---------------------------|-----|--|-----|
| Choose your own Employees | YES | Paper Timesheets Options | YES |
| Set Your Own Schedule | YES | EVV Compliant Timesheet Options | YES |
| Online Timesheet Options | YES | Time-sheet App for Smart Phone of Device Options | YES |

GT CUSTOMER SERVICE

In person meetings are held to enroll you in GT Independence's services. Phone support is available to assist you with any ongoing needs and information.



**YOUR LIFE.
YOUR CHOICE.**

USING A FISCAL INTERMEDIARY TO SELF DIRECT YOUR CARE

MANAGING EMPLOYEE TIMESHEETS

- Submitting your timesheet online can be done easily through your portal account from your computer, smartphone, or tablet device.
- Paper timesheets are available and can be submitted through traditional mail, fax, or email.

WHAT IS ELECTRONIC VISIT VERIFICATION (EVV)?

- The federal 21st Century Cures Act requires that states must use EVV system for personal care services and home health services that require an in-home visit by a provider.
- This must be implemented by January 1, 2020, unless a time extension is granted to a state.
- Requires the electronically verifying the location of services delivered. GT complies with this by documenting the GPS location at the beginning and end of each shift using the Caregiver App. This allows consumers to receive services anywhere rather than using a landline to call in and record a shift, which limits the start and end of each shift to only being at the consumer's residence.

CONTACT

215 Broadus Street Sturgis, MI 49091

Toll Free Customer Service:

1-877-659-4500

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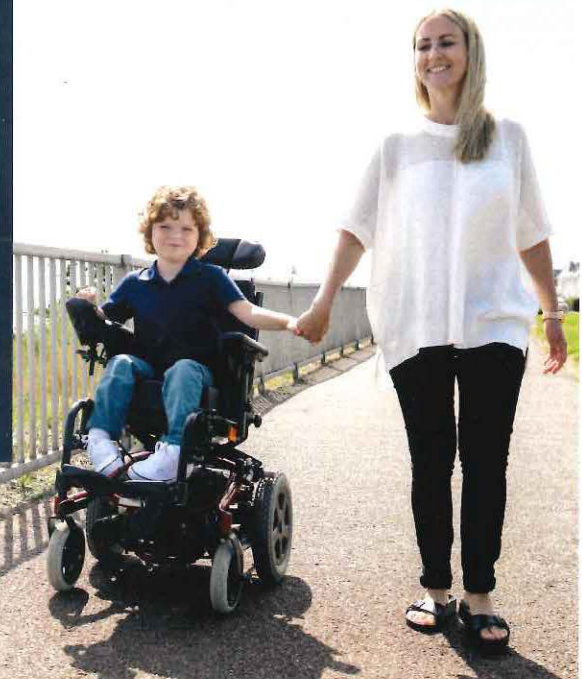
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Fiscal Employer Agent

Family Owned & Family Operated

At GT we are passionate about empowering those to live the life of their choosing.

LESS than **30** sec.
call hold time



**Customer
Satisfaction Rating**

"Our family is deeply appreciative of your services. GT staff are always helpful and respectful. Frankly I'm not sure where we would be without the help GT provides. Thank you!"

"I truly appreciate the efficient, compassionate attention with which GT Independence ALWAYS addresses my issues."

Helping people live a life of their choosing regardless of age or ability

www.gtindependence.com

1-877-659-4500

customerservice@gtindependence.com

215 Broadus Street, Sturgis, MI 49091



Benefits of Choosing GT Independence

Dedicated Customer Service

Our knowledgeable customer care team is available to serve you by phone or email from 8am-5pm EST Monday through Friday. Our customers **reach a real person in less than 30 seconds** when calling us and **over 98% of customers report that they are satisfied** with GT Independence.

Secure Web Portal

Access your monthly budget report, employee paystubs and other documents from your smartphone or tablet through the GT Independence Portal. You can also easily create, approve, and submit employee time reports through your personal portal account.

Easy to Read Reports

We offer multiple monthly budget report styles that are easily readable and provide you with the information you need to easily self-direct your care. Your report is available on your phone or tablet through your portal account and is also mailed to your home each month.

Fast and Easy Payment of Employees

Employees can choose to receive their paycheck by direct deposit or VISA debit cash card. Employees can submit timesheets 24/7 by fax, email, or online using a computer, smartphone, or tablet and can receive a text or email confirmation that their timesheets has been received.

Person-Centered Self-Direction

GT Independence is a family owned and operated company and we are passionate about empowering those that we serve to live the life of their choosing. We welcome customer feedback and are continuously working to improve the experience of our customers.

Industry Leader

GT Independence is headquartered in Sturgis, MI. We are a proud family-owned company who understands the importance of providing services with staff who live in your community. We are a leader in providing fiscal services to home and community based programs nationwide and have over 14 years of experience serving participants. We have received the highest industry accreditation from CARF for exemplary service to our customers.

What Our Customers Are Saying

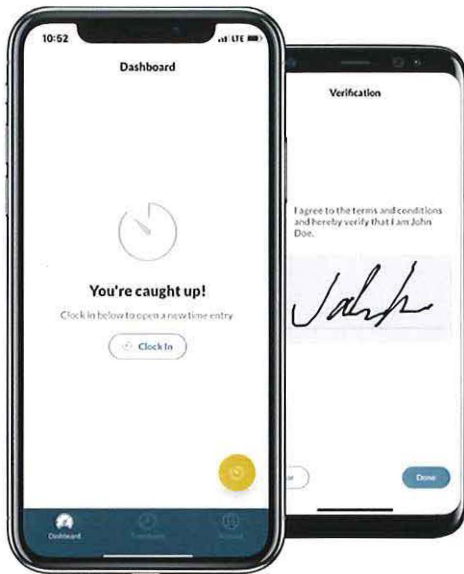
"Our family is deeply appreciative of your services. GT staff are always helpful and respectful. Frankly I'm not sure where we would be without the help GT provides. Thank You!"

Participant Family Member

"Thank you as always to all GT personnel. You are always beautifully professional, prompt and proactive."

Participant

Completing Your Timesheet on Your Phone or Tablet



Get the Caregiver App

Caregiver by GT Independence lets you easily log your care hours, receive approval from your employer, and submit your timesheet for payment right from your phone or tablet.

Download the App for free today.



Want More Information?

Visit our website to learn more about the benefits of using the App.

www.gtindependence.com/APP

¿hablas español?

La aplicación Caregiver está disponible en español. Simplemente seleccione español en la pestaña de configuración.

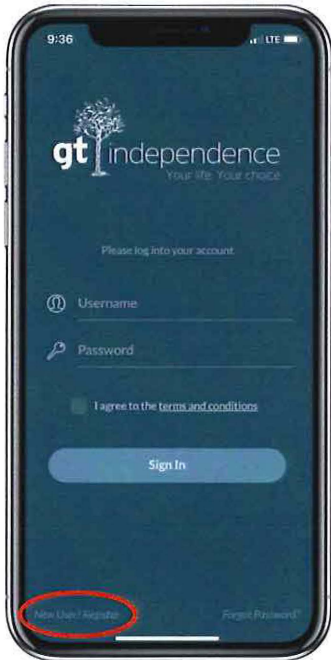
Need to talk to someone?

Our Customer Service Team is here to help!
1-877-659-4500

Follow These Steps to Get Started!

- 1 Download Caregiver by GT Independence App from the Apple App Store or Google Play Store.
- 2 Register your account through the App or login using your GT Portal username and password.
- 3 View in-App instructions and set up security pin and App notifications.
- 4 Clock-in / out or manually add time entry to start your timesheet.

Caregiver App Instructions and Frequently Asked Questions



Setting Up Your Account and Logging In

Existing Portal Users

Simply use the same username and password as your portal account to log into the app.

New Users

Follow the steps below to set up your account:

- 1 Select "New User? Register"
- 2 Enter your Account ID and Personal Information (DOB Date should be MM/DD/YYYY Format)
- 3 Create a Password (Password must contain at least 8 Characters, 1 Uppercase, 1 Lowercase, and 1 Special Character)

My Account ID

My Username

My Password

Frequently Asked Questions:

Will the App Work on My Device?

The Caregiver app is built to work on Apple iOS and Android operating systems and most mobile devices and tablets are compatible; The App requires Android Devices to use versions newer than 5.0 lollipop and Apple devices to use iOS versions newer than 10.0.0.

What if I Don't Have Service?

The Caregiver App is built to work even if you don't have service on your mobile device or tablet. Once you have downloaded the App and successfully logged in you can use all the functionality of the App and only need to connect to WIFI or Cellular Service when you are ready to submit your timesheet.

Why do I need a passcode on my phone?

A passcode is required since the app has protected health information such as participant name and services provided. Only you, the authorized employee, should have access to this sensitive information.

Have Other Questions?

You can find a full list of answers to Frequently Asked Questions by visiting www.gtindependence.com/app.



Helping people live a life of their choosing regardless of age or ability.

www.gtindependence.com

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