

Staff Management Toolbox: Tips and Tricks

Co-management: Who does what?

When you choose self-hired community habilitation and/or respite services, you take on the responsibility of making budget, staffing and supervisory decisions. You and your fiscal intermediary will co-manage your employees. This makes you a supervisor. We recognize that not everyone has experience being a supervisor, which is why we are here to help with our monthly Staff Management Toolbox guides. Consider connecting with other self-directing participants on our new Facebook page to compare tips and tricks on co-managing staff.

Understanding your role and responsibilities as a co-manager can help you be a better supervisor. In the chart below we have summarized the co-management roles of Heritage Christian Services and you. These roles are drawn from our Memorandum of Understanding. You can request a copy of your signed MOU from your FI contact.

Co-Management Roles and Responsibilities

Heritage Christian Services/FI Coordinator	Self-Directing Participant or Designee
<ul style="list-style-type: none">Advise on recruitment and interview strategies.	<ul style="list-style-type: none">Recruit and interview self-hired staff.
<ul style="list-style-type: none">Onboard/hire staff referred by participant.Process self-hired staff terminations.	<ul style="list-style-type: none">Decide who to hire and refer self-hired candidates to FI contact to initiate hiring.Decide when you no longer want to work with someone and let your FI contact know.
<ul style="list-style-type: none">Complete and maintain all required background checks.	<ul style="list-style-type: none">Support self-hired staff through the onboarding process as needed.
<ul style="list-style-type: none">Provide staff OPWDD/DOL/DOH* new hire training. Provide and ensure completion of annual required training.	<ul style="list-style-type: none">Provide staff with training specific to your needs and encourage them to complete the required agency training.
<ul style="list-style-type: none">Ensure all fringe benefits are provided to employees as applicable (sick time, holiday pay, vacation time, health benefits, etc.).	<ul style="list-style-type: none">Notify the FI of any issues/concerns with self-hire staff benefits.
<ul style="list-style-type: none">Ensure compliance with state and federal labor and tax regulations (worker's comp claims, wage garnishments, disability leave, Paid Family Leave, etc.). Ensure Self-hired employees receive appropriate wage and tax statements.	<ul style="list-style-type: none">Notify the FI if the employee reports any concerns with their employment or pay.

<ul style="list-style-type: none"> • Implement self-hired staff pay changes. 	<ul style="list-style-type: none"> • Determine staff pay rates/notify FI in writing when pay changes are needed.
<ul style="list-style-type: none"> • Monitor staff documentation and ensure it is compliant with all applicable regulations. Follow up with the staff on missing documentation or documentation that needs corrections. Monitor documentation for potential fraud. Report and investigate fraud. 	<ul style="list-style-type: none"> • Monitor staff documentation and time in eVer0. Support the FI to obtain required staff documentation as needed. Notify the FI if there are any concerns about staff documentation or hours.
<ul style="list-style-type: none"> • Process payroll, staff activity fees, and mileage, and ensure self-hired employees are paid accurately and timely. 	<ul style="list-style-type: none"> • Schedule self-hired staff and coordinate coverage when a self-hired employee calls off.
<ul style="list-style-type: none"> • Monitor self-hired staffing usage (including staff activity fees and mileage) to ensure it stays within budgeted amount. Communicate any concerns to person supported. Monitor staff hours to prevent overtime. 	<ul style="list-style-type: none"> • Ensure self-hired staff usage stays within the budgeted amount. Ensure staff do not work more than 40 hours per week (Sunday-Saturday). Monitor budget usage to ensure there are enough funds to cover SAF and transportation.
<ul style="list-style-type: none"> • Report and investigate reportable incidences that involve self-hired staff. 	<ul style="list-style-type: none"> • Report any abuse, neglect, serious injuries or other significant events to the FI. Cooperate with the investigative process and encourage self-hired staff to do so as well. Provide a safe and non-hostile work environment for self-hired employees.
<ul style="list-style-type: none"> • Ensure staff follow agency policy and procedures and meet employment expectations. 	<ul style="list-style-type: none"> • Follow agency policies regarding hiring, paying, training and terminating self-hired staff.**
<ul style="list-style-type: none"> • Mediate concerns between the self-hired participant/designee and self-hired staff with the participant. 	<ul style="list-style-type: none"> • Monitor staff performance. Document any performance concerns and contact the FI if assistance is needed.
<ul style="list-style-type: none"> • Provide support and advice on co-managing staff. 	<ul style="list-style-type: none"> • Reach out to the FI if assistance is needed with managing staff.
<ul style="list-style-type: none"> • Bill Medicaid for the Services Provided. 	<ul style="list-style-type: none"> • Keep FI apprised of any changes to your Medicaid status.

*OPWDD: Office for People with Developmental Disabilities; DOH: Department of Health; DOL: Department of Labor.

**You can request a copy of our self-hire employee handbook from your FI.

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