



# FactSheet:

## Participant Directed Services — Financial Management Services

### DHS Office of Intellectual Disability

#### What is Participant Directed Services (PDS) for the Intellectual Disability (ID) Service System?

There are two service delivery models in the ID service system, Traditional (Agency) and Participant Directed Services (PDS). PDS allows individuals to self direct their services, to have additional control over where, when and how their supports and services are delivered. With PDS the person receiving services, or their surrogate, becomes an employer. This means more choice and control regarding the workers delivering their services and more responsibilities such as creating a schedule for Support Service Workers.

#### Can I use the Participant Directed Services model of service delivery?

- Do you live in a private residence that you own or residence of a family member or friend?
- Does your Individual Support Plan (ISP) include authorized services that are eligible Participant Directed Services? (Home and Community Habilitation, respite, transportation may be examples)
- Are you or your surrogate prepared to be employers?

If you answered yes to all these questions you may want to learn more about Participant Directed Services (PDS). Your surrogate is the person that you, as an ID services participant, designates to act on your behalf as an employer. This is not a paid position and your surrogate cannot be a provider of your services. If you choose a PDS model you or your surrogate will self direct your services and will become either a Common Law or Managing employer.

*\*all references to "you" that follow will refer to either the ID services participant or their surrogate, which ever is appropriate*

#### If I choose to self direct some of my services can I also utilize the Traditional (Agency) model?

Individuals may elect to receive some services via the Traditional model and others via the PDS model.

#### What other choices and responsibilities do I need to consider?

If you utilize PDS you will need to choose the type of Financial Management Service (FMS) organization you want to use. FMS organizations provide administrative services to support employer functions such as processing timesheets and creating paychecks for your workers. There are two FMS models.

#### What are the two Financial Management Service (FMS) types ?

They are Vendor Fiscal (VF EA FMS) and Agency with Choice (AWC FMS). With both, workers are hired by you and must complete an agreement which includes:

- Following the ISP
- Maintaining documentation
- Participating in meetings
- Meeting qualifications

Also, the worker can receive on the job training from you (the employer) regarding how to perform their duties.

### **What makes the two FMS types different?**

If you choose the AWC FMS (agency with choice Financial Management Service) you will become a Managing Employer (ME) of your Support Service Worker (SSW). Managing Employers are the onsite supervisor or manager of the SSW. Pathways of Southwestern PA, the AWC FMS will be the employer of record for your workers, also known as the common law or legal employer. You and the AWC FMS and will be joint employers. Pathways of Southwestern PA could assist you with job training.

If you choose VF EA FMS (vendor fiscal / employer agent financial management service) you will become an employer of your Support Service Workers (SSW). Public Partnership Ltd. (PPL) will be the fiscal management organization and is considered a fiscal agent. You are the Common Law Employer (CLE) , also known as the employer of record. A Common Law Employer is the legal employer of the staff (SSW) they hire.

### **What are some things I need to learn about?**

If you are going to self direct your ID services you should consider each option carefully to learn about:

- What the increase in the choice and control of your workers will mean to you.
- Your responsibilities as an employer of your workers, including the difference between being a Managing Employer (ME) and a Common Law Employer (CLE).
- Which Financial Management Service (FMS) type may be best for you.

### **What is a Supports Broker service?**

The Supports Broker service is designed to assist you with employer related functions in self directing some or all of your services.

### **How may a Supports Broker assist me?**

- By performing employer related functions on behalf of a participant.
- By helping coordinate informal PDS activities.

### **Where can I get more information about PDS and Supports Broker services ?**

- The Office of Developmental Programs Consulting website at [www.odpconsulting.net/](http://www.odpconsulting.net/)  
Follow the path: Resources > Training Webcasts, Videos and Recordings > Participant-Directed Services (PDS) in ODP: What You Need to Know  
Additionally, follow the path Topic Info > Participant Direct Services (PDS)
- Reach your Supports Coordinator to ask about your options and responsibilities. Consider using this FactSheet to help guide a conversation with them.

*Please access additional FactSheets on the Allegheny County Department of Human Services website or by placing OID FactSheets into your internet browser.*