

Self-Directed Goods and Services

A service available through the MyCare Waiver and Ohio Home Care Waiver

Self-directed goods and services is a service offered through the MyCare waiver and Ohio Home Care waiver. It helps people be more independent and involved in their communities. The service allows individuals to pay for services, equipment, or supplies that they need but cannot purchase through Medicaid, waivers, or other sources. Individuals will have \$2,500 available for this service each 365 days.

Self-Directed Goods and Services Requirements

Every person has different needs and different resources available, so there is no list of what self-directed goods and services will or will not cover. However, purchases must meet the following criteria:

- Helps increase independence, safety, or remain engaged in the community;
- Decreases need for other Medicaid services; or
- Covers costs of services, equipment, or supplies that are not available through other sources; and
- Meets a specific need included in the individual's person-centered service plan.

Self-directed goods and services cannot be used to pay for any of the following:

- Experimental treatments.
- Items that are only used for entertainment or leisure activities.*
- Rent or bills (like utilities or internet service).
- Items that are illegal or prohibited by federal or state regulation.

*Exception: funds can be used for camp fees and gym memberships.

Steps for Facilitating a Conversation about Self-Directed Goods and Services

1. Understand the individual's needs

To create a person-centered service plan that best serves the individual, encourage them to openly and honestly share their thoughts and feedback. Ask open-ended questions to help the individual describe their needs, what is or is not working, and how they would prefer to receive their care.

2. Discuss available options with the individual

Explain and talk through in detail the services and supports that are available to the individual through Ohio Medicaid State Plan benefits, waivers, or other programs. This conversation should include an overview of self-directed goods and services.

3. Ask the individual to determine how they want to manage goods and services

Individuals have options for how they want to manage the funds for self-directed goods and services. This includes authorizing services per item, per service, or in a lump sum amount that individuals can manage each month. If the individual chooses monthly amounts, the case manager will need to document each item purchased in the person-centered service plan once the receipts are submitted.

4. Add self-directed goods and services to the individual's person-centered service plan

If the individual decides that self-directed goods and services is a good fit for them, add it to their person-centered service plan. Walk the individual through the process to use self-directed goods and services, including paperwork and responsibilities. Be sure the individual is aware goods and services funds authorized but remaining unused could be considered income.

Note: if an individual needs an item or service, but they do not have enough funding in their self-directed goods and services to cover it, please contact the Ohio Department of Medicaid at

selfdirectionprogramassistance@medicaid.ohio.gov.

Effective for Ohio Home Care Waiver on October 1, 2024

Effective for MyCare Waiver on November 15, 2024

1. Understand the Individual's Needs and Identify Existing Supports

Encourage the individual to openly and honestly share their goals and the needs they have. Ask how their needs are currently being met and if existing supports can help them achieve their goal and meet the assessed need. Consider using the sample questions below to guide the conversation.

- What are your most important health and personal care needs?
- What are your short-term and long-term goals?
- How do you like to spend your free time?
- What activities are most important to you? Are you able to do those things when and how you want?

2. Explore Other Waiver Resources and Non-Waiver Resources

Explain in detail the services and supports that are available through Ohio Medicaid State Plan benefits, waivers, or other programs. This should include a conversation about self-directed goods and services, including what could be purchased through budget authority to meet their need.

3. Align the Individual's Need to the Chosen Service(s)

After reviewing all potential service and support options, work together to create their person-centered service plan. Ask the individual to identify the service(s) they prefer and want to include in the plan. Once the plan is created, review it together to confirm the plan best fits their needs.

4. Ensure Requirements are Met

If an individual chooses to use self-directed goods and services, ensure the chosen item or service meets all requirements per page 1 of this document, including the \$2,500 annual limit for both the MyCare and Ohio Home Care Waivers. To determine whether an item or service can be covered under goods and services funds, use the flow chart on page 3 of this document.

5. Add Goods and Services to the Individual's Person-Centered Service Plan

If the individual decides that self-directed goods and services is a good fit for them and all requirements are met, walk the individual through the process to engage in self-directed goods and services, including paperwork and responsibilities. Update the individual's person-centered service plan and submit authorization to the Financial Management Service (FMS). The FMS will then load the authorized amount to the individual's pay card.

6. Use Self-Directed Goods and Services

To properly use self-directed goods and services, the individual must purchase the approved item or service within 30 days of authorization. Any amount authorized remaining unused could be considered income. They must submit a receipt or invoice to their care manager within 10 days of the purchase with the FMS pay card. Following their submission of the receipt or invoice, the care manager must upload it to the FMS's record and update the person-centered service plan to document the items (if needed) within 10 days.

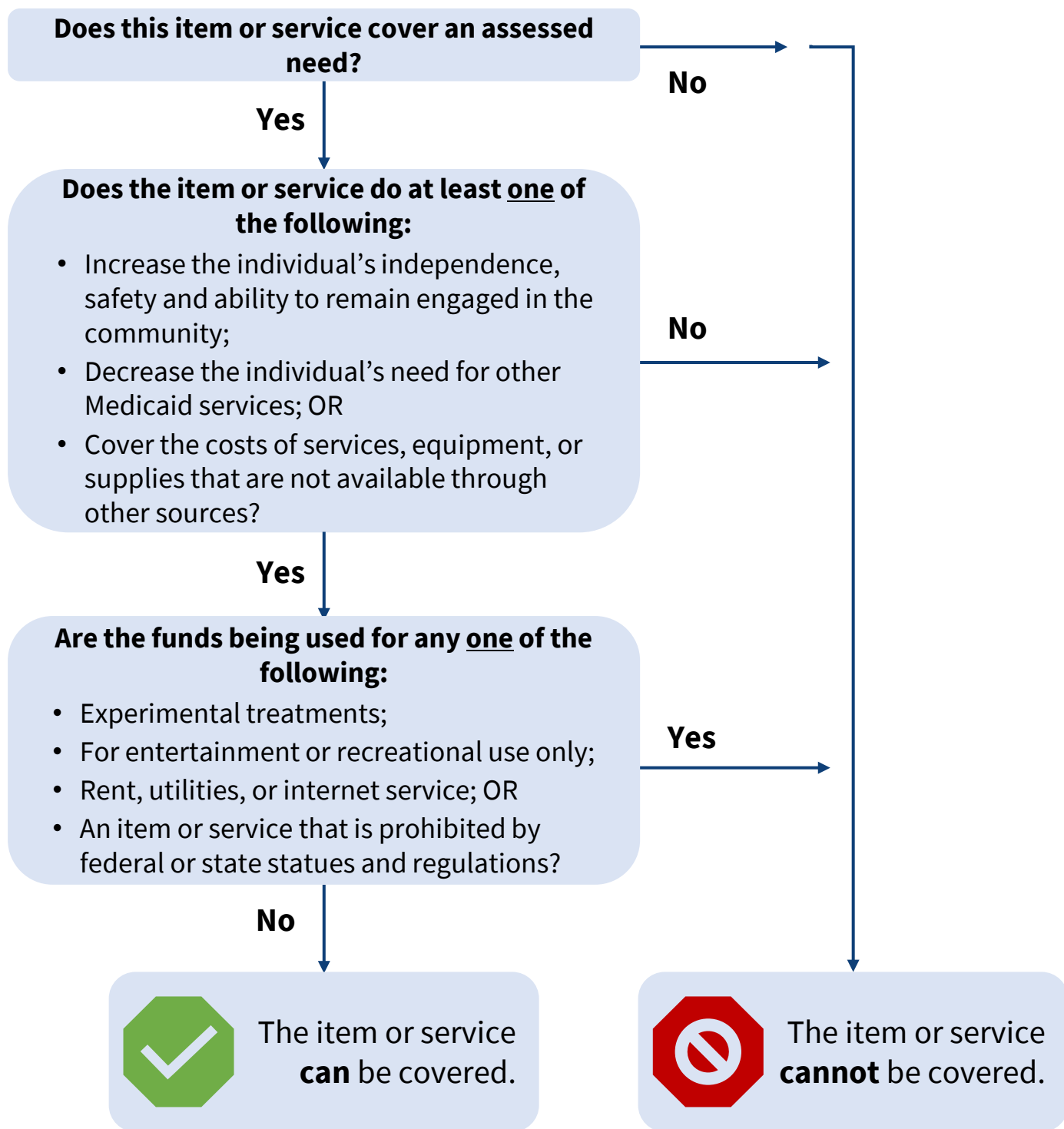
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Self-Directed Goods and Services Decision Flow

The flow chart below will help you determine if the item or service can be purchased using self-directed goods and services.



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