



Frequently Asked Questions

A guide to provide answers to some of the most common questions related to self-direction.

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Remember to always refer to the most up-to-date information from official Wisconsin State Resources or your assigned program contacts, as policies and financial thresholds can change.

Self-Directed Supports

1. What are Self-Directed Supports (SDS)?

SDS provides the opportunity for individuals enrolled in Wisconsin's long-term care programs (Family Care, Family Care Partnership, PACE, IRIS, or CLTS) to have more control over deciding how, when, and who provides their services and supports. This includes input into creating a budget, hiring, training, supervising, and at times, terminating Direct Care Workers.

2. What is the role of a Fiscal Agent (or Fiscal Employer Agent/Fiscal Intermediary) in SDS?

A Fiscal Agent (FA) is an organization that helps manage the financial aspects of your self-directed plan. This typically includes processing payroll for your chosen Direct Care Workers, handling tax withholdings (FICA, FUTA, SUTA, federal and state income), workers' compensation, and ensuring compliance with labor laws. They also process payments for other approved services and vendors that are in your plan. Lori Knapp Choice[™] is a fiscal agent.

3. Am I considered an employer if I self-direct services?

Yes, if you hire your Direct Care Workers, you are considered the employer. Lori Knapp Choice[™], as your fiscal agent, acts on your behalf for many of the administrative and financial employer responsibilities, but you retain core employer duties like hiring, training, and supervision.

4. How is my SDS budget determined?

For Family Care or Family Care Partnership, your Managed Care Organization (MCO) will provide a budget based on your assessed needs and service plan. For CLTS, your budget will be provided by your County case manager. This budget will be provided to Lori Knapp Choice[™] as your fiscal agent. Lori Knapp Choice[™] will use this budget to help determine payment of services to your employees.

5. What services and supports can be paid for through the SDS budget?

Generally, home and community-based services that are part of your approved care plan can be self-directed. This includes services like personal care, supportive home care, respite, and supported employment. There may be specific exclusions for some services. Please check with your care manager.

Payroll and Employees

6. How do I pay my Direct Care Workers?

Lori Knapp Choice™, as your chosen fiscal agent, will process payroll for your approved Direct Care Workers. You will approve time sheets submitted by your workers, and Lori Knapp Choice™ will then issue payment.

7. What paperwork does a new employee need to complete?

New employees will typically need to complete an Employee/Direct Care Worker application, background check forms, and tax withholding forms (e.g., W-4). Your Lori Knapp Choice™ Enrollment Specialist will guide you through the specific paperwork required.

8. Are background checks required for Direct Care Workers?

Yes, all workers, including family members, need to complete a background check and be approved before they can be paid. Lori Knapp Choice™ facilitates this on your behalf.

9. How do I ensure my Direct Care Workers are paid on time?

It's crucial to submit approved timesheets to Lori Knapp Choice™ by their designated deadlines. Lori Knapp Choice™ has a payroll schedule included in your onboarding documentation as well as on our website: LoriKnappChoice.com

10. What about taxes for my Direct Care Workers?

Lori Knapp Choice™, as your fiscal agent, is responsible for withholding, filing, and depositing all applicable federal and state taxes (FICA, FUTA, SUTA, federal and state income tax) on behalf of your Direct Care Workers.

11. What about workers' compensation and unemployment insurance?

Lori Knapp Choice™ will handle workers' compensation benefits and unemployment compensation for your Direct Care Workers. They can provide details on this insurance.

12. What if I need a copy of a pay stub or W-2 for my Direct Care Worker?

Lori Knapp Choice™ can provide electronic copies of pay stubs and mailed copies only of W-2s. W-2s are required to be mailed by January 31st each year.

Budget Management and Reporting

13. How do I monitor my SDS budget and spending?

Your care manager or Enrollment Specialist/Payroll Analyst will provide you with information and tools to monitor your budget and track spending. Regular communication with your care manager, your LKC™ Enrollment Specialist and your LKC™ Payroll Analyst is key.

14. What if I need to make changes to my budget or plan?

If your needs or circumstances change, you will work with your care manager to modify your self-directed supports plan and budget accordingly.

15. What documentation do I need to keep for fiscal purposes?

It's advisable to keep records of approved service plans, budgets, time sheets, and any communication with your care manager or Lori Knapp Choice™ regarding financial matters.

16. What if there's a discrepancy in payments or my budget?

Contact your Lori Knapp Choice™ Payroll Analyst or your care manager immediately to address any discrepancies or questions regarding payments or your budget.

Eligibility and Income

17. What are the income and asset limits for SDS programs in Wisconsin?

Eligibility for Wisconsin's long-term care programs (Family Care, Family Care Partnership, PACE, IRIS, CLTS) involves financial criteria related to income and assets, which are updated annually. Spousal allowances and home ownership rules also apply. It's crucial to check with your County, local Aging and Disability Resource Center (ADRC) or the Wisconsin Department of Health Services (DHS) for the most current and specific financial eligibility requirements.

18. Can family members be hired as caregivers, and how does that affect financial aspects?

Yes, family members (including spouses in some cases) can often be hired as Direct Care Workers. All Direct Care Workers, including family, must complete background checks and be approved in order for Lori Knapp Choice™ to process their payroll and taxes.

Where to Find More Information

- **Wisconsin Department of Health Services (DHS)**

The official source for program policies, manuals, and general FAQs. Look for publications related to Self-Directed Supports, IRIS, Family Care, Family Care Partnership, and CLTS: dhs.wisconsin.gov

- **Aging and Disability Resource Centers (ADRCs)**

Your local ADRC is an excellent resource for unbiased information on long-term care options, eligibility, and connecting with fiscal agents: dhs.wisconsin.gov/adrc

- **Managed Care Organizations (MCOs)**

If you are enrolled in Family Care or Family Care Partnership, your MCO will be a primary resource for your specific plan and budget.

- **County Children's Services (CLTS)**

Your local County Children's Services Department can help to explain the services available to you and discuss eligibility.

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