Budgeting for Goods & Services

Financial responsibilities of the key players in Self-Directed Services

EMPLOYER OF RECORD

- Helps develop the annual budget
- Ensures that projected expenses are based on the needs identified in the recipient's service plan
- Provides accurate invoices
- Submits vendor payment requests with an authorized invoice to the Fiscal Management Services agency
- Keeps records in a Home Record book and submits quarterly progress reports

DDS CASE MANAGER

- Helps the EOR develop their budget to meet the recipient's needs identified in the Individual Plan
- Calculates the final budget and submits it for approval
- Assists in updating the budget when revisions become necessary
- Troubleshoots any issues identified in the recipient's service plan or budget

FMS AGENT

- Confirms all goods and services are approved in the recipient's plan prior to issuing payment
- Verifies that all payments match the recipient's approved spending plan
- Issues requested payments directly to service providers
- Maintains an online portal for EORs to check the status of vendor payment requests

VENDORS

- Supplies an invoice to the EOR showing the dates and total cost of each service, along with any associated taxes and fees
- Must agree to accept payment after services have been delivered
- Communicates with the EOR and provides an updated invoice if service costs change during the Plan of Care year

This document is a condensed version of the EOR training and DDS policy. Completing the EOR training is a requirement for utilizing Self-Directed Services. 26/01