



Participant Handbook

Designed to Help You Live Your
Life with the Support You Need



Wisconsin

Department of Health Services P-01008LP (08/2021)

IRIS – Include, Respect, I Self-Direct

Welcome to the Include, Respect, I Self-Direct (IRIS) Program. IRIS is a Medicaid-funded, long-term care program offered by the Wisconsin Department of Health Services. IRIS is available in counties where Family Care operates. In IRIS, you have budget authority, which means that you choose which goods, support and services you will use to achieve your long-term care goals. You also have employer authority, which means that you are able to hire and manage your own workers to help you achieve your long-term care goals. IRIS participants may also choose to obtain workers through an agency. IRIS funds can be used to purchase services that your family and friends cannot provide. When you build on the help you get from others instead of replacing it you strengthen your relationships. IRIS funds are used to purchase assistance where and when it is needed.

IRIS is grounded in the Principles of Self-Determination:

- Freedom to decide how you want to live your life
- Authority over a specific budget amount
- Support to organize resources in ways that are meaningful to you
- Responsibility for your wise use of public dollars
- Confirmation of your important leadership as an advocate

The Intent of this Handbook

This handbook describes the IRIS Program and your role in the program as an IRIS participant. It also describes who is available to help you and offers ideas and tips for building your own IRIS plan. It explains your responsibilities in IRIS, as well.

You are the expert on your own life. You know better than anyone what is important to you and what support you need. IRIS is available to help

you achieve your long-term-care-related goals so you can live your life the way you want.

Participating in IRIS does not mean doing things all by yourself – you will have others to help you along the way. People with guardians or representatives are welcome to choose IRIS.

Table of Contents

IRIS – Include, Respect, I Self-Direct	1
The Intent of this Handbook.....	1
Living a Self-Directed Life Means	5
Help is Available in IRIS	6
The IRIS Call Center:	6
IRIS Consultant Agencies	7
IRIS Consultants	7
Choosing Your IRIS Consultant.....	8
Your First Meeting	8
IRIS Fiscal Employer Agents.....	9
Creating Your IRIS Support and Service Plan	11
Support and Service Plans are Important	11
Monthly IRIS Budgets.....	11
When Additional Money is Needed for My Plan.....	12
Getting My Plan Started	13
Changing Your Plan	14
When a Support is Needed Right Away.....	14
IRIS Goods, Support and Services Available	15
IRIS Self-Directed Personal Care	17
Goods, Support and Services NOT Covered in IRIS	17
Completing Your Plan How Your IRIS Consultant Can Help	18
IRIS Timeline	19
IMPORTANT: Making Your Plan Happen	20
Obtaining Workers	21
Options for Obtaining Workers or Attendants	22

Things to Consider When Hiring Workers	23
Create a Job Description.....	23
Finding Potential Workers.....	24
Interviewing Job Applicants.....	25
Checking References	27
Completing the Caregiver and Criminal Background Check	29
Making the Job Offer.....	29
Benefits for Your Workers	30
Deciding if Your Plan is Working	31
The Annual Review.....	31
Staying Healthy and Safe	31
Your Responsibilities in IRIS	32
Employer Responsibilities When You Hire Your Own Workers.....	33
Your Monthly Medicaid Cost Share Payment.....	34
Filing Complaints and Grievances	35
Transferring to a New IRIS Consultant Agency or a New IRIS Fiscal Employer Agent or Leaving the IRIS Program	37
Answers to Your Questions or for More Information	37
GLOSSARY OF TERMS	38

Living a Self-Directed Life Means



You have many choices in deciding how you want things done. You choose:

- What goods, support and services you need.
- When you want those goods, support and services provided.
- Who will provide those goods, support and services.
- Where you want the goods, support and services provided.
- How to use your IRIS monthly budget effectively and wisely.

Help is Available in IRIS

The IRIS Call Center:

After you are enrolled in the program you will have access to the Department of Health Services' Call Center. The Call Center answers questions you have.

Contact the IRIS Call Center by calling toll free 1-888-515-4747 or by messaging IRIS@wpsic.com.



IRIS Consultant Agencies

The Department of Health Services contracts with IRIS consultant agencies that oversee and support a network of IRIS consultants in your area. These agencies coordinate program enrollment, provide orientation, handle recordkeeping and process program disenrollment. IRIS consultant agencies manage overall program quality and ensure program integrity. After the participant develops a plan with the help of their consultant, the IRIS consultant agency provides final approval after all requirements are met. These costs do not come out of the participant budget.

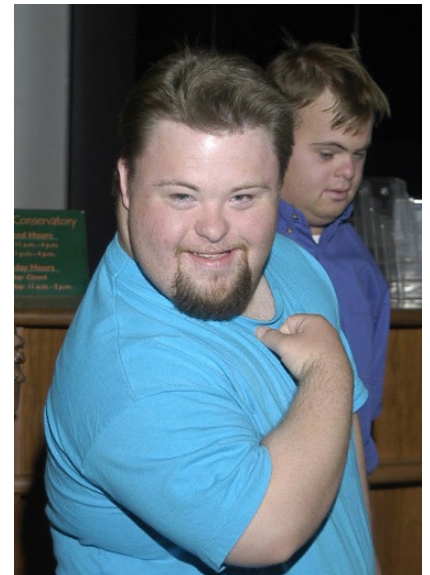
IRIS Consultants

Everyone in IRIS has an IRIS consultant. Consultants value the independence, choice, freedom and responsibility that IRIS provides. Consultants are knowledgeable about the services in your area. Consultants help you develop your IRIS plan.

Your consultant is required to meet with you several times each year. You may choose to have more meetings if you need additional help. You also choose where and when to meet.

Your consultant will:

- Listen to what you want your life to be like.
- Help you figure out how to meet your goals.
- Help you design a plan that fits your budget.
- Make sure all required paperwork is done.
- Assist you to update your plan.
- Help you find workers, service providers and items.
- Assist you in completing all new employer and employee paperwork and submit these materials to the fiscal employer agent (FEA).
- Help you find places to buy equipment and other supplies.



- Help you explore job opportunities.
- Assist you to develop a backup plan to help keep you safe.
- Measure how well your plan is working.
- Help you understand your responsibility to stay eligible for Medicaid and IRIS.

Choosing Your IRIS Consultant

The IRIS consultant agency you choose will send you information about the IRIS consultants who are available in your area. You may communicate with the consultants before making a choice. Before you decide, you may want to ask the consultant:

- How many other people they work with in IRIS.
- How much they know about services in your community.
- How much experience they have working with a person like you (if it is important to you to find a consultant who understands your culture, disability, etc.).
- What days and times they are available to meet with you.

The consultant you choose will contact you to set up the first meeting. If you wish to change consultants, contact your IRIS consultant agency for assistance.

Your First Meeting

At your first meeting, your consultant will take time to get to know you and learn what is important to you.

Your consultant will also explain some of the things you need to know about IRIS, such as:

- How you create an IRIS plan to help you achieve your long-term care goals.
- How your IRIS budget works and how to choose an IRIS fiscal employer agent.

- Your opportunities and responsibilities within IRIS.
- How to contact the IRIS Call Center and your IRIS consultant agency.
- How to make a complaint if you are not satisfied with something.

IRIS Fiscal Employer Agents

The Wisconsin Department of Health Services contracts with IRIS fiscal employer agents. Fiscal employer agents make sure that tax and employer and employee accounting is properly managed for any caregivers you hire and manage. Fiscal employer agents also manage other accounting duties, and they collect and track any cost share payments you might have. These costs do not come out of your IRIS budget.

Once the IRIS consultant agency signs off on your completed IRIS plan, it shares a copy to your chosen fiscal employer agent. Your plan provides needed information about your selected services, what bills to pay, who will be receiving payment and for what amounts. Your fiscal employer agent will:

- Complete all employer and employee setup duties, including criminal and caregiver background checks on workers you may hire.
- Collect and account for your monthly Medicaid cost share, if you are required to pay one, and send you a monthly report listing your payments.
- Assist with verifying provider qualifications and help you make written provider agreements.
- Send payments you authorize to the business(es) or agency listed on your plan that provide you with goods, support and services. Program rules require that checks are made payable to the business or agency providing the service which prevents the need to reimburse you.

- Serve as your employer agent and process paperwork and time sheets when you employ workers directly (see page 23 for information on hiring workers).
- Contact you and your IRIS consultant agency if you request something to be paid that is not listed in your plan.
- Send you a report listing all payments made from your budget.
- Closely coordinate with your IRIS consultant agency and the Department of Health Services.



See the fiscal employer agent materials for specific information on Workers' Compensation Insurance, unemployment, determining contractor status, having a non-payroll item paid, and Medicaid cost share and payments.

Creating Your IRIS Support and Service Plan

Support and Service Plans are Important

All IRIS participants have a written support and service plan. Your plan is based on your long-term care goals and how you want to achieve them. Your plan lists:

- The goods, support and services you choose.
- The people or agencies you selected to provide the goods, support and services you chose.
- The amount of money your plan will spend on each item or support.
- The goods, support and services you need each month.

When you build your plan, think about the things that will maintain or improve the quality of your life, such as:

- The things that are the most important to you.
- The unpaid support and services you may be able to use.
- The goods, services and support you may need once or just a few times during the year.
- The number of workers you may need and the type of support they will provide.
- Your interest in being the employer of your workers or using an agency to hire workers (see page 23 for information on hiring workers).
- Your emergency backup plan, including who will help when your worker is not available.
- How you will know your plan is working.

Monthly IRIS Budgets

Based on your needs, the Department of Health Services estimates how much it will cost to purchase services in order to meet your needs. When you enroll in IRIS, you will be told the amount of your budget estimate. This estimate is the amount of money you may spend on the long-term-

care-related goods, support and services that are listed on your approved plan. Once your IRIS support and services are approved, the total cost to fund your plan is called your IRIS budget.

Your budget can be adjusted if needed (see the following section). If your health or ability changes and your plan is not able to meet your needs, your budget may need to change.

When Additional Money is Needed for My Plan

Your IRIS budget is the cost of the goods, support and services listed in your plan. Your budget is flexible. You may use more in some months and less in others as long as the services are listed on your plan. You may also shift budgeted dollars between services listed on your plan. You may set aside money for purchases up to 12 months in the future as long as those goods, support and services are listed on your plan.

IRIS has a process to make sure that your budget includes enough money to purchase necessary goods, support and services. If you have tried to create a plan within your IRIS budget and find it is not enough, then your IRIS consultant prepares and submits a request for additional funds to the Department of Health Services for review and approval.

There may also be times when you need to purchase a one-time item or service, such as a home modification or piece of equipment, that is covered by IRIS but will not fit into your budget. In these situations, your IRIS consultant prepares and submits a budget request to the Department of Health Services for review and approval.

In either situation, you may write your own request and submit it to your IRIS consultant. There are a few things to keep in mind when requesting additional funds:

- Describe why the approach you propose is the most cost-effective way to meet your long-term care needs.

- When possible, your request should include three written cost estimates for the items or services being requested.
- Remodeling and building projects must meet all building codes.
- Wait for approval before purchasing any goods, support or services included in the request.

Plan to submit a bill for the items to the fiscal employer agent. Program rules require that checks are made payable to the provider, which prevents the need for reimbursement to you.

Getting My Plan Started

Based on your goals, you decide what goods, support and services will help you achieve your long-term-care-related goals that are important to you. Make sure to first think about ways your needs can be met at no cost. When you decide what is most important, consider the following:

- Many things or the help you need can be free.
- Your friends and family can help you, or they may know other people who can. In addition, your IRIS consultant can link you to other people who use IRIS and who may be interested in bartering or sharing workers or goods.
- You will want to include the goods, support or services that improve your quality of life. You will also want to make sure you are finding them for the best price.
- Someone else in the IRIS program may be looking for some of the same help you are. If you are interested in sharing information you have learned about specific goods, support and services, tell your consultant who can then share it with others.
- Your IRIS consultant has tools to help you think about and design your plan. You decide whether to use them and whether you would like your IRIS consultant to help you. These planning tools are not required but may help you decide what is important to include in your plan.

Changing Your Plan

You may change your plan to match a change in your needs. Call or send an email to your IRIS consultant, or contact your IRIS consultant agency directly to update your plan. Changes to your plan are not effective until the update has been approved by your IRIS consultant agency.

When a Support is Needed Right Away

Occasionally, people's lives and situations require that they get started in IRIS right away. For example, Medicaid eligibility for some individuals begins when their IRIS plan starts. If you need goods, support or services immediately, your IRIS consultant can help you make a temporary plan. Your consultant agency then makes sure you can get started as quickly as possible. You may adjust your plan at any time after you begin IRIS.

NOTE: If you are transferring into IRIS from another program there will be no gap in services.



IRIS Goods, Support and Services Available

In addition to your unpaid support and any customized goods and services you choose, other goods, support and services may be in the following IRIS service categories: ⁴

- Adaptive aids
- Adult day care
- Adult family home (1-2 bed)*; (3-4 bed)†
- Communication aids
- Consumer education and training
- Counseling and therapeutic resources
- Customized goods and services*
- Daily living skills training*
- Day services
- Home-delivered meals
- Home modifications
- Housing counseling
- Housing startup
- IRIS consultant agency provider
- IRIS fiscal employer agent provider
- IRIS self-directed personal care*
- Nursing*(above MA Card covered)
- Personal emergency response system
- Prevocational services
- Residential care apartment complex
(assisted living facility)
- Relocation related
- Respite*
- Specialized medical equipment and supplies
- Support broker†
- Supported employment*

- Supportive home care*
- Transportation*
- Vocational futures planning

Note Key

*Your qualified spouse, relative, or guardian may provide these items.

†Excludes decision makers.

⁴IRIS funds may be used only after other insurance, Medicare or your Medicaid ForwardHealth Card is determined to be unable to pay for the good, support or service.

IRIS Self-Directed Personal Care

IRIS participants who are eligible for personal care services may receive their personal care from either a Medicaid personal care agency or through IRIS self-directed personal care. IRIS services can complement any personal care you are eligible for and the cost is paid outside of your monthly IRIS budget. The IRIS self-directed personal care agency coordinates obtaining physician orders and nurse oversight for this service. You may choose to either self-direct your personal care or receive your personal care from a Medicaid personal care agency. Ask your consultant about this option if you are interested in self-directing your personal care.

Goods, Support and Services NOT Covered in IRIS

IRIS is designed to keep you in control of your life. However, there are goods, support and services that cannot be purchased with IRIS funds, including:

- Goods or services covered by health insurance, your Medicaid ForwardHealth Card or Medicare.
- Goods or services that are the responsibility of another agency (such as educational services for persons up to age 21 years and vocational services provided by the Wisconsin Department of Vocational Rehabilitation).
- Your room and board, including your rent, mortgage payment or utilities.
- Experimental goods and/or treatments.⁵
- Goods, support and services that are not directly related to your long-term-care-related goals or needs or those that are intended to benefit others.

Completing Your Plan

How Your IRIS Consultant Can Help

You can develop your plan by yourself or with others. Your consultant or your IRIS consultant agency will help you as much as you request. All plans are reviewed to make sure they meet IRIS program standards. If your plan does not meet the standards, your IRIS consultant agency or your IRIS consultant will contact you to discuss your options.

Once your plan is reviewed and approved, you will receive a letter that informs you of your IRIS start date. A copy of this letter is sent to others who need to be informed that you are enrolled in IRIS.

⁵Your IRIS consultant can help you determine what goods, support or services are considered experimental.

IRIS Timeline

Please refer to the timeline below for an illustration of the planning process and the time associated with each step.

What Happens	When it Happens
You choose your IRIS consultant agency (ICA) at the Aging and Disability Resource Center	Your referral date
Your ICA contacts you with a welcome call	Within 3 days of your referral date
You select your consultant or one is assigned to you on the fourth day	Within 3-4 days from your welcome call
Your consultant has an initial visit with you	Within 14 days of your referral date
You and your consultant develop your IRIS plan and submit it to your ICA for approval	Within 30 days of your initial visit
You select your IRIS fiscal employer agent	Within 30 days of your initial visit
Your IRIS plan is reviewed, approved and is implemented; your IRIS start date is established	Within 45 days from initial visit
Your IRIS enrollment is complete and your plan is activated	

IMPORTANT: Making Your Plan Happen

You can begin to arrange the services, support and goods in your plan while your IRIS consultant agency is reviewing your plan. However, you cannot begin to receive IRIS funded services until the review is complete, your plan is approved and activated, and the service is authorized. This includes any workers you hire, as they may not begin work until after they have completed all paperwork and have successfully passed required background checks. Workers may not work more than 40 hours each week without prior approval and the timesheet you and your worker sign should not have more hours than are listed on your approved IRIS plan.

Obtaining Workers

There are several ways to obtain workers to provide services such as supportive home care, respite, job coaching or personal care. You have different rights and responsibilities based on the option you choose. You may:

- Be an employer and hire workers directly (your fiscal employer agent serves as your employer agent and pays workers from submitted time sheets). These workers are referred to as “participant hired workers.”
- Manage the workers you choose with assistance of an agency with choice provider.
- Recommend workers to be hired and managed by a co-employment or leasing agency.
- Use a provider agency to supply the services you need using the workers they have on staff.

Options for Obtaining Workers or Attendants



You buy
agency
services

The agency
chooses,
employs and
manages the
workers.

Your IRIS
fiscal
employer
agent pays
the agency
invoice.

You
recommend
workers

The workers
you
recommend are
employed and
managed by an
agency with
choice or
leasing agency.
Your IRIS
fiscal employer
agent pays the
agency invoice.

You manage
the workers

The workers
you choose are
employed by
the agency
with choice
provider.

Your IRIS
fiscal
employer
agent pays the
agency
invoice.

You are the
employer

You make all
employer
decisions.
Your IRIS
fiscal
employer
agent serves
as your
employer
agent and
handles all
payroll-related
tasks.

Things to Consider When Hiring Workers

Answering these questions may help you decide what you are looking for in the workers you choose to hire:

- Do I need more than one worker to help me?
- How often do I want help? Part-time or full-time?
- What time of day and what days of the week do I need help?
- Can the worker's time be flexible?
- What hourly pay will the worker receive?
- Does my budget amount allow any worker benefits?
- What exactly do I need the worker to do? How do I want the work done?
- Does the worker need to be able to drive me places?
- How will I handle the training the worker needs?
- Do I prefer someone with a particular skill or experience?
- Does the worker need to be able to lift a certain number of pounds?
- Do I need different workers to help me with different things?
- Do I want the worker to be a friend, neighbor, or family member?
- Is a person I know and who wants to help me the best worker for the job?
- How I will schedule a worker so they do not work more than 40 hours per week without prior approval?

Create a Job Description

Writing a good job description will help you prevent future misunderstandings. It is as important to your worker as it is to you to be clear on what the job entails. Include detailed information, such as short descriptions of the parts of the job and when you need the work to be completed.

Finding Potential Workers

Once you know what you are looking for in a worker, you will want to find the best worker to do the job. Your IRIS consultant can help you.

Good places to find a worker might include:

- People you already know, including your family and friends
- Local organizations for elders or people with disabilities
- Church, synagogue or place of worship
- Local college or university
- Employment agency and job service
- Local newspaper
- Bulletin board at local organizations
- Online resources

You may want to place an advertisement online or in the newspaper's help wanted section. Consider all the ways that you might locate a person who can do the job. Find out if you will need to spend money on an ad. You may use your IRIS budget to pay for the cost of an ad.

A help wanted ad should include:

- A description of the hours you want someone to work
- A general description of what you want a worker to do
- Instructions on how to apply for the job

Don't include more information than is needed in your ad. For example, do not include your address or mention that you live alone. It is a good idea to require each applicant to complete a written application. IRIS will provide you a sample job application and job description.

A job application should include information on the applicant's:

- Name, address, phone number
- Training or educational background
- Skills and work experience
- References
- Authorization to check references
- Certification of truthfulness
- Signature



Interviewing Job Applicants

You may want to conduct a brief telephone interview with interested applicants before you interview them in person. Make sure you ask questions about their past work history, whether they are able to perform specific job duties, and how they would handle specific situations.

One of the first steps to schedule an in-person interview is to decide where the interview should take place. If you are not comfortable interviewing in your home, decide on a different place to meet the person. You may want to meet in a public place, such as a library, coffee shop or restaurant. You may also arrange to have a friend with you at the interview.

Interviews should cover some basic topics:

- Tell the applicant about the job and what you want them to do for you, and provide a copy of your job description.
- Tell them about any household pets in case they have pet allergies.
- Ask open-ended questions instead of those that can be answered yes or no.
- Talk about when you need a worker to start.
- Discuss the time sheet requirements and how the IRIS fiscal employer agent serves as the employer agent, handling all payroll, payroll taxes and any other withholding.
- Discuss the job's hourly pay and benefits and how raises are obtained.
- Let the person ask some questions.
- Tell them a caregiver and criminal background check is required.

- If they have not already given you one, ask the applicant for a list of references with contact information so you can contact their previous employers.
- Make certain the applicant understands that you are the employer, not IRIS, your IRIS consultant, IRIS consultant agency, or the fiscal employer agent.

Some questions to ask during an interview:

- What kind of experience do you have?
- What are you looking for in a job?
- What motivates you to do your job well?
- What skills do you have that would help you do this job?

Don't forget to thank the person for their time. Let them know when you expect to make your decision and how you will notify them of your decision.

IMPORTANT TIP – Some questions you should **NOT** ask during an interview:

- How old are you?
- How much do you weigh?
- Are you married or do you have a life partner?
- Do you have children? Are you planning to have more?
- Are you dating anyone?
- Have your wages ever been garnished?
- Do you have a disability?
- How often do you drink alcohol?
- What is your religion, race or ethnicity, politics?

Checking References

Checking previous or current employer references can give you insight on how the applicant you are considering might actually work out. To

check references, call the people listed as references and ask about the applicant.

Some good questions are:

- How do they know the applicant?
- What kind of work did the applicant do for them?
- What are the applicant's strengths?
- What are the applicant's weaknesses?
- Would they hire the applicant again? Why or why not?
- Does the applicant show up on time?
- Does the applicant show up regularly?
- Does the applicant call when they will be late or may not be able to work?
- Does the applicant bring personal problems to the job?

- Using a scale of 1-10 , how well did the applicant do the job that was required of them? Ask them to explain their ranking.
- Ask questions related to the qualities you want in a worker. For example, is the applicant honest? Does the applicant respect other people?



Completing the Caregiver and Criminal Background Check

Your IRIS fiscal employer agent completes criminal background checks on your workers for you. Your consultant will help you complete the necessary forms and will ensure they are sent to your fiscal employer agent for processing.

Some serious convictions may disqualify an applicant from being your employee and having wages paid with IRIS funds. Worker wages cannot be paid with IRIS funds until all worker screening and setup is complete.

Making the Job Offer

Based on what you have learned about the applicant, make the best decision you can about whether the worker is right for you. If you decide to hire the person, call and let the individual know you want to hire them for the job. Restate what the job pays. If the person accepts your job offer, decide on a start date.

Let the people you didn't hire know that you selected someone else. You don't need to tell them why they were not selected. Simply explain that you chose someone with skills that better fit your needs. You may wish to notify them by sending a letter. Be certain your selected applicant accepts the job before informing any applicant you did not choose.

As quickly as possible after you've made your decision to hire, have the selected individual complete the new hire forms your IRIS consultant agency will provide to you:

- Form I-9 to demonstrate work eligibility
- Wage and hour agreement
- Form W-4 for income tax withholding purposes
- Medicaid provider agreement

Send these completed forms, along with a copy of the worker's Social Security card, to your IRIS fiscal employer agent. Your consultant can help you complete and submit these forms if you need help.

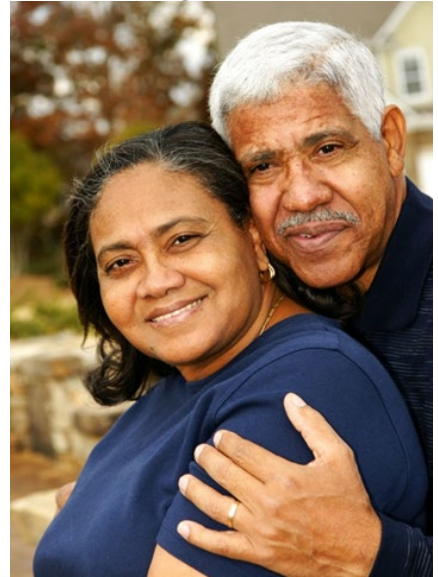
Benefits for Your Workers

You may use your IRIS budget to purchase benefits such as time off. Workers' Compensation Insurance protects workers who could be hurt on the job and is provided outside of your IRIS budget. Your IRIS fiscal employer agent or your IRIS consultant can provide more information about purchasing benefits for your worker(s).

Deciding if Your Plan is Working

You are the best person to decide if your IRIS plan is working or if it needs to change. You might want to consider questions like:

- Am I any closer to reaching my goals?
- Do I work at the job I want, with the hours and wage I want?
- Am I involved in my community as I choose?
- Do I spend time doing the things I enjoy?
- Do I spend enough time with the people I care about?
- Are my workers doing things the way I want them to be done?
- How does my plan improve my life?



The Annual Review

Your eligibility for IRIS will be verified each year. The verification includes:

- Your Medicaid financial eligibility, which is conducted by your county income maintenance office.
- Your Medicaid functional eligibility. Your IRIS consultant agency will notify you in advance of this date and will schedule a meeting with you to review your long-term care functional screen, which documents your continued Medicaid functional eligibility.
- Meeting with your IRIS consultant to discuss your IRIS plan.

Staying Healthy and Safe

IRIS is a Medicaid waiver program and is obligated to ensure the health and safety of all IRIS participants. It is your responsibility to report any

incident that you know or suspect has endangered you or any IRIS participant.

The following are examples of reportable incidents and include actions done by others, such as family, friends, caregivers, service providers, or persons in your community:

- Abuse or neglect
- Crimes
- Death
- Falls or injuries
- Hospitalization
- Medical or health emergency
- Medication errors
- Misuse of finances
- Property damage



If you know or suspect any of these incidents occurred, contact your IRIS consultant agency as soon as possible within the next 24 hours. If time has passed since an incident occurred, you should still report it.

If you or someone you know is being abused or neglected, call your local law enforcement or your county adult protective services office to make a report. In addition, notify your IRIS consultant agency of the critical incidents that occur.

Your Responsibilities in IRIS

You have some important responsibilities to fulfill to ensure your success with IRIS. Help is available to help you meet your responsibilities. Your responsibilities include:

- Participating in the IRIS orientation provided.

- Working in cooperation with the IRIS consultant you choose and letting them know how much help you want.
- Building an IRIS plan that meets your long-term care goals.
- Listing all of the IRIS-paid goods, support and services on your plan.
- Arranging to get the goods, support and service you need and keeping certain records of the services you receive.
- Making an emergency backup plan.
- Providing information to your fiscal employer agent so people and companies that provide you services, support or goods are paid after services are received.
- Reporting critical incidents to your IRIS consultant agency. Reporting hospitalizations, nursing home or institutional admissions to your IRIS consultant agency.
- Maintaining your IRIS program eligibility, including your Medicaid functional and financial eligibility.
- Paying any required Medicaid monthly cost share amount (see below).
- Making sure your providers complete Medicaid Provider and Service Agreements.
- Allowing IRIS access to information it needs to maintain your eligibility or to serve your long-term-care-related needs.

Employer Responsibilities When You Hire Your Own Workers

- Reviewing the employer startup packet provided by your consultant
- Reviewing the employee startup packet with each of your employees
- Making sure your workers' pay rate, time off and any benefits are all within program guidelines
- Completing and submitting all required employer and employee startup paperwork to your IRIS fiscal employer agent before your

employee begins working (your consultant will help you complete these forms)

- Managing and supervising your workers
- Scheduling any workers you hire so they do not work more than 40 hours each week without prior approval.
- Completing and approving your workers' time sheets and submitting them to your IRIS fiscal employer agent in time for published payroll deadlines
- Approve time sheets for hours worked that do not exceed the hours authorized on your IRIS plan
- Approving payment for services within the service authorization on file.

Your Monthly Medicaid Cost Share Payment

If your Medicaid eligibility requires that you pay a monthly cost share payment, it is your responsibility to pay that amount each month to remain eligible for Medicaid and IRIS. Your county income maintenance office will inform you if you are required to make a monthly payment. Failing to make these required payments places your Medicaid and IRIS eligibility at risk. Cost share payments are due at the beginning of each month and should be sent to your IRIS fiscal employer agent.

Make cost share payments payable to IRIS, and send them to your chosen IRIS fiscal employer agent. If you have questions about making a cost share payment, please contact IRIS at 1-888-515-4747.

Filing Complaints and Grievances

If you have a complaint or grievance about IRIS first contact your IRIS consultant or your IRIS consultant agency. You may also call the toll-free hotline 1-888-203-8338 and ask to speak to a program representative, or email DHS IRIS Grievances at DHSIRISGrievances@wisconsin.gov.

You may obtain assistance from an ombudsman, who will help investigate and resolve IRIS-related issues. There are two ombudsmen depending on your age.

If you are age 18-59, your IRIS ombudsmen is available through Disability Rights Wisconsin at three regional offices:

Madison Disability Rights Wisconsin	Milwaukee Disability Rights Wisconsin	Rice Lake Disability Rights Wisconsin
1502 West Broadway, Suite 201 Madison, WI 53713 608-267-0214 TTY: 888-758-6049 Fax: 833-635-1968 Toll Free: 800-928- 8778	6737 W. Washington Street, Suite 3230 Milwaukee, WI 53214 414-773-4646 TTY: 888-758-6049 Fax: 833-635-1968 Toll Free: 800-708- 3034	217 W. Knapp Street Rice Lake, WI 54868 715-736-1232 TTY: 888-758-6049 Fax: 833-635-1968 Toll Free: 877-338- 3724

If you are age 60 or above, your IRIS ombudsman is the Board on Aging and Long-Term Care, with offices located throughout the state, at:

Board on Aging and Long-Term Care

Toll Free: 1-800-815-0015

Complaints and grievances not settled with your IRIS consultant agency, your IRIS fiscal employer agent, or with the ombudsman may be directed to the Wisconsin Department of Health Services:

Department of Health Services

P.O. Box 7851

1 W. Wilson Street, Room 665

Madison, WI 53707-7851

608-266-1865

TTY: 888-701-1251

Email: DHSIRIS@wisconsin.gov

Website: <https://www.dhs.wisconsin.gov/iris/index.htm>

Transferring to a New IRIS Consultant Agency or a New IRIS Fiscal Employer Agent or Leaving the IRIS Program

You may choose to transfer to another IRIS consultant agency available in your area at any time. You can contact your local Aging and Disability Resource Center to make the transfer.

If you want to transfer to a new fiscal employer agent, contact your IRIS consultant who can help you transfer.

You may choose to leave the IRIS program at any time. It is important that you let the program know you are leaving. Please inform your IRIS consultant agency to help you with this process. You can also contact your Aging and Disability Resource Center. You may return to IRIS provided you remain eligible and meet your program responsibilities.

Answers to Your Questions or for More Information

Contact IRIS if you would like additional assistance.

The IRIS Call Center

Voice and TTY: 1-888-515-IRIS (4747)

Email: info@Wisconsin-IRIS.com

Website: <https://www.dhs.wisconsin.gov/iris/index.htm>

GLOSSARY OF TERMS

IRIS – INCLUDE, RESPECT, I SELF-DIRECT

Wisconsin's self-directed support program through which you self-manage your long-term care goods, support and services within your IRIS budget. IRIS funding can purchase goods, support and services you choose related to your long-term care outcomes that your friends and family do not already provide. IRIS serves as an alternate choice to managed long-term care programs.

IRIS BUDGET

The money needed to fund your ongoing services that excludes one-time or high-cost items. Your budget is based on your needs and can be changed if needed. The amount of your budget estimate will be shared with you before you choose IRIS. After you have a plan, your budget is the cost of IRIS-funded services listed in your support and service plan.

IRIS CONSULTANT/CONSULTANT

A trained individual in your community who helps you understand IRIS requirements, helps you develop and implement a support and service plan, and provides assistance as you request.

IRIS CONSULTANT AGENCY

An agency under contract with, and certified by, the Department of Health Services that handles day-to-day IRIS operations; trains, supervises and supports IRIS consultants; reviews support and service plans; and answers questions you, families, providers and others may have. You choose your IRIS consultant agency at your local Aging and Disability Resource Center.

IRIS FISCAL EMPLOYER AGENT

The agency under contract with, and certified by, the Department of Health Services that handles employer agent functions, pays the workers and providers you hire, collects cost share payments, completes expenditure reporting, and helps you monitor your IRIS spending. Your IRIS consultant can help you choose your IRIS fiscal employer agent.

IRIS PARTICIPANT

The person enrolled in the IRIS program, which includes Wisconsin frail elders and adults with a physical or developmental disability who meet the eligibility criteria. In IRIS, you are the participant, and you choose to self-manage your long-term care goods, support and services.

IRIS SELF-DIRECTED PERSONAL CARE

IRIS participants eligible for Medicaid personal care may self-direct their personal care or receive agency-based Medicaid personal care.

IRIS SUPPORT AND SERVICE PLAN

A written plan you develop, either alone or with help, that lists the goods, support and services you choose to meet your goals and long-term care needs; the cost of services; their frequency; and the provider of each service. Unpaid goods and support, as well as any Medicaid-funded services you receive, are also listed on your plan. Your plan also includes goods, support and services you receive at no cost.

MEDICAID

Also called Title XIX, Title 19 and MA, is a state- and federal-funded program that purchases certain health-related goods, support and services.

SELF-DETERMINATION

A broad concept that means you have control of your life and are a valued citizen in society. Self-determination is based on five basic principles:

1. **Freedom** to decide how you want to live your life
2. **Authority** over a specific budget amount
3. **Support** to organize resources in ways that are meaningful to you
4. **Responsibility** for your wise use of public dollars
5. **Confirmation** of your important leadership as an advocate

WISCONSIN DEPARTMENT OF HEALTH SERVICES

The Wisconsin department that sponsors IRIS. The Federal Centers for Medicaid and Medicare Services authorize IRIS through Section 1915(c) of the Social Security Act.

NOTES

A large, light blue rounded rectangle with a dark blue border, intended for taking notes. It occupies the majority of the page below the 'NOTES' header.



For More Information about IRIS:

Wisconsin Department of Health Services IRIS Website:

<https://www.dhs.wisconsin.gov/iris/index.htm>

IRIS Contact Information:

Call: 1-888-515-IRIS (4747)

Email: iris@wpsic.com