

Lifeworks

A nonprofit serving
people with disabilities

245D BASIC SERVICES PROGRAM AND EMPLOYEE MANUAL

Individualized Home Supports Without Training
Night Supervision
Homemaker
Respite

January 2024

LIFEWORCS SERVICES, INC.

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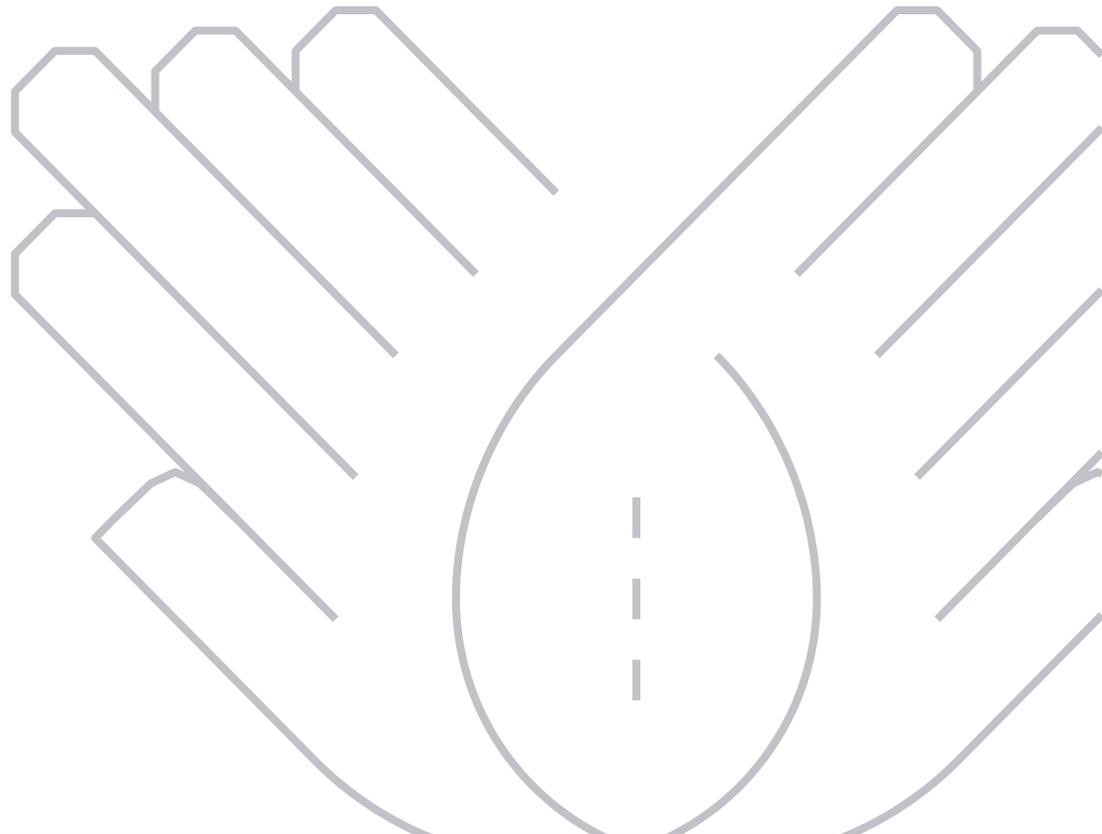


PURPOSE

The purpose of this manual is to clarify the roles and responsibilities for the Authorized Representative, legal representatives, and the people served by Lifeworks. Please see the 245D Basic Service Contract and the Employee Handbook for additional information.

Lifeworks Services, Inc. reserves the right to add or change this manual at any time. This program manual is available on our website at www.lifeworks.org. Any changes to this manual will be communicated via email or posted on our website.

A paper copy of this manual may be obtained by asking your Service Coordinator to provide one by mail.



CONNECT WITH US

Administrative Offices

6636 Cedar Ave S, Suite 250
Richfield, MN 55423

Monday-Friday
8:00 am to 4:30 pm with the exception of holidays

Phone: 651-454-2732 | 1-866-454-2732 (toll free)

Fax: 651-454-2773

Website: www.lifeworks.org

Support Contacts Email

Support with hiring or to check on the status of an applicant: gethired@lifeworks.org

Cashe or Pavillio timekeeping support: cashesupport@lifeworks.org

Payroll support: payroll@lifeworks.org

Reimbursement support: reimbursments@lifeworks.org

245D training support: trainingforlifeworks@lifeworks.org



WHO WE ARE

Since 1965, Lifeworks Services Inc. has been a champion for inclusion. Lifeworks was founded by families who recognized the importance of advocacy and breaking down barriers for people with disabilities to be part of the community.

As an industry leader, Lifeworks continues our commitment to self-determined support, careers with competitive wages, and developing innovative opportunities that enhance everyday lives.

LIFEWORKS MISSION & VISION

We envision accessible, equitable, and diverse communities.

Our mission is to partner with people with disabilities to drive change by increasing opportunity and access in the community.

OUR VALUES

Values tell us what's important. They are the foundation of who we are and how we work together.

At Lifeworks, our values are also the pillars to our culture. They are part of everything we do and define the expectations we have for ourselves and each other. We stand by these principles. They guide our decision making and how we carry out our mission.

As Lifeworks core beliefs, our values set us apart and are the blueprint for our success.

You Lead the Way – We Listen

We honor choice and pursue opportunities with community at the heart of our work.

Together, We Break Down Barriers

We seek diverse perspectives, advance accessibility, and encourage a sense of belonging for all.

We Focus on Impact

We hold ourselves to the highest standards. We share expertise and collaborate to find solutions that address the whole picture.

We Reinvent What's Possible

We take chances and welcome the unknown. We learn from the past and lean into the future.

WHAT WE DO

Through services that provide choice and foster community – as well as through partnerships with over 400 businesses – Lifeworks serves more than 2,900 Minnesotans with disabilities and their families.



EQUITY STATEMENT

Lifeworks strives to be radically accessible, diverse, equitable, and inclusive. We appreciate the vibrancy of differences, center the voices of silenced and marginalized people, and champion universal rights.

We welcome change and work to reverse historic oppression. We promise to educate ourselves to end the dominant cultural practices of White supremacy, ableism, racism, sexism, homophobia, transphobia, xenophobia, anti-Indigenous practices, religious oppression, and all other obstacles to personal authenticity and achievement. We support our partners and members of our community who are marginalized to restore justice and dignity.

At Lifeworks, we expect accountability from all employees and our Board of Directors. We know that we cannot be truly person-centered unless we celebrate all identities - emphasizing authenticity over conformity.

At Lifeworks, we partner with complete human beings with intersectional identities, recognizing that disability exists in every race, religion, gender, culture, and class and that most of us will experience disability at some point in our lives. We recognize we have made mistakes and will continue to evolve with humility and openness, placing psychological safety, equity, and belonging over comfort. Lifeworks recognizes that in the best interests of our community, we must approach disability through the lens of diverse perspectives.

We call upon our diverse community to hold us accountable.

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245D BASIC SERVICES

Individualized Home Support

Individualized Home Support services are available through the federally approved BI, CAC, CADI, and DD waiver plans and must follow Minnesota Statute 245D Basic services compliance standards.

Individualized Home Support provides support in community living service categories for people who live in their own home or their family's home. Individualized Home Supports can be provided in the person's own home, family's home or in the community, and either in person or remotely. Support is defined as a staff member providing a person with direct supervision, cueing, maintenance, guidance, instruction, assistance with activities of daily living or assistance with coordination of community living activities. Individualized Home Support is limited to a maximum of 16 hours per day. Services through this program must relate to supports identified in the person's service plan.

Night Supervision

Night Supervision services are available through the federally approved BI, CAC, CADI, and DD waiver plans and must follow Minnesota Statute 245D Basic services compliance standards.

Night Supervision services are overnight assistance and supervision provided by a staff in a person's own home when the person needs assistance and supervision in at least one of the qualifying areas. Night Supervision is limited to a maximum of 12 hours per day.

Homemaker

Homemaker services are available through the federally approved BI, CAC, CADI, EW, and DD waiver plans and must follow Minnesota Statute 245D Basic services compliance standards. This service can be delivered when the participant is unable to manage general cleaning and household activities, or when the primary caregiver who is regularly responsible for these activities is unable to manage them.

Lifeworks provides basic Homemaker services which includes light household cleaning. These services must be authorized by the county. For Homemaker services, independent contractors are not allowed. The person providing this service must be an employee of Lifeworks who has passed a fingerprinting background check.

Respite

Respite services are available through the federally approved BI, CAC, CADI, EW, and DD waiver plans and must follow Minnesota Statute 245D Basic services compliance standards.

Respite is a one-to-one service that provides short-term care due to the absence or need for relief of the primary caregiver. Respite may be provided in the person's home.

In-home or out-of-home Respite settings must meet provider licensure qualifications.

Criteria for Providing Services

Lifeworks is committed to serve all people who would benefit from our services based on the following criteria:

- Resides within the designated geographic service area
- Meets eligibility requirements for waiver funding

Timeframe for Starting Services

At Lifeworks our goal is to provide support to the people we serve in a timely manner.

Lifeworks requires a service authorization from the county to begin services. An intake meeting is required, and this will be arranged through a Lifeworks Service Coordinator. At this meeting the team will identify how services will best meet the needs of the Participant, complete the Support Plan Addendum (SPA) and Individual Abuse Prevention Plan (IAPP), and complete the intake process.

Hiring Process

The Service Coordinator, Human Resources, and the Lifeworks Training Department will work together to facilitate the employee application paperwork and hiring process, including helping prospective employees obtain a fingerprint authorization to complete a background study and assigning 245D Basic Services training as required by 245D licensing standards.

AUTHORIZED REPRESENTATIVE ROLE

The Authorized Representative agrees to take on the responsibility of knowing and following the legal obligations as defined in the signed 245D Basic Services Contract with Lifeworks.

The Authorized Representative is responsible for providing the support necessary to assist the Participant in the use of these services and for following the policies and procedures provided by Lifeworks.

Hiring Responsibilities

EMPLOYEE SELECTION

The Authorized Representative will recruit and nominate candidates for Lifeworks to consider hiring. The Authorized Representative will interview and verify eligibility of prospective employees to work. For Individualized Home Supports without Training and Respite services, to be eligible for hire the candidate must be 16 years of age or older. For Night Supervision to be eligible for hire the candidate must be 18 years of age or older.

Homemaker staff must be 16 years of age or older, must not reside in the home of the person receiving the service, or must not share with the Participant, the areas to be cleaned.

INTERVIEWING ASSISTANCE

When interviewing, all applicants interviewing for the same position must be asked the same questions. Begin the interview with information about the position and review the job description and hours for the position. The prospective employees must be asked if they are able to perform the duties of the job description and notified that they will need to pass a background study to become employed.

Listed below are some of the questions we recommend asking:

- Are you able to perform the duties on the job description?
- What tasks might make you uncomfortable?
- What is your experience with people with disabilities?
- Why are you interested in this position?
- What work experience do you have?
- What did you like or dislike about those jobs?
- Do you prefer a job that is highly structured or one that is flexible?
- Tell me about a mistake you made in a previous job and how you handled it?
- What hours and days are you available?

Some questions violate the Minnesota Human Rights Act and may not be asked. Contact the Human Resources department if additional questions are necessary to verify that they are legally permissible.

It is Lifeworks' policy to create a work environment in which all persons are treated equally without regard to race, color, creed, religion, sex, sexual orientation, age, national origin, marital status, status with regard to public assistance, membership or activity in a local commission, disability, or any other protected class status.

REFERENCE CHECKS

Lifeworks does not check references on the employees nominated for hire. If the Authorized Representative chooses to check references of a prospective employee, the employee should be notified, and the Authorized Representative should ask if there is anyone that should not be contacted.

When calling the approved reference, ask to speak to someone who has direct knowledge of the applicant's performance. Begin the conversation by saying, "I am considering [prospective employee's name] for employment and am calling to verify some information." Ask questions that verify basic information, such as:

- Job title
- Responsibilities as stated on the application
- Length of time employed
- Would they rehire the individual?

EMPLOYEES RESPONSIBLE FOR DRIVING

Lifeworks employees are required to fill out the driver's certification form if driving will be a part of their job. They are also required to carry insurance. Lifeworks will submit the driver's check through our insurance provider. The insurance provider will make a recommendation as to whether the employee should be allowed to drive.

If it's determined that the employee is unable to drive due to discoveries on a driving verification, the Authorized Representative will be notified, and employee will be required to submit a driver's exclusion form before being cleared to work.

When employees are driving their own vehicles as part of their job, they are required to have adequate insurance coverage. If the employee will be driving the Authorized Representative's, legal guardian's, or Participant's vehicle, the owner will want to notify their insurance provider that a non-family member will be driving that vehicle. Lifeworks does not carry automobile insurance for either the Authorized Representative or employees.

EMPLOYEE APPLICATION

An application is required for all new hires. A supplemental application is required for current Lifeworks employees who are working under another Lifeworks program. The Authorized Representative should provide each new hire with directions, obtained from the Service Coordinator, Fiscal Administrative Specialists, or a Human Resources representative, to complete the online application process.

The Authorized Representative will assist Lifeworks by ensuring the employee has completed and signed the required paperwork to become an employee of Lifeworks. The Authorized Representative will also ensure they sign the I-9 form in addition to the employee.

New employees must fill out:

- Employment application
- I-9
- W-4
- Background study
- Acknowledgment form for the job description and employee handbook
- Direct Deposit form

In addition to the new hire paperwork, the employee must pass a background check prior to working. Lifeworks will notify the employee and the Authorized Representative if/when the employee is cleared to begin working.

STATE OF MINNESOTA BACKGROUND STUDY (NETSTUDY 2.0)

All potential employees require a state of Minnesota background check to clear before becoming an employee of Lifeworks. This will require the applicant to be fingerprinted through the Minnesota Department of Human Services Net Study 2.0. Once Lifeworks submits the background study a new employee has fourteen (14) days to be fingerprinted. If the fingerprinting is not done within fourteen days, the study is void and must be re-initiated by Lifeworks. (Please note that the background study process can take up to several weeks for The Department of Human Services to complete).

If an employee has a criminal history that disqualifies them from providing direct care services, the employee will not be hired. If they are a current employee and Lifeworks receives new disqualifying information about their background, a new background check will be conducted. Their employment will be terminated, and they will be notified by a Human Resources employee or Service Coordinator immediately upon notification from the state of Minnesota of a disqualifying event. Lifeworks follows Minnesota Statutes 245A-D regarding background studies. Receiving a background clearance notification from The Department of Human Services does not constitute a hire date. Lifeworks will contact the Authorized Representative with the date employees are eligible to begin training and again when they are cleared to work.

Management Responsibilities

The Authorized Representative will facilitate communication with employees and assist Lifeworks in explaining the following:

- The paycheck schedule (see www.lifeworks.org for the Lifeworks payroll calendar)
- The employment start date (provided by Lifeworks)
- Maintaining employee eligibility
- The training schedule
- The work schedule
- Performance feedback

TRAINING

As a requirement under 245D all 245D Basic employees must complete the required training for new hire orientation and on an ongoing, annual basis. This training is mandatory and must be

completed in the timelines identified by Lifeworks.

Homemaker employees are not required to complete new employee orientation or annual training.

If training is not completed within the specified timelines to meet state statute requirements, the employee will be suspended from working with the Participant. If the employee still does not complete the required training within ten days of suspension, their employment will be terminated.

New Employee Orientation Process

- Once the employee has been cleared for employment by Human Resources, they will receive training information from the Training Coordinator.
 - This information will include an introduction to our online learning management system and an outline of the assigned courses.
 - The new employee will complete the training online on a device of his/her own or at a public computer.
- The new employee will complete the assigned training and any other outside training required per the Participant's SPA.
- New employee orientation is comprised of approximately fourteen hours of curriculum. These hours will be submitted for approval by the Authorized Representative and will be reflected on the employee's time submitted for payroll.
- When the training is complete, the Authorized Representative will conduct a competency review with the employee about the Participant's SPA and Individual Abuse Prevention Plan (IAPP) before releasing the employee to start working.
- When a new employee is hired, the employee will complete orientation training which will meet the annual training requirement for the year. However, to stay aligned with the annual training schedule, a new employee may be required to do orientation and annual training in the same year. Training notices will be sent to the Authorized Representative and the employee to ensure all parties are aware of the requirements whenever an employee is assigned training.

Annual Training Process

- At the beginning of each year, Authorized Representatives and employees will receive an email with the schedule for annual training timelines.
- Training is assigned throughout the year according to the Participant's last name. November and December training groups will be combined each year. This rotation will continue year to year with the employee's training window moving up two months each year.
- Annual training notifications will be communicated twice before commencement of the training. The first notification will be sent to the Authorized Representative and the employee in the month prior to beginning so there is time to schedule training into each employee's work week. Overtime is not allowed, even to complete annual training. Training and direct service hours may not exceed 40 hours per week, per employee.
- The second notification will be directly to each employee on the first day of the month in which the assigned training is due. This notification will inform the employees that the

required trainings have been assigned in the online learning management system and that they have until the last day of the month to complete all required training.

- Annual training is comprised of approximately twelve hours of curriculum. Training hours should be reflected on each employee's time submission.
- Employees will be expected to complete all the annual training assignments within the month that they are assigned. The employee will be suspended on the last day of the month if training is not complete. The Authorized Representative will need to work with the Service Coordinator to create a plan for the employee to complete the training before the employee is able to work again with the Participant. Failure to complete the annual training could impact employment up to and including termination.

After each annual support team meeting, employees will be expected to train on the Participant's new and updated SPA and IAPP. The final version of the SPA and the IAPP are distributed by Lifeworks to the Authorized Representative after the annual support team meeting. The Authorized Representative should make the documents available to the employees immediately and at all times throughout the service year. Each employee must review and complete the online learning management course associated with the Participant's SPA and IAPP.

Lifeworks is able to verify the amount of time an employee spends on learning within the online learning management system. To ensure accurate and responsible use of public funds and to minimize risk of fraud and abuse, Lifeworks will randomly audit training time entries in comparison to the actual amount of time spent on training in the learning management system.

PERFORMANCE REVIEWS

The Authorized Representative is responsible to provide feedback for the annual performance review for each current employee. The Service Coordinator will follow up with each employee as needed for performance concerns or feedback. If an issue arises with an employee's performance, the Authorized Representative should contact the Service Coordinator to work on a resolution together.

WORKING ENVIRONMENT FOR EMPLOYEES

The Authorized Representative will assist Lifeworks with ensuring the working environment is free of intimidation, coercion, and unlawful discrimination and harassment by following all Harassment and Discrimination Policies as defined by Lifeworks. The Authorized Representative and employees are encouraged to report any observed or reported harassment to the Human Resources department by calling 651-454-2732 or toll free at 1-866-454-2732. An investigation involving all concerned parties will begin following any report of discrimination or harassment.

The Authorized Representative will assist Lifeworks with ensuring a safe workplace for all employees. This includes following infection control and first report of injury procedures as well as providing a work environment where employees may communicate openly. If an employee believes there is a problem with how services are provided or with compliance concerns, they should notify Lifeworks.

The Authorized Representative should not ask or direct an employee to perform duties outside of the responsibilities outlined in the Participant's Support Plan Addendum (SPA) and Individual Abuse Prevention Plan (IAPP).

SCHEDULING

The Authorized Representative is responsible for ensuring an employee **does NOT start working until Lifeworks has provided a start date** for the employee.

The Training Department will send each newly hired employee an email with instructions for how to begin new employee orientation and information on how to log onto the online learner management system. Human Resources will also send the employee a new hire letter which includes their hire date, wage, job description, and salary.

Homemaker employees are not required to complete the online orientation.

Once the employee receives the new hire letter, they may begin the required 245D orientation training. In addition to the online orientation, the Authorized Representative should give the employee the SPA and IAPP to read prior to the competency review, which will be completed with the Authorized Representative. A new employee must complete all steps of their orientation prior to working directly with the Participant. Once the employee is finished with their orientation, the Service Coordinator will inform both the employee and the Authorized Representative that the employee is ready to work. This will be the employee's official "start date".

The Authorized Representative will develop a schedule for employees and provide the Service Coordinator with this information upon request. The schedule is contingent on the level of supports and funding the Participant is authorized for by the Minnesota Department of Human Services. The Service Coordinator will provide the Authorized Representative with the number of hours per week [or month] that have been approved for the Participant to ensure the schedule matches the services authorized.

The Authorized Representative will monitor the hours worked by all employees to ensure the health and safety of the Participant. Lifeworks' definition of a work week, for payroll purposes, begins on Sunday at 12 a.m. and ends on Saturday at 11:59 p.m. The employee may not work more than 40 hours per week. **Overtime is not allowed. Employees may not work more than 40 hours between Sunday and Saturday. This includes hours worked directly with the Participant and hours worked to complete required training.**

Employees cannot work while the Participant is in the hospital, a care facility, or is incarcerated. Employees cannot work overnight hours unless the service recipient has been assessed and approved for overnight supervision in their annual assessment and Support Plan.

Note: If employees work more hours than approved in the service authorization, Lifeworks reserves the right to recover the money from the legal guardian or Authorized Representative.

Employees who work and live in the same home as the Participant must have a defined work schedule designating work times and duty-free times. Written agreements of defined work schedules are required by Lifeworks.

Employees who work for more than one Participant in the same workday at different locations can submit travel time from Participant A to Participant B as this time is considered work time.

Please contact Lifework payroll department at payroll@lifeworks.org for additional information on how to submit paid travel time.

Employees working with more than one Participant, family, or service type are responsible for ensuring that they do not exceed 40 hours per week, combined.

Employees that are 16 and 17 years of age may not work before 5:00 am or after 11:00 pm. They may not exceed 8 hours in a single work day or more than 40 hours in a work week from Sunday through Saturday per Department of Labor Laws.

TIME SUBMISSION

An employee's actual number of hours worked, including start and end time, must be entered in the designated EVV compliant timekeeping system. The Authorized Representative is responsible for verifying the accuracy of the employee's time entry before approving and submitting to Lifeworks. It is a federal crime to provide false information for medical assistance billing.

Included in the 21st Century Cures Act, EVV is a federal requirement being implemented by the state of Minnesota. EVV uses GPS to record the employee's location only at the moment of clock in and clock out times. For more information, visit the Minnesota Department of Human Services and Medicaid.gov's EVV webpages: <http://bit.ly/3oQZBjy> and <http://bit.ly/39zkg95>.

Each employee will receive their own username and password to enter their OWN time entries. The time entries will be electronically sent to the support manager. The support manager will receive their own username and password to approve the time entries. Once approved, the time entries are sent to our Payroll Department for payment.

Lifeworks employees are paid every other Friday. If Friday is a bank holiday, the pay date will be the last previous business day prior to the holiday. All time submissions are due to the administrative office by 11:59 p.m. two Mondays prior to the Friday pay date.

The payroll schedule is available on our web site at www.lifeworks.org. **Late time submissions/approvals will be processed the following pay period (two weeks)**. The Authorized Representative may contact payroll by calling Lifeworks at 651-454-2732 or toll free at 1-866-454-2732 and asking to speak with payroll, or via the payroll help desk, at payroll@lifeworks.org. To confirm that the time submission has been received or to receive assistance with any payroll corrections contact our technical team at CashSupport@lifeworks.org or by calling 651-454-2732 and asking for Cashé Support.

PAYROLL

Lifeworks provides direct deposit which ensures proper payment of wages on pay day. A Direct Deposit Authorization form is available on the Lifeworks website and should be mailed to Lifeworks or emailed to payroll@lifeworks.org once completed. Alternatively, employees may opt use a Money Network pay card provided by Lifeworks.

Payroll deductions for all employees are standard:

- Social Security
- Medicare

- State and federal withholding taxes.

Other deductions, such as retirement savings, health insurance, etc., may be made with employee authorization.

If an employee who participates in Lifeworks health insurance benefits does not work within the two week pay schedule, Lifeworks reserves the right to deduct the missed premium(s) from all future checks until paid in full.

In the event that a wage attachment (garnishment) is issued against an employee's salary through the proper judicial process, Lifeworks will withhold such portion of their salary as the law requires.

In the event of an over payment, payroll will work with the employee, Authorized Representative, and Lifeworks Service Coordinator to rectify the issue and collect the overage as soon as possible either by payroll deduction(s) or specific agreed upon arrangements. All overpayments need to be collected prior to calendar year end.

If a replacement check is requested, please contact the payroll department. Lifeworks charges a \$25.00 fee for this service.

The IRS Form W-2 is mailed to employees by January 31 of each year. In the event an employee has lost their paper copy of Form W-2, they may request a duplicate copy in writing and must include a \$10.00 fee payable to Lifeworks.

FAMILY AND MEDICAL LEAVE ACT

The Family Medical Leave Act of 1993 requires certain employers to allow eligible employees to take unpaid, job-protected leaves for certain family and medical events. It is intended to assist employees in reaching a balance between family and work responsibilities with as little conflict as possible. Please contact Human Resources for eligibility, reasons, and uses.

MN EARNED SICK AND SAFE TIME

In compliance with Minnesota labor laws, Lifeworks has established a Sick and Safe Leave policy, effective January 1, 2024. This policy ensures employees are entitled to accrue and utilize sick and safe leave for personal health needs or to address issues related to domestic violence, sexual assault or stalking.

Employees will accrue sick and safe leave based on hours worked at a rate of one hour for every thirty hours worked.

Employees must provide reasonable notice for foreseeable absences and documentation to support the leave.

Contact Human Resources for the complete Earned Sick and Safe Time policy.

JURY DUTY AND MILITARY LEAVE

If an employee requests a leave due to jury duty or military leave, please contact Human Resources for eligibility, reason, and uses.

EMPLOYEE INJURIES

Lifeworks provides Workers' Compensation for employees who are injured on the job. If an employee gets hurt on the job:

- The Authorized Representative must complete a First Report of Injury Form with the employee. This form is available on our web site at www.lifeworks.org
- Fax the completed form to Lifeworks Human Resources at 651-365-3787
- Call Lifeworks Human Resources to report the injury at 651-454-2732.
- If the employee needs medical treatment, they can go to one of the Lifeworks approved clinics or their own clinic. If the employee goes to their own clinic, they should call Lifeworks Human Resources at 651-454-2732 or toll free at 1-866-454-2732.
- The employee should tell the clinic staff it is a Workers' Compensation injury
- Employees injured on the job must report the injury within 24 hours of the injury.

ENDING THE EMPLOYMENT RELATIONSHIP

Lifeworks employees are at-will, as decided upon by the state of Minnesota. If at any time an issue arises with an employee's performance, contact your Service Coordinator to communicate the issue, expectations, and consequences of their performance. Since Lifeworks is the employer, the Service Coordinator should be involved with any employee termination decisions.

Incident and Emergency Use of Manual Restraint (EUMR) reporting

The Authorized Representative will assist Lifeworks with ensuring employees report all significant incidents within 24 hours. The employee is required to complete the Incident and Emergency Report or the Emergency Use of Manual Restraint Incident Report, and to notify the Service Coordinator of the incident. Employees are trained upon hire, and annually thereafter, on the Reporting of Incidents and the Emergency Use of a Manual Restraint Policy and Procedures. Employees and Authorized Representatives may also access this information on our web site at www.lifeworks.org.

Incident Reports can be submitted four different ways:

By Email: Service Coordinator's e-mail address

By Fax: 1-651-454-2773

By Mail: Lifeworks Services
6636 Cedar Ave S, Suite 250
Richfield, MN 55423

Drop off: A drop-off box is available after business hours

Administrative and Fiscal Responsibilities

CONFIDENTIALITY

The Authorized Representative must maintain strict confidence regarding employee information obtained through a background check, or any protected health information for the Participant according to federal, state, and local requirements.

INFORMATION CHANGES

Lifeworks must be promptly notified in writing of any changes to names, addresses, email address, phone number, or other information related to the Authorized Representative or the employees.

CONTACTING LIFEWORKS

When contacting Lifeworks, all callers should be prepared to verify their identity and let the Lifeworks representative know the reason for the call for the most efficient handling of the question.

ACCESS TO PHONE

The Authorized Representative will ensure employees have access to a phone while providing services.

ANNUAL RENEWAL OF THE SUPPORT PLAN / SUPPORT PLAN ADDENDUM (SPA)

Revision to Services

All budget/service related revisions need to be approved by the case manager. It is important to first contact the case manager to discuss the need for a revision to services. The case manager will work with the Authorized Representative and Lifeworks to approve the requested changes when appropriate.

If the changes are approved, the case manager will authorize the revisions and notification will be sent to Lifeworks. Once Lifeworks has received a revised service authorization, the revisions will be implemented. Revisions to the SP and SPA may also have to be completed at the time of the authorized revision requiring an updated plan and signatures by the team.

Note: No revisions can be implemented until Lifeworks has received the new service authorization from the case manager.

Changes such as hiring a new employee, switching hours between employees (within the same service), or other changes that do not result in a revision to the services or the budget do not need to go through an approval process, but the Lifeworks Service Coordinator should be notified when changes outside of the approved schedule occur.

RENEWING SERVICES

The Authorized Representative will work with the Lifeworks Service Coordinator to ensure they

are informed of the annual renewal meeting at least 30 days in advance of scheduling the meeting. The Authorized Representative will participate in the annual meeting and the development of the SP and SPA to ensure services are adequate, and to sign all required documents.

Note: A new service authorization is required each year.

Authorized Service Hours

The types of services and the budget allocation are approved by the county of responsibility and the case manager. If the Authorized Representative consistently approves employees to work more hours than approved by the county there may not be enough money to pay for employees at the end of the Participant's budget year. This means the employees will not be able to work, or in extreme cases, the county may decide the Participant is no longer eligible for services.

Note: If employees work more hours than approved in the service authorization, Lifeworks reserves the right to recover the money from the legal guardian or Authorized Representative.

Overtime of employees is not approved under these services. Employee wages are determined by Lifeworks at the time of the employees' hire date.

Lifeworks reserves the right to limit the number of employees per household.

A service authorization is only valid when a Participant's Medical Assistance (MA) is active. In the event MA becomes inactive, services will be suspended immediately until MA becomes active. Lifeworks will notify the Authorized Representative when services are suspended due to inactive MA. The Authorized Representative must notify Lifeworks when it has been reinstated.

Transportation Reimbursement

For those who qualify, Lifeworks offers limited transportation reimbursement for employees for who transport participants in the community in the employee's personal vehicle. The per mile reimbursement rate will align with the IRS suggested guidelines and is subject to change. This is not a separate authorized service by the county.

Because MA offers transportation for medical appointments, and because there can be no duplication of services, Lifeworks will not reimburse for mileage to and from medical appointments. Additionally, mileage will not be reimbursed for services conducted outside the state of Minnesota.

To claim mileage benefits the Authorized Representative will have an employee complete the Mileage Reimbursement Request form and submit to Lifeworks. If the form is complete, contains all required documentation, and is received by the Lifeworks administrative office by 5:00 p.m. Friday, the check will be issued on Friday of the following week. Lifeworks processes expense checks weekly, however, most individuals submit for reimbursements monthly. The form may be accessed through the Lifeworks web site at www.lifeworks.org.

INSURANCE AND BENEFITS

Lifeworks has the following insurance and benefits available. Please refer to the Employee Handbook for an explanation of coverage, eligibility criteria, and/or enrollment instructions. Employees may be eligible for the following benefits:

- Liability and Bonding
- Medical Insurance
- Thrift Retirement Plan
- Employee Assistance Program

Medical Insurance Eligibility:

Individuals who have worked 1560 hours or more over the first 12 months of their employment are eligible to enroll in the Lifeworks medical plan. Lifeworks uses a 12-month lookback period to determine eligibility. Individuals who work the required number of hours are eligible for benefits the first of the month following 12 months of employment. In addition to the initial lookback period, a lookback is conducted each year prior to open enrollment to determine which individuals are eligible for medical insurance benefits. If an individual is newly eligible, coverage will be effective the first day of the new plan year.

If an individual is eligible for benefits, an email will be sent to them, their support manager, and service coordinator, notifying them of eligibility and providing a 30-day window for enrollment. If the individual does not respond within 30 days, benefits will be automatically waived.