



Consumer/Consultant Agreement

The purpose of this agreement is to clarify the responsibilities of consumers and consultants, and make sure everyone understands those responsibilities.

Your Responsibilities as a Consumer:

1. Complete mandatory CDC+ training.
2. Develop a purchasing plan to show how the budget will be spent each month.
3. Keep all purchases within your monthly budget.
4. Make purchases that are the same as listed on the purchasing plan.
5. Select a representative for assistance with managing finances or decision making, if needed.
6. Develop an emergency back-up plan for coverage when your regular employee is absent because of illness, transportation problems, or needing time off.
7. Find and hire employees and send the employment forms package to the program Fiscal/Employer Agent.
8. Train employees about their job duties and what you expect of them.
9. Make sure employee time sheets reach the FEA on time.
10. Pay employees as soon as you get their paychecks from the FEA.
11. Approve invoices from vendors, agencies or independent contractors and mail them to the Fiscal/Employer Agent.
12. Review monthly budget reports from the FEA.
13. Report any changes in income and assets to your consultant and to the Office of Economic Self Sufficiency.
14. Tell your consultant about your satisfaction with the services he or she is giving you.
15. Contact your consultant when you have questions.
16. Contact your consultant if you have concerns, so small problems won't become big problems.

Your Consultant's Responsibilities to You:

1. Attend training for consultants and understand the Consumer-Directed Care Plus program philosophy.
2. Provide training to you and adjust the training to meet your needs.
3. Encourage and support you in making independent choices about services, purchases and employees.
4. Review your purchasing plan and backup plan. Call you if additional information is needed.
5. Talk with you about your satisfaction with the quality of services he or she is providing to you.
6. Review your monthly budget reports from the FEA.
7. Review your receipts for any cash purchases every month.
8. Be available to you to answer questions or provide technical assistance in resolving problems.
9. Work with you to develop a corrective action plan if you have problems managing your services or the monthly budget.
10. Inform you about community resources.
11. Coordinate your annual Medicaid re-determination with the Office of Economic Self-Sufficiency.

What the Consultant will not do:

1. Interview, hire, train or supervise your employees.
2. Tell your employees if you are unhappy with their work.
3. Fire your employees.
4. Fill out the employment forms package.
5. Find emergency back up employees or providers for you.
6. Write your purchasing plan.
7. Be able to get extra money if spend more than monthly budget

I understand and accept the responsibilities listed in this agreement.

(Consumer Signature)

(Date)

(Consultant Signature)

(Date)