



Participant Employer Handbook
May 2025

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Introduction

Participant Employers receiving funding through Maryland Department of Health Developmental Disabilities Administration (DDA) or through the Office of Long-Term Services and Supports (OLTSS) may choose either a traditional provider delivery model or a self-directed services model. At Fello, both options are provided and supported. Each participant decides which approach best fits their life. If you have received this handbook, then you have chosen to self-direct your services.

Welcome! Fello is proud to serve you!

As the Participant Employer, it is important that you carefully read this handbook. This handbook will provide an overview of the Maryland Department of Health's Self-Directed Services program. Each section will guide you through important information that you will need to know as an employer and outline your role in overseeing quality support services.

Additionally, this handbook will explain the role of Fello as the Financial Management & Counseling Services (FMCS) provider. Fello supports the Participant or their representative with employer-related services. Fello is responsible for assisting the employer with ensuring employee qualification and eligibility, processing approved timesheets, issuing payments, filing taxes, and many other services you will find described in this handbook. Fello is not the employer of the persons you ultimately hire. Rather, Fello is merely providing you with an administrative service for the employees or vendors you hire.

What is Self-Directed Services?

Self-Directed Services is an option for service delivery for Participants with disabilities who wish to exercise more choice, control, and authority over their service needs. Self-Directed Services is founded on the principles of self-determination and provides Participant Employers greater control over the services they receive, how they receive them, and who provides them.

Under the Self-Directed Services model of funding, the Participant with a disability or their chosen representative has both the choice and responsibility of who to recruit, hire, fire, train, and supervise to provide their services. The Financial Management & Counseling Services agency is not involved in these functions. Choosing Self-Directed Services requires Financial Management & Counseling Services through a Maryland Department of Health approved provider.

The Role of the Financial Management & Counseling Services (FMCS) Provider

Financial Management & Counseling Services is a required administrative service funded by the Maryland Department of Health when Self-Direction is chosen by the Participant or their Representative. Any Participant choosing to self-direct will require the support and services of an FMCS provider, like Fello, who can assist them in exercising their employer and budget authority.

In support of employer authority, participants can expect Fello to assist Participants in verifying employee qualifications and eligibility, collect and process timesheets of employees, and process payroll, withholding, filing, and payment of applicable Federal, state, and local employment-related taxes and insurance.

In terms of budget authority, Fello will maintain a separate account for each Participant's budget, track and report disbursements and balances of participants' funds, and process and pay invoices for goods and services approved in the service plan. The FMCS provider will also provide Participants with periodic reports of expenditures and the status of their self-directed budget.

Contact Information

Phone/Fax

Feel free to call or e-fax toll-free. Lines are open 24 hours per day. Phones are answered by a live operator during business hours 8am-4:30pm. After hours, you may leave a message.

Phone: 1.866.252.6871

Fax: 1.888.272.2236

Website

Access the website to review the Self-Directed Services Contact Sheet with direct phone lines, staff emails, and email addresses for submitting documentation for processing.

<http://www.fello.org/selfdirectedservices>

Office

Please schedule an appointment for a face-to-face meeting in advance by calling the main number or placing a customer service ticket.

Fello Linthicum
999 Corporate Blvd, Ste 300
Linthicum, MD 21090

Business Hours: 8:00am-4:30pm Monday-Friday (except holidays)

Customer Service

Fello provides individualized customer service to assist Participant Employers with any questions or concerns they may have.

Translation and interpretation services are available.

Submitting a Customer Service Ticket: <https://felloselfdirection.zendesk.com/>

Additional FMCS Resources & Tools

For additional resources and tools, please visit Fello's website where there are forms, videos, guides, and tutorials ready to answer your questions.

Participant Roles & Responsibilities – Employer Authority

Recruiting Workers / Process for Hiring Employees

Recruiting and hiring is in the hands of the FMCS Participant Employer so it can be tailored to your exact needs and wants.

When it comes to the people you hire to support you, you want to choose people who are reliable and have the skills and experience you're looking for. Some participants choose to hire people they have known for years, and some choose to post job openings to online platforms like Indeed and LinkedIn. Either way, Fello is here to provide steady support as we help onboard your new hires.

Depending on what you choose, your hiring process could range from very formal with several interviews with job candidates, to more informal if you propose the job opportunity to someone you already know.

Whenever you are posting job opportunities, interviewing candidates, or offering employment to candidates you want to hire, it can be helpful to clearly communicate essential pieces of information with them, such as the wage or salary for the position as well as whether or not the position will offer them health benefits, paid time off, sick leave, etc. As the employer, you decide the wages and benefits your employees will receive, and all of those choices must align with the funds available in your approved budget.

General Recruitment Process

- Job opening becomes available.
- You determine job details (wage/salary, health benefits, paid time off (PTO), sick leave, etc.) based on what your budget allows.
- Post the job opening online and/or share job opening with friends, family, and community members you choose.
- Review resumes.
- Interview candidate(s).
- Reject unqualified candidate(s).
- Make a job offer to qualified candidate(s) you choose.
- Candidate accepts or rejects job offer (all job offers must be conditional based on background check and meeting qualifications and requirements).

Hiring Employees

Once you have offered a candidate a conditional offer of employment and they accept it, you are ready to move on to officially hiring the employee, which includes completing all new hire paperwork and submitting to the FMCS for review and processing.

General Hiring Process

- New Hire completes CPR & First Aid training (unless they already have documentation of a current CPR & First Aid certification; the skills portion of the training must be in-person for both CPR & First Aid).
- Participant Employer submits New Hire Packet to Fello.
- Fello runs a background check on the New Hire.
- Background check results are sent to the Participant Employer if there is notice of any criminal history (please see process outline below under “Criminal Background

Check Authorization Form” for more information about next steps and options for the Participant Employer).

- Fello completes the Employee Clearance Verification Form and provides it to the Participant Employer after all pre-employment requirements are met.
- Employees can begin working on the official clearance date indicated on the Employee Clearance Verification Form.

New Hire Paperwork

All required new hire documentation is available on Fello’s webpage. The hiring process is initiated when Fello runs the background checks and ends with the Employee Clearance Verification Form being issued with the clearance date indicated. Once a complete and accurate new hire packet is submitted by the Participant Employer to Fello, please allow at least five (5) business days for Fello to process new hire documentation and to provide the Employee Clearance Verification Form.

When you are recruiting and hiring employees, Fello will review new hire documentation for completion and accuracy. It is essential that new hires comply with state and federal regulations and training requirements. Fello is available to address employee onboarding inquiries to ensure a streamlined process.

Application & Documents in the New Hire Packet

On Fello’s website you will find Fello’s Self-Directed Services New Hire Packet with all required documentation to officially hire your new employee.

Documents in New Hire Packet

- Employee Enrollment Document Checklist
- Applicant Data & Payroll Form
- Form I-9 Employment Verification
- IRS Form W-4
- State Tax Withholding Forms
- Direct Deposit Authorization and Agreement
- Employee Special Tax Exemption Information & Declaration
- Self-Directed Services Employee Agreement
- Self-Directed Services Employee Handbook

Criminal Background Check Authorization Form

Fello is responsible for conducting the criminal background check, which is required in order for the employee to be cleared to work for the Participant Employer and be paid from the Participant's budget. The Participant Employer is informed of any criminal history. If the Participant Employer wishes to continue to pursue onboarding of an employee with any type of criminal history, they have the option to request the Maryland Department of Health/DDA's review and approval to proceed. Some offenses are immediately disqualifying in nature while others are not. Any criminal offenses over ten (10) years old may not be disqualifying. Ultimately, the DDA determines if hiring may proceed given the employee's record. The DDA will issue its determination within three (3) business days.

Initial and On-Going Qualifications and Eligibility Requirements

It is the role of Fello to assist the Participant Employer by confirming their employee's initial and on-going qualifications and eligibility. The employee must achieve and maintain all training certifications, or licenses and other documentation as required by the Maryland Department of Health to meet the minimum qualifications to be eligible for payment for services, which includes First Aid and CPR with in-person skills assessments for each training but does not exclude additional requirements. If an employee's certification/licensure lapses, Fello is unable to provide payment from the Participant's budget to the employee. The Participant Employer and/or their designee is responsible for identifying and providing all other training which includes, but is not limited to, understanding the needs specific to the Participant Employer and their disability.

Employee Age

Employees must be at least 18 years of age. Exception: Employees must be at least 16 years of age to provide Respite Care services.

Onboarding New Employees

Once all new hire requirements are met, an Employee Clearance Verification Form will be issued by Fello to the Participant Employer. The applicant cannot provide services or receive payment prior to the Participant Employer obtaining this clearance.

Direct Deposit & Mailed Check

As is required by state law, all employees are entitled to their compensation via check if they choose. However, there are many benefits to direct deposit and Participant

Employers are encouraged to make sure their employees know of this extremely efficient and effective option. Employees will automatically receive their pay via check mailed through United States Postal Service (USPS) unless they elect direct deposit in the New Hire Packet.

Live checks are subject to handling and delays related to USPS processing and delivery. If selecting payment by live check, employees must allow a minimum of ten (10) business days for delivery before contacting Fello to request the check be reissued.

Special Tax Exemptions

Employees may qualify for special tax exemptions and are required to complete and submit the Employee Special Tax Exemption Information & Declaration Form in order for Payroll to process the exemption.

Timekeeping Practices

Your role as the Participant Employer is to ensure timekeeping practices in accordance with program regulations based on your Participant Agreement in alignment with payroll calendar due dates to facilitate timely processing and prompt payment for services. Late time submittal may result in a delay of payment to your employee.

Fello will provide payment for services on behalf of the Participant Employer following the submission of accurate and approved payment requests, within the constraints of the Participant's plan and budget. Payment will be for typical services rendered as assigned by the Participant Employer and as outlined in the plan and Budget.

Overtime Law

The Fair Labor Standards Act (FLSA) as well as Maryland law indicates that all non-exempt employees (employees paid by the hour who are eligible for overtime) must receive overtime pay for all hours worked over 40 hours in a single workweek. Overtime pay must be at least

1.5x their regular rate of pay. For example, if an employee's pay rate is \$20 per hour, their overtime pay rate would be \$30 per hour, just for those extra hours they worked. (For example, if an employee earning \$20 per hour works 45 hours in a week, their pay would be as follows:

\$20 per hour x 40 hours = \$800 PLUS \$30 per hour OT rate x 5 hours = \$150, for a gross weekly total of \$950.) Overtime is not required to be paid for Holidays, PTO, etc. Please note that Family as Staff, as defined by the Maryland Department of Health (please see the Family as Staff Form on the State's webpage for Self-Directed Services Forms), are limited to payment for 40 hours per week unless granted an exception by the Developmental Disabilities Administration.

Sick and Safe Leave Laws

Pursuant of Maryland law, if you have fewer than 14 employees, you must provide, at the very least, unpaid sick and safe leave for certain employees. If you have more than 15 employees, you must provide paid sick and safe leave for certain employees. More strict requirements apply to Participant Employers residing in Montgomery County, Maryland.

For more information, please review information on the Maryland Department of Labor's website. If you are an employer in Montgomery County, please see Earned Sick & Safe Leave Law (Montgomery County) on Fello's website.

Break Requirements

Neither Federal nor state law requires meals, smoke, or coffee breaks. However, most employers do offer short breaks (typically 5-20 minutes) and meal breaks (typically 30+ minutes). Short breaks are compensable work hours that should be included in the sum of hours worked during the workweek and considered in determining if overtime was worked. Meal breaks, however, are not work time and are not compensable if the employee is excused from working and can use their free time without restrictions. For more detailed information, please review the U.S. Department of Labor's website.

Managing Employees

Being an employer means you are responsible for managing employees equitably and respectfully. While managing your employees, any number of circumstances could arise from an employee getting injured on the job to an employee getting a raise. Fello is here to support you in navigating these situations successfully. Please open a customer service ticket or reach out to Fello's Employee Relations Team overseen by the Director of Employer Resources.

Managing Employee Payroll

Fello's Payroll team processes electronic time entries for all active employees working for each individual Participant Employer. The Payroll team is responsible for processing updated paperwork related to special tax exemptions, and all matters related to tax forms and W-2s. The Payroll team also processes employee actions such as Employee Change Forms and garnishments. It is the Participant Employer's responsibility to get this information to Fello for prompt action.

Employee Promotions & Demotions

You are the employer, so it is your responsibility to determine eligibility for promotions or demotions. Fello requires changes to your employee's status or wages to be provided in writing on the Employee Change Form located on Fello's website.

Employee Raises & Pay Cuts

You are the employer, so it is your responsibility to determine the pay rates and wages of your employees as long as pay rates are within the program's reasonable and customary rates (please see the State's webpage for Self-Directed Services Forms) and align with all federal and state requirements around wages and salaries such as minimum wage laws.

Workers' Compensation

Workers' compensation includes the money paid to and benefits received by your employee if they are injured while working for you. Fello provides Workers' Compensation Insurance for your employees on behalf of Participant Employers. If employees are hurt on the job, the injury must be reported to Fello within 24 hours of the occurrence so the workers' compensation insurance company can begin processing the claim and determining whether compensation is due to the injured employee to help cover medical costs, etc. If you do not report your employee's injury right away, the Workers' Compensation claim may be delayed or denied.

There is information available on the website under Individual Forms, including information on how to submit a claim and the claim form.

Employee Benefits

As an employer it is your responsibility to determine what kinds of benefits you will offer your employees. What you offer must align with your approved plan and budget.

Paid Time Off

Paid time off (PTO) can be factored into the budget during the person-centered planning (PCP) process. Employees are eligible for any benefits included in the Participant's approved plan and budget. Participant Employers can budget a certain number of hours to be paid out to the employee each plan year.

Health Benefits

Health insurance benefits can be factored into the budget during the person-centered planning process. Your employees are eligible for any benefits included in the approved plan and budget.

Updating Employee Personal Information

The Participant Employer must notify Fello of any change to their employee's name, address, email address, phone number, direct deposit account, number of dependents, change in federal or state tax forms or other relevant information. This is done by completing an Employee Change Form in collaboration with the Participant Employer and submitting to Fello for processing. Please note that any name change requires confirmation via a Social Security Card copy submitted with the Employee Change Form. Updates must be communicated to Fello within five (5) business days for the purposes of payroll and employee record updates.

Service Code Updates

If a service code needs to be added or updated for an employee, please complete an Employee Change Form and submit the form for processing. Please ensure the service is authorized in the approved plan and budget before submitting to Fello for processing.

Employee Separation

In Maryland, employees work "at will," meaning an employee can be separated from employment for almost any reason as long as the reason is not unlawful. Working "at will" also means employees can resign and leave employment for any reason at any time.

Employees may leave for a multitude of reasons and while providing two weeks' notice is recommended, it is not required. Whether the employer initiates the separation, or the employee voluntarily leaves, Fello is here to help the Participant Employer with the off-boarding process.

Separation Process

The separation process can be very straightforward. When an employee leaves employment, even temporarily, the Participant Employer should complete the Employee Separation & Inactivation Form in its entirety within two (2) business days and provide details related to the status change so Fello can process these administrative updates. Once your employee is separated from employment, they must submit another New Hire Packet to be cleared to work again.

Unemployment Claims

Fello provides Participant Employers with unemployment insurance as part of its FMCS program. Employees who no longer work for you are entitled to initiate unemployment claims with the Maryland Department of Labor, Division of Unemployment Insurance. Fello is contacted to provide information to the State based on the employee filing for unemployment benefits. Fello may need to reach out to you for additional information than was provided on the Employee Separation Form. Please note that it may be in your best interests to attend/testify in an unemployment benefits hearing conducted by the State, particularly in circumstances where your employee voluntarily resigned, or they were involuntarily separated for their misconduct. You will be notified by Fello should your testimony be requested.

Participant Roles & Responsibilities – Budget Authority

Approving Timesheets & Time Entries

Participants/Employees, with the support of their team, are responsible for reviewing and approving employees' timesheets for actual services rendered, in accordance with policies, procedures, and program standards and to prevent Medicaid Fraud. Participants/Employees, with the support of their team, are responsible for monitoring and staying within their budget. Participants/Employees shall not exceed or overspend their budget.

Electronic timekeeping is strongly encouraged within self-directed services to advance transparency and efficiency with this administrative process. There are many benefits to

electronic timekeeping. For example, electronic timekeeping does not require emailing or faxing timesheets, and there is no wondering if your employees' timesheets were received and processed. As soon as time entries are submitted by your employee, they can be approved electronically by the Participant Employer and posted for payroll.

Electronic Visit Verification (EVV)

Electronic Visit Verification (EVV) refers to technology that electronically verifies that services are delivered at the right time, in the right place, and to the right person. EVV is required for Personal Supports and Respite.

Benefits of EVV for participants self-directing their services and their teams include:

- Helps ensure the Participant Employer is receiving authorized services
- Makes employees' activities transparent and measurable
- Improves the quality of services
- Helps the Participant Employer be good stewards of public resources
- Allows the Participant Employer to view their service information online
- Makes submitting timesheets and reporting easier. Timesheets are submitted with a phone or tablet
- Provides records when employees start and stop working
- Reduces billing errors
- Helps to prevent fraud

Please see Fello's Tools & Technology webpage for information regarding tools and software made available to Participant Employers for electronic timekeeping and EVV compliance.

Approving Invoices & Reimbursement Requests

Fello's Accounts Payable team reviews and processes 1) vendor accounts and payment request documentation as well as 2) mileage reimbursement accounts and payment request documentation for your employees. All vendor and mileage reimbursement requests are processed in accordance with the Accounts Payable calendar as long as they are supported by the Participant Employer's plan and budget and meet all documentation requirements.

Fello's vendor payment software, Bill.com, is used for electronic payment by check or direct deposit. Bill.com is a cash disbursement and invoice management system that allows transparency of payment to vendors with login credentials. Notification emails are

sent when payment is processing. Bill.com also allows vendors to view their invoice and payment history.

For information on the submittal process and requirements for the processing of vendor invoices and reimbursements, please visit Fello's website. Please review Fello's Accounts Payable Calendar & Info Form for detailed information about when payments are processed and holidays/events that may impact processing.

All payments are, by default, provided via live check delivered by USPS. To request direct deposit, employees and vendors can update their information in their Bill.com account.

Reviewing Your Budget Status

Fello provides Participant Employers with access to the FMSE Participant Dashboard. The Participant Dashboard shows real-time spending information. Information available on the Participant Dashboard will include budget balances and payment history that is up to date within one (1) business day.

Participant Employers, with the support of their team, are responsible for monitoring and staying within their budget. Participant Employers shall not exceed or overspend their budget.

Changing Your Budget

Reviewing and processing DDA's budget modification form is a responsibility of the FMCS provider.

Without DDA's prior authorization, participants with the support of their team may move funding across approved budget service lines only (please see DDA's budget guidance for more specific information).

To prevent any conflict of interest, the FMCS cannot process budget modifications that are completed or sent by a Support Broker or employee/paid vendor of the Participant Employer. Budget modifications must be completed by the Participant Employer with the support of their team. The budget modification must be sent by the Participant Employer and/or their Coordinator of Community Services (CCS).

Transferring From One FMCS to Another FMCS

You reserve the right to change FMCS providers in accordance with the guidance provided by the Maryland Department of Health and DDA. To change providers, you should notify your Coordinator of Community Services (CCS or case manager) or your Support Broker. Fello will work with the FMCS provider of your choice to ensure your services are uninterrupted during the time of the transfer.

Please refer to the State's guidance on FMCS transfers for specific forms required from the Participant and their team through the transfer process.

Complaints and Grievances

Your feedback is important to Fello. If you have a complaint or grievance regarding the services you receive from Fello, please let Fello know immediately. Responses are provided to all complaints and grievances in a reasonable and prompt manner. Fello will work diligently to reach a resolution agreeable by all parties.

A complaint should be filed if you have an issue with something within reasonable control of Fello. Issues with the employee onboarding procedures, handling of payment issues, or payroll website concerns would be some examples of functions within reasonable control of Fello. Complaints may be made verbally or in writing. Written complaints may be submitted using the customer service ticket system accessed on Fello's website.

If you feel your rights have been violated or you disagree with a policy of Fello, you may file a grievance. Grievances must be submitted in writing for Fello's review. Once you file a complaint or grievance, Fello will work with you to address your concerns. If you are not satisfied with the initial recommendations, then the issue will be escalated to the appropriate manager, whose determination will be final. All complaints and grievances will be responded to within reasonable timelines, allowing Fello leadership sufficient time to investigate the matter and provide feedback.