



Fiscal Assistance, Inc.
124 W. Holum Street
De Forest, WI 53532
Phone 1-855-201-4230
Fax: 1-844-727-7533

As the Self-Directed Employer Agent, Fiscal Assistance is committed to sharing our fiscal expertise with Self- Direction to all members and their employees.

Making a New Referral/Enrollment Visit

- Once the Member and Case Manager determine SDS is the route to proceed with, a Fiscal Agency is chosen.
- The Case Manager completes a Fiscal Assistance Intake Form, completes it with as much information as they have and emails it to enrollment@fiscalassistance.org.
- When a new referral is received FA calls the member within 24 hours, preferably the same day, to set up an Enrollment Visit with the member/parent(s) and the respite employee(s) at their earliest convenience.
- Once we make contact with the member, or attempt to make contact, we update the Case Manager on the status of our initial phone call.
- At the face-to-face visit we offer a personalized intake with completing initial employer and employee enrollment paperwork
- FA provides comprehensive training materials for members to train their member hired respite employees consistent with the SDS Training and Documentation Standards for Supportive Home Care.
- FA obtains Attestation form from member hired respite employee for completion and documentation of training.
- FA provides education on maintaining and improving program integrity and preventing fraud.
- FA makes sure employers and employees have a strong understanding of accurate timesheet completion and the payroll process as extensively as they need.

Paperwork Processing

- FA is committed to processing paperwork to establish your member as an employer and the worker as an employee as quickly as possible although it may take up to five business days.
- There are times when paperwork cannot be processed right away. Examples include the employer may have a previous EIN that we were unaware of, the employee did not have proper identification to complete the I-9 and/or the employee has a criminal background check that requires further review.
- If the employer has an existing EIN, FA will reach out to the member and Case Manager to try and get the EIN. If we are unable to obtain the EIN through the member, the Case Manager, a previous Fiscal Agency or over the phone

with the IRS, FA will fax signed employer documents to the IRS requesting the existing EIN. The average turnaround time is about 4-6 weeks which significantly delays an employee's start date.

- If the employee has a background check requiring additional review, FA will email the agency supervisor indicating the conviction(s) and attach the Criminal Background Check. Within 24 hours the background check should be forwarded to the Case Manager who will need to review the conviction with their member for them to determine if they want to continue hiring the employee. The Case Manager or Agency Supervisor will email FA with their decision to hire or decline the employee. Within 24 hours, FA will finalize the paperwork upon employment decision.

Start Date

- Once all paperwork is processed, your member and employee will be provided with a start date. FA is not able to backdate employment as the state requires legal compliance.
- FA emails the Case Manager and copies the Agency Supervisor confirming the start date for your member and the employee.
- The Case Manager should email an Intake Data Form to enrollment@fiscalassistance.org within 48 hours of receiving the email confirmation to ensure proper disbursements (if they have not done so already or were missing rate information etc).
- A packet will be mailed to the employer and the employee including their new hire letter, a timesheet sample with instructions, pre-printed timesheets, and a payroll schedule.

Fiscal Assistance has been providing Self-Directed Employer Agent services since 2005. The Employer Agent staff at FA is committed to supporting Self-Directed Services and providing individualized, timely and excellent customer service. Our knowledgeable staff is here to assist the member, their employees and team every step of the way.