

DOCUMENT NAME	REQUIRED / OPTIONAL
Participant Onboarding Data	Required
IRS: SS-4	Required
IRS: 2678	Required
Michigan: UIA 1488	Required
Participant Release of Confidential Information Authorization	Optional
Participant Authorized Representative	Optional
Participant Backup Supports	Required
Participant Household Employer Orientation	Required

**NOTE:**

Please ensure all **REQUIRED** documents are filled out accurately before submitting them for processing.

**PARTICIPANT INFORMATION**

\_\_\_\_\_  
First Name Middle Initial Last Name

\_\_\_\_\_  
Address 1 Address 2

\_\_\_\_\_  
City County State Zip

\_\_\_\_\_  
Home Phone Number Mobile Phone Number

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Date of Birth Social Security Number  
Restart New Change

\_\_\_\_\_  
Enrollment Date

\_\_\_\_\_  
PAS ID CLS ID CMH ID

**AUTHORIZED REPRESENTATIVE INFORMATION *(if applicable)***

Guardian POA Appointed Rep

\_\_\_\_\_  
First Name Middle Initial Last Name

\_\_\_\_\_  
Address City State Zip

\_\_\_\_\_  
Home Phone Number Mobile Phone Number

\_\_\_\_\_  
Email Address

Copy of Guardianship/POA documents

**SERVICES RECEIVED**

CLS Supports	Staffing Agent	Direct Hire
Respite Supports	Staffing Agent	Direct Hire
Family Friend Respite	Staffing Agent	Direct Hire
Representative Payee Services		

**STAFFING AGENT INFORMATION**

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Full Name

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Address City State Zip

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Phone Number Fax Number

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Email Address

**DIRECT CARE WORKER INFORMATION - 1**

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First Name Middle Initial Last Name

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Address City State Zip

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Phone Number Email Address

**DIRECT CARE WORKER INFORMATION - 2**

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First Name Middle Initial Last Name

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Address City State Zip

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Phone Number Email Address

# Application for Employer Identification Number

(For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.)

See separate instructions for each line. Keep a copy for your records.

Go to [www.irs.gov/FormSS4](http://www.irs.gov/FormSS4) for instructions and the latest information.

EIN

<b>Type or print clearly.</b>	<b>1</b> Legal name of entity (or individual) for whom the EIN is being requested		
	<b>2</b> Trade name of business (if different from name on line 1)	<b>3</b> Executor, administrator, trustee, "care of" name	
	<b>4a</b> Mailing address (room, apt., suite no. and street, or P.O. box)	<b>5a</b> Street address (if different) (Don't enter a P.O. box.)	
	<b>4b</b> City, state, and ZIP code (if foreign, see instructions)	<b>5b</b> City, state, and ZIP code (if foreign, see instructions)	
	<b>6</b> County and state where principal business is located		
	<b>7a</b> Name of responsible party		<b>7b</b> SSN, ITIN, or EIN
<b>8a</b> Is this application for a limited liability company (LLC) (or a foreign equivalent)? <input type="checkbox"/> Yes <input type="checkbox"/> No		<b>8b</b> If 8a is "Yes," enter the number of LLC members	
<b>8c</b> If 8a is "Yes," was the LLC organized in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No			
<b>9a</b> <b>Type of entity</b> (check only one box). <b>Caution:</b> If 8a is "Yes," see the instructions for the correct box to check.			
<input type="checkbox"/> Sole proprietor (SSN) _____		<input type="checkbox"/> Estate (SSN of decedent) _____	
<input type="checkbox"/> Partnership		<input type="checkbox"/> Plan administrator (TIN) _____	
<input type="checkbox"/> Corporation (enter form number to be filed) _____		<input type="checkbox"/> Trust (TIN of grantor) _____	
<input type="checkbox"/> Personal service corporation		<input type="checkbox"/> Military/National Guard <input type="checkbox"/> State/local government	
<input type="checkbox"/> Church or church-controlled organization		<input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government	
<input type="checkbox"/> Other nonprofit organization (specify) _____		<input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises	
<input type="checkbox"/> Other (specify) _____		Group Exemption Number (GEN) if any _____	
<b>9b</b> If a corporation, name the state or foreign country (if applicable) where incorporated		State	Foreign country
<b>10</b> <b>Reason for applying</b> (check only one box)			
<input type="checkbox"/> Started new business (specify type) _____		<input type="checkbox"/> Banking purpose (specify purpose) _____	
<input type="checkbox"/> Hired employees (Check the box and see line 13.)		<input type="checkbox"/> Changed type of organization (specify new type) _____	
<input type="checkbox"/> Compliance with IRS withholding regulations		<input type="checkbox"/> Purchased going business	
<input type="checkbox"/> Other (specify) _____		<input type="checkbox"/> Created a trust (specify type) _____	
<input type="checkbox"/> Created a pension plan (specify type) _____			
<b>11</b> Date business started or acquired (month, day, year). See instructions.		<b>12</b> Closing month of accounting year	
<b>13</b> Highest number of employees expected in the next 12 months (enter -0- if none). If no employees expected, skip line 14.			
Agricultural	Household	Other	
<b>14</b> If you expect your employment tax liability to be \$1,000 or less in a full calendar year <b>and</b> want to file Form 944 annually instead of Forms 941 quarterly, check here. (Your employment tax liability will generally be \$1,000 or less if you expect to pay \$5,000 or less, \$6,536 or less if you're in a U.S. territory, in total wages.) If you don't check this box, you must file Form 941 for every quarter <input type="checkbox"/>			
<b>15</b> First date wages or annuities were paid (month, day, year). <b>Note:</b> If applicant is a withholding agent, enter date income will first be paid to nonresident alien (month, day, year)			
<b>16</b> Check <b>one</b> box that best describes the principal activity of your business.			
<input type="checkbox"/> Construction <input type="checkbox"/> Rental & leasing <input type="checkbox"/> Transportation & warehousing		<input type="checkbox"/> Health care & social assistance <input type="checkbox"/> Wholesale—agent/broker	
<input type="checkbox"/> Real estate <input type="checkbox"/> Manufacturing <input type="checkbox"/> Finance & insurance		<input type="checkbox"/> Accommodation & food service <input type="checkbox"/> Wholesale—other <input type="checkbox"/> Retail	
<input type="checkbox"/> Other (specify) _____			
<b>17</b> Indicate principal line of merchandise sold, specific construction work done, products produced, or services provided.			
<b>18</b> Has the applicant entity shown on line 1 ever applied for and received an EIN? <input type="checkbox"/> Yes <input type="checkbox"/> No			
If "Yes," write previous EIN here _____			

<b>Third Party Designee</b>	Complete this section <b>only</b> if you want to authorize the named individual to receive the entity's EIN and answer questions about the completion of this form.		
	Designee's name		Designee's telephone number (include area code)
	Address and ZIP code		Designee's fax number (include area code)
Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.			Applicant's telephone number (include area code)
Name and title (type or print clearly)			Applicant's fax number (include area code)
Signature _____			Date _____

See below to determine whether you need an EIN. However, for further information on applying for an EIN, including how to submit an EIN application, see the separate instructions at [www.irs.gov/FormSS4](http://www.irs.gov/FormSS4).

## Do I Need an EIN?

File Form SS-4 if the applicant entity doesn't already have an EIN but is required to show an EIN on any return, statement, or other document.<sup>1</sup> See also the separate instructions for each line on Form SS-4.

IF the applicant...	AND...	THEN...
started a new business	doesn't currently have (nor expect to have) employees	complete lines 1, 2, 4a-8a, 8b-c (if applicable), 9a, 9b (if applicable), 10-14, and 16-18.
hired (or will hire) employees, including household employees	doesn't already have an EIN	complete lines 1, 2, 4a-6, 7a-b, 8a, 8b-c (if applicable), 9a, 9b (if applicable), and 10-18.
opened a bank account	needs an EIN for banking purposes only	complete lines 1-5b, 7a-b, 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
changed type of organization	either the legal character of the organization or its ownership changed (for example, you incorporate a sole proprietorship or form a partnership) <sup>2</sup>	complete lines 1-18 (as applicable).
purchased a going business <sup>3</sup>	doesn't already have an EIN	complete lines 1-18 (as applicable).
created a trust	the trust is other than a grantor trust or an IRA trust <sup>4</sup>	complete lines 1-18 (as applicable).
created a pension plan as a plan administrator <sup>5</sup>	needs an EIN for reporting purposes	complete lines 1, 3, 4a-5b, 7a-b, 9a, 10, and 18.
is a foreign person needing an EIN to comply with IRS withholding regulations	needs an EIN to complete a Form W-8 (other than Form W-8ECI), avoid withholding on portfolio assets, or claim tax treaty benefits <sup>6</sup>	complete lines 1-5b, 7a-b (SSN or ITIN as applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
is administering an estate	needs an EIN to report estate income on Form 1041	complete lines 1-7b, 9a, 10-12, 13-17 (if applicable), and 18.
is a withholding agent for taxes on nonwage income paid to an alien (that is, individual, corporation, or partnership, etc.)	is an agent, broker, fiduciary, manager, tenant, or spouse who is required to file Form 1042, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	complete lines 1, 2, 3 (if applicable), 4a-5b, 7a-b, 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
is a state or local agency	serves as a tax reporting agent for public assistance recipients under Rev. Proc. 80-4, 1980-1 C.B. 581 <sup>7</sup>	complete lines 1, 2, 4a-5b, 7a-b, 9a, 10, and 18.
is a single-member LLC (or similar single-member entity)	needs an EIN to file Form 8832, Entity Classification Election, for filing employment tax returns and excise tax returns, or for state reporting purposes <sup>8</sup> , or is a foreign-owned U.S. disregarded entity and needs an EIN to file Form 5472, Information Return of a 25% Foreign-Owned U.S. Corporation or a Foreign Corporation Engaged in a U.S. Trade or Business	complete lines 1-18 (as applicable).
is an S corporation	needs an EIN to file Form 2553, Election by a Small Business Corporation <sup>9</sup>	complete lines 1-18 (as applicable).

<sup>1</sup> For example, a sole proprietorship or self-employed farmer who establishes a qualified retirement plan, or is required to file excise, employment, alcohol, tobacco, or firearms returns, must have an EIN. A partnership, corporation, REMIC (real estate mortgage investment conduit), nonprofit organization (church, club, etc.), or farmers' cooperative must use an EIN for any tax-related purpose even if the entity doesn't have employees.

<sup>2</sup> However, don't apply for a new EIN if the existing entity only (a) changed its business name, (b) elected on Form 8832 to change the way it is taxed (or is covered by the default rules), or (c) terminated its partnership status because at least 50% of the total interests in partnership capital and profits were sold or exchanged within a 12-month period. The EIN of the terminated partnership should continue to be used. See Regulations section 301.6109-1(d)(2)(iii).

<sup>3</sup> Don't use the EIN of the prior business unless you became the "owner" of a corporation by acquiring its stock.

<sup>4</sup> However, grantor trusts that don't file using Optional Method 1 and IRA trusts that are required to file Form 990-T, Exempt Organization Business Income Tax Return, must have an EIN. For more information on grantor trusts, see the Instructions for Form 1041.

<sup>5</sup> A plan administrator is the person or group of persons specified as the administrator by the instrument under which the plan is operated.

<sup>6</sup> Entities applying to be a Qualified Intermediary (QI) need a QI-EIN even if they already have an EIN. See Rev. Proc. 2000-12.

<sup>7</sup> See also *Household employer agent* in the instructions. **Note:** State or local agencies may need an EIN for other reasons, for example, hired employees.

<sup>8</sup> See *Disregarded entities* in the instructions for details on completing Form SS-4 for an LLC.

<sup>9</sup> An existing corporation that is electing or revoking S corporation status should use its previously assigned EIN.

Form **2678** **Employer/Payer Appointment of Agent**

(Rev. December 2024) Department of the Treasury — Internal Revenue Service

OMB No. 1545-0029

**Use this form if you want to request approval to have an agent file returns and make deposits or payments of employment or other withholding taxes or if you want to revoke an existing appointment.**

- If you're an employer or payer who wants to request approval, complete Parts 1 and 2 and sign Part 2. Then give it to the agent. Have the agent complete Part 3 and sign it.

**Note:** This appointment isn't effective until we approve your request. See the instructions for more information.

- If you're an employer, payer, or agent who wants to revoke an existing appointment, complete all three parts. In this case, only one signature is required.

<b>For IRS use:</b>

**Part 1: Why you're filing this form.**

(Check one)

- You want to **appoint** an agent for tax reporting, depositing, and paying.
- You want to **revoke** an existing appointment.

**Part 2: Employer or Payer Information: Complete this part if you want to appoint an agent or revoke an appointment.**

**1 Employer identification number (EIN)**

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**2 Employer's or payer's name**  
(not your trade name)

**3 Trade name** (if any)

**4 Address**

Number Street Suite or room number

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City State ZIP code

--	--	--

Foreign country name Foreign province/county Foreign postal code

**5 Forms for which you want to appoint an agent or revoke the agent's appointment to file.** (Check all that apply.)

	For ALL employees/ payees/payments	For SOME employees/ payees/payments
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- Form 940, Employer's Annual Federal Unemployment (FUTA) Tax Return\* (all 940 series)
- Form 941, Employer's QUARTERLY Federal Tax Return (all 941 series)
- Form 943, Employer's Annual Federal Tax Return for Agricultural Employees (all 943 series)
- Form 944, Employer's ANNUAL Federal Tax Return (all 944 series)
- Form 945, Annual Return of Withheld Federal Income Tax
- Form CT-1, Employer's Annual Railroad Retirement Tax Return
- Form CT-2, Employee Representative's Quarterly Railroad Tax Return

<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

\* Generally, you can't appoint an agent to report, deposit, and pay tax reported on Form 940, unless you're a home care service recipient.

- Check here if you're a home care service recipient, and you want to appoint the agent to report, deposit, and pay FUTA tax for you. See the instructions.

I am authorizing the IRS to disclose otherwise confidential tax information to the agent relating to the authority granted under this appointment, including disclosures required to process Form 2678. The agent may contract with a third party, such as a reporting agent or certified public accountant, to prepare or file the returns covered by this appointment, or to make any required deposits and payments. Such contract may authorize the IRS to disclose confidential tax information of the employer/payer and agent to such third party. If a third party fails to file the returns or make the deposits and payments, the agent and employer/payer remain liable.

**Sign your name here**

Print your name here

Print your title here

Date

Best daytime phone

**Now give this form to the agent to complete.**

**Part 3: Agent Information: If you'll be an agent for an employer or payer, or want to revoke an appointment, complete this part.**

**6 Agent's employer identification number (EIN)**

2 6 - 0 1 3 0 3 7 0

**7 Agent's name** (not trade name)

Personal Accounting Services Inc as Fiscal Agent

**8 Trade name** (if any)

**9 Address**

20500 Eureka Rd Unit 112  
Number Street Suite or room number

Taylor MI 48180  
City State ZIP code

Foreign country name Foreign province/county Foreign postal code

Check here if the employer is a home care service recipient receiving home care services through a program administered by a federal, state, or local government agency.

Under penalties of perjury, I declare that I have examined this form and any attachments, and to the best of my knowledge and belief, they are true, correct, and complete.

**Sign your name here**

Ashley Lyver

Print your name here Ashley Lyver

Print your title here Payroll Tax Manager

Date / /

Best daytime phone 612-808-8941



STATE OF MICHIGAN  
DEPARTMENT OF LABOR AND ECONOMIC OPPORTUNITY  
UNEMPLOYMENT INSURANCE AGENCY  
www.michigan.gov/uia

## Power of Attorney (POA)

Complete this form if you wish to appoint someone to represent you with the State of Michigan Unemployment Insurance Agency (UIA), or if you wish to revoke or change your current Power of Attorney representation. Read the instructions on page 3 before completing this form.

### PART 1: EMPLOYER INFORMATION

Name and Address	If business, enter DBA, Trade or Assumed Name		
	Telephone Number	Extension	Fax Number
	FEIN Number	UIA Account Number *	
E-mail Address			

### PART 2: REPRESENTATIVE INFORMATION AND AUTHORIZATION DATES

Your authorized representative may be an organization, firm, or individual. If your representative is not an individual, designate a contact person. Please ensure that you submit a separate form for each representative.

Representative Name and Address	Contact Name		E-mail Address
	Telephone Number	Extension	Fax Number
	Beginning Authorization Date (mm/dd/yyyy)		Ending Authorization Date (mm/dd/yyyy) **
	Representative FEIN		Representative UIA Account Number

The representative is a(n):  PEO  CPA  Human Resources  Bookkeeper  Other Service Provider

### PART 3: TYPES OF AUTHORIZATION

**GENERAL AUTHORIZATION**

Authorizes my representative to: (1) inspect or receive confidential information, (2) represent me and provide oral or written presentations of fact and/or argument, (3) sign quarterly reports or registration reports, (4) enter into agreements, and (5) receive mail from the UIA (includes forms, billings, and notices.) This authorization applies to all tax related/non-tax related matters and all years or periods.

**LIMITED AUTHORIZATION**

Select the type of authorization by checking the appropriate boxes to the right of each item listed below. You may check up to 4 boxes. If 5 boxes apply, please complete the "General Authorization" section above.

- |  |                          |
|--|--------------------------|
| 1. Inspect or receive confidential information                             | <input type="checkbox"/> |
| 2. Represent me and make oral or written presentation of facts or argument | <input type="checkbox"/> |
| 3. Sign reports  | <input type="checkbox"/> |
| 4. Enter into agreements   | <input type="checkbox"/> |
| 5. Receive mail from the UIA (including forms, billings, and notices)      | <input type="checkbox"/> |

If the box for Line 5 above is checked, please select the category/categories of forms that you want mailed to this POA:

Tax  Claims Control  Contested Claims  All

UIA correspondence will be sent based on your selections above to the representative at the address indicated in Part 2.

**WORK OPPORTUNITY TAX CREDIT (WOTC)**

Select this box if you have been appointed to represent the taxpayer before the Internal Revenue Services (IRS) for the Work Opportunity Tax Credit.

Authorization Dates: \_\_\_\_\_(Required Beginning Date) through \_\_\_\_\_(Required End Date).

**PART 4: CHANGE IN POWER OF ATTORNEY**

**CHANGE IN POWER OF ATTORNEY REPRESENTATION:** This form replaces all earlier Powers of Attorney documents except those attached on file for the same tax related/non-tax related matters and years, or periods covered by this Power of Attorney.

**REVOKE PREVIOUS AUTHORIZATION:** I Revoke all Powers of Attorney submitted and will represent myself in all tax and benefit matters.

**PART 5: EMPLOYER'S SIGNATURE**

If signed by a corporate officer, partner or fiduciary on behalf of the employer, I certify that I have the authority to execute this Power of Attorney.

Signature	Name or Title Printed or Typed	Date
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\* The Unemployment Insurance Agency is abbreviated throughout this form as the "UIA."

\*\* If no ending Authorization Date is provided, the above-named representative will be authorized to represent you until you notify the UIA in writing to revoke this Power of Attorney.

## INSTRUCTIONS FOR POWER OF ATTORNEY (FORM UIA 1488)

Complete and file Form UIA 1488, *Power of Attorney*, if you wish to appoint an individual, firm, or organization as your representative in tax or benefit matters before the UIA. **Failure to complete this form will prohibit the UIA from discussing your information with another person or releasing your information to another person, to protect your Firm's confidential information.**

### PART 1: EMPLOYER INFORMATION

Enter the employer's name, address, telephone number, fax number, and email address. If the taxpayer is a business operating under another name, enter the doing business as, trade or assumed name. Enter the Federal Employer Identification Number (FEIN), any other applicable FEIN, and the UIA Account Number, leave the indicated space blank.

### PART 2: REPRESENTATIVE INFORMATION AND AUTHORIZATION DATES

You must submit a separate Power of Attorney form for each representative. Enter the authorized representative's telephone number, fax number, and email address. If your representative is not an individual, please designate a contact person. Make sure to indicate the beginning and end ending dates of authorization. Provide the FEIN associated with the representative and the representative's UIA account number, if available. In addition, indicate whether the representative is a professional employer organization (PEO), certified public accountant (CPA), human resources specialist, bookkeeper, or other service provider. More than one box may be checked, if applicable.

### PART 3: TYPE OF AUTHORIZATION

Check the General Authorization box to allow your representative to act on your behalf to do all of the following: (1) inspect and receive confidential information, (2) represent you and provide oral or written presentations of fact and/or argument, (3) sign reports, (4) enter into agreements, and (5) receive all mailings (including forms, billings, and payment notices). This authorization applies to all tax/non-tax matters and for all years or periods.

You may restrict your representative's authorization to act on your behalf by checking the Limited Authorization box, and then checking the appropriate specific powers boxes. The authorizations selected apply to all tax related/non-tax related matters and for all years or periods. If all 5 boxes apply, complete the "General Authorization" section only. If you check the box for line five, you may select the category/categories of forms that you want mailed to the Power of Attorney indicated on this form. The categories of forms are: (1) Tax, (2) Claims Control, (3) Contested Claims or (4) All.

All mail will be sent to the address you entered in Part 2 of this form. To change the mailing address after submission of this form, use your Michigan Web Account Manager (MiWAM) at [www.michigan.gov/uia](http://www.michigan.gov/uia).

### WORK OPPORTUNITY TAX CREDIT (WOTC):

The Work Opportunity Tax Credit (WOTC) is a Federal tax credit incentive that Congress provides to the private-sector businesses for hiring individuals from nine target groups who have consistently faced significant barriers to employment. To learn more about WOTC and how to apply, visit [www.doleta.gov](http://www.doleta.gov).

### PART 4: CHANGE IN POWER OF ATTORNEY

Unless otherwise specified, this Power of Attorney replaces or revokes any previous Power of Attorney form on file with the Michigan UIA for the same tax matters identified on this form. You must identify any previous authorizations to this form when filed.

### PART 5: EMPLOYER SIGNATURE

Sign and date the form if you have the authority to execute the Power of Attorney on behalf of an employer.

### FILING POWER OF ATTORNEY

To file this form, mail or fax it to:  
UIA Tax Office, P.O. Box 8068, Royal Oak, MI 48068-8068

Fax (517) 636-0014

Direct any questions to the Office of Employer Ombudsman (OEO) through your MiWAM account at [www.michigan.gov/uia](http://www.michigan.gov/uia) or call 1-855-484-2636. TTY service is available at 1-866-366-0004.



PARTICIPANT  
RELEASE OF CONFIDENTIAL  
INFORMATION AUTHORIZATION FORM

**Instructions:** Please review, complete, and sign at the bottom. Submit the form to PAS via one of the following options:

**Mail or Drop-Off**  
20500 Eureka Rd, Ste 112  
Taylor, MI 48180

**Email**  
[HR@PASSelfDirection.com](mailto:HR@PASSelfDirection.com)

**Fax**  
734.206.1433

This form authorizes PAS (Personal Accounting Services, Inc.) to disclose any information regarding the services you receive, wages, and payment information for your Direct Care Workers and/or anything else related to your service and support plan. You have the right to revoke this Authorization by providing PAS with written notice of revocation.

**AUTHORIZATION**

I, \_\_\_\_\_, hereby authorize PAS or any of its staff to disclose, by any acceptable means, information regarding the services I receive, wages, and payment information for my Direct Care Workers, including fax or email, and/or anything else related to my service and support plan described as follows:

I, \_\_\_\_\_, hereby authorize the release of the above information to the following person:

\_\_\_\_\_ Full Name

\_\_\_\_\_ Address City State Zip

\_\_\_\_\_ Phone Number

**This authorization does not grant the individual authority to sign off on timesheets or any other program-related documents.**

\_\_\_\_\_ Participant or Legal Representative Name

\_\_\_\_\_ Participant or Legal Representative Signature

\_\_\_\_\_ Date

\_\_\_\_\_ Participant Date of Birth

\_\_\_\_\_ Form Completion Date



As a Participant self-directing your services, a backup plan is required for times where your primary Direct Care Worker is unable to provide services. A backup plan should be tested and updated periodically to assure that it works and changes are not needed. Always confirm with backup Direct Care Workers on their willingness to provide backup care before adding them to your backup plan.

\_\_\_\_\_  
Participant Full Name

\_\_\_\_\_  
Authorized Representative Full Name (if applicable)

**BACKUP DIRECT CARE WORKER INFORMATION**

NAME	ADDRESS	PHONE	AVAILABILITY

Or I may use the Agency, \_\_\_\_\_, as my backup provider.

\_\_\_\_\_  
Agency Phone Number

**NATURAL SUPPORTS BACKUP INFORMATION**

NAME	ADDRESS	PHONE	AVAILABILITY

I understand that if my backup Direct Care Worker is a paid worker, they must be a credentialed employee before being able to provide services as a backup and be paid. They must also have a completed Medicaid Provider Agreement signed by both the employer and employee to be valid.

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Representative Signature

\_\_\_\_\_  
Date

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Participant Full Name

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Authorized Representative Full Name *(if applicable)*

## **REVIEW**

1. Employer Tax Forms
2. Workers' Compensation
3. Authorization to Release Information
4. Contact List
5. Designated Representative *(if applicable)*
6. Budget and/or Authorization
7. Employee Pay Schedule
8. Time and Attendance *(if applicable)*
9. Timesheet, Service Log, Health Report
10. Privacy Notice
11. Overtime Guidelines
12. Direct Care Worker Training Requirements
13. Backup Direct Care Workers
14. Household Employer Guide
15. Hiring and Managing Assistance
16. Reporting of Incident(s)
  - a. Accidents
  - b. Hospital
  - c. Recipient Rights
  - d. Medicaid Fraud
  - e. Adult Protective Services
17. False Claim Act (DCA)

## **ORIENTATION ACKNOWLEDGEMENT**

I acknowledge that I have received documentation and orientation on becoming a Household Employer. The PAS (Personal Accounting Services, Inc.) Enrollment Specialist has reviewed each of the above policies, guidelines, and forms for me to fulfill my responsibilities as a Household Employer. I further understand that I may contact my agency Support Coordinator/Care Manager or PAS if I have questions or need additional assistance.

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Participant Signature

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Date

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Authorized Representative Signature

---

Date