

Dear PCA Consumer:

RE: Employment Packages

Welcome to the Stavros Fiscal Intermediary (FI) program. Enclosed please find the forms you will need to complete and return to us to begin your participation in the FI program – and to make sure your PCAs get paid for the work that they do.

If you have any questions about these forms, please ask your Skills Trainer. He or she will be happy to assist you with completion of these forms. The following is a list of the forms you have received and a brief description of their use:

**Consumer Information Form:** This form lets us know who you are and which Provider Agency you work with, and provides us with important information to get you started in our F.I. Program.

**Consumer Agreement:** Every consumer must sign a Consumer Agreement and indicate whether you wish to choose the Consumer-Delegated option (Option One) or the Consumer-Directed option (Option Two). If you choose the Consumer-Directed option, no other forms are needed at the FI. Please make sure you understand your responsibilities under each option before you make your choice.

**IRS Form 8821, Tax Information Authorization:** This authorizes Stavros F.I. to inspect and receive tax information for the payroll taxes and forms indicated on line 3(a) and 3(b). The Form 8821 is renewable and will need to be updated every 3 years.

**IRS Form SS-4, Application for Employer Identification Number (EIN):** MassHealth regulations state that each consumer will be an employer and must obtain an EIN to report their PCA's withholding taxes to the Internal Revenue Service. This form must be completed by you – the consumer – and your name should appear **exactly** as it does on your Social Security card.

**IRS Form 2678, Employer/Payer Appointment Agent:** This form allows Stavros F.I. to file the appropriate reports for your PCA's payroll with the Internal Revenue Service. This form must be completed by you – the consumer – and your name should appear exactly as it does on your Social Security card.

**Mass DOR Form M-2848, Power of Attorney and Declaration of Representative:** This form allows the Stavros F.I. to represent you with the Massachusetts Department of Revenue (DOR – the people who collect state taxes) in case there is ever an issue with your Mass DOR account. This form must be completed by you – the consumer – and your name should appear exactly as it does on your Social Security Card.

**Consent to Use Payroll Processing Agent:** Stavros F.I. contracts with PAI Services to process payroll for your PCAs: your PCAs' checks are printed there. Your signature means you are acknowledging that you are aware of this. This form must be signed by *you!*

**Department of Industrial Accidents Notice to Employees:** As an employer in Massachusetts you need to post this Notice where your PCAs can see it. In the event that one of your PCAs is injured while working for you the name and telephone number of your Workers' Compensation Insurance company are on this form. Please fill in your name and address before posting.

**Stavros CIL Grievance Procedure:** If you are not happy with the services you are receiving use the steps as outlined in this document to file an official complaint.

**Stavros Center for Independent Living Notice of Privacy Practices:** This notice explains how we handle your confidential records at Stavros.

Please complete the forms and return to your skills trainer as soon as possible. Once we have received and processed your F.I. Packet and you have received a Prior Authorization from MassHealth you may submit timesheets (Activity Forms) to the F.I. Office. There are instructions on the back explaining the correct way to fill them out. Please leave the Employer Number blank for your first set of timesheets. If you have any questions on the completion of your timesheets you may contact our office at (413)256-6692 or (800)442-1185.

The F.I. office will determine your payroll schedule and employer number when we receive your first set of timesheets. You will then receive a packet that contains a letter with your employer number, your payroll schedule and timesheets. It is important that you follow the payroll schedule so there is not a delay with processing your timesheets.

**Please Remember:**

As a Consumer in the Stavros Fiscal Intermediary program you *must* inform your PCAs of the option to choose Direct Deposit to receive their payroll payments.

Stavros Fiscal Intermediary can only pay your PCAs for hours that are approved by MassHealth and for which you are MassHealth Eligible. As the employer you may be responsible for wages due to your PCA if:

- You have your PCA work overtime (over 40 hrs per week) and these hours have not been approved by MassHealth;
- You bill for more hours than MassHealth has approved;
- You lose your Masshealth Eligibility;
- You have your PCA work for you while you are in a hospital or a Long Term Care Facility.

Please contact your skills trainer if you have any questions about any of these issues.

Timesheets may be sent to our office by mail, Stavros F.I., P.O. Box 2130, Amherst, MA 01004 or via fax (413)256-3849 or toll free (888)773-4281.

All of the F.I. forms are available for download from our website at [www.stavrosfi.org](http://www.stavrosfi.org).