

Support Broker Agreement

Member Name: _____

Support Broker Name: _____

Client Representative Name (if applicable): _____

Date: _____

This agreement outlines the responsibilities and expectations for support brokerage services provided under a self-directed program. The Support Broker agrees to assist the Member in managing their self-directed services as outlined below and as determined by the Case Manager.

Scope of Services

The Support Broker agrees to provide assistance in the following areas, as checked below. Agreed upon services may change throughout the duration of the support brokerage based on member needs.

☐ **Budget Planning**

- Review the individual budget to determine employee allotted hours
- Ensure expenses align with program rules and client goals

☐ **Hiring Support Staff**

- Assist with recruitment and interviews
- Help draft job descriptions and schedules

☐ **Staff Training and Oversight**

- Guide the member in developing training plans
- Support monitoring of staff performance if requested

☐ **Payroll and Fiscal Intermediary Liaison**

- Support submission of hiring paperwork
- Communicate with the Fiscal Intermediary on timesheets, reimbursements, etc.

☐ **Monitoring and Follow-Up**

- Review implementation of services on a regular basis
- Help resolve issues and adjust the plan as needed

☐ **Advocacy and Guidance**

- Support Broker will provide regular updates to case manager
- Support client self-advocacy
- Assist in navigating program rules and updates

☐ **Other (Specify):**

Terms of Agreement

- **Duration:** This agreement shall begin on **XX/XX/XXXX** and remain in effect until the authorization units have been terminated.
 - **Maximum Hours:** _____ hours
 - **Frequency of Contact:** Frequency of contact may vary based on the level of support required by the Support Broker
 - **Approved Hours:** The number of approved hours for support brokerage will be approved and authorized by the case manager/approving entity
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Clarification of Roles

The Support Broker is not the Fiscal Intermediary or the Fiscal Employer Agent (F/EA). The Support Broker does not process payroll, issue payments to employees or vendors, file employment taxes, manage benefits, or collect and submit timesheets for payment. These responsibilities are handled by the designated FI/FEA. While the Support Broker may assist the client with organizing paperwork, completing forms, and communicating with the FI/FEA, they do not perform any direct financial or payroll functions. This distinction ensures a clear separation of duties and helps maintain compliance with program guidelines

Signatures

By signing below, both parties acknowledge and agree to the terms outlined in this agreement.

Client Name: _____

Client Signature: _____

Date: _____

Support Broker Name: _____

Support Broker Signature: _____

Date: _____

Please return this form to Palco via email: wisconsin@palcofirst.com or via fax toll free to 1.877.859.8757 or 501-821-0045.