

**MI Self-Determination in Long-Term Care
Fiscal Intermediary Readiness Review
Interview Protocol**

Name of Fiscal Intermediary Reviewed:

Address:

Phone:

Key Personnel Interviewed:

Date of Review:

Review Conducted By:

I. Entrance Conference Discussion and Initial Observations

A. Status of Physical Plant, Equipment, Information Systems Technology and Customer Service System

Corrective Action Needed

Comments

B. Staffing

Corrective Action Needed

Comments

C. Coordination and Communication with Waiver Agent Support Coordinators

Corrective Action Needed

Comments

D. Administration - FI Policies and Procedures Manual, Quality Management Plan and Staying Up-to-Date with Federal and State Rules and Regulations Pertaining to Vendor FIs and Household Employers and Employees

Corrective Action Needed

Comments

E. Administration – Record Management Process

Corrective Action Needed

Comments

**F. Administration – Processing Payroll and Invoices Preparing and Submitting
Required Reports to State Government and Program Participants/Representatives**

Corrective Action Needed

Comments

G. Enrollment of Participants and Workers

Corrective Action Needed

Comments

H. Waiver Agent Approval to Be an FI

Corrective Action Needed

Comments

XII. Exit Conference Discussion

XIII. Summary of Key Readiness Review Findings

[illegible]