AIM Self-Direction Start-Up Process

Self-Direction Intake

External Team reaches out to: sdinfo@aimservicesinc.org with interest in AIM as a Fiscal Intermediary

External team attends an information session for new or transfer budgets

*Schedule available on **AIM Self-Direction Website-Education Calendar**

Email & checklist of required documents sent within 24 hours of attended session

The external team will send supporting documents to submit to AIM for review to: sdinfo@aimservicesinc.org

AIM Start-Up Team submits completed start-up budget to the region DDRO for start-up approval at AIM

- Submit DDP-1 indicating AIM as the agency fiscal intermediary

AIM Start-Up Support:
Approx. 30 days for intake support at AIM

Start-Up Approval

Self-Direction Start-Up budget is received approved by region DDRO with FI & Broker budget line open

AIM team completes the following:

- upload approval in eVero

Email with AIM attachments sent to the external team
Sent from:
sdapproval@aimservicesinc.org

Initial Support Budget will be built by external team

Please note:
for assistance with building the initial support budget please see the following AIM Resources:

- **AIM Self-Direction Support Budget Information**
- **AIM Self-Direction Website-Budget Tools**

Start-Up Approval Timeline:
Approx. 30 days based off OPWDD DDRO approval

Initial Support Budget Submission

External team completes the initial support budget

External team has included supporting justification for the initial support budget:

- Life Plan
- Staff Action Plan (if applicable)

External team has submitted initial support budget packet to: sdreview@aimervicesinc.org

Start-Up team actively reviews packets to submit completed initial support budget packet to the DDRO regional office for approval; see **Budget Submission Checklist**

'Initial Support Budget' received approved

AIM Launch Session

Initial Budget Review:
Approx. 30 days based off OPWDD DDRO approval

AIM Additional Supports:
Questions on AIM Self-Direction Intake or the Start-Up process please email the team at sdinfo@aimservicesinc.org
Questions on independent brokerage with AIM please email the team at brokerinfo@aimservicesinc.org
For additional team supports please email the support team at sdsupport@aimservicesinc.org

AIM Resources:
AIM Self Direction Website link: https://www.aimservicesinc.org/self-direction/
AIM Self-Direction Start-Up Services Page; link: https://www.aimservicesinc.org/self-direction/start-up-services/
AIM Self-Direction Budget Tools link: https://www.aimservicesinc.org/self-direction/budget-tools/

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