



Employee Orientation

Welcome to Morning Sun Financial Services!

We are the financial management service for your employer. That means we will be responsible for processing your timesheets and handling your paychecks.

As an employee to a participant/consumer receiving self-directed (or self-determined) services, you play a vital role in helping this individual achieve independence and live a fuller life. You will not only be providing a valuable service to this person, but also making a contribution to their family and to society as a whole.

What are Self-Directed Services (SDS)?

The individual you have been hired to work with or their representative has chosen services that are “Self Directed” or “Self-Determined”). Self-Directed Services puts the person with the disability in control of the care and assistance they need. The individual or their representative chooses who they want to work with them and provide their care, what type of care they want and need, and when they want to receive that care. Often the individual or their representative chooses family members, friends, or other people that know them well. The individual or their representative hires and manages their own workers; they decide what type of support they want the workers to provide and when they want the support workers to work with them.

Self-directed services have their origins in the concept of self-determination. Self-determination is a movement aimed at changing the service system for people who have disabilities. Self-determination means that each person who has a disability has the same rights as all other citizens to have a meaningful life that is:

- Fully integrated into their communities
- Rich in relationships
- Individually crafted

The Self-Determination Project showed that when participants are given control over the funds allocated for their support, they create the type of supports they need to live the life that they want instead of a life determined by others.

What are the advantages of Self Directed Services?

- People plan their own services to lead self-directed lives.
- People choose where and when services are provided.
- People can hire, manage and direct support workers.
- People use support workers from their own network of family, friends, neighbors, and local organizations.
- People access support workers familiar with their own language, culture, and traditions.
- People strengthen and maintain informal networks of community support and opportunities for integration in the community.

The Role of the Employee, the Employer and Morning Sun

Employer: This is either the person you have been hired to work with (also referred to as “Participant”) or their representative. Many times the representative is a parent, or other family member that helps the participant manage these services. The employer is also the person that:

- hires you,
- sets your rate of pay,
- schedules you,
- trains you,
- establishes your job duties
- oversees your work/Supervises you

Morning Sun Financial Services: Is the Financial Management Company or “Payroll Agent” meaning we are responsible for processing your employers payroll and handling other administrative responsibilities for the Employer and Participant.

Your Role as an Employee: Working for a person who is choosing Self Directed Services may be a new experience for you as the Employee. If you’ve had experience working with people with disabilities through an agency you may find some unique differences with this job. As opposed to being hired, trained, scheduled, and assigned to an individual by an agency, you are being chosen by the individual with disabilities or their representative (Employer) to work specifically with that person. The Employer will train you on your duties according to the individual’s needs and wishes.

You may also have been chosen as an Employee because you know the individual receiving services his or her family. Perhaps you are family member, neighbor, friend, or other acquaintance. One of the benefits of Self Directed Services is that it allows the Participant to hire people they know and with whom they are comfortable with. You may have been providing unpaid support and now can receive compensation. It is important to

note that family members or other acquaintances of the Participant that are hired as an employee are required to adhere to the same employment policies and procedures as all employees.

New Employee Packet

In order for you to become an employee, you must first complete a *New Employee Packet*. You will receive this packet from your Employer, who will also assist you in completing the forms. There are also instructions in the packet on how to complete each of the forms. Your Employer will need to assist in the completion of this packet by filling out certain sections of the paperwork and signing many of the forms.

We ask that you and the Employer double check to make sure all forms are filled out completely, correctly, and signed in the correct places before returning them to Morning Sun. Missing or incomplete information may result in the delay of your paycheck.

Payroll Policies and Procedures

Starting Wage: Your wage is determined by your Employer (within established guidelines of the program) and must be approved by the Case Manager.

Pay Periods: Pay periods are the 1st - 15th of each month and the 16th – last day of the month. We have attached a payroll schedule as part of this packet. Each workweek begins on Sunday at midnight and ends on the following Saturday at midnight. We have included a pay date schedule with this paperwork.

Time Sheets

Employees are required to record their hours worked for each pay period by completing time sheets.

Time sheets must be a true and accurate reflection of the hours worked. The Employer must review and approve Employee time sheets each pay period.

Time sheets must be received in our office on or before the due date identified on the payroll schedule. This will insure that Employees will be paid on time. *If time sheets are received after the due date, Employees will not be paid until the following pay date.* The Employer is responsible for submitting Employee timesheets to our payroll department.

Time sheets can be mailed or faxed or e-mailed to our office. This information can be found at the bottom of the time sheet.

Web Based Timesheet Submission –Your Employer can decide to have their Employees’ submit their timesheets through Morning Sun Financial Services of Ohio’s web site. Both you and your employer will need to be able to access the internet. Your employer will make a request to be enrolled as an employer and will submit to Morning Sun their email address and the email addresses of their employees. The Morning Sun payroll department will setup the employer and an automated email will be sent to both the Employer and employees with instructions to complete the enrollment. There is also a tutorial on the web site to help guide you through the submission process.

Issues That May Delay Payroll:

- 1. Time sheets that are not completed properly or accurately**
 - 2. Time sheets that are missing a signature from either you or your Managing Employer**
 - 3. Time sheets that are received after the due date.**
 - 4. Time sheets that include unauthorized hours on the time sheet.**
 - 5. New Employee paperwork is missing or incorrect.**
 - 6. Insufficient funding left on the Participant’s waiver allocation.**
- Time sheets corrected after the due date will be paid on the following payroll.**

Employee Paychecks

You have several choices in how you would like to receive your pay. If you choose an electronic deposit, your options are to have your payroll deposited directly into your personal bank account or on a Global Cash Prepaid MasterCard Pay Card.

You must also choose how you would like to receive your electronic earnings statement (this is a copy of your itemized pay stub). You may have your earnings statement emailed to your personal email account or mailed to you.

You also have the choice of having your paycheck mailed to you. We encourage Employees to use direct deposit or the cash card option because of the convenience and the potential for periodic delays caused by the United States Postal Service.

Copies of timesheets and timesheet instructions will be issued upon the approval of both the Employer and Employee documents and eligibility to begin working.

Customer Service

For questions on timesheets, paychecks or payroll information, please contact our Payroll Specialist between the hours of 7am and 5pm Monday through Friday at: 1-866-233-7024. You may also contact Linda Jernberg, the Payroll Manager at 1-763-450-3781 or ljernberg@morningsunfs.com

For customer service complaints, please contact the Program Administrator, Rebecca Lipari at 1-866-233- 7024, or rlipari@morningsunfs.com. You may also contact the Cheryl Vennerstrom at 612-235-3768 or cherylv@morningsunfs.com.

Corrections Involving Payroll

If you feel that there has been an error with a payment made to you, please bring this matter immediately to the attention of your Employer. Your Employer should immediately bring this matter to the attention of his or her Case Manager or to our Payroll Specialist, or the Payroll Manager Linda Jernberg. Morning Sun will work with Employer or Employee to immediately rectify the problem. You may also choose to contact the Morning Payroll Specialist or Payroll Manager yourself. In the event that Morning Sun makes an error in payment to you, we will correct that error and issue repayment within one business day.

Complaints and Grievances

If Employees have a complaint or problem, the first step is to let your Employer know so they can work to resolve the issue with you. If you are not satisfied with the initial response or action from your Employer, please let the Morning Sun Program Administrator know immediately. If you are not satisfied with the response, you may also choose to contact any of the following individuals:

- Program Administrator, Rebecca Lipari at 866-233-7024, rlipari@morningsunfs.com
- Payroll Manager, Linda Jernberg at 763-450-3781, ljernberg@morningsunfs.com
- Chief Operating Officer, Cheryl Vennerstrom at 612-239-3768, cvennerstrom@morningsunfs.com
- Chief Financial Officer Toni Thulen at 763-450-3780, tthulen@morningsunfs.com

Any of these individuals will work with you to help resolve the situation.

Morning Sun of Ohio

Instructions for Employees Filling Out the New Employee Packet

Each of these forms is returned to Morning Sun Financial Services of Ohio Human Resources/Payroll Departments, unless otherwise indicated.

Included in your New Employee packet is an Employee Orientation-Welcome letter.

1. Application for Employment- You may have filled out an Application for Employment at the time you applied for your position. If you have already completed one there is no need to fill out a second application. Your Employer can provide Morning Sun with a copy of that application.

Please complete all sections of the application to the best of your ability and sign and date the last page of the application. **This form is required.**

2. New Employee/Employee Change Notification – This is a critical form which assists us in establishing and maintaining current worker records for payroll and other administrative purposes.

You must notify your Employer whenever there is a change in your contact information (including address, phone number etc.) The Employer must complete and submit this form to Morning Sun of OH whenever there is a change in an employees' information or status, including, name, contact info, wage changes, and notice of an employees' separation. **This form is required.**

To Complete the New Employee Notification:

The **Employee** should complete the section titled "Personal Information" with their name as it appears on their Social Security Card, address (this is where you want your payroll checks or other correspondence to be mailed to), phone number, social security number and birth date.

The **Employer** should check one of the boxes in the top section and then complete the section titled "Employment Information" if "Employee Termed" has been checked.

Both the Employer and the Employee must sign and date at the bottom of this form.

New Employee Tax Information - A Household Worker is a person that is employed by an individual to do work in the individuals own home. Most Household Workers are required to have employment taxes withheld from their paychecks but there are some exceptions. The information collected within this section will allow Morning Sun to determine if you are exempt from certain employment taxes. **This information is required.**

3. W-4 – This form will be used to instruct the payroll system how to tax your wages and withhold the appropriate taxes based on those earnings. If the W-4 is sent to the Morning Sun incomplete Morning Sun will need to send the form back for completion of the missing information. If you are unsure of how to fill out this form to claim the appropriate withholding based on your earnings, please see instructions on top of form and follow the step by step calculations. Morning Sun can only advise you on how to fill out the form. No advice can be given as to the number of allowances you should claim. Please contact your tax advisor for help in determining the number of allowances to claim.
This form is required.

To Complete the Form W-4:

Box 1- fill in the bottom third of the form with your first name, last name, and home address.

Box 2- fill in your social security number

Box 3- check the box that applies to your marital status.

Box 4- check this box if the name on your social security card is different than the name in Box 1. Note: Morning Sun is required to report your earnings under the name on your social security card.

Box 5-Enter the total number of allowances you are claiming. If you are unsure of the number, please answer questions A thru H on the top portion of the W-4.

The following walks you through the Personal Allowance Worksheet A thru H

- a. Enter a '1' to count yourself
- b. Enter a 1 for yourself if you have one job, or you are married and have one job and your spouse does not work, or you have wages from a 2nd job or your souses wages (or total of both) is \$1500.00 or less.

- c. Enter a “1” for your spouse. If your spouse works and you have more than one job between you, you may enter “0” on line C. This may avoid having to little tax withheld.
- d. Enter the number of children you can claim as dependents on your tax return.
- e. Enter “1” if you are ale to file your tax return as “Head of Household”
- f. Enter “1” if you will have at least \$1900.00 in child care or dependent care expenses that you plan to claim on your tax return.
- g. Enter 2 for each child if your income is less than \$65000.00 (\$95,000.00 if married). Then minus “1” if you 3 to 7 children, minus “2” if you have 7+ children.
- h. Add lines A-G. This is the number you would enter in Box 5. If you are still unsure, please read the entire W-4 document.

Box 6-Enter any additional withholding dollar amounts you want withheld from each payroll check. This must be in dollars, a percent cannot be accepted.

Box 7-If you are answering “Exempt” in box 7, Box 5 should be blank. Note: if you answer Exempt in box 7, there will be no federal withholding taxes deducted from your payroll checks. Please consult your tax advisor if you are unsure.

The employee should sign and date the W-4

4. Ohio Form IT-4- this form is required by the State of Ohio to determine the amount of Ohio state withholding taxes that need to be withheld from your wages. If the IT-4 is sent to the Morning Sun incomplete Morning Sun will need to send the form back for completion of the missing information. If you are unsure of how to fill out this form to claim the appropriate withholding based on your earnings, please see instructions on top of form and follow the step by step calculations. Morning Sun can only advise you on how to fill out the form. No advice can be given as to the number of allowances you should claim. Please contact your tax advisor for help in determining the number of allowances to claim.

This form is required.

To Complete the Form IT-4

- a. Print your full name
- b. Print Social Security number

- c. Fill in your home address and zip code-this should be your physical address not a PO Box
- d. Fill in your Public School District if known
- e. Fill in your School District number if known
- f. Enter 1 for a personal exemption for yourself-only if you claimed yourself on your last 1040 tax return
- g. If married enter 1 for your spouse – only if claimed on your last 1040 tax return
- h. Enter the number of Exemptions for dependents claimed on your last 1040 tax return.
- i. Add the number of exemptions on lines 1, 2 and 3.
- j. Enter additional amount of withholding per period if choosing this option.
- k. Sign and date the form IT-4

5. Direct Deposit/Pay Card Enrollment –The fastest and most efficient way for a worker to receive their pay is to enroll in either Direct Deposit or a Pay Card. Either one of these options will guarantee you will receive your pay on the expected pay date rather than waiting for a check to arrive by mail. Please complete this form to choose how you would like to receive your pay.

To Complete the Direct Deposit/ Pay Card Enrollment:

- a. Complete all information asked on page 2 of the Enrollment Form.
- b. If you are choosing to receive your pay on a MasterCard Pay Card, fill in the Global Cash Prepaid MasterCard section. When Morning Sun receives your enrollment form, a pay card will be mailed out to you to the address you have provided in the Employee Authorization section along with activation instructions.
- c. If you are choosing to have your pay deposited into your own checking or savings account, fill in the section titled “Direct Deposit”. **You must attach a voided check or a letter from your bank that provides your bank routing number and your personal account number. Please write “VOID” across your check.**
- d. Sign and date the form
- e. If you feel your best option is to receive a check in the mail, please check the box just below your signature.
- f. If you do not complete this form you will receive your pay by receiving a check in the mail.

7. Employment Eligibility/I-9/ E-Verify— all new employees are required to present proof of employment eligibility and complete an Immigration and Naturalization Service "Employment Eligibility Verification (Form I-9)" upon hire. Please fill out all of Section 1. You must show the proper forms of identification to your employer. **This form is required.**

To Complete the Employment Eligibility Form I-9:

The Employee-Section 1.

- a. Print your last name, first name, and home address.
- b. Fill in the box requesting your date of birth
- c. Fill in the box requesting your social security number
- d. Fill in your email address and telephone number- these are optional.
- e. Place a check in the box that best states your personal status
- f. Sign and date where it says "Employee Signature"

The Employer-Section 2.

- a. The Employer will show the worker page 9 of the form I-9 and instruct the worker to provide either one document from List A, or one document from List B and List C.
- b. The Employer may not ask for a specific document.
- c. When the worker has provided a List A or List B and C document, the Employer will log under the appropriate column the document type, number, and expiration date (if there is one) for all documents received.
- d. A photocopy of each document will need to be made and included with the submission of the I-9 to Morning Sun.
- e. The date these documents were reviewed should be included in the section titled CERTIFICATION.
- f. This section must be completed within three business days of hire.
- g. The Employer should than sign, print their name, title (owner, employer), business address (usually the participants address) and date.

***You must submit a photocopy of your I-9 documents to Morning Sun Financial Services of Ohio!**

***Morning Sun of Ohio will use the information provided on the Form I-9 to verify employment eligibility through E-Verify the US Department of Homeland Security.**

7. Medicaid Fraud Form- This form is required.

8. Employer/Employee Agreement Form – You as the Provider/Employee will fill in on information requested on page one of the agreement and sign and date page 2. Your Employer or their Authorized Representative will also sign and date this form. **This form is required**

9. The IRS Notice 797 is provided to each new Worker hired. This notice provides the worker with information about the Federal Earned Income Credit and how to identify if you qualify for this credit when you file your personal tax returns.

10. Timesheets and instructions on how to fill out the timesheet and a Payroll Schedule will be sent to you once you have been approved by Morning Sun to begin work. Please review the instructions on how to complete your timesheet. The Payroll schedule will tell you what the pay periods are, when your timesheet needs to be submitted for payment and when you will get paid for those hours worked. Your Employer may choose to have you submit your timesheets using Morning Sun's Web Based Timesheet Portal. If your employer has chosen to use this option, you will be notified and given a tutorial to use to complete and submit your timesheet on-line.

***All timesheets must be submitted to Morning Sun for processing well before the 6 month deadline or you risk not getting reimbursed. Morning Sun must submit timesheet reimbursement request to the Managed Care Organization no later than 6 months from the pay period begin date on the timesheet.**