

# Voucher Learning Collaborative

## January 20, 2022

### CHAT Transcript

00:19:56 Amy Harris, Colorado State Unit on Aging

00:20:01 Amber Goodrich - New York State Office for the Aging

00:20:02 Sarah Schmidt, Arkansas DHS

00:20:05 Abbey Derepentigny - NYS Office for the Aging

00:20:08 Anya Taylor, Easterseals, Delaware

00:20:11 Deana Prest, New York State Office for the Aging

00:20:15 Aietah Stephens, Oklahoma and with OU Sooner SUCCESS

00:20:15 Tina Yurik, Illinois Respite Coalition, Hi Everyone!

00:20:15 Lynn Fyanes, Idaho Commission on Aging

00:20:19 Cheryl Dinnell, Nevada Lifespan Respite Care Coalition, Nevada

00:20:19 Cory Lutz, Helping Hands of Vegas Valley and the Nevada Lifespan Respite Care Coalition.

00:20:21 Nancy Ranalli, Easterseals Delaware

00:20:22 Doris Green - NYS Caregiving and Respite Coalition

00:20:25 Merle Edwards-Orr, Applied Self-Direction

00:20:26 Nick Slentz, Virginia Department for Aging and Rehab. Services (DARS)

00:20:28 Liza White, Virginia Department for Aging

00:20:28 Karen Wilson, NYSCRC, Rochester, NY

00:20:29 Tracy, PAVE, WA State Contact Info: tkahlo@wapave.org and 206.799.9454

00:20:31 Lisa Schneider, Exec. Dir. Respite Care Association of Wisconsin

00:20:32 Stephanie Red Elk Oklahoma

00:20:39 Molly Morris, Applied Self-Direction

00:20:41 Gina Stucki, Area V Agency on Aging, Pocatello, Idaho

00:20:42 Mary Weltz North Dakota Dept of Human Services-Aging Services Division

00:21:01 Paula Callahan, SWNPHD McCook, NE

00:21:10 Kerrie from Montana SUA, I will be tag teaming with Patrick today. I will be signing off at noon.

00:21:54 Good morning everyone! Jamie Ahumada- Nevada

00:22:00 Regina Stokes- TCAD, Nashville, Tennessee

00:22:21 James Davis Mississippi Department of Human Services

00:22:27 Hello! ~Lincoln, Nebraska

00:30:41 **Innovative and Exemplary Respite Services Application**  
<https://archrespite.org/innovative-and-exemplary-respite>

**National Lifespan Respite Conference Call for Presentations**  
<https://arch.wildapricot.org/call-for-presentations>

00:36:02 Lynn Fyanes Idaho Commission on Aging: Will these slides be available?

00:36:18 Jill Kagan: **Participant-Directed Respite Guidebook**  
<https://archrespite.org/images/Books/RespiteGuidebookFinal6.pdf>

00:37:13 Jill Kagan: **Applied Self Direction PPT Slides**  
[https://lifespanrespite.wildapricot.org/resources/Documents/Voucher\\_Learning\\_Collaborative/1-20-2022/ARCH%20presentation%201.20.22.pdf](https://lifespanrespite.wildapricot.org/resources/Documents/Voucher_Learning_Collaborative/1-20-2022/ARCH%20presentation%201.20.22.pdf)

00:54:16 Lynn Fyanes Idaho Commission on Aging: I thought the annual tax threshold was \$1200?

00:57:32 Lisa Schneider, RCAW: Not heard of that either, agree that it is \$600

01:10:47 Lisa Schneider, RCAW: In case I missed it, this is IRS Notice 2014-7, Difficulty of Care Payments Excludable from Income. If you are an Individual Provider who lives with your client, the income you earn for providing care services can be excluded from your federal income taxes.

01:14:50 Lynn Fyanes Idaho Commission on Aging: Links to materials are very useful thank you

01:16:56 Cheryl Dinnell: The caregiver will get 1099 for reimbursement but they can apply/use the "costs" of service they spent the money on against that income.

01:17:03 Lisa Schneider, RCAW: It depends on how the voucher or payment was 'awarded'. If it is via the family caregiver and they pay provider, the family caregiver gets the 1099

01:19:15 Nick Slentz- DARS : But would that be the same if a family hires a professional agency to provide that respite?

01:19:18 Cheryl Dinnell: It's a reporting requirement, not a tax.

01:19:35 Cory Lutz\_HHOVV: This is why I for my vouchers people are only allowed to use agencies - then I do not have to deal w/taxes.

01:20:18 Doris Green - NYSCRC: The payment becomes taxable for payment \$600 and above or MORE than \$600?

01:20:35 Cheryl Dinnell: \$600 and up

01:21:07 Nick Slentz- DARS : We reimburse 595 to avoid the 1099 in Virginia

01:21:35 Tonya Cedars: Is it possible to get the chat information along with the presentation

01:22:14 james.davis: In Mississippi we also changed our reimbursement to \$595 to avoid the 1099.

01:23:17 Lynn Fyanes Idaho Commission on Aging: I agree!

01:23:28 Tricia Lazare: Yes!

01:23:32 james.davis: I agree! Great point!

01:24:14 Lisa Schneider, RCAW: We collect a W9 from everyone we award a respite grant to as we never know if the annual amount will total \$600+ so it's plugged into our accounting system and we can generate 1099's very easily.

01:24:18 Lynn Fyanes Idaho Commission on Aging: Highly interested in the FMS best practices

01:25:10 Lynn Fyanes Idaho Commission on Aging: Thanks Lisa

01:30:38 Nick Slentz- DARS : We also collect a W9 for all awardees, but that is how our state payment system works. They can't get put into our payment system without it.

01:34:42 Lynn Fyanes Idaho Commission on Aging: Great advice, I want to ensure we understand the taxes involved

01:37:56 Cheryl Dinnell: Biggest challenge for self-directed respite program was helping family caregivers find respite workers to hire. They could hire an agency but that eats up respite voucher funds quickly. So many don't have family/friends to approach and need to find someone to hire. Rural areas often don't have an agency option.

01:38:21 Lisa Schneider, RCAW: Information only: Just sharing guidance we got from our auditors in regard to 1009's and the family caregiver needing to issue 1099 to respite care worker or not.

1. RCAW does need to issue 1099s to the grant recipients. The "grants" given would be reported in Box 3 as "prizes and awards that are not for services performed."
2. For the recipient caregivers, since they are not their own trade or business (i.e., they are not in the business of caregiving), 1099s would not need to be issued to the hired respite care worker/agency. However, if they want to deduct the payment as a medical expense on their tax returns, then they will need to get the information and issue 1099s. However, if they aren't trying to deduct the payments, then 1099s do not need to be issued.

01:39:05 Cheryl Dinnell: There is a huge case management role to help family caregivers with paperwork they are unfamiliar with. Self-direction isn't successful if people are left on their own.

01:39:27 Gina Stucki: I agree! Keeping it uncomplicated is so very important. Complications take away from the idea of respite.

01:40:18 Tracy (she/her) WA PAVE: @ Cheryl - I so agree! And only going to be harder with continued disruption, change, and uncertainty.

01:44:25 Deana Prest, New York State Office for the Aging: Great job Karen!!!

01:44:48 Karen Wilson: Thank you Deana.

01:45:48 Amber Goodrich: Other considerations for the updated guidebook - more info. on capacity building and assessing readiness (for new programs) and perhaps more on roles and responsibilities?

01:46:12 Amber Goodrich: And thank you - this presentation has been great and the current guidebook has been awesome for us here in NY as Deana had said!

01:46:35 Merle Edwards-Orr: Thanks, Amber. Great point.

01:46:46 Deana Prest, New York State Office for the Aging: Amber led our workgroup and read the guide from front to back - glad she chimed in with some suggestions.

01:46:52 Lori Stalbaum/ACL: Thank you. Super presentation. Wonderful discussion!

01:47:27 Gina Stucki: Thank you very much for all of this good information! It has been very interesting.

01:47:30 Tracy (she/her) WA PAVE: Thank you! Very insightful and has a number of ideas turning in my mind! 🌟🙌👏

01:47:54 Lisa Schneider, RCAW: Blown away by your knowledge, thanks for sharing!!

01:47:55 Tina IRC: Illinois interested to share. Great presentation today! Thank you! Everything in guide book so helpful need to just update data.

01:48:00 Lynn Fyanes Idaho Commission on Aging: Thanks, good to have this on the front burner

01:48:13 Stephens, Aietah L. (HSC): Yes thank you everyone!

01:48:17 Tonya Cedars: Thank you! Thank you!

01:48:20 Cory Lutz\_HHOVV: Thank you for the great information and discussion!!

01:48:24 mweltz: Thank you!

01:48:28 james.davis: I want to thank Jill and Lori for being so supportive of the respite program here in Mississippi!