

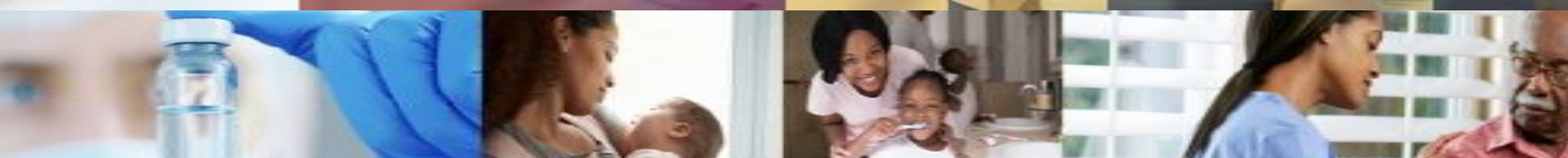


Developmental Disabilities Administration (DDA) Self-Directed Budget Sheet - Demonstration

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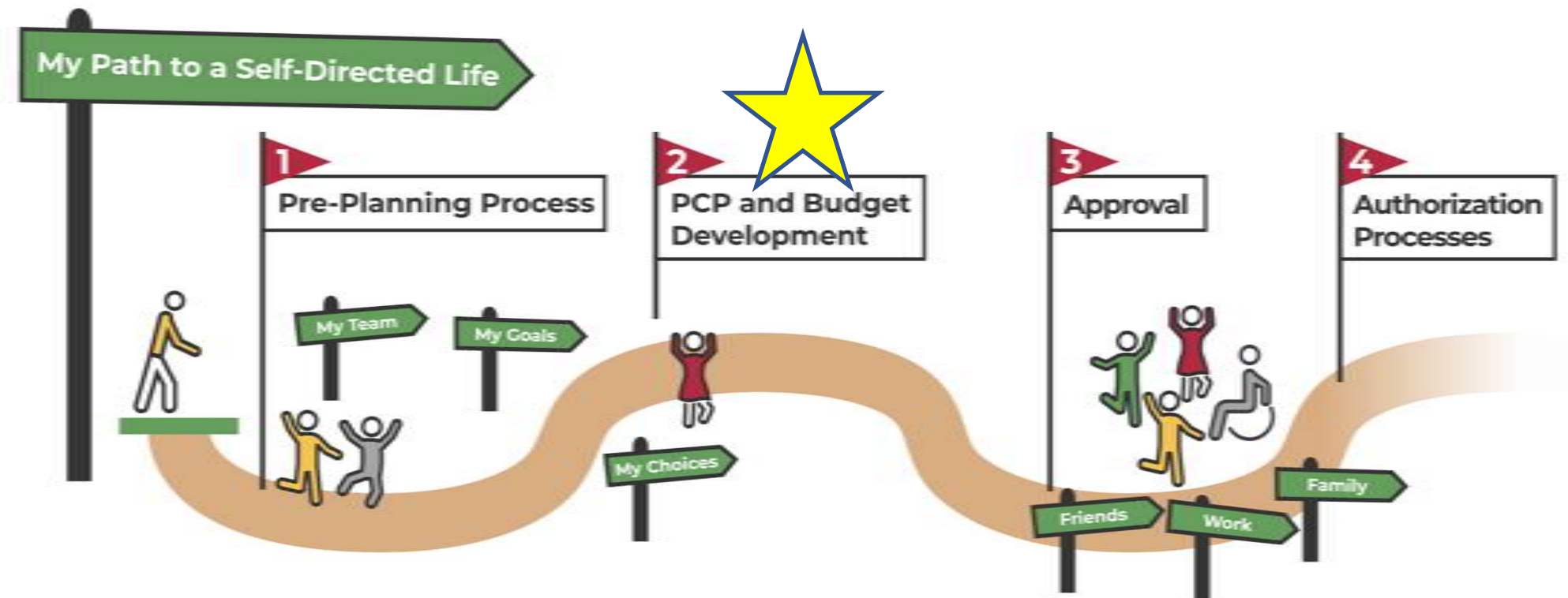
February 18, 2021



Agenda

- Introduction
- Budget Development Resources and Tools
 - [Self-Directed Services Handbook](#)
 - [Instructions for DDA's SDS Budget Sheet](#)
 - [DDA - Self Directed Services Budget Sheet](#)
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Introduction



Budget Development Resources and Tools

Budget Development Resources and Tools

HOME MDH HOME INDIVIDUALS FAMILIES PROVIDERS TRANSFORMATION LTSSMARYLAND
ELECTRONIC VISIT VERIFICATION (EVV) POLICYSTAT PERSON-CENTERED PLANNING

Welcome to the Maryland Developmental Disabilities Administration (DDA)

COVID-19 Information

Customer Service

Join our mailing list

Report Abuse or Concern

Quick Links

- > About DDA
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Services We Provide

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- > Low Intensity Supports Services (LISS)
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- > Self-Directed Services
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- > Transitioning Youth

Image: A group of diverse people, including adults and children, smiling together outdoors.

Reference: : [DDA Website](https://dda.health.maryland.gov/Pages/home.aspx)
<https://dda.health.maryland.gov/Pages/home.aspx>

Self-Directed Services



The Maryland Developmental Disabilities Administrations (DDA) supports participants' rights to self-determination and choice to self-directed their services. Self-determination means making your own choices, learning to effectively solve problems, and taking control and responsibility for one's life. People with intellectual and developmental disabilities have the same right to self-determination as all people and are entitled to the freedom, authority, and support to exercise control over the things in their life that are important to them, to the degree that they desire. Practicing self-determination also means one experiences the real life outcomes of making choices, both positive and situations that help us grow. This right to self-determination exists regardless of guardianship status.

How Do I?

- Get information on Support Services (P)

Popular Links

- Waiver Basics
- Maryland Medicaid Services
- HCBS Transition P

Resources and Inform

- Community Pathwa Forms, and Memos
- Self-Directed Servi Forms, and Webin

Budget Development Resources and Tools

Self-Directed Services Guidance, Forms, and Webinars

Self Direction

- [Self-Directed Services A Handbook for People with Developmental Disabilities Who Are Interested in Directing their DDA Services in Maryland - Feb 10, 2021](#)

Participant Agreement

Self Directed Budgets

- [Instructions for DDA's SDS Budget Sheet - Feb 5, 2021](#)
- [DDA - Self Directed Services Budget Sheet - Feb 5, 2021](#)
- [Staff Recruitment and Advertisement Allowance - June 5, 2019](#)

Reasonable and Customary Rate

- [DDA - Self Directed Services Reasonable and Customary Rates - Feb 11, 2021](#)
- [Self-Directed Services Person-Centered Plan Process and Rate Increase – December 31, 2020](#)

Resources and Tools

- [Safety/Risk Assessment and Planning Tool \(Aug. 24, 2015\)](#)
- [Structured Support Broker Interview Checklist \(Aug. 21, 2015\)](#)
- [Structured Support Interview \(Aug. 21, 2015\)](#)
- [DDA Support Broker List](#)

[Reference: Self-Directed Services Guidance, Forms, and Webinars](#)

Webinars

- [The Self-Directed Person-Centered Plan: Process, Rates, and COLA for Coordinators, Services and Providers Webinar – January 26, 2021](#)
 - [The Self-Directed Person-Centered Plan: Process, Rates, and COLA for Coordinators, Community Services and Providers PowerPoint – January 26, 2021](#)
- [The Self-Directed Person-Centered Plan: Process, Rates, and COLA for Participants and Families Webinar - January 20, 2021](#)
 - [The Self-Directed Person-Centered Plan: Process, Rates, and COLA for Participants and Families PowerPoint - January 20, 2021](#)

Budget Development Resources and Tools

Self-Directed Services

A Handbook for People with Developmental Disabilities Who Are Interested in Directing their DDA Services in Maryland



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What is Self-Directed services?

Roles and Responsibilities in Self-Directed Services

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Evaluating your Person-Centered Plan and Services

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Definition

Resources

[Reference: Self-Directed Services A Handbook for People with Developmental Disabilities Who Are Interested in Directing their DDA Services in Maryland - Feb 10, 2021](#)

Budget Development Resources and Tools

Maryland Department of Health

Developmental Disabilities Administration

Self-Directed Services Budget Sheet

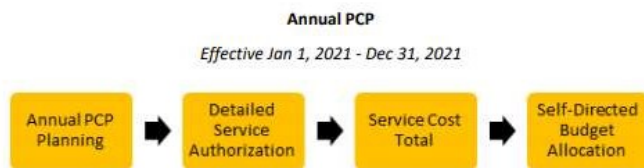
Overview:

The Developmental Disabilities Administration's (DDA's) Self-Directed Services (SDS) Budget Sheet is used by participants to allocate their self-directed budget based on the federally approved waiver program (i.e., Family Supports, Community Supports, and Community Pathways Waivers) in which they are enrolled.

The SDS Budget Sheet is a fillable Microsoft excel spreadsheet that captures information related to the Person Centered Plan's (PCP) approved services and amount, your selected employees and vendors, and your chosen rates of pay within the established reasonable and customary ranges. The sheet is designed to help you develop and stay within your allocated budget. Yellow spaces within the sheet may be filled in. White spaces will auto calculate and cannot be changed.

Allocated Budget - Annual vs Revised Person Centered Plan

Annually, you work with your Coordinator of Community Services (CCS) and team to develop your PCP. The PCP includes the detailed service authorization section which details the specific services and amount (Units) of service needed and calculates the total cost of the requested services. All of the costs for your proposed services are added together and that total is called your **allocated budget total**. This plan is referred to as the **Annual PCP**.



If your needs change during your annual plan year, then you can request to update your PCP which is referred to as a **Revised PCP**. The detailed service authorization section is revised and updated to reflect changes in your assessed needs (e.g., adding Employment Discovery to support in finding a job, ending Day Habilitation because you have a new job, etc.). To be approved, the Revised PCP will also require you to submit a revised Self-Directed Budget which reflects the changes noted in the Revised PCP.

How to Complete the Self Directed Services Budget Sheet

Participant, Program, PCP, and Budget Information (Reference: Rows 1 - 7)

1. **Name** - enter your first and last name (i.e., the participant)
2. **Effective Date** - enter the effective date (i.e., date services should begin as determined in the currently approved Annual or Revised PCP effective date)
3. **Initial PCP, Annual PCP or Revised PCP** - select Annual PCP or Revised PCP from the drop down to correspond with the applicable PCP for which the budget allocation is associated.
4. **Type of Waiver** - from the drop-down menu, select the waiver in which you, the participant, is currently enrolled (i.e., Family Supports, Community Supports, or Community Pathways)
5. **~ I will have _____ (number) employees and _____ (number) vendors ~**
 - enter the number of employees (i.e., staff) reflected in the budget
 - enter the number of vendors (e.g., companies, DDA Providers, etc.) reflected in the budget
6. **Enter approved budget amount here** - enter the total PCP budget allocation from the approved PCP.

Note: When you worked with your CCS to develop your PCP, the detailed service authorization section was completed which details the specific services you need, units of service, and the LTSSMaryland calculated total cost of the requested service. All of the costs for your proposed services are added together and that total is called your **allocated budget total**. Enter your allocated budget total amount in this field.

Example:

Enter approved budget amount here → \$10,000.00

Reference: [Instructions for DDA's SDS Budget Sheet - Feb 5, 2021](#)

Budget Development Resources and Tools

SELF-DIRECTED SERVICES - BUDGET SHEET Enter approved budget amount here

DEVELOPMENTAL DISABILITIES ADMINISTRATION

Initial, Annual PCP or Revised PCP:

Name: Effective Date:

Vendors 1/22/2021 "I will have (number) employees and (number) vendors" Type of Waiver:

Administrative Service - Fiscal Management Services				
<small>The Fiscal Management Service (FMS) is an administrative service and not part of your budget, therefore cost are not included on this worksheet. Please note the name of the FMS in next box.</small>				Budget Total
Support Broker (Optional Waiver Service - Orientation, Coaching and Mentoring Supports)				
Support Broker	# of Hours per month	Rate per Hour	# of Months	Budget Total
Initial orientation and assistance up to 15 hours				\$0.00
Ongoing Monthly Service - Staff				\$0.00
Staff Benefits				
Health Benefits				
Other Benefits - list				
Sick and Safe (Applicable to Mont. Co. ONLY)				
Training	# of Staff	Cost per staff		
Training (e.g., CPR/1st Aid/CMT/etc. as applicable)				\$0.00
W/5888 - CPW W/5883 - CSW W/5890 - FSW	Staff Transportation/Travel Reimbursement	# of Miles	Mileage Rate # of Weeks	
	Mileage			\$0.00
	Staff Transportation/Travel Reimbursement, Cont.	# of Trips	Cost per	
	Public (Maryland Mass Transit Administration)			\$0.00
	Taxi/Uber			\$0.00
	Taxes			\$0.00
	Taxes - <i>(indicate percentages)</i>			\$0.00
	Support Broker - Vendor/Contractor	# of Hours per Month	Rate per Hour # of Months	
	Support Broker - Vendor			\$0.00
Services to Support My Daily Living				
Personal Supports (PS)	# Hours per Week	Rate per Hour	# of Weeks	Budget Total
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Personal Supports - Staff				\$0.00
Staff Benefits				
Health Benefits				
W/5811 - CPW W/5813 - CSW W/5815 - FSW	Other Benefits - list			
	Sick and Safe (Applicable to Mont. Co. ONLY)			

SDS Budget
Instructions
Budget Mod
Waiver Service Summary_
+

Reference:

[DDA - Self Directed Services Budget Sheet - Feb](#)



Budget Development Resources and Tools

Developmental Disabilities Administration Self Directed Services - Reasonable and Customary Rates - February 11, 2021

Overview: Under the DDA's Family Supports, Community Supports, and Community Pathways Waivers, participants using the Self-Directed Service Delivery Model can establish their own payment rates for approved services. However, these rates must be reasonable and customary. The following table provides information on average rates for services and the range of DDA-approved rates considered reasonable and customary standards. The rates are based on the Bureau of Labor statistic wage and include the following cost components: Employee Related Expenses, Program Support, Facility (Day Habilitation only), Training, Transportation, General and Administrative, and Service Adjustment (depending on the service.). The Geographic Differential range is to be used when the person receiving services lives in one of the following counties - Calvert, Charles, Frederick, Montgomery, or Prince George's.

SERVICE	BILLABLE UNIT	STANDARD RATES		GEOGRAPHIC DIFFERENTIAL		ADDITIONAL INFORMATION
		MINIMUM	MAXIMUM	MINIMUM	MAXIMUM	
Assistive Technology and Services	Upper Pay Limit	N/A	N/A	N/A	N/A	Reimbursement shall be reasonable, customary, and necessary, as determined for the participant's needs, recommended by the team. If the item costs over \$1000, the most cost effective option that best meets the participant's needs shall be selected from the list noted in the Assistive Technology assessment.
BSS - Behavioral Assessment	Milestone	\$ 680.82	\$ 1,400.51	\$ 680.82	\$ 1,400.51	Limited to one unless otherwise authorized by the DDA
BSS - Behavioral Plan	Milestone	\$ 680.82	\$ 1,400.51	\$ 680.82	\$ 1,400.51	Limited to one unless otherwise authorized by the DDA
BSS - Behavioral Consultation	Hour	\$ 75.09	\$ 129.16	\$ 75.09	\$ 129.16	Limited to 8 hours per day
BSS - Brief Support Implementation	Hour	\$ 33.98	\$ 64.25	\$ 45.81	\$ 73.08	Limited to 8 hours per day
Community Development Services 1:1 Staffing Ratio	Hour	\$ 34.53	\$ 56.42	\$ 37.06	\$ 61.44	Limited to 8 hours per day/40 hours per week in combination with other meaningful day services
Day Habilitation 1:1 Staffing Ratio	Hour	\$ 32.47	\$ 53.05	\$ 38.67	\$ 64.11	Limited to 8 hours per day/40 hours per week - Monday through Friday only - in combination with other meaningful day services
Employment Services - Discovery Milestone 1	Milestone	\$ 388.78	\$ 681.59	\$ 463.79	\$ 774.01	Limited to one unless otherwise authorized by the DDA
Employment Services - Discovery Milestone 2	Milestone	\$ 1,166.34	\$ 2,044.76	\$ 1,391.37	\$ 2,322.03	
Employment Services - Discovery Milestone 3	Milestone	\$ 777.56	\$ 1,363.17	\$ 931.84	\$ 1,548.02	
Employment Services - Self- Employment Development Supports	Milestone	\$ 281.32	\$ 493.20	\$ 335.60	\$ 560.08	Limited to one
Employment Services - Job Development	Hour	\$ 48.60	\$ 85.20	\$ 57.97	\$ 96.75	Limited to 8 hours per day and 90 hours per year unless otherwise authorized by the DDA
Employment Services - Ongoing Job Supports	Hour	\$ 37.69	\$ 66.07	\$ 44.96	\$ 75.03	Limited to 40 hours per week in combination with other meaningful day services
Employment Services - Follow Along Supports	Month	\$ 362.79	\$ 628.04	\$ 423.00	\$ 720.45	Requires at least two face to face contacts with the participant in the course of the month

Reference:
[DDA - Self Directed Services - Reasonable and Customary Rates - Feb 11, 2021](#)

Budget Sheet Demonstration

Example Only – Jane Doe’s Person-Centered Plan – Service Authorization Section

Service Status & Effective Date	Service and Provider	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Annual Service Cost
▶ Changed - 09/13/2020	Respite Care Services - Camp	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$3,458.08 ↑
▶ Changed - 09/13/2020	Respite Care Services - Hour	0	0	0	0	0	0	0	0	0	0	0	0	0	\$0.00 ↓
▶ Changed - 09/13/2020	Personal Supports	416	416	416	448	384	384	448	416	416	416	416	416	448	\$38,787.20 ↑
▶ Changed - 09/13/2020	Community Development Services 1:1 Staffing Ratio	72	72	64	80	64	64	0	0	0	0	0	0	0	\$23,470.72 ↑
▶ Changed - 09/13/2020	Individual and Family Directed Goods & Services - Staff Recruitment & Advertising	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$500.00
▶ Changed - 09/13/2020	Transportation	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$7,000.00 ↓
▶ Changed - 09/13/2020	Support Broker	4	4	4	4	4	4	4	4	4	4	4	4	4	\$2,080.00 ↑
Annual - 09/13/2020	Community Development Services 1:1 Staffing Ratio	0	0	0	0	0	0	288	288	256	288	288	288	96	\$25,231.36
Annual - 09/13/2020	Respite Care Services - Hour	0	0	0	0	0	0	0	0	112	0	0	0	0	\$792.96

Total Plan Cost

Annual Waiver Plan Services Total:	\$100,820.00
DDA State Only Funded Services Total:	\$500.00
Total Plan Year Cost:	\$101,320.00

Example Only – Jane Doe’s Person Centered Plan – Service Authorization Section

Based on her current needs, Jane is seeking to:

- Increase Respite Care Services for Camp; and
- Receive 28 hours of Respite in May which displays as 112 15-minute units

Service Status & Effective Date	Service and Provider	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Annual Service Cost
▶ Changed - 09/13/2020	Respite Care Services - Camp	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$3,458.08 ↑
Annual - 09/13/2020	Respite Care Services - Hour	0	0	0	0	0	0	0	0	112	0	0	0	0	\$792.96

Example Only – Jane Doe’s Person Centered Plan – Service Authorization Section

Based on her current needs, Jane is seeking to:

- Increase her Personal Supports Services to support 24 to 28 hours per week (*which displays as 384 to 448 15-minute units per month*)

Service Status & Effective Date	Service and Provider	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Annual Service Cost
▶ Changed - 09/13/2020	Personal Supports	416	416	416	448	384	384	448	416	416	416	416	416	448	\$38,787.20 ↑

Example Only – Jane Doe’s Person Centered Plan – Service Authorization Section

Based on her current needs, Jane is seeking to:

- Increase her Community Development Services to support 16 to 18 hours per week (*which displays as 64 to 80 1-hour units for Sept to Feb per month and 256 to 288 15-minute units March to Sept per month*)

Service Status & Effective Date	Service and Provider	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Annual Service Cost
▶ Changed - 09/13/2020	Community Development Services 1:1 Staffing Ratio	72	72	64	80	64	64	0	0	0	0	0	0	0	\$23,470.72 ↑
Annual - 09/13/2020	Community Development Services 1:1 Staffing Ratio	0	0	0	0	0	0	288	288	256	288	288	288	96	\$25,231.36

Example Only – Jane Doe’s Person Centered Plan – Service Authorization Section

Based on her current needs, Jane is seeking to:

- Use Individual and Family Directed Goods and Services – Staff Recruitment & Advertisement

Service Status & Effective Date	Service and Provider	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Annual Service Cost
▶ Changed - 09/13/2020	Individual and Family Directed Goods & Services - Staff Recruitment & Advertising	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$500.00

Example Only – Jane Doe’s Person Centered Plan – Service Authorization Section

Based on her current needs, Jane is seeking to:

- Decrease stand alone Transportation services due to some transportation supports will be provided within the Personal Support and Community Development Services

Service Status & Effective Date	Service and Provider	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Annual Service Cost
▶ Changed - 09/13/2020	Transportation	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$7,000.00 ↓

Example Only – Jane Doe’s Person Centered Plan – Service Authorization Section

Based on her current needs, Jane is seeking to:

- Increase Support Broker services up to 4 hours per month

Service Status & Effective Date	Service and Provider	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Annual Service Cost
▶ Changed - 09/13/2020	Support Broker	4	4	4	4	4	4	4	4	4	4	4	4	4	\$2,080.00 ↑

Example Only – Jane Doe’s Person Centered Plan – Service Authorization Section

Jane’s Total Plan Year Cost = \$101, 320.32

This is Jane’s Self-Directed Budget Allocation

Total Plan Cost	
Annual Waiver Plan Services Total:	\$100,820.32
DDA State Only Funded Services Total:	\$500.00
Total Plan Year Cost:	\$101,320.32

Example Only – Jane Doe’s Person Centered Plan – Service Authorization Section

Budget Sheet Demonstration

Questions

