



Maryland

DEPARTMENT OF HEALTH

**Developmental Disabilities Administration (DDA)
Self-Directed Services**

FMCS Transition Lunch and Learn Series

Choice Form, LTSS Maryland Service Referrals, and Transfers

Target Audience: Coordinators of Community Services

Kristi Culbreth, Statewide Coordinator of Self-Directed Services

Cara Buckman, Western Maryland Self-Directed Services Lead

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Agenda

- Financial Management and Counseling Services (FMCS)
Transition Timelines
 - Participants new to self-direction
 - Participants currently self-directing
- Common Clarification Requests
- Demonstration of the FMCS Participant Choice Form
- Review of the LTSS FMCS Service Referral
- Review of Transfers

FMCS Agencies

- GT Independence
- Public Partnerships, LLC
- The Arc Central Chesapeake Region

FMCS Transition Timelines

Participants New to Self-Direction Timeline

- **Learn** about each FMCS to make an informed decision
- **Choose** and FMCS agency and Effective Date
 - Effective date is any date the person would like to begin self-directing
 - CCSes complete LTSSMaryland FMCS Assignment

Participants New to Self-Direction Timeline

- **Take action** steps by completing PCP and Budget

Submitted to DDA in PCP Process	Submitted to FMCS after PCP Approval
Participant Agreement	SDS Budget Sheet
Rights and Responsibilities documentation	Family as Staff Form
Service Implementation Plan (SIP)	Wage Exception Forms (as needed)
Other documents to support assessed need and as per DDA policy	

Open Enrollment FMCS Transition Timeline

- **Learn** about each FMCS to make an informed decision
- **Choose** and FMCS agency and Effective Date
 - CCS completes a [FMCS Participant Choice Form](#)
 - CCS completes LTSSMaryland FMCS Assignment
- **Take action** steps to transition to the FMCS
 - Team sends all documentation to FMCS
 - Participant and Team meet with FMCS

Open Enrollment Transitions - Scenario 1

A participant's APD is before October 1, 2022 (the first Effective Date Option)

- The Participant's Annual Plan Date is 9/2/22.
- They have chosen 10/1/22 as their FMCS Effective Date
 - The participant and their team would submit their PCP and budget (without FMCS fees) to the DDA for review
 - The DDA Regional Office would review and approve the PCP and budget and send it to the current FMS
 - The team then works through Open Enrollment together
 - Choice Form
 - LTSS FMCS Assignment
 - Update SDS Budget Sheet with FMCS fees (10/1/22-9/1/23 = 11 months)
 - Meet with FMCS Team, sends FMCS all documentation

Open Enrollment Transitions - Scenario 2

A participant's APD is after their chosen Effective Date

- The Participant's Annual Plan Date is 10/15/22.
- They have chosen 10/1/22 as their FMCS Effective Date
 - The participant and their team must complete Open Enrollment with their current PCP
 - Choice Form
 - LTSS FMCS Assignment
 - Update FMCS Budget Sheet with FMCS fees (10/1/22 - 10/14/22) = 1 month
 - Meet with FMCS team, sends FMCS all documentation
 - The team should also be preparing to send in the PCP for 10/15/22 to the DDA
 - PCP
 - Participant Agreement
 - SIP
 - Rights and Responsibilities

Common Clarification Requests

Common Clarification Requests - Assessed Need Justification

It's important to provide justification for all waiver services requested

- CDS and Day Habilitation 1:1 or 2:1
 - Medical reasons: HRST of 4+ - the need should be noted in the HRST and signed off by the nurse
 - Behavior support reason: the need should be noted in the behavior plan
- If no assessed need for 1:1 or 2:1 supports, the CCS should include CDS Group 1:4 or Day Habilitation Group in the DSA

Common Clarification Requests - Participant Agreement

The [Participant Agreement](#) should be submitted with the PCP

- Option 1: Participant is primarily responsible for the agreement
- Option 2: Participant appoints a representative who is responsible for the agreement
- Option 3: Participant names team members to support them with certain tasks
 - Participant is always the final decision maker
 - Not required for all tasks
 - Support Brokers' service/scope includes providing information and assistance
 - Avoid conflicts of interest

Common Clarification Requests - DSA Units and Budget Sheet Hours Alignment

The number of hours for each service in the budget spreadsheet must match the number of hours listed in the Detailed Service Authorization

- If someone has an assessed need for 10 hours, they should have 10 hours on their budget sheet
- The total budget allocation does not need to be used

Common Clarification Requests - Family as Staff Form

The [Family as Staff Form](#) should be sent with the SDS Budget

- Relative must meet minimum requirements of the service provided
- Relatives can be a staff **or** Support Broker
- Rate of pay information should match the budget sheet
- Limitations
 - Nursing Support Services
 - Personal Support Services
 - Support Broker Services
 - Supported Living

FMCS Participant Choice Form Demonstration

FMCS Participant Choice Form Reminders

- Completed by the CCS for the Participant
- Used only for people who currently self-direct
- Effective Dates require a 30 day runway for transition
 - October 1, 2022 could have been chosen through September 1
 - January 1, 2023 can be chosen through November 15

LTSS Maryland FMCS Assignment

LTSS Maryland FMCS Assignment Reminders

- Completed by the CCS for every participant who self-directs - new and current
- Currently self-directing - Effective Dates require a 30 day runway for transition
- New to SDS - Effective Date can be immediate
- Once the assignment is made, the team is responsible to ensure the PCP and all documentation is sent to the FMCS

LTSS Maryland FMCS Assignment Reminders

For a step by step demonstration of an FMCS Assignment Process, review our [guidance](#) and [training video](#)

Self-Direction — Referral Record

[Cancel](#) Save & Submit

Referral

Referred To Information

Program Type

Referred To* Self-Direct

FMCS Selection

Create Date:	1/28/2022	FMCS Provider Agency:*	Preethi Test Agency
Create by:	Quinones, Nicolas	Effective Date:*	01/31/2022
Reason for Selection:	<input type="text"/>		
End Date:	<input type="text"/>		

Attestation*

I have confirmed with the participant and other MDH HCBS programs' assigned case managers of the participant's Yes No
FMCS Provider of choice

FMCS Transfers

FMCS Transfers - Update to Original Guidance

- Future changes of FMCS agency can be completed at any time
- The LTSS Maryland FMCS assignment must be made **at least 30 calendar days** from the new Effective Date
- Best practice
 - Ensure participants understand the actions needed to change FMCS
 - Encourage participants and teams to ask critical questions of all FMCS agencies so that informed decisions can be made
 - If appropriate, consider changing FMCS on tax quarters for ease of transition for employees and vendors

FMCS Transfer Example

- Chose January 1, 2023 as their FMCS effective date using FMCS A
- Team meeting April 30 - change to FMCS B desired
- The team notifies FMCS A and B that a transfer will happen on June 1
- The team gathers the documents needed to get to FMCS B
 - PCP
 - Participant Agreement
 - Family as Staff Form
 - Current Budget Sheet
 - Employee Information (including wage rates)
 - Any wage exception forms
 - Any vendor forms
 - Service Implementation Plan
 - Employee/Vendor Schedules

FMCS Transfer Example - part 2

- FMCS A (current) sends documents to FMCS B (new)
 - List of expenditures from current year during their service time frame
 - Tax information associated with the participant, their employees, and vendors

Resources and Tools

- [Self-Directed Service Guidance, Forms, and Webinars](#)
- [DDA FMCS Webpage](#)
- [Training Calendar](#)
- [Financial Management and Counseling Services - Open Enrollment](#)
- [FMCS Participant Choice Form](#)
- [LTSSMaryland FMCS Assignment CCS Training Video](#)

Questions



Lunch and Learn Series

- [September 16 - The Support Broker Role in the FMCS Transition](#)
- [September 30 - \(Repeat\) Choice, Open Enrollment, and FMCS Information](#)

The September 23 Lunch and Learn regarding Electronic Visit Verification has been postponed for a later date

Recordings will be uploaded to the [DDA Website](#) and [DDA YouTube](#)