



Maryland
DEPARTMENT OF HEALTH

Developmental Disabilities Administration (DDA) Coordinators of Community Services Meeting

January 20, 2026



Housekeeping



The image shows a Zoom meeting window. At the top, the name 'Yemonja Smalls' and 'No active cameras' are visible. The main content is a title slide with the Maryland Department of Health logo, the text 'Developmental Disabilities Administration (DDA) Coordinators of Community Services Meeting', and the date 'June 17, 2025'. The slide is framed by two rows of small images: the top row shows a diverse group of people, and the bottom row shows healthcare professionals and patients. At the bottom of the Zoom window, there is a control bar with icons for Record, React, Mic, Camera, Share, Leave, and Captions. A yellow arrow points to the Captions icon.

Click here for
closed captioning

Housekeeping



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Housekeeping



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Housekeeping



The image shows a Zoom meeting window. At the top, the name 'Yemonja Smalls' and 'No active cameras' are visible. A yellow arrow points to the top right corner of the window. The main content is a title slide with the Maryland Department of Health logo, the text 'Developmental Disabilities Administration (DDA) Coordinators of Community Services Meeting', and the date 'June 17, 2025'. The slide is framed by a collage of photos showing diverse people in various settings. At the bottom, the Zoom control bar includes buttons for Record, React, Mic, Camera, Share, Leave, Captions, and Pop out.

Agenda

- Welcome
- Training
 - Forensic Review - Cathy Marshall and Nicole Keener
 - Nursing Services Review - Ramona Bradley
- Liberty Healthcare Corporation - Amber Rose and Sue Ludwig
- LTSS *Maryland* reports - Meghan Hall
- Statewide Themes, Trends and Resources
- Closing and Questions

Forensic Review Micro-Training

Forensically Involved Individuals (1 of 3)

- An individual with criminal charges against them is considered forensically involved.
- Applies to individuals discharging from Behavioral Health Administration (BHA) facilities, Secure Evaluation and Therapeutic Treatment (SETT), or the Potomac Center.
- Before submitting referrals, contact:
 - Nicole R. Keener, Western Maryland Regional Office's Forensic Coordinator/Statewide Forensic Liaison, nicoler.keener@maryland.gov
- We encourage a dedicated representative from each CCS Agency to work directly with Nicole.

Forensically Involved Individuals (2 of 3)

In addition to the referrals, Nicole should be included in the PCP process.

- Forensic individuals are either placed on probation or Conditional Release (COR).
- Ensure that the proper information is included in the PCP risk section and review prior to submitting the PCP for approval.
- Work closely with the Community Forensic Aftercare Program (CFAP) to ensure proper services are in place for successful discharge.
- Meet monthly with CFAP to address progress and any issues that arise.

Forensically Involved Individuals (3 of 3)

Why this matters:

- Strengthens communication between BHA, Developmental Disabilities Administration, and Coordinators of Community Services;
- Ensures referrals align with provider capacity and expertise;
- Supports successful transitions to the community; and
- Helps prevent re-entry into restrictive settings.

Questions



Nursing Services Micro-Training

Nursing Services (1 of 3)

In the Community Pathways Waiver, under Nursing Support Services, DDA has three options:

- Nurse Health Case Management and Delegation
- Nurse Health Case Management
- Nurse Consultation

*Health Risk Screening Tool (HRST) Reminder - Any HRST with an Health Care Level (HCL) of 3 and above requires a clinical review. If the individual accesses the DDRN contractors for the clinical review, the CCS must add NSS to the pending plan.

Nursing Services (2 of 3)

Nurse Health Case Management and Delegation

- Unlicensed staff are being paid to administer medication and/or provide other nursing services
- Unlicensed staff can be Unlicensed Assistant Personnel (UAP), Certified Medication Technician and/or Certified Nursing Assistant
- To delegate, the RN must:
 - Complete an assessment
 - Create Nurse Care Plans
 - Provide training for staff

Nursing Services (3 of 3)

RN Health Case Management

- This is only in traditional services
- Must be able to Self Medicate at Level III
- May have DDA Provider agency staff assistance in other nursing tasks
- Visits are up to every 90 days and no more than 4 hours per visit

RN Consultation

- Self-Directed Services Only
- Individual is cognitively capable
- Develops protocols
- Visits are up to every 90 days and no more than 4 hours per visit

Questions



Liberty Healthcare Corporation

Basic Assurances® Review Overview

Network Accreditation

Presented by the Quality Improvement Organization (QIO):

Amber Rose, Quality Manager – Data Collection



Agenda



Overview

1. What is the Basic Assurances® (BA) review?
2. How can Targeted Case Management providers prepare and engage in the process?
3. How does the Basic Assurances® review support the network (individual, organizational, and statewide system level)?

What is the Basic Assurances® review?



Basic Assurances® Review



- Participant and Family Voice (National Core Indicators®)
- System Compliance (CMS Waiver Assurances)
- **System Quality and Participant Outcomes (CQL Network Accreditation)**



Basic Assurances® Review



The Basic Assurances® is a tool to evaluate the essential, fundamental, and non-negotiable requirements of all human service organizations and systems.



Basic Assurances® Review

1. RIGHTS PROTECTION AND PROMOTION

2. DIGNITY AND RESPECT

3. NATURAL SUPPORT NETWORKS

4. PROTECTION FROM ABUSE, NEGLECT,
MISTREATMENT, AND EXPLOITATION

5. BEST POSSIBLE HEALTH

6. SAFE ENVIRONMENTS

7. STAFF RESOURCES AND SUPPORTS

8. POSITIVE SERVICES AND SUPPORTS

9. CONTINUITY AND PERSONAL SECURITY



Systems



Practices



- Factor Conversations
- Personal Outcome Measures®
- Focus Groups (families, people receiving services, CCSs, supervisors)
- Documentation Review



Basic Assurances® Review

! A few important things:

- Basic Assurances® reviews do not result in corrective action
- They are not compliance or audit focused
- Individual provider review results are not shared with the DDA (your organization *can* opt in to have positive highlights shared)
- Your organization is not being accredited during this review
- Basic Assurances® Reviews are a part of Maryland's CQL statewide system accreditation journey and are **not** linked to the CMS Waiver Assurances Reviews (utilization, qualified provider reviews, welfare reviews, targeted case management) of the QIO

How can Targeted Case Management providers prepare and engage in the process?



TCM Providers and the Basic Assurances®

“Both reviewers provided detailed training and resources that will be super useful with our day-to-day functions as CCS’s.”

“We received a number of resources to assist with putting recommendations into action.”

“Participating in the Basic Assurance Review was helpful because [Reviewer] was able to share what other agencies are doing differently than our agency and she was willing to provide additional resources.”



TCM Providers and the Basic Assurances®

- Engage with notifications from Liberty. White-list **@libertyhealth.com**
- Review the materials
- Encourage the right people to attend the planning calls and BA review factor conversations
- Do not create or update policies and procedures or other documents for the Basic Assurances!

How does the Basic Assurances® review support the network (individual, organizational, and statewide system level)?



Basic Assurances® (BA) Network Impact

Individual	Organizational	System (Network)
<p>Organizations can impact people's lives by implementing recommendations that align with the Basic Assurances®.</p> <p>Information from people receiving services (focus groups and/or Personal Outcome Measures®) provide meaningful feedback, conducted by a third party.</p>	<p>Organizations receive a summary report AND tangible resources to help implement recommendations and explore best practices for the Basic Assurances® factors.</p>	<p>The DDA receives technical assistance from The Council on Quality and Leadership (CQL) to enhance its systems and practices.</p> <p>Aggregate summaries are provided to the DDA for review.</p> <p>Coming Soon: The DDA will receive organization specific highlights of strengths across Maryland (orgs can opt out).</p>

Remember, the DDA does not receive individual organization results.



Basic Assurances® (BA) Network Impact



Guardianship and Its Alternatives:

A Handbook on Maryland Law

Joan O'Sullivan, J.D.
Author

Virginia Rowthorn, J.D.
Ellen A. Callegary, J.D.
2011 Edition Handbook Co-Editors

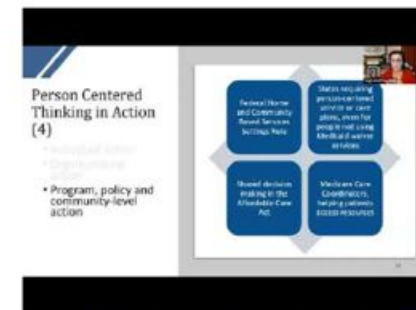
A Joint Publication of the University of Maryland Francis King Carey School of Law's
Law & Health Care Program and the Maryland State Bar Association



Person-Centered Thinking in Action

Person-centered thinking includes everyday actions and behavior that shifts us away from systems-centered action to person-focused, person-directed action. When we act in a person-centered way, there is clear intent, thought, and commitment to centering the person as the expert of their life.

In the following video, [Leigh Ann Kingsbury](#) outlines how person-centered thinking occurs on 3 different levels: individual action; organizational action; and program, policy, and community action.



Video link: https://www.youtube.com/watch?v=12jCOiv9C_k

Reflection Activity #5

How does person-centered thinking show up in your work?

How does person-centered thinking show up in your organization?

How does person-centered thinking show up in policies/your community?

Natural Support Identifier Name:

Instructions: The Natural Support Identifier form is to be completed initially, updated as changes occur and then reviewed annually for accuracy. It can be done as an interview with the person or complete as a team. The information obtained through this process needs to be considered during the Person-Centered Planning (PCP) process to ensure people have the support necessary to maintain their Natural Support network.



Important People in My Life

Parents:

Name: _____ Preferred contact method: Phone call Facetime Email

How often I want to have contact: _____ in-person visit Other: _____

Address: _____

Phone number: _____ Email: _____



Recap

1. Defined the Basic Assurances® (BA) review?
2. Outlined how Targeted Case Management providers can prepare and engage in the process
3. Identified how Basic Assurances® reviews support the network (individual, organizational, and statewide system level)

Questions?

Christina Dixon, Executive Director, Liberty Healthcare Corporation

Christina.Dixon@libertyhealth.com

Amber Rose, Quality Manager-Data Collection, Liberty Healthcare Corporation

Amber.Rose@libertyhealth.com

Jennifer Sova, Network Accreditation Lead Supervisor, Liberty Healthcare Corporation

Jennifer.Sova@libertyhealth.com

CQL SOP can be found on the [QIO webpage](#)



Questions



***LTSS Maryland* Updates**

January 12, 2026 LTSS *Maryland* Releases (1 of 13)

- **Enhancement Name:** Create Ability to Deny a Comprehensive Assessment Extension Request.
- **Description:** When the CCS requests an extension for a Comprehensive Assessment, the regional office will have the option to deny the extension for the following reasons:
 - No proof of attempts to contact the applicant or authorized representative.
 - Extension request is due to Coordinators of Community Services absence or availability rather than applicant circumstances.
 - Extension request was not submitted timely.

January 12, 2026 LTSS *Maryland* Releases (2 of 13)

- Requested documentation has not been received, and it is not reasonable to believe it will be available within the requested extension period.
 - Insufficient justification provided to support the extension request.
 - Other (free text box)
- The CCS will receive an alert that the extension request was denied, and the original due date of the assessment will be retained.

January 12, 2026 LTSS *Maryland* Releases (3 of 13)

- **Why?**

Without a "deny" function, the regional office only has the option to approve the request, or let the request sit in an outstanding status until the form is submitted.

Allowing the regional office to deny extension requests will improve the accuracy of data related to Comprehensive Assessments and extension requests in general. This will also provide workflow history of the request that can be tracked and monitored.

January 12, 2026 LTSS Maryland Releases (4 of 13)

DDA Comprehensive Assessment Status: In Progress – Extension Requested View Edit

[Back to List](#) Abandon Discard Submit Approve Extension Deny Extension Expand All

Comprehensive Assessment Edit

Documentation Manage

Workflow History

Deny Extension ✕

Deny Extension

Reason: *

No proof of attempts to contact the applicant or authorized representative.

Extension request is due to Coordinators of Community Services absence or availability rather than applicant circumstances.

Extension request was not submitted timely.

Requested documentation has not been received, and it is not reasonable to believe it will be available within the requested extension period.

Insufficient justification provided to support the extension request.

Other

Save & Close Cancel

January 12, 2026 LTSS *Maryland* Releases (5 of 13)

DDA Comprehensive Assessment Status: In Progress View Edit

[Back to List](#) Abandon Discard Submit Expand All

- Comprehensive Assessment Edit
- Documentation Manage
- Workflow History

From Status	To Status	Actor Name/Role	Date	Comments
In Progress – Extension Requested	In Progress	Test RO	12/08/2025	Extension request was not submitted timely.
In Progress	In Progress – Extension Requested	Test CCS Staff	12/08/2025	Please grant an extension for xyz
	In Progress	Test CCS Staff	12/08/2025	

January 12, 2026 LTSS *Maryland* Releases (6 of 13)

- **Enhancement Name:** Provide Ability for DDA Super User to Remove PCP End Dates
- **Description:** The DDA Super User will have the ability to completely remove end dates from Person-Centered Plans, rather than only being able to edit/change Person-Centered Plan end dates.
- **Why?**

Person-Centered Plan End dates can occur on a PCP prematurely when:

- Overlapping plans generate, such as when the CCS submits an annual PCP (opened prior to the annual PCP date) over an auto-extend PCP or when there is a data patched PCP
- An initial PCP is generated off of an autoextend PCP as seen in the 10/6 Waiver Consolidation information as these PCPs have an end date automatically

January 12, 2026 LTSS *Maryland* Releases (7 of 13)

- The CCS revises a PCP with an end date present, resulting in the newly submitted/approved plan auto-end-dating to a single-day span to prevent an overlap
- The Eligibility Determination Division submits an Overall Decision disenrollment form in error and does not correct it in time before the PCP end-dates
- User error as the CCS/Regional Office manually enters in the wrong end date on an active plan

January 12, 2026 LTSS *Maryland* Releases (8 of 13)

- **Why?** (Continued)

The possible scenarios listed on the previous slide pose an issue if/when a CCS goes to revise the currently active PCP that has an end date.

Unfortunately, while the Super User is unable to remove the end date once generated, they can only move it to a later date. This repeats the cycle if the CCS needs to submit another revised PCP later in the plan year.

This update will stop this cycle and make PCP processes smoother and more organic.

February 23, 2026 LTSS *Maryland* Releases (9 of 13)

- **Enhancement Name:** LTSS and Provider Portal Dashboard for Eligibility and Plan Creation with Reports.
- **Description:**

The LTSS *Maryland* system requires multiple steps for a client to be eligible for Medicaid and programs. The Person-Centered Plan is also a multi-step process.

A new dashboard will be added to the Client Summary section in LTSS *Maryland* that contains three sections: Eligibility (MA), Program (CP) Eligibility and Person-Centered Plan.

Each section will contain:

1. A line for the step of the process
2. Red, green, yellow status “light” based upon status of each step above
3. The link to each process by program type

February 23, 2026 LTSS *Maryland* Releases (10 of 13)

- Why?

Providing a visual representation of the progress made during the eligibility process will mitigate provider exceptions and facilitate the resolution of eligibility/plan-related issues.

MDH will implement an indicator, which will show the completion of steps, along with a printable/exportable report for Case Managers to use to identify participants in various statuses of authorization.

February 23, 2026 LTSS *Maryland* Releases (11 of 13)

- **Enhancement Name:** DDA Monitor and Follow Up Form - Updates to Ensure Basic Service Authorization Information Is Not Included
- **Description:**

Old Provider MA numbers (base MAs) and their associated services, which are no longer current, continue to transfer into the Monitoring and Follow-Up (MFU) form. This results in inaccurate data capture, as CCS staff are forced to respond “Yes” or “No” to required fields linked to non-existent services.

Newly generated MFU forms, old ‘base’ MA numbers and the associated services will not appear in the Monitoring and Follow-Up form.

Previously generated MFU forms - a data patch will remove the base MA numbers and associated services.

February 23, 2026 LTSS *Maryland* Releases (12 of 13)

- **Why?**

Removing the outdated base MA numbers and associated services from populating the MFU form will eliminate inaccurate data capture and ensure accurate documentation, equitable billing practices, and alignment with current service authorization standards.

February 23, 2026 LTSS *Maryland* Releases (13 of 13)

- **Enhancement Name:** Prevent retroactive enforcement of PCP hard limits
- **Description:** When unit limits are enforced by LTSS *Maryland* during the Person-Centered Planning process, the system must only impose the limits for months in the future.
- **Why?**

This enhancement will improve the efficiency of the Person-Centered Planning process by preventing any retroactive unit limits for the CCS.

Bonus Info - Adding Units of Service for Individual Months of the Plan Year

- LTSS *Maryland* provides the flexibility to add units for service one month at a time.

Service Status & Effective Date	Service and Provider	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Total Units	Annual Service Cost	Actions	Provider Status	Provider Status Date
▶ Change d - 10/19/2 025	Com munity Develop ment Services Group (1-4)	320	640	736	704	640	704	704	672	704	736	672	704	416	8352	\$93,709 .44 ↑	Edit Delete Revert	N/A	N/A
Provider Site Address: N/A																			

Bonus Info - Adding Units of Service for Individual Months of the Plan Year

Community Development Services Group (1-4) x

Unit Calculation Type: Daily

All

October November December January February March

April May June July August September

October

Sunday: hours minutes

Monday: hours minutes

Tuesday: hours minutes

Wednesday: hours minutes

Thursday: hours minutes

Friday: hours minutes

Saturday: hours minutes

Days Per Week: (max 7 days a week)

How Many Weeks: * All (max 3 weeks)

Units Per Week:

Calc Type	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Actions
Daily	320	640	736	704	640	704	704	672	704	736	672	704	416	Edit

Billable Unit:

Back Close Save to Service Authorization

Bonus Info - Adding Units of Service for Individual Months of the Plan Year

Community Development Services Group (1-4)

Unit Calculation Type: Daily

All

October November December January February March

April May June July August September

October

Sunday: 0 hours minutes Thursday: 2 hours minutes

Monday: 6 hours minutes Friday: 8 hours minutes

Tuesday: 8 hours minutes Saturday: 0 hours minutes

Wednesday: 3 hours minutes

Days Per Week: 5 (max 7 days a week)

How Many Weeks: * All (max 3 weeks)

Units Per Week: 108

Calc Type	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Actions
Daily	320	640	736	704	640	704	704	672	704	736	672	704	416	Edit Editing...

Bonus Info - Adding Units of Service for Individual Months of the Plan Year

Community Development Services Group (1-4)

Unit Calculation Type: Daily

All
 October November December January February March
 April May June July August September
 October

Sunday: hours minutes
 Monday: 4 hours minutes
 Tuesday: 3 hours minutes
 Wednesday: 2 hours minutes
 Thursday: 1 hours minutes
 Friday: 8 hours minutes
 Saturday: hours minutes

Days Per Week: 5 (max 7 days a week)
 How Many Weeks: * All (max 3 weeks)
 Units Per Week: 72

[Add Calculation](#)

Calc Type	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Actions
Daily	0	0	0	0	432	0	0	0	0	0	0	0	0	Edit Delete

[Back](#) [Close](#) [Save to Service Authorization](#)

Bonus Info - Adding Units of Service for Individual Months of the Plan Year

Community Development Services Group (1-4)

Unit Calculation Type: Daily

All

October November December January February March

April May June July August September

October

Sunday: hours minutes

Monday: hours minutes

Tuesday: hours minutes

Wednesday: hours minutes

Thursday: hours minutes

Friday: hours minutes

Saturday: hours minutes

Days Per Week: (max 7 days a week)

How Many Weeks: * **All** (max 3 weeks)

Units Per Week:

Add Calculation

Calc Type	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Actions
Daily	0	0	0	0	432	0	0	0	0	0	0	0	0	Edit Delete
Daily	0	0	0	0	0	0	0	0	316	332	0	0	0	Edit Delete

Back **Close** **Save to Service Authorization**

Bonus Info - Adding Units of Service for Individual Months of the Plan Year

Service Status & Effective Date	Service and Provider	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Total Units	Annual Service Cost	Actions	Provider Status	Provider Status Date
▶ Change d - 10/19/2 025	Community Development Services Group (1-4)	0	0	0	0	432	0	0	0	316	332	0	0	0	1080	\$12,117.60 ↓	Edit Delete Revert	N/A	N/A
Provider Site Address:		N/A																	

Service Details

Annual Service Cost: **\$12,117.60**

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Units	0	0	0	0	0	0	0	0	316	332	0	0	0
Rate	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$11.22	\$11.22	\$0.00	\$0.00	\$0.00
Units	0	0	0	0	432	0	0	0	0	0	0	0	0
Rate	\$0.00	\$0.00	\$0.00	\$0.00	\$11.22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Questions



DSS Age Outs

DSS Age Out Participants

- Coordinators should be aware of any participants who are aging out of their foster care placements with the Department of Social Services.
- These are youth who are turning 21 during this Transitioning Youth year and will need to transition to DDA funding before July 1, 2026 as funding from the Department of Social Services ends on the day they turn 21.

Questions



Statewide Themes and Trends

Rights and Responsibilities (1 of 2)

- The DDA released the updated Participant Rights and Responsibilities form on December 18, 2025.
- The form outlines what a participant, their legal guardian, or their chosen representative must do to follow the rules and requirements of the DDA waiver or state-funded programs.
- Coordinators should ensure that the document is reviewed and signed by the participant at their first and each annual Person-Centered Plan meeting.

Rights and Responsibilities (2 of 2)

- All participants need to understand their rights and responsibilities.
- The review and completion of the forms helps to make sure that participants are healthy, safe and happy with the services provided by the DDA.
- The link to the form is:

[Rights and Responsibilities Form](#)

Certification Review

- We have reached out to any coordination agencies that needed updates or clarifications to their applications.
- We are hoping to finalize the certification process by the end of this month.
- If there are any questions regarding your current status, please reach out to: Debbie Balea, Division Chief of Community Coordination Services, at debbie.balea@maryland.gov.

Eligibility Determination Division Contacts

Contact Information:

1- 800-226-2142

[Cognito Form](#)

Questions



Closing

- **Next meeting - February 17, 2026 10am - noon.**
- Please submit agenda topics, ideas, or if you would like to present on behalf of your agency's accomplishments to Debbie.balea@maryland.gov.