



Developmental Disabilities Administration

Self-Directed Services Training Series

Module 13: Individual and Family Directed Goods and Services

Updated October 2025



Overview

- This training module will provide you with an overview of Individual and Family Directed Goods and Services.
- This training is a summary with important information on this topic.
- More information and requirements are found in the Medicaid waiver program applications, laws, regulations, guidance and policies.
- The most updated information regarding Self-Directed Services is published in the Self-Directed Services policy and manual that can be found on the DDA's website at <https://health.maryland.gov/dda/Pages/sdforms.aspx>.

What are Individual and Family Directed Goods and Services?

- Services, equipment, activities, or supplies that support participants who choose the Self-Directed Services delivery model, including:
 - Recruitment and Advertising,
 - Day-to-Day Administrative Supports, and
 - Other Goods and Services as outlined in guidance.

Individual and Family Directed Goods and Services (1 of 4)

Individual and Family Directed Goods and Services:

- Must not compromise the participant's health or welfare;
- Are provided to, or directed exclusively toward, the benefit of the participant;
- Help meet needs in a participant's Person-Centered Plan;

Individual and Family Directed Goods and Services (2 of 2)

Individual and Family Directed Goods and Services:

- Help the participant to maintain or increase their independence and promote opportunities for the participant to live and be included in the community; and
- Are services that cannot be provided through the DDA-operated Medicaid waiver programs or through the Medicaid State Plan (also known as Medicaid are services that cannot be provided through the DDA-operated Medicaid waiver programs or through the Medicaid State Plan.

Individual and Family Directed Goods and Services Eligibility

A participant may be eligible to receive funding for Individual and Family Directed Goods and Services if:

- The good or service is connected to an assessed need in the Person-Centered Plan;
- All requests meet all requirements of the Medicaid waiver program, policies, and guidance.
- The participant does not have funds to purchase the good or service, and
- All other funding sources have been explored and documented.

Recruitment and Advertising

Recruitment and Advertising



- Up to \$500 in dedicated funding
- Recruitment and Advertising may include:
 - Developing, printing, and posting flyers; and
 - Online staff registries.

Recruitment and Advertising Funding

Recruitment and Advertising is authorized in the Person-Centered Plan.

- Funding does not come from cost savings, and
- Must be included in the Self-Directed Services Budget Sheet.
- Is purchased by the Financial Management and Counseling Services provider (who is the Organized Health Care Delivery System provider).

Day-to-Day Administrative Supports

Day-to-Day Administrative Supports Definition

- Day-to-Day Administrative Supports provide:
 - Assistance with household management, and
 - Scheduling medical appointments.
- Household management means:
 - Scheduling house maintenance and repairs,
 - Scheduling snow removal, and
 - Scheduling lawn care.

Day-to-Day Administrative Supports Do Not Include (1 of 4)

Day-to-Day Administrative Supports **do not include:**

- Making payments for household management care including repairs, snow removal, and lawn care;
- Making decisions for the participant;
- Approving and signing timesheets or vendor payments;

Day-to-Day Administrative Supports Do Not Include (2 of 4)

Day-to-Day Administrative Supports **do not include:**

- Personal Supports Services including budgeting and money management, maintaining a home, meal preparation, personal care, house cleaning/chores, laundry, and overnight supports;
- Developing staff schedules and cleaning schedules;

Day-to-Day Administrative Supports Do Not Include (3 of 4)

Day-to-Day Administrative Supports **do not include** Financial management activities such as:

- Maintaining benefits and Medicaid eligibility;
- Managing money and property management;

Day-to-Day Administrative Supports Do Not Include (4 of 4)

Day-to-Day Administrative Supports **do not include:**

- Development of a Person-Center Plan, emergency plan, or staffing back-up plan;
- Assistance with recruiting and hiring direct support professionals, managing workers, terminating workers, and providing information on effective communication, problem-solving, and conflict resolution; or
- Monitoring of participant's services, activities, goals, and satisfaction.

Availability of Day-to-Day Administrative Supports (1 of 2)

Day-to-Day Administrative Supports are available to participants:

- Who are 18 years of age or older and are unable to do the tasks independently;
- When the people that currently provide household management and medical appointment scheduling are not able to continue providing those supports;
- When additional natural supports are immediately available to provide those supports; and
- When support is not available under other Medicaid or waiver services.

Availability of Day-to-Day Administrative Supports (2 of 2)

Up to 10 hours per month of Day-to-Day Administrative Supports are available if they are approved in the Person-Centered Plan.

- This service will be paid for through the waiver. It does not need to be covered using cost-savings funds.
- This service is a new drop down option in the Person-Centered Plan detailed services authorization (available on October 6, 2025).
- Person-Centered Plans must include an outcome that can be supported by Day-to-Day Administrative Supports. A Decision Tree Form is required to be submitted with the Plan.

The Day-to-Day Administrative Supports Decision Tree Form

If a participant is asking for Day-to-Day Administrative Supports in their Person-Centered Plan, the Decision Tree must be filled out and submitted with the Person-Centered Plan. If they are not asking for these supports, the Decision Tree does not need to be completed.

Decision Tree Form: Team Members

All team members who are present to complete the Decision Tree should be listed in the “Team Members in Attendance” Section.

Team Members in Attendance

For each line, enter the name of team members present with the participant during this assessment and their relationship to the participant (e.g., Parent, Support Broker, legal guardian).

Name:

Relationship:

Name:

Relationship:

Name:

Relationship:

Name:

Relationship:

Name:

Relationship:

Decision Tree Form: Task Identification

☐ Scheduling medical appointments
Notes: _____ _____
☐ Scheduling house maintenance (e.g., furnace checks)
Notes: _____ _____
☐ Scheduling repairs (e.g., dishwasher repair)
Notes: _____ _____
☐ Scheduling snow removal
Notes: _____ _____
☐ Scheduling lawn care
Notes: _____ _____

Section 1: Task Identification

- The team should check all tasks that apply to the participant. This includes tasks that the participant can complete independently and with support.
- If checked, provide specific details about the task as it relates to the participant in the “Notes” line by the task.

Decision Tree Form: Participant Assessment

Section 2: Participant Assessment

- For the tasks that apply to the participant, check whether the participant can complete those tasks independently, needs support to complete the tasks, or cannot complete the tasks.
- In the “Task” column, type what tasks the participant needs support with.

Task	The participant can complete the task independently.	The participant can complete the task with support.	The participant cannot complete the task.
[insert task here]	☐	☐	☐
[insert task here]	☐	☐	☐

Decision Tree Form: Available Supports

Task	What support, training, or education is available for the participant to learn how to complete the task?	Which team members can support the participant to complete the task?	What waiver services (e.g. Personal Supports, Live-in Caregiver) does the participant receive that can support the participant to complete the task?
[insert task here]			
[insert task here]			

Section 3: Available Supports

- For the tasks that the participant cannot complete independently, complete Section 3 to note what help or resources are available to the participant.
- In the “Task” column, type what tasks the participant needs support with.

Decision Tree Form: Unmet Needs

Task	Reason Support is Unavailable	Is Day-to-Day Administrative Supports Needed for this task?	<i>If Day-to-Day Administrative Supports are needed, how many hours per month are needed to complete the task?</i>
[insert task here]			
[insert task here]			

Section 4: Unmet Needs

- After completing Section 3, list any tasks where the participant still needs help that isn't available.
- In the "Task" column, type what tasks the participant needs support with.

Decision Tree Form: Total Hours

Total Hours being Requested for
Day-to-Day Administrative Supports
(up to 10 hours per month):

In the “Total Hours being Requested for Day-to-Day Administrative Supports” box, type how many hours of Day-to-Day Administrative Supports hours are being requested. *Up to 10 hours per month in quarter-hour increments may be requested.*

The total number of hours being requested should be included in the Person-Centered Plan Detailed Service Authorization.

Decision Tree Form: Attestation and Signatures

Section 5: Attestation and Signatures - The participant and Coordinator of Community Services must review and sign the Decision Tree Form.

By signing this document, I attest (confirm) that I have met with my team and considered all resources available to support me. I attest (confirm) that all information shared is true to the best of my knowledge.

Participant or (Authorized Representative) Name:

Signature:

By signing this document, I attest (confirm) that this team considered all resources available for the participant. I attest (confirm) that all information shared is true to the best of my knowledge.

Coordinator of Community Services Name:

Coordinator of Community Services Signature:

Decision Tree Form: Upload and Review

If Day-to-Day Administrative Supports are being requested in a Person-Centered Plan that is being submitted on or after October 6, 2025, the Decision Tree Form.

- It must be completed and uploaded into the “Documents” section of the Person-Centered Plan.
- It will be reviewed by the DDA to confirm any assessed need for Day-to-Day Administrative Supports.

Qualifications to Provide Day-to-Day Administrative Supports

Qualifications for Day-to-Day Administrative Supports Employees and Vendors include:

- Must at least 18 years old;
- Must pass a criminal background investigation (including Child Protective Services investigations if the participant is under 18 years old); and
- Must be a Maryland resident.

Relatives (who are not legally responsible persons or legal guardians) may provide Day-to-Day Administrative Supports.

Day-to-Day Administrative Supports: Employees

- Must meet all requirements of employees listed in the Self-Directed Services Policy and Manual.
- Must be paid a wage with taxes withheld (within Reasonable and Customary standards).
- Must receive any benefits required by law.
- May receive other benefits as determined by the employer (within Reasonable and Customary standards).

Day-to-Day Administrative Supports: Vendors

- Must meet all requirements of vendors listed in the Self-Directed Services Policy and Manual.
- Must be paid an hourly rate without taxes withheld (within Reasonable and Customary standards).

Day-to-Day Administrative Supports Payments

Financial Management and Counseling Services payments:

- Employees must clock in and out using the Financial Management and Counseling Services provider's payroll system
- Vendors must submit invoices to participants following invoice requirements outlined in the Self-Directed Services Manual

Day-to-Day Administrative Supports Exclusions

- A participant's Support Broker may not provide Day-to-Day Administrative Supports.
- Employees may not provide any other waiver service at the same time that they provide Day-to-Day Administrative Supports.

Other Goods and Services

Other Allowable Goods and Services



- Cost savings or unallocated funds can be used to purchase other allowable goods and services.
- Requests must meet the definition and requirements of Individual and Family Directed Goods and Services.
- Supporting documentation is required.

Allowable Goods and Services Include (1 of 5)

- Activities that promote fitness, such as fitness membership, personal training, aquatics, and horseback riding;
- Fees for community programs and activities that are inclusive, promote socialization and independence, such as art, music, dance, sports, or other according to the participant's individual interests;
- Small kitchen appliances that promote independent meal preparation, if the participant lives independently;

Allowable Goods and Services Include (2 of 5)

- Laundry appliances (non-commercial washer and/or dryer), if not currently in the home, to promote independence and self-care, if the person lives independently;
- Sensory items related to the person's disability, such as headphones and weighted vests;
- Safety equipment related to the person's disability and not covered by health insurance, such as protective headgear and arm guards;

Allowable Goods and Services Include (3 of 5)

- Personal electronic devices, including watches and tablets, to meet an assessed health, communication, or behavioral purpose documented in the Person Centered Plan;
- Fitness items that can be purchased at most retail stores not to exceed \$1,000 per item;
- Toothbrushes or electric toothbrushes related to the person's disability and not covered by insurance;

Allowable Goods and Services Include (4 of 5)

- Weight loss program services other than food related to the person's disability, recommended by a medical professional, and not covered by health insurance;
- Dental services recommended by a licensed dentist and not covered by health insurance (that are medically necessary and non-cosmetic), such as dental anesthesia and denture services not covered by health insurance;

Allowable Goods and Services Include (5 of 5)

- Nutritional consultation and supplements recommended by a professional licensed in the relevant field related to the person's disability and not covered by health insurance; and
- Internet services - Initial internet services startup costs only (purchase of modem or other startup).

Goods and Services Do Not Include (1 of 8)

- Services, goods or supports provided to or directly benefiting persons other than the participant that have no benefit to the participant;
- Services otherwise covered by the Medicaid waiver program or the Medicaid State Plans;
- Co-payment for medical services, over-the-counter medications, or homeopathic services;

Goods and Services Do Not Include (2 of 8)

- Items used for entertainment or recreational purposes, such as televisions, video recorders, game stations, and digital video disc (DVD) player except as needed to meet an assessed behavioral or sensory need documented in a Behavioral Support Plan;
- Monthly cable fees;
- Monthly telephone fees;
- Room & board, including deposits, rent, and mortgage expenses and payments;

Goods and Services Do Not Include (3 of 8)

- Food;
- Utility charges;
- Fees associated with telecommunications;
- Tobacco products, alcohol, cannabis, or illegal drugs;
- Vacation expenses and travel adventures;
- Insurance; vehicle maintenance or any other transportation-related expenses;

Goods and Services Do Not Include (4 of 8)

- Tickets, memberships, and related cost to attend recreational activities and events, such as museums, zoos, bowling, and indoor skydiving;
- Personal clothing and shoes;
- Haircuts, nail services, and spa treatments;
- Goods or services with costs that exceed reasonable and customary costs for the same or similar good or service;

Goods and Services Do Not Include (5 of 8)

- Tuition including:
 - Post-secondary credit and noncredit courses;
 - Tuition and educational services otherwise available through a program funded under the Individuals with Disabilities Education Act (IDEA);
 - Tuition and other fees associated with programs or activities at educational institutions;
 - Private tuition
 - Applied Behavior Analysis (ABA) in schools, and
 - School supplies, tutors, and home-schooling activities and supplies;

Goods and Services Do Not Include (6 of 8)

- Staff bonuses and staff benefits;
- Housing subsidies;
- Subscriptions;
- Training provided to paid caregivers;
- Services in hospitals;
- Costs of travel, meals, and overnight lodging for staff, families, and natural support network members to attend a training event or conference;

Goods and Services Do Not Include (7 of 8)

- Service animals and associated costs;
- Exercise rooms, swimming pools, hot tubs, and all associated cost and accessories;
- Items purchased prior to the approved Person Centered Plan; including items purchased prior to DDA approval of the Individual and Family Goods and Services request;
- Goods, services, equipment, and supplies intended for commercial use, such as commercial washers and dryers;

Goods and Services Do Not Include (8 of 8)

- Goods, services, equipment, and supplies that are diversional or recreational in nature fall outside the scope of section Medicaid 1915(c) of the Social Security Act. These are things used just for fun like events, sports, games, or toys;
- Goods, services, equipment, and supplies that a household that does not include a person with a disability would be expected to pay for as household expenses (e.g., subscription to a cable television service); and
- Programs and activities that are exclusive for individuals with disabilities.

Requesting Allowable Goods and Services

- Must be requested using the [DDA Individual and Family Directed Goods and Services Request Form.](#)
- Individual and Family Directed Goods and Services Request Form must be completed by the Coordinator of Community Services.
- The participant and team members must provide supporting documentation in order for the request to be approved.

Activities that Promote Health Requirement Request

- An uploaded invoice or other documentation of price for the activity, AND
- A schedule of when the activities will be attended, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Activities that Promote Health must be reasonable and customary.

Reasonable and Customary Goods and Services - Activities that Promote Health

Good / Service Type	Reasonable and Customary Maximum
Fitness membership	Central Maryland Region: \$64.00 per month Eastern Shore Region: \$62.00 per month Southern Maryland Region: \$104.00 per month Western Maryland Region: \$60.00 per month
Personal Training	Maximum: \$75.00 per hour
Swim lessons	Maximum: up to \$500.00 annually
Horseback Riding	Maximum: \$200.00 per session

Fees For Programs And Activities That Promote Socialization And Independence Request

- An uploaded invoice or other documentation of price for the activity, **and**
- A schedule of when the programs or activities will be attended, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Fees for Programs and Activities that Promote Socialization and Independence must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Fees for Programs and Activities that Promote Socialization and Independence

Good / Service Type	Reasonable and Customary Maximum
Art	Maximum: \$65 per 6-8 week class; \$10.00 per one day class
Music	Maximum: \$50 per 30 minutes
Dance	Maximum: \$20 per one day class Memberships to dance studios should follow Reasonable and Customary standards for gym memberships.
Sports	Maximum: \$80 per league (6-10 weeks) Most Maryland counties have free youth and adult sport leagues. If none are available in the sport of choosing, requests up to the maximum may be made.

Small Kitchen Appliances

The participant must live independently to request Small Kitchen Appliances.

- An uploaded invoice or other documentation of price for the appliance, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Small Kitchen Appliances must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Small Kitchen Appliances

Good / Service Type	Reasonable and Customary Maximum
Air Fryer	Maximum: \$75.00 per item
Microwave	Maximum: \$150.00 per item
Toaster Oven	Maximum: \$75.00 per item
Other	Maximum: \$100.00 per item

Laundry Appliances

The participant must live independently to request Laundry Appliances.

- An uploaded invoice or other documentation of price for the appliance, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Laundry Appliances must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Laundry Appliances

Good / Service Type	Reasonable and Customary Maximum
Washing Machine	Maximum: \$600.00 per item
Dryer	Maximum: \$900.00 per item

Sensory Items Related To The Participant's Disability Request

- An uploaded invoice or other documentation of price for the item, **and**
- Documentation that the item is not covered by insurance or health plans, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Sensory items must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Sensory Items

Good / Service Type	Reasonable and Customary Maximum
Headphones	Maximum: \$75.00 per item
Weighted Vests, weighted blankets, and other weighted materials	Maximum: \$100.00 per item
Other	Maximum:\$25.00 per item

Safety Equipment Related To The Participant's Disability Request

- An uploaded invoice or other documentation of price for the item, **and**
- Documentation that the equipment is not covered by insurance or health plans, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Safety Equipment must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Safety Equipment

Good / Service Type	Reasonable and Customary Maximum
Protective Headgear	Maximum: \$200.00 per item If Safety Equipment can be covered under the Maryland Durable Medical Equipment program, this resource must be used first.
Arm Guards	Maximum: \$25.00 per item If Safety Equipment can be covered under the Maryland Durable Medical Equipment program, this resource must be used first.
Other	- Maximum for Global Positioning Systems (GPS) device: \$50.00 per item - Maximum for monthly subscription to GPS monitoring: \$25.00/month - Maximum for all other Safety Equipment: \$50.00

Personal Electronic Devices Request

- An uploaded invoice or other documentation of price for the item, **and**
- Documentation that the device has not been approved by any other funding source (including through Assistive Technology in the Person-Centered Plan), **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Personal Electronic Devices must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Personal Electronic Devices

Good / Service Type	Reasonable and Customary Maximum
Watch	Maximum: \$100.00 per item
Tablet	Maximum: \$150.00 per item
Laptops	Maximum: \$400.00 per item

Toothbrushes and Electric Toothbrushes Request

- An uploaded invoice or other documentation of price for the toothbrush(es), **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Toothbrushes and Electric Toothbrushes must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Toothbrushes

Good / Service Type	Reasonable and Customary Maximum
Manual toothbrushes	Maximum: \$2.00 per toothbrush, up to 4 toothbrushes per year
Electric toothbrushes	Maximum: \$35.00 per item

Weight Loss Program Services Request

- An uploaded invoice or other documentation of price for the service, **and**
- Documentation that the service is not covered by insurance or health plans, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Weight Loss Program Services must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Weight Loss Programs

Good / Service Type	Reasonable and Customary Maximum
Weight loss programs	Maximum: \$50.00 per month Weight loss programs would not include gym memberships or personal training.

Dental Services Recommended By A Licensed Dentist Request

- An uploaded invoice or other documentation of price for the service, **and**
- Documentation that the service is not covered by insurance or health plans, **and**
- Documentation that shows that all other funding sources were attempted, **and**
- Documentation that the service was recommended by a dentist.

All requests for Dental Services must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Dental Services

Good / Service Type	Reasonable and Customary Maximum
Dental anesthesia	Maximum: \$3,500.00 per visit
Adult dentures	Maximum: \$1,000 per set

Nutritional Consultation and Supplements Request

- An uploaded invoice or other documentation of price for the service, **and**
- Documentation that the item is not covered by insurance or health plans, **and**
- Recommendation by a medical professional, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Nutritional Consultation and Supplements must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Nutritional Consultation and Supplements

Good / Service Type	Reasonable and Customary Maximum
Consultation	Maximum: \$110.00 per year If nutritional assessment or consultation can be covered under the Maryland State Plan, private insurance program, or other resources, these resources must be used first.
Supplements	Cost across supplements cannot exceed \$300.00 per year Many vitamin deficiencies and other concerns that call for supplements may be covered by health insurance. If nutritional supplements can be covered under the Maryland State Plan, private insurance program, or other resources, these resources must be used first.

Internet Services Request

Initial internet services startup costs only (purchase of modem or other startup).

- An uploaded invoice or other documentation of price for the service, **and**
- Documentation that shows that all other funding sources were attempted.

All requests for Internet Services must be reasonable and customary.

Reasonable and Customary Goods and Services Chart - Internet Services (Startup Costs Only)

Good / Service Type	Reasonable and Customary Maximum
Modem or Startup Services	Maximum: \$200.00

Personal Funds Documentation

Under federal guidance, one of the rules to authorize Individual and Family Directed Goods and Services is that the person does not have personal funds to purchase the item or service, including banking accounts.

Individual and Family Directed Goods and Services Requests

The request must be approved by the DDA before the good or service can be purchased.

Any goods, services, equipment, activities, and supplies purchased prior to DDA approval of the request are not allowed.

Review of Individual and Family Directed Goods and Services Requests

- The DDA Regional Office will review all Individual and Family Directed Goods and Services requests within 20 business days.
- If the Regional Office approves the request, the Financial Management and Counseling Services provider will process the approval.
- If the Regional Office denies the request, the Regional Office will send the participant a denial letter and appeal rights.

Resources

- [Self-Directed Services Comprehensive Policy](#)
- [Self -Directed Services Manual](#)
- [Individual and Family Directed Goods and Services Request Form](#)

Summary (1 of 5)

- **Individual and Family Directed Goods and Services include:**
 - Recruitment and Advertising,
 - Day-to-Day Administrative Supports, and
 - Other allowable goods and services.

Summary (2 of 5)

Recruitment and Advertising and Day-to-Day Administrative Supports are:

- Requested through Person-Centered Plan, and
- Paid from funds in the detailed service authorization.

Other allowable goods and services are:

- Requested with Individual and Family Directed Goods and Services Request Form, and
- Paid from cost savings.

Summary (3 of 5)

Day-to-Day Administrative Supports:

- Are limited to 10 hours per month, and
- Must be requested in the Person-Centered Plan by completing the Day-to-Day Administrative Supports Decision Tree Form.

Summary (4 of 5)

All Individual and Family Directed Goods and Services must:

- Not compromise health and safety,
- Be provided directly to the participant,
- Help meet a need listed in the Person-Centered Plan, and
- Not be able to be provided with another Medicaid waiver service, Medicaid State Plan service, or another funding source.

Summary (5 of 5)

- The Participant must not have personal funds to purchase the request for Individual and Family Directed Goods and Services.
- All Individual and Family Directed Goods and Services requests must meet all requirements in order to be approved.
- All requests must be within the Reasonable and Customary standard.