



# Developmental Disabilities Administration

## Self-Directed Services Training Series

### Module 1: Self-Direction Overview

*Updated October 2024*



# Overview

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- This training module will provide you with an overview of the Self-Directed Services model available under the Maryland Department of Health Developmental Disabilities Administration (DDA)-operated Medicaid waiver programs.
- 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>.
- Additional training modules are available that provide additional information on the topics presented in this overview training module.

# DDA-operated Medicaid Waiver Programs

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## Community Pathways Waiver

- Adults -18 years and older in need of residential services
- Meaningful Day, Support, and Residential Services

## Community Supports Waiver

- Adults -18 years and older
- Meaningful Day and Support Services

## Family Supports Waiver

- Children birth to 21 years
- Various Support Services

# What are Self-Directed Services?

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- Freedom to choose services and supports needed to live independently
- Choice and control over:
  - How services are provided
  - Who is paid for those services



# Self-Directed Services Responsibilities (1 of 4)

- **Participants are the employer responsible for:**
  - Choosing who delivers services to them.
  - Making sure services are delivered correctly.
- **Participants are in control of a budget (that is established by the Department):**
  - With a fixed dollar amount.
  - For the purchase of services and supports available under the DDA-operated Medicaid waiver programs.



# Self-Directed Services Responsibilities (2 of 4)

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## Participants also:

- Select employees, vendors, and providers.
- Arrange for services and supports as authorized in their Person-Centered Plan (PCP).
- Set wages and rates within a reasonable and customary range and within the DDA-approved budget.



# Self-Directed Services Responsibilities (3 of 4)

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## Participants are accountable for:

- Effectively using their budget to meet their assessed needs and efficiently utilizing public funds.
- Hiring, training, supervising and terminating employees.



# Self-Directed Services Responsibilities (4 of 4)

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- The participant self-directing their services must follow all federal, state and local **employment laws**.
- The participant must use Medicaid waiver funds responsibly, preventing fraud, waste and abuse.
- The participant must comply with local, state, and federal **regulations, policies and guidance, as well as Medicaid waiver application requirements**.



# Self-Directed Services Supports

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- The Coordinator of Community Services (CCS) provides guidance through the process of self-direction.
- The participant has the option to hire a Support Broker to assist with employer responsibilities.
- The participant must work with a Financial Management and Counseling Services (FMCS) provider to assist with budget and payment responsibilities.

# Service Delivery Models

Both models ensure the participant is in control of their own plan.

## Self-Directed Services Model

- Promotes personal choice and control over the delivery of services and budget.
- Participant or their designated representative assumes employer and budget authority responsibilities as the “employer of record.”

## Traditional Model

- Services provided by DDA-certified or licensed community providers.
- The provider assumes all responsibilities as the “employer of record.”

# Employer Authority

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- Participant hires, trains, supervises and terminates employees
- Employer of Record
- Federal Employer Identification Number (FEIN)



# Employer Authority Services

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- Community Development Services
- Employment Services - Ongoing Job Supports
- Nursing Support Services
- Individual and Family Directed Goods and Services - Day-to-Day Administrator
- Participant Education, Training, and Advocacy Supports
- Personal Supports
- Respite Care Service
- Support Broker Services
- Transportation Services

# Budget Authority

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- Over all services
- Making choices about how Medicaid funding is spent
- Includes:
  - Wage rates for employees
  - Rates for providers and vendors
  - Costs of goods and services
- Must be within established DDA standards



# Budget Authority Services (1 of 2)

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- [Assistive Technology and Services](#)
- [Behavioral Support Services](#)
- [Community Development Services](#)
- [Day Habilitation](#)
- [Employment Services](#)
- [Environmental Assessment](#)
- [Environmental Modifications](#)
- [Family and Peer Mentoring Supports](#)
- [Family and Caregiver Training & Empowerment Services](#)
- [Housing Support Services](#)
- [Individual and Family Directed Goods and Services](#)
- [Live-In Caregiver Supports](#)

# Budget Authority Services (2 of 2)

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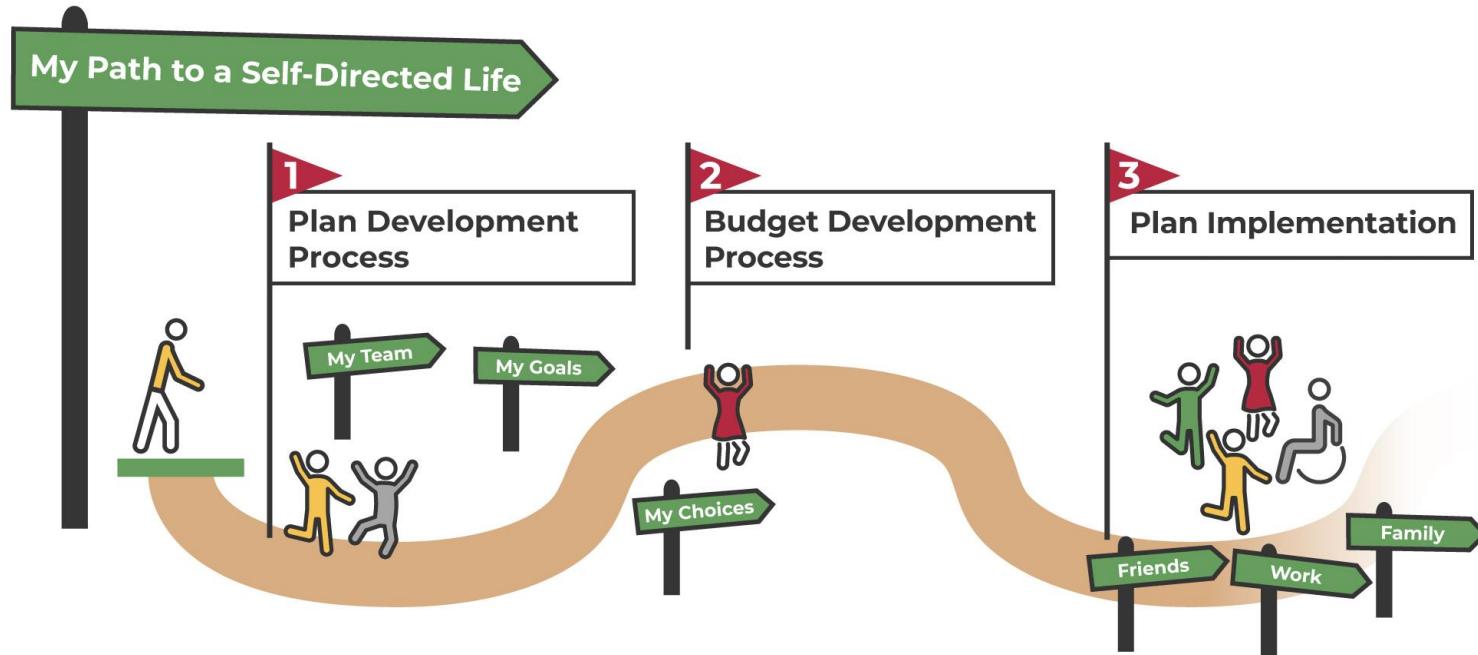
- [Nursing Support Services](#)
- [Participant Education, Training, and Advocacy Supports](#)
- [Personal Support Services](#)
- [Remote Support Services](#)
- [Respite Care Services](#)
- [Shared Living](#)
- [Support Broker Services](#)
- [Supported Living](#)
- [Transition Services](#)
- [Transportation Services](#)
- [Vehicle Modifications](#)

# Requirements to Self-Direct

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- Must be enrolled in a DDA-operated Medicaid waiver program
- Understand the rights, roles and responsibilities of the employer of record
- Willing to participate in the planning and budgeting process
- Able to participate without lapse or decline in care or risk to health and welfare
- Able to manage budget and employees or receive support to do so

# Steps to Self-Direct (Visual) (1 of 3)



## Steps to Self-Direct (2 of 3)

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- Be eligible.
- Notify the Coordinator of Community Services.
- Get the team together:
  - Choose a Financial Management and Counseling Services provider.
  - Hire a Support Broker, if desired or required.
- Develop the Person-Centered Plan.
- Develop employee policies.

## Steps to Self-Direct (3 of 3)

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- Develop a budget and finalize policies as needed.
- Hire employees, vendors and providers.
- Manage employees, vendors, providers and other services.
- Monitor expenses and quality of services.
- Inform the Coordinator of Community Services of any concerns or changes needed.

# Disenrollment

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- Participants can suspend or stop their participation in the Self-Directed Services model at any time for any reason.
- The DDA may suspend or stop someone's participation in the Self-Directed Services model in certain circumstances.
- Reasons for suspension or termination by the DDA include but are not limited to:
  - The participant is no longer eligible for the waiver.
  - The health, safety or welfare of the participant is compromised.
  - The participant's rights are compromised.

# Resources (1 of 4)

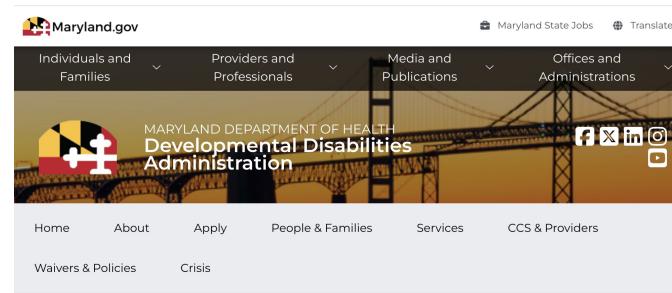
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- [Self-Directed Services Comprehensive Policy](#)
- [Self-Directed Services Manual](#)
- [CMS Self-Directed Services Website](#)
- [DDA Self-Directed Services Overview](#)
- [DDA-operated Medicaid waiver programs website](#)

# Resources (2 of 4)

## DDA Self-Directed Services Model Website

- Self-Directed Services Guidance, Forms and Webinars
- Financial Management and Counseling Services



### Self-Directed Service Model



# Resources (3 of 4)

MARYLAND DEVELOPMENTAL DISABILITIES ADMINISTRATION  
Easy-to-Understand Guide to Services  
May 2023

**Information About This Guide**

**What is this guide about?**  
This guide has important information about the Maryland Developmental Disabilities Administration. The Maryland Developmental Disabilities Administration is also called the DDA.

This Easy-to-Understand Guide to Services was written to be understandable to everyone. It has the most important information you should know.

The DDA also has a longer guide called the Guide to Services for People with Intellectual and Developmental Disabilities and Families. That guide has more information. Click [here](#) if you want to read it.

**What information is in this guide?**  
This guide will help you understand:

➤ What is the DDA and how does it work?	Page 2
➤ Who can get DDA services and how do you apply?	Page 4
➤ When can you get DDA services?	Page 7
➤ What services does the DDA provide?	Page 8
➤ How are DDA services provided?	Page 12
➤ How do you make a plan for the services you need and want?	Page 13
➤ What are rights and responsibilities?	Page 15
➤ Where else can you go for support?	Page 17
➤ Important words to know	Page 18
➤ How to contact the DDA	Page 24

Page 1 of 25

- [DDA Guide To Services](#)
- [DDA Easy-To-Understand Guide to Services](#)
- [Person-Centered Planning Manual](#)

# Resources (4 of 4)

## Rights and Responsibilities:

- [DDA Participant Rights and Responsibilities](#)
- [Derechos y Responsabilidades del Participante de los Servicios financiados por la DDA \(Spanish\)](#)
- [DDA Know Your Rights Flyer \(Box version\)](#)
- [DDA Know Your Rights Flyer \(Narrative\)](#)



# Summary

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- Choice and Control
- Budget authority over all services
- Employer authority over some services
- Participants have many rights, roles and responsibilities when self-directing:
  - Following labor laws as the employer of record
  - Using public funds correctly
- Participants can choose to stop using the Self-Directed Services model
- The DDA can require that participants stop using the Self-Directed Services model in certain circumstances