



Developmental Disabilities Administration

Self-Directed Services Training Series

Module 2: The Self-Directed Services Team

Updated October 2025



Overview

- This training module will provide you with an overview of the Self-Directed Services team
- This training is a summary with important information on this topic
- There is more information and requirements 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 website at <https://health.maryland.gov/dda/Pages/sdforms.aspx>
- Additional training modules are available that provide specific information on the topics presented in this overview training module

The Self-Directed Services Team

- Participant (Person self-directing their services)
- Coordinator of Community Services (CCS)
- Financial Management and Counseling Services provider (FMCS)
- Support Broker
- Self-Directed Services Providers
 - Employees
 - DDA Providers
 - Vendors/Contractors
- Others chosen by the participant



The Participant (1 of 2)



- Identifies and works with their team to create their Person-Centered Plan (PCP)
- Makes decisions about who works for them
- Reviews and approves expenses

The Participant (2 of 2)

- Interviews, hires, trains, manages, evaluates and terminates employees, vendors, and providers.
- Schedules and attends meetings to review their Person-Centered Plan and services
- Monitors expenses and the quality of their services



Coordinator of Community Services (1 of 3)

- Helps with the person-centered planning process
 - Creates the Person-Centered Plan in LTSSMaryland
 - Helps with completion of Self-Directed Services documents

SELF-DIRECTED SERVICES - BUDGET SHEET		Enter Approved DDA Budget Allocation from the Detailed Service Authorization here		\$0.00	\$0.00
Developmental Disabilities Administration				Self-Directed Services Budget Total	Unallocated Funds
PCP Status: Initial, Annual, Revised, or FMCS Change					
Name:		Effective Date:		Annual Plan Date:	
Number of Months Left in Plan:	12.00	Number of Weeks Left in Plan:	52.143		



Coordinator of Community Services (2 of 3)

- **Conducts quarterly face-to-face monitoring and follow-up**
 - Makes sure services are being delivered according to the approved Person-Centered Plan
 - Reviews participant satisfaction with services
 - Helps to prevent conflicts of interest
 - Helps to emphasize the participant's voice



Coordinator of Community Services (3 of 3)

- **Community resource coordination**
 - Encourages use of community resources to meet assessed needs and achieve goals



Choosing a Coordinator of Community Services (1 of 2)

- **Participant chooses a Coordination of Community Services provider**
 - The provider assigns a Coordinator of Community Services to the participant
- **Choice is the participant's alone**
 - Support Brokers are not allowed to make recommendations or suggestions



Choosing a Coordinator of Community Services (2 of 2)

- **Participants may:**
 - Request a new Coordinator of Community Services from their Coordination of Community Services provider
 - Choose to hire a different Coordination of Community Services provider
- **Choice is the participant's alone**



Financial Management and Counseling Services Provider (FMCS) (1 of 2)

- Verifies employee, vendor, and provider requirements and certifications
- Conducts background checks
- Creates an account for the funds from the participant's budget
- Creates accounting and expense reports for the participant and their team to review



Financial Management and Counseling Services Provider (FMCS) (2 of 2)

- Makes payments to employees, vendors, and providers at the direction of the participant
- Operates a payroll system for employees
- Pays employees, vendors, and providers



Choosing a Financial Management and Counseling Services Provider

The participant chooses their provider.

- [DDA's webpage about Financial Management and Counseling Services](#)

Three companies provide the DDA's Financial Management and Counseling Services:

- [GT Independence](#)
- [Public Partnerships LLC \(PPL\)](#)
- [Fello \(formerly The Arc Central Chesapeake Region\)](#)

Support Brokers are not allowed to make recommendations or suggestions about the participant's choice of Financial Management and Counseling Services provider.



Self-Directed Services Providers (1 of 2)

- **Employees** - Selected and **hired** by the participant in a full time or part-time role
- **Vendors** - Selected, **hired**, and enter into a ***contractual agreement*** with the participant
- **DDA Providers** - Selected, **hired**, and enter into a ***contractual agreement*** with the participant

Note: All are paid to provide a Medicaid waiver service, and are considered Medicaid providers

Self-Directed Services Providers (2 of 2)

- Must initially and continuously meet all required qualifications, training, and certifications
- Must provide and maintain documentation and records regarding the services they provide
- Must follow all local, State, and federal regulations, policy, and guidance

Employees (1 of 2)

- Hired by the participant who is their employer
- Provide services at the direction of the participant
- Must complete required training and maintain certifications
- Complete initial criminal background check

Employees (2 of 2)

- Pay rates, benefits, and discipline are determined by the employer (when benefits are offered, and the Employee Handbook is **required**)
- Rates/benefits must be Reasonable and Customary for employees
- Employees, paid to provide a Medicaid waiver service, are considered Medicaid providers, subject to all laws and regulations associated with being one

Vendors (1 of 2)

- Enter into a contractual agreement with the participant
- Written agreements are **required** in order to receive services from a vendor in the Self-Directed Services model
- Provide services at the direction of the participant
- Must complete required training and maintain certifications
- Provide criminal background check information for all employees upon hire

Vendors (2 of 2)

- Pay rates must be within Reasonable and Customary standards for vendors
- Rate increases are not automatic
- Vendors, paid to provide a waiver service, are considered Medicaid providers, subject to all laws and regulations associated with being one

DDA Providers (1 of 2)

- Enter into a contractual agreement with the participant
- Written agreements are **required** in order to receive services from a DDA Provider in the Self-Directed Services model
- Licensed or certified by the Department
- Provide services at the direction of the participant within Medicaid waiver program limits
- Must complete required training and maintain certifications

DDA Providers (2 of 2)

- Rates of payment must be within Reasonable and Customary standards for providers
- Rate increases are not automatic
- Licensed and certified providers are Medicaid providers, subject to all laws and regulations associated with being one

Support Brokers

- Offer employer-related information and assistance
- Provide Human Resources (HR) support
 - May assist with creating staff policies, procedures, handbooks, and schedules
- Can offer assistance recruiting new employees and vendors
- Serve as an active member of the team
- Are paid to provide a waiver service and are considered a Medicaid provider, subject to all laws and regulations associated with being one. This is because the money they receive to provide services is Medicaid funding.

Support Broker and Coordinator of Community Services Task Matrix (1 of 4)

Participant-Driven Task <i>Coordinators of Community Services or Support Brokers can help the participant with...</i>	CCS	Support Broker
Identifying goals, needs, and preferences for an Annual Person-Centered Plan	●	
Creating a Self-Directed Services Budget Sheet that includes all approved services from the Person-Centered Plan and meets all Medicaid waiver standards	●	●
Submitting the Self-Directed Services Budget Sheet to the Financial Management and Counseling Services provider	●	
Choosing employees, providers, and/or vendors to meet the assessed needs outlined in the Person-Centered Plan	●	●

Support Broker and Coordinator of Community Services Task Matrix (2 of 4)

Participant-Driven Task <i>Coordinators of Community Services or Support Brokers can help the participant with...</i>	CCS	Support Broker
Discussing agreements with all providers/vendors who provide Medicaid waiver services (as applicable)		●
Recruiting and interviewing all applicants who will provide Medicaid waiver services		●
Hiring all employees who will provide Medicaid waiver services		●
Managing, supervising, and evaluating all employees		●
Reviewing and approving all employee time and submitting to the Financial Management and Counseling Services provider		●

Support Broker and Coordinator of Community Services Task Matrix (3 of 4)

Participant-Driven Task <i>Coordinators of Community Services or Support Brokers can help the participant with...</i>	CCS	Support Broker
Terminating employees (as necessary)		●
Reviewing and approving provider and vendor invoices and submitting to the Financial Management and Counseling Services provider		●
Meeting with participant to review services and quality of supports	●	
Reviewing Financial Management and Counseling Services budget reports and making sure services are being paid in accordance with the Person-Centered Plan	●	●

Support Broker and Coordinator of Community Services Task Matrix (4 of 4)

Participant Driven Task <i>Coordinators of Community Services or Support Brokers can help the participant with...</i>	CCS	Support Broker
Understanding all rights and responsibilities of Self-Directed Services	●	●
Understanding and following all employment laws		●
Filing grievances and complaints when necessary	●	
Developing an emergency back- up plan	●	
Recognizing critical incidents	●	●
Reporting critical incidents as outlined in the Policy on Reportable Incidents and Investigations (PORII)	●	●

Hiring a Support Broker (1 of 4)

- Support Brokers work at the direction of the participant
- Can be hired as a vendor or employee
- Can be terminated by the participant at any time

Hiring a Support Broker (2 of 4)

- Optional for some participants
- Required when a participant selects a relative as their Designated Representative
- Required for participants who hire:
 - A relative, legally responsible person, representative payee, or legal guardian to serve as paid staff
 - Any person to provide Day-to-Day Administrative Supports

Hiring a Support Broker (3 of 4)

Support Broker Services are required when a participant hires:	This means:
A relative	A natural or adoptive parent, step-parent, grandparent, step-grandparent, child, stepchild, sibling, step-sibling, aunt, uncle, niece, or nephew of a participant
A legally responsible person	A type of person legally required to care for the participant
A representative payee	Someone who manages a participant's Social Security or Supplemental Security Income benefits
A legal guardian	A type of person legally required to care for the participant
Any person providing Day-to-Day Administrative Supports	Someone who provides the Individual and Family Directed Goods and Services - Day-to-Day Administrative service

Hiring a Support Broker (4 of 4)

- All Support Brokers must complete required training and maintain certification.
 - Support Broker Certification - the certification is valid through the calendar year.
- Rates for Support Brokers must be within Reasonable and Customary standards

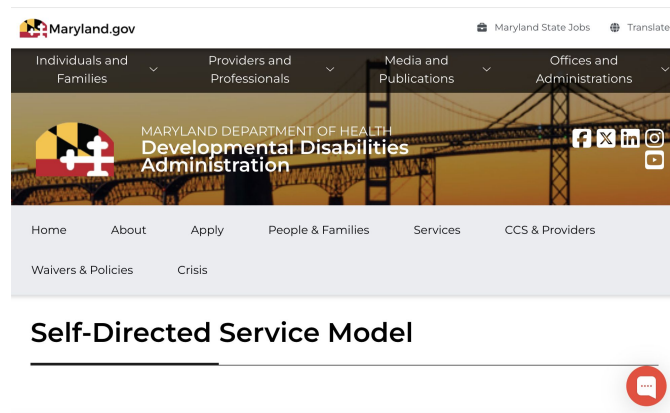
Resources (1 of 2)

- [Self-Directed Services Comprehensive Policy](#)
- [Self-Directed Services Manual](#)
- [DDA Self-Directed Services Overview](#)
- [Person-Centered Plan Overview](#)
- [Person-Centered Planning Manual](#)

Resources (2 of 2)

DDA Self-Directed Services Model Website

- [Self-Directed Services Guidance, Forms, and Webinars](#)
- [Financial Management and Counseling Services](#)



Summary (1 of 2)

- Self-Directed Services is a team-based model
- The participant is always in control; they direct their services and supports
- Anyone paid to provide a Medicaid waiver service is considered a Medicaid provider, subject to all laws and regulations associated with being one

Summary (2 of 2)

- Support Broker Services
 - Optional for some participants
 - Required when a participant selects a relative as their Designated Representative
 - Required for participants who hire:
 - A relative, legally responsible person, representative payee, or legal guardian to serve as paid staff
 - Any person to provide Day-to-Day Administrative Supports