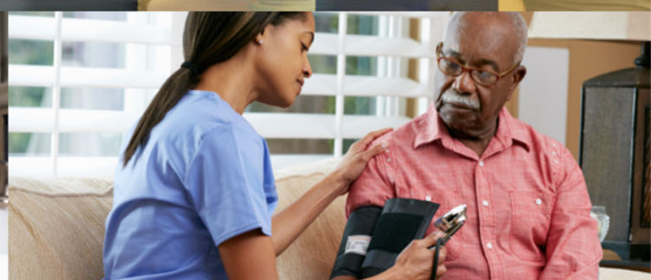


Developmental Disabilities Administration (DDA) Self-Directed Services Reasonable and Customary Wages/Rate Updates

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May 25, 2022



Agenda

- Introduction
- Budget Responsibilities and Expenses
- Reasonable and Customary Wages and Rates
- Participant Options and Process
- Unwinding Appendix K
- Resources
- Questions

Introduction

- Self-direction **budget allocations** are based on the DDA rates
- Self-direction [reasonable and customary wages and rates](#) are based on DDA rates
- Some DDA Rates are increasing or decreasing due to rate changes and a cost of living adjustment
- New rates will become effective July 1, 2022
- Self-direction reasonable and customary wages and rates were updated. The new standards will be effective July 1, 2022

Budget Responsibilities and Expenses

- Participants are responsible for various cost related to their services, staff, vendors and providers. These costs come out of the participant's budget
- Participants must ensure their budget can support all employer related cost
- Self-directed budgets are used to pay employer related cost including:
 - Staff wages
 - Employer related costs (taxes and benefits)
 - Vendor/provider costs
 - Other goods and services

Budget Responsibilities and Expenses

- Participants can *offer* staff benefits
 - Benefits are *optional* unless required by law
 - Health insurance premium payments, paid time off, training, and travel reimbursement (e.g., mileage) are examples of benefits
 - Benefits must meet reasonable and customary standards
- Costs associated with benefits are different from staff wages
 - They are an additional cost that is included in the self-directed budget sheet

Budget Responsibilities and Expenses

- Participants should hire enough direct support staff to meet their needs
- Participants should minimize the need for staff to work overtime
 - Overtime payment is required by law
 - Overtime payments are an additional cost to the budget
- Before approving overtime, participants must ensure they have funding available in their budget allocation

Reasonable and Customary - Wages

- Reasonable and customary wages were updated based on DDA rates
- The new wage standards are **effective July 1, 2022**
- Participants self-directing services can establish their own staff wages based on these updates
- Staff wages must be reasonable and customary
- Participants can hire staff at their county's established minimum wage or higher based on the reasonable and customary standards

Reasonable and Customary - Wages

- Staff wage increases are an option participant's can consider
 - Participants can offer their staff a pay wage increase
 - Participants are not required to offer staff pay wage increases
- Pay wage increases can be based on staff performance
- Pay wage increases can be offered at any time during the year. For example:
 - During the annual PCP process
 - During the staff annual date of hire anniversary

Reasonable and Customary - Wages

- Participants can submit a request to exceed the staff wage range
 - The request is submitted using the Self-Directed Services - Staff Wage Exception Form. The form is available on the DDA website and in policy
- A higher wage can be used as noted in the guidance
 - Higher wage is used for the following counties - Calvert, Charles, Frederick, Montgomery, or Prince George's.

Reasonable and Customary - Wages

Self Directed Services -Staff Reasonable and Customary Wages
Effective July 1, 2022

SERVICE	BILLABLE UNIT	Staff Wage Range		Exception Maximum	
		MINIMUM	MAXIMUM	Standard	Calvert, Charles, Frederick, Montgomery, and Prince George's Only
Community Development Services - Group (1-4)	Hour	\$15.00	\$20.60	\$ 31.03	\$36.43
Community Development Services - Enhanced 1:1	Hour	\$15.00	\$31.20	\$47.33	\$55.59
Community Development Services 2:1	Hour	\$15.00	\$62.40	\$94.67	\$111.15
Employment Services - Ongoing Job Supports	Hour	\$15.00	\$31.20	\$55.21	\$62.81
Nursing Support Services	Hour	\$42.00	\$62.40	\$83.80	\$89.82
Personal Supports	Hour	\$15.00	\$30.94	\$36.09	\$41.42
Personal Supports - Enhanced	Hour	\$20.00	\$36.40	\$45.72	\$53.66
Respite Care Services	Hour	\$15.00	\$20.80	\$26.18	\$26.49
Support Broker	Hour	\$15.00	\$31.20	\$58.14	\$58.14

Reasonable and Customary - Rates

- Participants self-directing services can also hire vendors and providers for approved services in their Person-Centered Plan
- Vendors and providers must meet service qualifications. Qualifications are listed in the [approved federal programs](#)
- Participants establish payment rates for vendors and providers
- Vendor and provider rates must be reasonable and customary

Reasonable and Customary - Rates

- Participants are responsible for vendor and provider costs
- These costs come out of the participant's budget
- Participants can negotiate lower rates with vendors and providers

Reasonable and Customary - Rates

Vendors

- Vendors are considered self-employed
- Vendors are responsible for their own taxes and business related expenses
- Participants do not pay for vendor taxes and other related business expenses
- Vendors are paid a flat fee or rate

Reasonable and Customary - Rates

Providers

- Providers are considered businesses
- Participants can hire DDA providers
- Providers are responsible for all their employer related responsibilities and costs
- Participants do not have to allocate additional funding to pay for provider staff taxes and other related business expenses
- Providers are paid a flat fee or rate

Reasonable and Customary - Rates

- Participants can offer an increase rate they pay vendors and providers
- Participants are not required to increase the vendor and provider rates
- Rate increases can be based on performance
- Rate increases can be offered at any time during the year. For example:
 - During the annual PCP process
 - During the vendor annual date of hire anniversary

Reasonable and Customary - Rates

Self Directed Services -Staff Reasonable and Customary Rates
Effective July 1, 2022

SERVICE	BILLABLE UNIT	STANDARD RATES		Calvert, Charles, Frederick, Montgomery, or Prince George's Only		ADDITIONAL INFORMATION
		MINIMUM	MAXIMUM	MINIMUM	MAXIMUM	
Assistive Technology and Services	Upper Pay Limit	N/A	N/A	N/A	N/A	Reimbursement shall be reasonable, customary, and necessary, as determined for the participant's needs, recommended by the team. If the item costs over \$1000, the most cost effective option that best meets the participant's needs shall be selected from the list noted in the Assistive Technology assessment.
BSS - Behavioral Assessment	Milestone	\$ 680.82	\$ 1,505.63	\$ 680.82	\$ 1,505.63	Limited to one unless otherwise authorized by the DDA
BSS - Behavioral Plan	Milestone	\$ 680.82	\$ 1,505.63	\$ 680.82	\$ 1,505.63	Limited to one unless otherwise authorized by the DDA
BSS - Behavioral Consultation	Hour	\$ 75.09	\$ 137.00	\$ 75.09	\$ 137.00	Limited to 8 hours per day
BSS - Brief Support Implementation	Hour	\$ 33.98	\$ 72.12	\$ 45.81	\$ 72.12	Limited to 8 hours per day
Community Development Service: Group (1 - 4)	Hour	\$ 17.10	\$ 36.08	\$ 19.67	\$42.36	Limited to 8 hours per day/40 hours per week in combination with other meaningful day services
Community Development Services Enhanced 1:1 Staffing Ratio	Hour	\$ 34.53	\$ 55.04	\$ 37.06	\$ 64.64	Limited to 8 hours per day/40 hours per week in combination with other meaningful day services
Community Development Services 2:1 Staffing Ratio	Hour	\$ 34.53	\$ 110.08	\$ 37.06	\$ 129.24	Limited to 8 hours per day/40 hours per week in combination with other meaningful day services.
Day Habilitation Small Group	Hour	\$ 17.10	\$ 19.28	\$ 17.10	\$ 22.64	Limited to 8 hours per day/40 hours per week - Monday through Friday only - in combination with other meaningful day services
Day Habilitation 1:1 Staffing Ratio	Hour	\$ 32.47	\$ 56.28	\$ 38.67	\$ 66.08	Limited to 8 hours per day/40 hours per week in combination with other meaningful day services.
Day Habilitation 2:1 Staffing Ratio	Hour	\$ 34.53	\$ 112.60	\$ 37.06	\$ 132.20	Limited to 8 hours per day/40 hours per week in combination with other meaningful day services.

Reasonable and Customary - Rates

SERVICE	BILLABLE UNIT	STANDARD RATES		Calvert, Charles, Frederick, Montgomery, or Prince George's Only		ADDITIONAL INFORMATION
		MINIMUM	MAXIMUM	MINIMUM	MAXIMUM	
Employment Services - Discovery Milestone 1	Milestone	\$ 388.78	\$ 662.48	\$ 463.79	\$ 753.454	Limited to one unless otherwise authorized by the DDA
Employment Services - Discovery Milestone 2	Milestone	\$ 1,166.34	\$ 1,987.44	\$ 1,391.37	\$ 2,260.36	
Employment Services - Discovery Milestone 3	Milestone	\$ 777.56	\$ 1,324.96	\$ 931.84	\$ 1,506.90	
Employment Services - Self- Employment Development Supports	Milestone	\$ 281.32	\$ 479.37	\$ 335.60	\$ 545.20	Limited to one
Employment Services - Job Development	Hour	\$ 48.60	\$ 82.80	\$ 57.97	\$ 94.20	Limited to 8 hours per day and 90 hours per year unless otherwise authorized by the DDA
Employment Services - Ongoing Job Supports	Hour	\$ 37.69	\$ 64.20	\$ 44.96	\$ 73.04	Limited to 40 hours per week in combination with other meaningful day services
Employment Services - Follow Along Supports	Month	\$ 362.79	\$ 609.20	\$ 423.00	\$ 701.31	Requires at least two face to face contacts with the participant in the course of the month
Employment Services - Co-Worker Supports	Upper Pay Limit	N/A	\$ 6,000.00	N/A	\$ 6,000.00	Limited to the first three months of employment unless otherwise authorized by the DDA
Environmental Assessment	Milestone	\$ 276.68	\$ 459.80	\$ 311.55	\$ 459.80	Limited to one unless otherwise authorized by the DDA
Environmental Modification	Upper Pay Limit	N/A	\$ 15,000.00	N/A	\$ 15,000.00	Cost of modification must be customary, reasonable, and may not exceed a Total of \$15,000 every three (3) years
Family and Peer Mentoring Supports	Hour	\$ 33.94	\$ 57.37	\$ 33.94	\$ 57.37	Limited to 8 hours per day
Family Caregiver Training and Empowerment	Upper Pay Limit	N/A	\$ 1,095.00	N/A	\$ 1,095.00	Limited to 10 hours per year
Family Caregiver Training and Empowerment - Fees	Upper Pay Limit	N/A	\$ 500.00	N/A	\$ 500.00	Limited to \$500 per year
Housing Support Services	Hour	\$ 33.94	\$ 64.24	\$ 40.49	\$ 73.08	Limited to 8 hours per day and may not exceed a maximum of 175 hours annually
Individual and Family Directed Goods & Services	Upper Pay Limit	N/A	\$ 5,000.00	N/A	\$ 5,000.00	Reimbursement shall be reasonable, customary, and necessary, as determined for the participant's needs, recommended by the team, and approved by DDA or its designee
Individual and Family Directed Goods & Services - Staff Recruitment & Advertising	Upper Pay Limit	N/A	\$ 500.00	N/A	\$ 500.00	Limit \$500 per year

Reasonable and Customary - Rates

SERVICE	BILLABLE UNIT	STANDARD RATES		Calvert, Charles, Frederick, Montgomery, or Prince George's Only		ADDITIONAL INFORMATION
		MINIMUM	MAXIMUM	MINIMUM	MAXIMUM	
Live-in Caregiver	Upper Pay Limit	N/A	\$ 20,000.00	N/A	\$ 20,000.00	Total monthly additional cost of rent and food as determined by the Department of HUD and the USDA monthly food plan.
Nursing Support Services	Hour	\$ 54.84	\$ 97.44	\$ 58.71	\$ 104.44	Nursing Consultation services limited to 4 hrs every 90 days. Nursing delegation services minimally every 45 days, but may be more frequent based on the MBON 10.27.11 regulation and the prudent nursing judgment
Participant Ed, Training, and Advocacy - Hours	Upper Pay Limit	N/A	\$ 1,095.00	N/A	\$ 1,095.00	Limited to 10 hours per year
Participant Ed, Training, and Advocacy - Fees	Upper Pay Limit	N/A	\$ 500.00	N/A	\$ 500.00	Limit \$500 per year
Personal Supports	Hour	\$ 27.63	\$ 41.96	\$ 32.19	\$ 48.16	Limited to 82 hours per week unless otherwise pre authorized by the DDA
Personal Supports - Enhanced	Hour	\$ 28.19	\$ 53.16	\$ 34.78	\$ 62.40	Person has approved Behavior Plan or Health Risk Screening Tool score of 4 or higher. Limited to 82 hours per week unless otherwise pre authorized by the DDA
Remote Support Services	Upper Pay Limit	N/A	\$ 6,000.00	N/A	\$ 6,000.00	Reimbursement shall be reasonable, customary, and necessary, as determined for the participant's needs, recommended by the team, and approved by DDA or its designee. Yearly limit
Respite Care Services - Camp	Upper Pay Limit	N/A	\$ 7,248.00	N/A	\$ 7,248.00	Maximum amount limited to plan year.
Respite Care Services - Licensed Site	Day	\$ 383.63	\$ 427.37	\$ 383.63	\$ 458.73	Respite Care Service - hourly and daily licensed site total hours may not exceed 720 hours per year unless otherwise authorized by the DDA. Daily licensed site respite equals 24 hours.
Respite Care Services - Hour	Hour	\$ 23.24	\$ 30.44	\$ 27.08	\$ 30.80	
Support Broker	Hour	\$ 25.00	\$ 67.60	\$ 25.00	\$ 67.60	Initial orientation and assistance up to 15 hours. Information, coaching, and mentoring up to 4 hours per month unless otherwise authorized by the DDA

Reasonable and Customary - Rates

SERVICE	BILLABLE UNIT	STANDARD RATES		Calvert, Charles, Frederick, Montgomery, or Prince George's Only		ADDITIONAL INFORMATION
		MINIMUM	MAXIMUM	MINIMUM	MAXIMUM	
Supported Living						
With Overnight Supervision - 1 person home	Daily	N/A	\$ 634.01	N/A	\$ 727.14	Person must be 18 years of age or older unless otherwise authorized by the DDA
With Overnight Supervision - 2 person home	Daily	N/A	\$ 411.19	N/A	\$ 471.59	
With Overnight Supervision - 3 person home	Daily	N/A	\$ 305.52	N/A	\$ 350.40	
With Overnight Supervision - 4 person home	Daily	N/A	\$ 346.87	N/A	\$ 397.82	
<i>Without</i> Overnight Supervision - 1 person home	Daily	N/A	\$ 376.73	N/A	\$ 432.07	
<i>Without</i> Overnight Supervision - 2 person home	Daily	N/A	\$ 282.55	N/A	\$ 324.05	
<i>Without</i> Overnight Supervision - 3 person home	Daily	N/A	\$ 219.76	N/A	\$ 252.04	
<i>Without</i> Overnight Supervision - 4 person home	Daily	N/A	\$ 282.55	N/A	\$ 324.05	
Transition Services	Upper Pay Limit	N/A	\$ 5,000.00	N/A	\$ 5,000.00	The maximum may not exceed \$5,000 per participant during their lifetime unless otherwise authorized by DDA. Items and goods must be procured within 60 days after moving.
Transportation - Orientation, Travel Training, and Public, Taxi, Uber, Lyft	Upper Pay Limit	N/A	\$ 7,500.00	N/A	\$ 7,500.00	Reimbursement shall be reasonable, customary, and necessary, as determined for the participant's needs, recommended by the team, and approved by the DDA or its designee
Vehicle Modification	Upper Pay Limit	N/A	\$ 15,000.00	N/A	\$ 15,000.00	Rates for services must be customary and

Considering Wage and Rate Changes

- If the rate or wage for a service has changed, the participant may need to make changes to employee wages or vendor rates
- We will share three options that participants have to make these changes

Important

Reminder - the participant is always the final decision maker. They may seek assistance from their team or decide to make decisions and complete tasks themselves

Participant Options and Process

- Option #1 - Budget Modification to use available cost savings or unallocated funding to increase wage and/or vendor/provider rates
- Option #2 - Revised PCP to increase wage and/or vendor/provider rates
- Options #3 - Consider increasing or decreasing rates and wages during Annual PCP process or at a later time

Participant Option - #1

Use *cost savings* or *unallocated funding* to increase wage and/or vendor/provider rates



Process: Budget Modification

1. Calculate funding needed for increase of:
 - Wages and associated taxes until the end of the plan year
 - Rates until the end of the plan year

Participant Option - #1

Process: Budget Modification (*continued*)

2. Complete the following forms:


- Budget Modification form to allocate/move funds
- Fiscal Management Services (FMS) wage change forms
 - [Arc change form](#)
 - Medsource change form available by request
- Family as Staff form (if applicable)

Participant Option - #1

Process: Budget Modification (continued)

3. Complete Budget Modification Checklist with your CCS to ensure:

- The budget modification is complete
- The budget modification is correct
- Program standards are met
- The Participant and team understand any changes



Developmental Disabilities Administration

Budget Modification Checklist

Participant Name: _____ Date Checklist Completed: _____

Effective Date of Modification: _____

The Budget Modification Checklist should be used to make sure modifications are complete and correct. It also helps make sure that the Participant understands any changes being made to their PCP and/or Budget. **This checklist must be completed by the Participant (or legal guardian / Designated Representative) and their CCS.** Other team members may support as well.

1. DDA Budget Allocation used for the modification is correct.
 The DDA Budget allocation on the form is the same as noted on LTSS PCP or the Optional Tracking Tool for Use of Unallocated Funds.
*If you have a partial or pro-rated budget, you may need to work with your team and Regional Office to confirm your DDA Budget Allocation.
2. The SDS Budget Total is correct.
 The SDS Budget Total on the modification is the amount I have allocated in my SDS Budget Sheet.
*Teams may need to review Revised budgets if Unallocated funds have been used before.
3. The Total Costs for Reducing and Increasing match.
 The Total Cost of "Services being reduced or Taken from Unallocated Funds" equals the Total Cost of "Services being Increased or Added"
4. The Services and W-Codes match the approved SDS Budget Sheet
 Only service names and codes listed in the Budget Sheet are used
 Taxes are included at 14% for every employee service
5. The calculations are correct.
 Calculations were based on effective date of the modification through the end of the plan year.
 Calculations were made using reasonable and customary standards.
 OR an Exception Form has been Completed and approved by the DDA. [Exception Form](#)
6. Signatures
 The Participant, legal guardian, or Designated Representative signed the modification.

Next Steps:
The CCS sends all forms to the FMS and uploads the documents to LTSS Maryland. If the request is for more than \$5000.00, the request must be submitted to and approved by the DDA Regional Office.

FMS Review: As the participant's Fiscal Management Services Provider, I attest that this modification is complete, correct, and within Maryland DDA program standards.
FMS Representative Signature: _____

Participant Option - #1

Process: Budget Modification (*continued*)

4. Coordinator of Community Services (CCS):

- Uploads all forms and documents into *LTSSMaryland* Client Attachments
- Emails forms to the FMS

5. FMS:

- Reviews all forms and documents to ensure meets DDA standards and requirements
- Informs team of missing or incomplete documents
- Processes forms that are complete and meet standards

Participant Option - #1

Process: Budget Modification

Note

- Some participants' PCP may have recently been *approved* with a July 1, 2022 or later effective date
- These participants that want to use the new reasonable and customary wages and rate can use this budget modification process
- Budget modification can be submitted prior to July 1, 2022 but can not be effective until July 1, 2022 or their approved PCP effective date

Example - Option 1 Budget Modification

- J. Doe has a plan that began on September 1, 2021 and ends on August 31, 2022
- J. has two employees and one vendor in their plan.
 - Community Development Services: 30 hours / week
 - Personal Supports Services: 25 hours / week
 - Nursing Vendor: 2 hours / week
- J. decides they want to give the employees a \$1.25 raise beginning on July 1, 2022 with the new wages DDA provided
- J. negotiates with their nurse to raise nursing rates by \$5.00 per hour on July 1, 2022
- J. meets with their team to work on the math for the modification

Example - Option 1 (Changing Employee Wages)

Formula for calculating employee wages increase cost:

- Increase Wage Cost: # of hours/week X(times) raise amount X(times)
of weeks until the end of the plan year
- Increase Taxes Cost: \$ amount to move X(times) 14% (.14)

Calculations:

- CDS: 30 hours X \$1.25 X 9 weeks (round up) = \$337.50
- CDS Taxes: \$337.50 X .14 = \$47.25
- PS: 25 hours X \$1.25 X 9 weeks (round up) = \$281.25
- PS Taxes: \$281.25 X .14 = \$39.38

July							August						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
26	27	28	29	30	1	2	31	1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	31	1	2	3
31	1	2	3	4	5	6							

Example - Option 1 (Changing Vendor Rates)

Formula for calculating vendor rates increase cost:

- Increase Rate Cost: # of hours / week *(times) raise amount *(times) # of weeks until the end of the plan year
- Increase Taxes Cost: No taxes needed for vendors

Nursing: 2 hours * \$5.00 * 9 weeks = \$90.00

July							August						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
26	27	28	29	30	1	2	31	1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	31	1	2	3
31	1	2	3	4	5	6							

Example - Option 1 (Modification)

DDA COVID-19 Self-Direction (DDACOVID Form *5) - Effective Until June 30, 2022

Participant Name: Date:

FMS:

Region:

DDA Budget Allocation		← Enter Total Budget Allocation from DSA
\$	60,000.00	
SDS Budget Total		← Enter Budget Total from the Budget Sheet
\$	42,000.00	
Total Unallocated Funds		← Total Unallocated Funds will calculate automatically
\$	18,000.00	

Note: The DDA COVID-19 Form #5 will continue to be used after June 30, 2022 until further notice

Example - Option 1 (Modification)

Service(s) Being Reduced or Taken from Unallocated Funds			Services Being Increased or Added*			
W-Code	Services	Amount	W-Code	Services	New Service? Y/N	Amount
	Unallocated Funds	\$ 795.38	1991	CDS - Wages	N	\$ 337.50
			5811	PS - Wages	N	\$ 281.25
			5805	Nursing Supp. Ven.(Rate Increase)	N	\$ 90.00
Add Tax (14% for support services)			Add Tax (14% for support services)			\$ 86.63
Total Cost*		\$ 795.38	Total Cost*			\$ 795.38

Calculations:

CDS: \$337.50

PS : \$281.25

Nurse: \$90.00

Total Taxes = \$86.63

Reference:

CDS Taxes:\$47.25

PS Taxes: \$39.38

Self-directed Services Participant / Legal Guardian
Signature:

Example - Option 1 (Modification)

Optional Tracking Tool for Use of Unallocated Funds

People and their team members are responsible for identifying the unallocated amount and staying within the approved DDA budget allocation. You may use this optional tool to keep track of the unallocated funds that are moved to the SDS Budget.

Total Unallocated Funds		Date Used	Unallocated Funds Used	
\$	18,000.00	7/1/2022	\$	795.38
Remaining Unallocated Funds			\$	17,204.62

Note: The DDA COVID-19 Form #5 will continue to be used after June 30, 2022 until further notice



Example - Option 1 (Modification)

- Complete Budget Modification Checklist
- FMS change forms - submitted to FMS
 - CDS Employee raise
 - PS Employee Raise
- Family as Staff Form - submitted to FMS
 - CDS Employee raise
- Notify Nurse and FMS of new nursing rate effective July 1.
- CCS uploads all documents into LTSS.

Participant Option - #2

Revised PCP to increase wage and/or vendor/provider rates

Process: Revised PCP

1. Work with CCS to submit a Revised PCP on or after July 1st
 - The Revised PCP will use new rates to update the budget allocation
 - If no other changes to PCP, the CCS note the revision reason as “*Budget allocation recalculation*”

Participant Option - #2

Revised PCP to increase wage and/or vendor/provider rates

Process: Revised PCP

2. Complete the SDS Budget Sheet

- Note recalculated LTSSMaryland Total Plan Cost
- Input updated rates and wages
- Make sure the services and number of hours matches the authorized services and unit from your PCP
- Reference: [Instructions for DDA's SDS Budget Sheet](#)


Participant Option - #2

Revised PCP to increase wage and/or vendor/provider rates

Process: Revised PCP

3. Complete Revised Budget Checklist with your CCS to ensure:

- The Revised Budget is complete
- The Revised Budget is correct
- Program standards are met
- The Participant and team understand any changes

 **Developmental Disabilities Administration**

Revised Budget Checklist

Participant Name: _____ Date Checklist Completed: _____

Effective Date of Revised PCP and Budget: _____

This Revised Budget Checklist should be used to make sure Revised Budgets are complete, correct, and meet the program standards. It also helps make sure that the Participant understands any changes being made to their Budget. **This checklist should be completed by the Participant (or legal guardian / Designated Representative) and their CCS.** Other team members may support as well.

1. DDA Budget Allocation used for the Revised Budget is correct.
 The DDA Budget allocation on the Budget sheet is the same as noted on the PCP in LTSS Maryland.
If you have a partial or pro-rated budget, you may need to work with your team and Regional Office to confirm your LUM Budget Allocation.

2. The SDS Budget Total is correct.
 The SDS Budget Total is equal to or less than the DDA Budget Allocation.
*The SDS Budget Total box will turn red if the amount is incorrect.

3. The Services listed are correct.
 All services align with the PCP authorized services.
 The number of units in the Budget Sheet for each service matches the number of units in the PCP.

4. The rates and wages are correct.
 The rates and wages are within reasonable and customary standards.
 OR an Exception Form has been completed to send to DDA. [Exception Form](#)
 Taxes are included at 14% for employee services.

5. Review
 The Participant, legal guardian, or Designated Representative has reviewed the Revised Budget (with team support if needed).

Next Steps:
The CCS sends all forms to the FMS and uploads the documents to LTSS Maryland.

FMS As the participant's Fiscal Management Services Provider, I attest that this Revised Budget is **Review:** complete, correct, and within Maryland DDA program standards.

FMS Representative Signature: _____

Participant Option - #2

Revised PCP to increase wage and/or vendor/provider rates

Process: Revised PCP

4. Complete the following forms

- Fiscal Management Services (FMS) wage change forms
- Family as Staff forms (if applicable)

Participant Option - #2

Revised PCP to increase wage and/or vendor/provider rates

Process: Revised PCP

5. CCS:

- Completes PCP Checklist
- Uploads all forms and documents into the LTSS *Maryland* Documentation Section
- Submits PCP

Participant Option - #2

Revised PCP to increase wage and/or vendor/provider rates

Process: Revised PCP

6. DDA Regional Office:

- Confirms revised PCP is specific to a budget allocation recalculation
- Approves
- Completes fiscal processes

Participant Option - #2

Revised PCP to increase wage and/or vendor/provider rates

Process: Revised PCP

7. CCS send forms to FMS once PCP approved

8. FMS:

- Reviews all forms and documents to ensure meets DDA standards
- Informs team of missing or incomplete documents
- Processes forms that are complete and meet standards

Example - Option 2 (Revised PCP)

- J. Doe has a plan that began on September 1, 2021 and ends on August 31, 2022
- J. has two employees and one vendor in their plan.
 - Community Development Services: 30 hours / week
 - Personal Supports Services: 25 hours / week
 - Nursing Vendor: 2 hours / week
- J. decides they want to give the employees a \$1.25 raise beginning on July 1, 2022
- J. negotiates with their nurse to raise nursing rates by \$5.00 per hour on July 1, 2022
- Knowing there are not enough unallocated funds in their budget, J. schedules a meeting with CCS for July 1 to to Revise their PCP

Example - Option 2 (Revised PCP)



S - BUDGET SHEET

Enter Approved DDA Budget Allocation from the DSA here

\$65,000.00	\$0.00	\$65,000.00
	SDS Budget Total	Unallocated Funds

Initial, Annual PCP or Revised PCP: Revised PCP

Effective Date: 7/1/2022

I will have 2 (number) employees and 1 (number) vendors

Type of Waiver: Community Pathways

- Update budget allocation in SDS Budget Sheet
- Add name, number of employees, and number of vendors
- Note the waiver
- Include the new Effective date

Example - Option 2 (Revised PCP)

Community Development Services (CDS)		# Hours per Week	Rate per Hour	# of Weeks	Budget Total
	CDS - Staff	30	16.25	52.143	\$25,419.71
	CDS - Staff				\$0.00
	CDS - Staff				\$0.00
	CDS - Staff				\$0.00
	CDS - Staff				\$0.00
	Benefits				
	Health Benefits				
	PTO Benefits				
	Other Benefits - list				
	Sick and Safe(Applicable to Mont. Co. ONLY)				
W1991 - CPW W1993 - CSW	Training	# of Staff	Fee per staff		
	Training (e.g., CPR/1st Aid/CMT/etc. as applicable)				\$0.00
	Staff Transportation/Travel Reimbursement	# of miles	Mileage Rate	# of Weeks	
	Mileage				\$0.00
		# of trips	Cost per trip		
	Public (Maryland Mass Transit Administration)				\$0.00
	Taxi/Uber				\$0.00
	Taxes - (indicate percentage)>	14%			\$3,558.76
	Community Development Vendor/Contractor	# Hours per Week	Rate per Hour	# of Weeks	
	Community Development Vendor/Contractor				\$0.00
	Community Development Vendor/Contractor				\$0.00

Example - Option 2 (Revised PCP)

Personal Supports (PS)		# Hours per Week	Rate per Hour	# of Weeks		Budget Total
	Personal Supports - Staff	25	16.25	52.143	<i>Anything over 82 hrs/wk must be preauthorized by the DDA</i> <i>Tax is not calculated on contractor/vendor services.</i>	\$21,183.09
	Personal Supports - Staff					\$0.00
	Personal Supports - Staff					\$0.00
	Personal Supports - Staff					\$0.00
	Personal Supports - Staff					\$0.00
	Personal Supports - Staff					\$0.00
	Personal Supports - Staff					\$0.00
	Personal Supports - Staff					\$0.00
	Personal Supports - Staff					\$0.00
	Personal Supports - Staff					\$0.00
	Personal Supports - Overnight Staff					\$0.00
	Personal Supports - Overnight Staff					\$0.00
	Personal Supports - Overnight Staff					\$0.00
	Staff Benefits					
	Health Benefits					
W5811 - CPW	PTO Benefits					
W5813 - CSW	Other Benefits - list					
W5815 - FSW	Sick and Safe (Applicable to Mont. Co. ONLY)					
Enhanced Rate	Training	# of Staff	Cost per staff			
W2139 - CPW	Training (e.g., CPR/1st Aid/CMT/etc. as applicable)				\$0.00	
W2140 - CSW	Staff Transportation/Travel Reimbursement	# of Miles	Mileage Rate	# of Weeks		
W2141 - FSW	Mileage	14			\$0.00	
	Staff Transportation/Travel Reimbursement, Cont.	# of Trips	Cost per Trip			
	Public (Maryland Mass Transit Administration)				\$0.00	
	Taxi/Uber				\$0.00	
	Taxes					
	Taxes - (indicate percentage)>	14%			\$2,965.63	

Example - Option 2 (Revised PCP)

Nursing Support Services		# Hours per Week	Rate per Hour	# of Weeks	Budget Total
W5805 - CPW W5817 - CSW W5798 - FSW	Nurse - Staff				\$0.00
	Staff Benefits				
	Health Benefits				
	PTO Benefits				
	Other Benefits - list				
	Sick and Safe (Applicable to Mont. Co. ONLY)				
	Training	# of Staff	Cost per staff		
	Training (e.g., CPR/1st Aid/CMT/etc. as applicable)				\$0.00
	Staff Transportation/Travel Reimbursement	# of Miles	Mileage Rate	# of Weeks	
	Mileage				\$0.00
	Staff Transportation/Travel Reimbursement, Cont.	# of Trips	Cost per Trip		
	Public (Maryland Mass Transit Administration)				\$0.00
	Taxi/Uber				\$0.00
	Taxes				
	Taxes - (indicate percentage)>				\$0.00
	Nurse - Vendor/Contractor	# Hours per Week	Rate per Hour	# of Weeks	
	Nurse - Vendor/Contractor	2	80	52.143	\$8,342.88

Example - Option 2 (Revised PCP)

Enter Approved DDA Budget Allocation from the DSA here	\$65,000.00	\$61,470.08	\$3,529.92
		<i>SDS Budget Total</i>	<i>Unallocated Funds</i>

- Complete the Revised Budget Checklist
- FMS change forms - submitted to FMS
 - CDS Employee raise
 - PS Employee Raise
- Family as Staff Form - submitted to FMS and DDA Regional Office
 - CDS Employee raise
- Notify Nurse and FMS of new nursing rate effective July 1

Participant Option - #3

- Consider increases or decreases during Annual PCP process or at a later time
- Participants are not mandated to make any rate increases

Participant Option - #3

- Participants may need to make a change when reasonable and customary wages or rates decrease
 - The current wage and rate can be used until the next Annual PCP
 - During the Annual PCP process, wages and rates must comply with the current reasonable and customary standards
 - Participants will need to follow the Department of Labor requirements when changing pay rates. Please see additional information noted above under Budget Responsibilities and Expenses C. 3.

Example - Option #3



- Evaluation Schedule for Employees
 - CDS employee - due October 15, 2022
 - PS employee - due January 1, 2023
- Negotiate new plan year rate with nurse before meeting with CCS and team to plan

Summary and Reminders

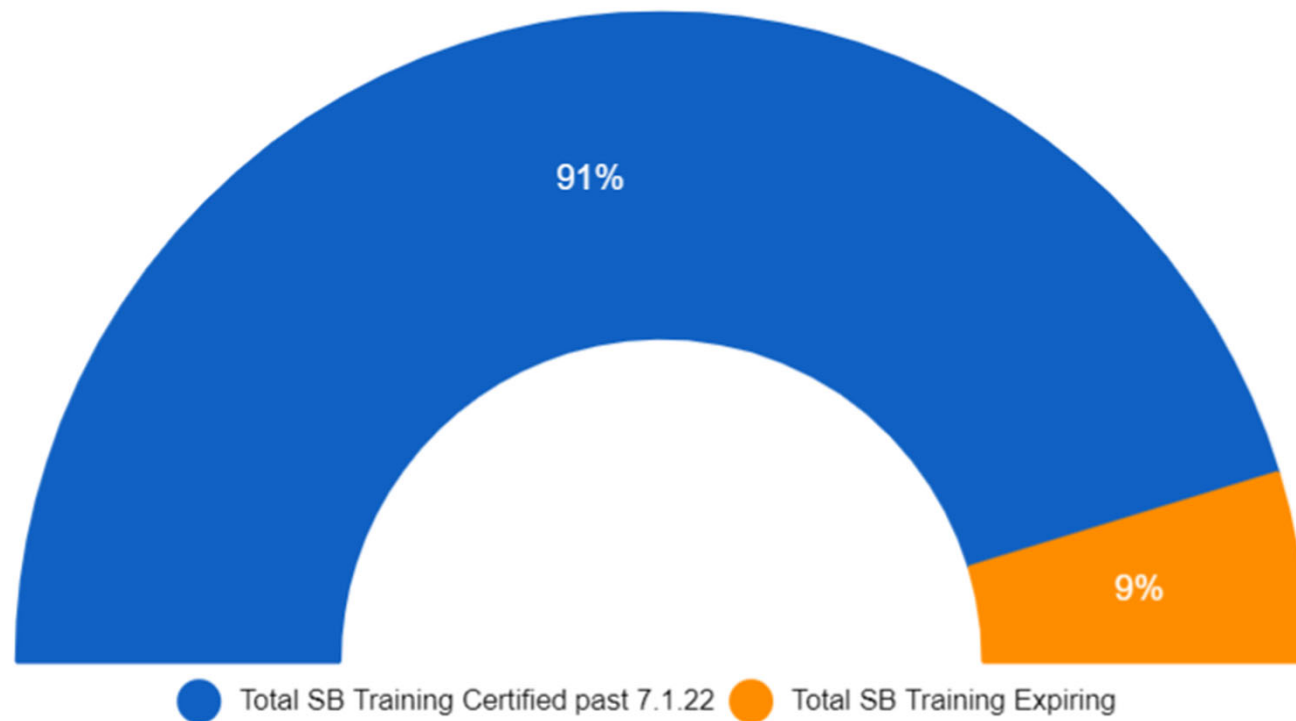
- **Option 1** : Use cost savings or unallocated funds to give raises based on new rates/wages
- **Option 2**: Revise your Person-Centered Plan with changes included in a Revised SDS Budget Sheet
- **Option 3**: Consider changing rates and wages at a different time
- You can increase or decrease rates and wages at any time
- You do not have to give raises
- Best practice:
 - Review your employees and vendors regularly and fairly

Appendix K Unwinding Reminders

- Staff and vendor/providers must have updated and current certifications, trainings, license
 - Example: First Aid, CPR, Support Broker Recertification, Nursing license, etc.
- If you are self-directing your services and want to continue to employ your family members as staff after June 30, 2022, you will need to be sure they have all of their required trainings and Family As Staff Form completed before June 30, 2022

Appendix K Unwinding Reminders

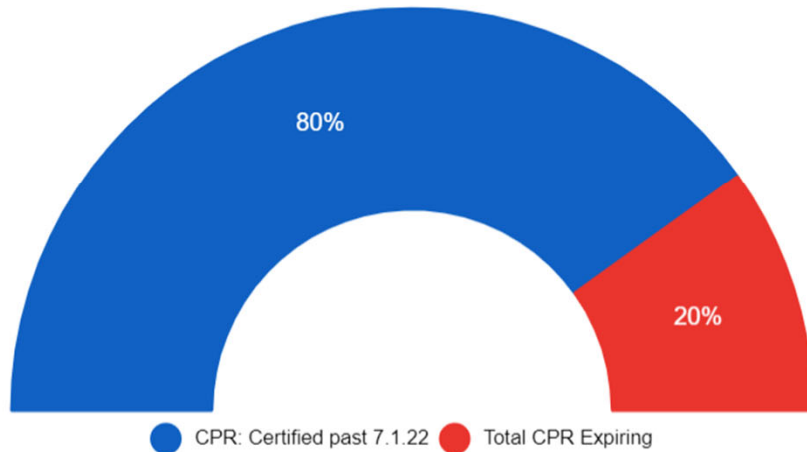
All SB Training Expiring On/Before 07.01.22



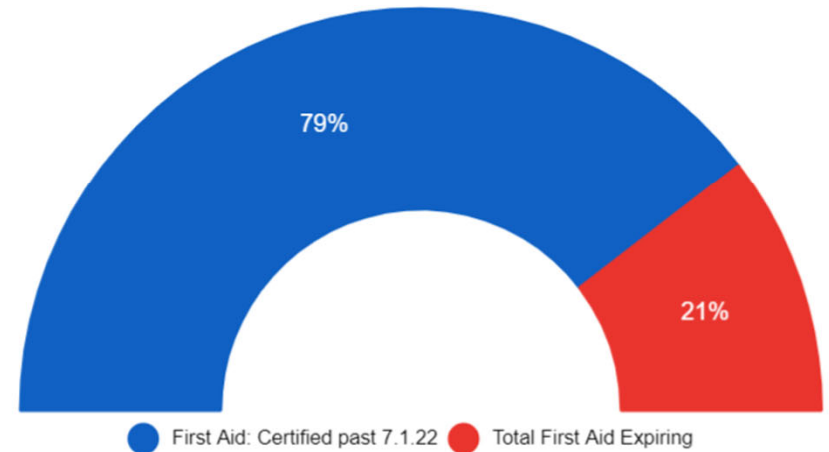
Data Source: The Arc of Central Chesapeake Region

Appendix K Unwinding Reminders

All CPR Expiring On/Before 07.01.22



All First Aid Expiring On/Before 07.01.22



Data Source: The Arc of Central Chesapeake Region

Resources

Self Directed Budgets

- [DDA - Self Directed Services Budget Sheet - Revised April 8, 2022](#)

Resources and Tools

- [Self-Directed Services - Budget Allocation Rate Change Guidance - April 8, 2022](#)

Appendix K Form

- [DDA COVID-19 Self-Direction \(DDACOVID Form#5\) - Revised April 8, 2022](#)

Resources

Support Broker Trainings

Date	Initial Certification	Recertification
May 31, 2022	1 p.m.	10 a.m.
June 7, 2022 June 14, 2022 June 21, 2022 June 28, 2022	1 p.m.	10 a.m.

Date	Initial Certification	Recertification
July 5, 2022 July 12, 2022 July 19, 2022 July 28, 2022	1 p.m.	10 a.m.
August 2, 2022 August 9, 2022 August 16, 2022 August 23, 2022 August 30, 2022	1 p.m.	10 a.m.

Register using the [DDA Training Calendar link](http://events.r20.constantcontact.com/calendar/monthview?eso=001qyf MFnJwY n7IYnREKVKw%3D%3D&llr=pce56arab) - at <http://events.r20.constantcontact.com/calendar/monthview?eso=001qyf MFnJwY n7IYnREKVKw%3D%3D&llr=pce56arab>



Resources - Regional Office SDS Leads

Central Maryland Regional Office (CMRO)

- Ola Otuyelu: olasubomi.otuyelu@maryland.gov
- Rashawn Moore: rashawn.moore@maryland.gov

Eastern Shore Regional Office (ESRO)

- Jonna Krabill: jonna.krabill@maryland.gov

Southern Maryland Regional Office (SMRO)

- Tia Henry: tia.henry2@maryland.gov

Western Maryland Regional Office (WMRO)

- Cara Buckman: cara.buckman@maryland.gov

Questions

