Developmental Disabilities Administration Self-Directed Services

Support Broker Services Updates

Kristi Culbreth, Statewide Coordinator of Self-Directed Services
Nicholas Burton, Director of Programs

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Agenda

- Overview
- Planning and Budgeting
- When is a Support Broker Required?
- Qualifications/Requirements
- Employees vs. Vendors
- Start-up Services
- Questions

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Overview of Support Broker Services

What are Support Broker Services?

- A service in each of the DDA's 3 waivers
- Works at the direction of a person:
  - Employee or vendor
  - **Required** when a person hires a:
    - relative(s)
    - legally responsible person
    - representative payee, and;
    - guardian

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What can a Support Broker do for you?

- Understanding the responsibilities of SDS
- Support with quality assurance and oversight
- Support with avoiding conflicts of interest
- Advocacy-defining/ helping communicate goals, needs and preferences
- Making informed decisions
- Developing emergency plans
- Identifying, accessing, and managing supports

Roles Chart

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Planning and Budgeting for a Support Broker

Planning for a Support Broker in the PCP

- **PCP Approval:** up to 4 hours per month

- Best practice: job descriptions, SIP, or Participant Agreement

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Budgeting for a Support Broker

- **SDS Budget Sheet:** budget for *up to 30* hours per month using cost savings

- **Budget Modification:** move funding for up to 30 hours per month at any time

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When is a Support Broker Required?

A Support Broker is required

- When you hire
  - Relatives
  - Legally responsible people
  - Representative payees
  - Guardians
- **Not required until**
  - **Person's next PCP Annual Plan Date *or***
  - **July 1, 2024, whichever is *later*.**

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When they are required, Support Brokers

- Cannot be a relative

- Must be included in the Participant Agreement

- Works to reduce <u>conflicts of interest</u>

- Provides <u>oversight and quality assurance</u>

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Support Broker Oversight and Quality Assurance

Support Brokers **should**:

- Attend PCP annual planning meetings

- Check-in with the person quarterly (in-person, phone, virtual)

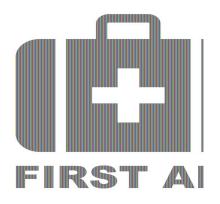- Receive completed copies of the PCP and Budget Sheet

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Support Broker Requirements and Qualifications

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Requirements

- Support Broker Certification
- First Aid, CPR, and any other required training
- Cleared Background
- Work within the scope of the service
- Maintain accurate records

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Employees vs. Vendors

Employees vs. Vendors

Employees

- Employers choose wage, hours, and benefits
- New hire paperwork required (per employer)
- FMCS pays for and conducts background checks
- Submits time on biweekly calendar using FMCS electronic timekeeping system
- Taxes are withheld

Vendors

- Rate and hours negotiated; no benefits
- FMCS paperwork required (1x for each FMCS)
- Vendor pays for and conducts background checks
- Invoices time at least monthly
- Taxes are not withheld

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Support Broker Vendor Invoices

- **<u>Must</u>** include
  - Name of the person and Support Broker
  - The mailing address of the Support Broker
  - The days in which Support Broker Services were provided
  - The total hours (calculated by the quarter hour)
  - Amount charged
  - Signature of the Support Broker
- Invoices must always be sent to the person to review and approve

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Invoicing by the Quarter Hour

- Add the total number of minutes worked each day for a person
- Round the number of minutes for the time worked for a person using the following table:

Time Worked	Noted Hours
0-7 minutes	0 hours
8-22 minutes	.25 hours
23-37 minutes	.5 hours
38-52 minutes	.75 hours

Time Worked	Noted Hours
53-67 minutes	1 hour
68-82 minutes	1.25 hours
83-97 minutes	1.5 hours
98-112 minutes	1.75 hours

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Sample Support Broker Vendor Invoice

Support Broker: J. Doe

PersonName: E. Graham

Billing Period: July 2023

Date	Total Time (by quarter hour)
July 10, 2023	26 minutes 30 minutes 26 + 30 = 56 minutes = **1 hour**
July 15, 2023	55 minutes = **1 hour**
July 30, 2023	1 hour 46 minutes = **1.75 hours**
	1 + 1 + 1.75 = **3.75 hours**

Support Broker Signature:
J. Doe

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Support Broker Start-Up

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Initial Orientation and Assistance (Startup)

- Up to 15 hours before first PCP Effective date
  - Initial meetings with the team
  - HR materials
    - Handbooks
    - Evaluation rubrics
    - Pay scales
    - Job descriptions
  - Recruitment materials and plans
  - Other support as needed

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Who is Support Broker Startup for?

- Support Broker Startup can be provided to
  - New people enrolling in a DDA waiver
    - Transitioning Youth
    - People who begin services from the Waitlist
  - People who are moving from DDA's Traditional Model to the Self-Directed Services Model

- Startup will not be provided to
  - People who are self-directing and choose to hire a Support Broker later
  - People who are self-directing with a Support Broker and move to another DDA-operated waiver

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Resources

[Self-Direction Guidance, Forms, and Webinars](#)

- Chart - CCS / SB / Administrator Roles

- Participant Agreement

- Reasonable and Customary Rate / Wages

- IFDGS Resources

- Self-Direction Handbook

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Regional Office SDS Leads

- Ola Otuyelu, Central Maryland Regional Office

    olasubomi.otuyelu@maryland.gov

- Jonna Krabill, Eastern Shore Regional Office

    jonna.krabill@maryland.gov

- Tia Henry, Southern Regional Office

    Tia.Henry2@maryland.gov

- Tina Swink, Western Maryland Regional Office

    tina.swink@maryland.gov

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DDA Headquarters Office Staff

- Nick Burton, Director of Programs

  nicholas.burton@maryland.gov

- Kristi Culbreth, Statewide Coordinator of Self-Directed Services

  kristina.culbreth@maryland.gov

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Questions