

7-13-22

Budget Authority Workgroup Notes



1. Welcome

Todd Koopmans, Jan Lampman, Laura Demeuse, Taylor McQuay, Melissa Frash, Courtney Trunk, Angela Martin, Sheryl Stumbaugh, Sheryl Kuenzer, Pat Carver, Heather Hallett, Marie Eagle, Stephanie Laird, Jill Gerrie

2. Logic Model

We all reviewed the logic model and added things. Updated document will be sent to everyone.

Kellogg Logic Model	Inputs	Activities	Outputs	Short-term Outcomes	Med-term Outcomes	Long-term Outcomes
Bennett's Hierarchy Logic Model	Inputs	Activities	Participation	Reactions	Knowledge Attitude Skills Aspirations	Practice Change Impact

3. MDHHS Update – Laura (Jill will send Laura a reminder about written notes when she sends out the agenda 😊)

➤ National Center on Advancing Person-Centered Practices and Systems (NCAPPS)

- Pennsylvania people were talking about reaching out to Amish and Mennonite communities which made Laura wonder how to reach these communities? Laura reminded us that 75 percent of people with disabilities don't receive services.



- Colorado has had an advisory group of people who have been using S-D for the past 10 years. The meetings are intense, generally three plus hours. Great information about how people want self-directed run is collected. **Laura talked about having a group in Michigan.** Here's a link to the Colorado group: <https://hcpf.colorado.gov/participant-directed-programs-policy-collaborative>



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- The Michigan group is meeting tomorrow, 7/14/22, with NCAPPS team.

- Advisory group – It was mentioned that if an advisory group was developed there are people from Michigan Partners for Freedom that might be interested.



- Laura mentioned it would be good to have an advisory group for the person-centered planning policy update too.

- Someone mentioned it feels like the NCAPPS work is a little slow going. A state that is ahead of Michigan for ideas hasn't been found yet.



- While there is some information about what others are doing, there are no details to look at.

- Someone asked if Values in Action was participating? They are a large group (in the 100s) so could be useful.
- It was noted we could look at who is trying to provide great services.
- It's important for CMS (the Center for Medicare and Medicaid Services at the federal level) to know how much progress is not happening.



➤ **Meeting with Pre-paid Inpatient Health Plans (PIHPs), Community Mental Health Association of Michigan (CMHAM) about the Self-Directed Services Technical Requirements or Guidance**

- June Meeting's topic: The role of Utilization and Management in the budget process and how to move money around in budget.



- At the last meeting the CMHAM negotiators said that if it's called "guidance" it can't be in contracts. Marie correctly pointed out it was written to be put into the contracts. Yay Marie!



- It was said that if it's not in the policy items can't be said to be a "must" do.

- When Laura asked people to show the conflicts in the contracts, she got nothing. Now they are saying it is policy overreach.

- An email from the CMHAM lawyers was recently received so there is finally something in writing to which the state (Laura) can respond.



- A meeting is being held again next week (week of July 17th).
- Work is being done to connect guideline items to the policy.

- Someone mentioned putting the guidelines in the contract and then just go through contract negotiations.



- Do we need to get people using S-D to react to CMHs and educating them about how what they are doing impacts their lives? Both Stephanie and Todd said, **People with lived experience need to be at the table!!!!!!**



- Someone commented, “Why are we having the same issues all these years later (self-directed services began in 2001)? People lives shouldn’t wait!!!!!!”
- Another person said that policy makers and others don’t trust people with disabilities to manage their

lives. EVV (electronic visit verification) is an example too.

☀ Geo tracking (geographic tracking) is tracking every move people make through their phones.

☀ Laura said that Michigan was not using geographic tracking, but someone said that at a Developmental Disabilities Council meeting that person from state said there is tracking. Is supposed to be only when person punches in and out. Laura will find out who spoke at the meeting.



➤ S-D Conference Update

- It is now going to be held remotely beginning 8/23 through 8/25, in the morning only. Here is the link to registration:



https://cmham.org/events/?EventId=6120&fbclid=IwAR2X8-mO4isb29Gnba1sUGav-oSCwq_4uJVa6eTppQ2nWvz0bqrDFcLGuXs

- **People who registered last time need to re-register!**

➤ Six-Month Reviews and Authorizations

- Laura talked to site reviewers to check on the corrective action plans of Oakland Community Health

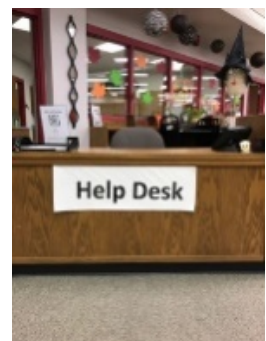
Network and Detroit-Wayne Integrated Health Network. She was told that no corrective plans had been turned in yet.

- Annette was going back to Oakland and Detroit to tell them that requiring six-month authorizations and budgets would not be an appropriate corrective action plan. We'll need to check in with her.
- The site reviewers are in the middle of a site evaluation right now.
- Someone said that in Oakland County six-month budgets have been in place for some years, that they don't follow the guidelines. **Laura said she would contact the S-D Coordinator there.** It was also mentioned that people also have to have another IPOS (Individual Plan of Service) and use or lose their hours – yikes!



4. Help Desk Update

- Not flooded with questions at this time.
- Frequently Asked Questions (FAQs) document(s) continue to be updated.
- Most questions coming in are from professionals.
- Lots of questions about training requirements and line-item changes within budgets.
- Will generalize questions for FAQs so they apply to others.
- It was asked if information was available about how many are using the help desk, broken down by who asked, and about what? **Heather will get hard numbers together for the next and future meetings.**



5. Survey Update – Angela’s still working on the infographics. Courtney volunteered to help!

Will be able to share at the Self-Determination Conference and our next meeting.



- We do have a list of people willing to do more from survey.
- Potential questions:
 - Are people controlling other parts of their budget besides staffing (Supports Coordinators, therapists, Occupational and Physical Therapists, nursing, respite, camps)? People may not know what their budget pays for in addition to staff. We will need to provide context. For example, “Do you receive (name here) services, and did you pick it/them?” (Poorly written – sorry)
 - Are there other services you’d like covered? Music lessons, horse-back riding, etc.
- Will provide link to webpage and the S-D policy and guidelines.
- There is not a real distinction between person-centered planning and budget development. It is different everywhere. It is key that someone sits down with individual and goes through budget and where money’s going.

6. S-D Table

- Jill will add icons or pictures

Individual Member	Individual Support	Individual Services	Individual Activities	Individual Transportation	Individual Health	Individual Housing	Individual Education	Individual Employment	Individual Recreation	Individual Other
Complete (check each column)										
ADL/Systems										
ADL/Original Services										
Behavioral/Chronic/Behavioral										
Behavioral/Support/Procedure										
Case Abstracts										
Case Management/Case Management										
Case Management/Case Management										

- Appendix with icons and descriptions will be developed.

7. Other

[More Info](#)



8. Future Meeting Schedule – 10:30 a.m. - noon

- ☀ 08/10/22
- ☀ 09/14/22
- ☀ 10/12/22
- ☀ 11/09/22
- ☀ 12/14/22



To-Do:

- 👉 Jill will update the logic model and send it to everyone.
- 👉 Jill will send Laura a reminder about a written report when she sends out the agenda.
- 👉 Jill will add icons or pictures to the S-D table and add an appendix explaining the pictures.
- 👉 Laura will find out who talked about geographic tracking at the Developmental Disabilities Council meeting and get to the bottom of whether the state will be tracking people geographically.
- 👉 Laura will contact the S-D Coordinator in Oakland County to talk about the six-month budget requirement and other issues.
- 👉 Heather will put together a report about Help Desk use.
- 👉 Angela will finish survey infographics with help from Courtney.
- 👉 Angela will put together potential questions for a new survey.