



5-8-24

Join Zoom Meeting

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Meeting ID: 840 8129 9787

• +1 312 626 6799 US (Chicago)

4-10-24

Budget Authority Workgroup Agenda

1. Welcome

Todd Koopmans, Jan Lampman, Tonya Schwerin, Courtney Trunk, Tayler Mc Quay, Laura Demeuse, Marie Eagle, Heather Hallett, Sheryl Kuenzer, Beth Durkee, Kalen Steger, Tedra Jackson-Washington, Jill Gerrie



What super excites you about this time of year?

2. Support Broker Conversation

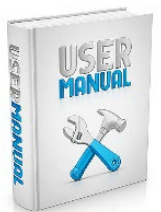
- **Definition:**

- Helps with all aspects of self-directed services or may do a certain thing (how to buy a house, get micro-enterprises up and running, etc.).

- Support brokers are paid by Financial Management Services same as CLS (Community Living Supports) staff.

- **Medicaid Manual** definition:

A services and supports broker is used to explore the availability of community services and supports, housing, and employment and then to



make the necessary arrangement to link the beneficiary with those supports. The role of the supports coordinator or supports coordinator assistant when a services and supports broker is used to perform the remainder of the functions listed above as they are needed, and to assure that brokering of providers of services and support is performed.

Thank you, Heather, for finding and posting the definition in the chat!



- **Requirements:**

- Has specific expertise and good knowledge about self-directed services and how they work.
- Knows about budgeting and how independent budgets work.
- Has experience with needed services.



- **Why use a Support Broker?**

- Because Supports Coordinators don't have enough time to provide the help needed to manage self-directed services.

- **How does someone gain the experience needed to be a Supports Broker?**

- Some are family members, friends, people with relationships with people who use self-directed services. Some are peers. Some receive training. Some people with special experience are used, like the hairdresser example Jan shared.



- **Training:**

- We talked about who provides the training and what kind of training needs to be done.



- Several states have on-line training modules. Tedra will reach out to them to get more information.

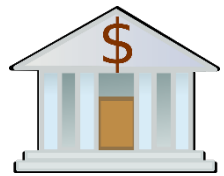
- We talked about training topics.
 - Medicaid rules for providing services. You can't provide other Medicaid services while other Medicaid services are being provided. Is this a Michigan rule?
 - Documentation
 - Can bill only for face-to-face contact with people. We talked about how to bill for non-face-to-face by rolling it into the rate. We talked about this for a while and the difficulties people can



have figuring out a unit rate that covers both billable and non-billable hours.

- We talked about needing an easy way to do training.
- Some states keep a registry like the one DDI has for Independent Facilitators.
- In **New Jersey** they have Support Broker agencies.

- We talked about whether a Financial Management Services (FMS) organization could employ supports brokers. Tonya told us that they do this in other states.



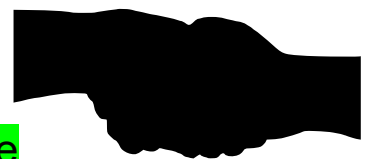
- Laura said it would have to be in the waiver.

- In **Indiana** Centers for Independent Living (CILs) connect people with brokers. This is being piloted (tried out to see how it works).

- **Maryland** and **New York** are two more states for us to look at.

- Tedra said brokers are a national issue.
 - We need to get information from the states we mentioned.

- Jan asked **Tonya if she knew of counties using more brokers to please let us know.**



- Community Living Services in metropolitan Detroit has Support Brokers. We need to check in with them. (They are doing a presentation at the Self-Determination conference)

- **Anyone outside of self-directed services have brokers? Not sure.**



- **Roles & Responsibilities:**

- The difference between Supports Coordinators and Support Brokers



needs to be clarified. (Brokers use the same billing code as Supports Coordinators) Does not currently have a modifier.

- Laura asked if broker services could be billed under something different instead of getting a new modifier. She said it would be easier to do and would get rid of some of the requirements under the Supports Coordinator positions.



- Right now, Supports Coordinators supervise Support Brokers. Probably because brokers are billed as Supports Coordinators.

- Tedra asked if the broker position would be like an Independent Facilitator?



- Heather said that Support Coordinator Assistant definition is in the Medicaid manual as is Support Broker. It says both positions need high school diplomas (or the equivalent) and are supervised by the Supports Coordinator.

- Someone asked if the definition for a Support Broker could be fixed in the Independent Facilitation work group.



- Oversight vs. supervision in the Medicaid Manual definition leaves a little wiggle room.

- Do Supports Coordinators or Independent Facilitator have requirements for driving?



- Not in Ottawa, but they do where Todd lives.
- Discussion. Driver record check should only be done if you are driving a person using services not for just driving to run errands.

- Peer mentoring can be done via telehealth as of this past year. So, you shouldn't need a driver's license.



- Someone asked who's doing a good job with peer mentoring? Ask Tracy at the DD Council.

vincentt1@michigan.gov



- Brokers and Independent Support Brokers

- Is it as important to be independent as it is with Supports Coordinators?
- NPI means national provider identifier.
- **Jill - Understand the provider qualifications and who needs the NPI and who doesn't?**
 - Typically, a “professional” with licensure, needs an NPI to insure a minimal level of training.
 - Example of an Independent Facilitator in southeast Michigan that was required to get an NPI. Does not need one.
- Anything in the Medicaid Manual about Independent Supports Coordination? No, so we probably don't need anything for Independent Support Broker.
- Conflict-free aspect of those outside the system
- **Expanding Brokers in Michigan**
 - We didn't get to this.



Topic for Next Meeting = Brokers, continued...

3. MDHHS Anything Urgent? – Laura



- Tedra asked when there would be public comment for the Waivers? It is due 6/1 and needs 30-day comment period (plus response to comments). Nobody is sure it's being worked on.



- Tedra will ask at DD PIT (Program Improvement Team)

- Beth asked, “What about the DD statewide assessment?”

- Another good question for DD PIT.

- Laura said they were close and were piloting stuff. The last few months have been hairy with reports and waivers in, etc.



- Discussion about the Design Team at the Department and the inability to add “customers” to the team.

- Laura said that is not the way the teams function.

- Training is about LEAN process; all teams trained the same way to improve processes. (LEAN = corporate process)

- Tedra felt that using this process to streamline corporations to decide policy was inappropriate.

- Laura offered to have Dennis (the facilitator) come and explain further.

- It was decided to invite Dennis to a meeting so we could hear more.

- Jill will work w/Laura to get invitation to Dennis Sergent.

- Todd heard differently from Hertel

4. Other – All – It was time to go.

To Do List

- ✓ Several states have on-line training modules. **Tedra** will reach out to them to get more information.
- ✓ We need to explore Support Brokering in **Maryland**, **New York**, **Indiana**, & **New Jersey** (**Jill** will do Maryland and Indiana, **Jan** will do New York and New Jersey)
- ✓ **Tonya**, please let us know if you know of any other counties in Michigan using Support Brokers, please let Jill know.
- ✓ **Laura**, please see if the Independent Facilitation group can fix the billing code for Support Brokers.
- ✓ **Jill** - learn about provider qualifications and who needs an NPI.
- ✓ **Jill** & **Laura** see when Dennis is available to attend one of our meetings and send him the Zoom invitation.

Future Meeting Dates

- **05/08/24**

- 06/12/24
- 07/10/24
- 08/14/24
- 09/11/24
- 10/09/24
- 11/13/24
- 12/11/24



Broker Resources: (some of these are good, others not so much, but they may have information we can use)

[support brokers - - Video Search Results \(yahoo.com\)](#)

[Support Broker | Idaho Department of Health and Welfare](#)

[Support Brokerage | Department of Developmental Disabilities \(ohio.gov\)](#) [A-Supports-Brokerage-Startup-Guide.pdf \(paddc.org\)](#)

[Resources | Applied Self-Direction \(appliedselfdirection.com\)](#)

[Self-Directed Services | Medicaid](#)