



6-12-24

Join Zoom Meeting

<https://us02web.zoom.us/j/84081299787>

Meeting ID: 840 8129 9787

• +1 312 626 6799 US (Chicago)

5-8-24

Budget Authority Workgroup Notes

1. Welcome

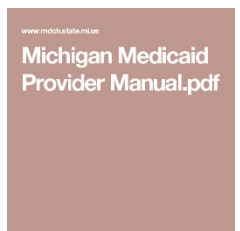
Jan Lampman, Todd Koopmans, Tedra Jackson, Courtney Trunk, Annette Downey, Kalen Steger, Beth Durkee, Sheryl Kuenzer, Heather Hallett, Taylor McQuay, Laura Demeuse, Angela Martin, Jill Gerrie, Angela Vasser, Stephanie Laird

Jan asked for our connection with brokering, and favorite May holiday.



2. Support Broker Conversation

- **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.”



- **Ideas from Other States**

- In New Jersey:

- Brokers help with circles of support.

- Brokers coach and help people navigate services.

- Detailed job descriptions are all individualized based on the help a person wants. The job posting is based on the description.



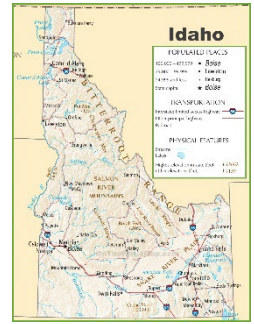
- Brokers are paid \$24.36 an hour, when the video I watched was made. They were working on improving the rate.

- This is a link to a broker services manual:
<https://boggcenter.rwjms.rutgers.edu/documents/BOGGS/Publications/Self-Direction/UnderstandingSDSinNJRoleofSupportsBroker-ENG.pdf>. Appendix D has a nice comparison of roles.

- In New Jersey when Support Brokers started it was a little like the wild, wild west.
 - Pennsylvania learned from that and did something a little more organized.

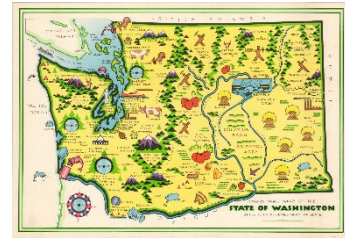
Idaho:

- Brokers assist with monitoring and reviewing the budget.
- They have a registry that includes where the person would work in the state.



Washington:

- Their registry is managed by an agency, not the state.



Minnesota:

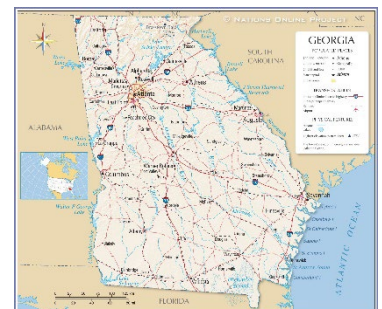
- Support Coordinator's duties:
 - Options counseling
 - Assess and identify needs
 - Begin authorizations
 - Oversee effectiveness of IPOS (Individual Plan of Service)
 - Monthly or quarterly contact
- Support Broker's duties:
 - Support person to make informed choices
 - Helps person to build skills as an employer
 - Helps with budget development
 - Helps person to understand spending and its use (utilization)



- Helps with finding, hiring, and getting workers started.
- Overall, their system is much like Michigan's.
- In some states, Minnesota for an example, the traditional Support Coordinator or Case Manager role is different.
 - The Support Coordinator's role is less intense, they don't have monthly contact.
 - The Broker person (whatever they are called) has more frequent contacts, at least monthly.
 - Beth found this helpful because of the complicated system in Michigan.
 - If we could make brokers a separate service from Support Coordinators it would be much easier!

Georgia:

- Support Brokers annual wage is \$60,000 plus benefits
- The wage is based on the Broker working with 5-7 people at 30 hours per person per month.



Canada:

- Jan told us they have a Navigator that acts as a Broker.
- In Vancouver the Navigator helps people with workers, but also connects people to community resources.



Wisconsin:

- Annette told us Brokers are called Independent Consultants through their IRIS program.
- Wisconsin uses an “allocation model” which means people are given money based on an assessment.
 - You get the money and then decide how to spend it.



California:

- Annette told us they call Brokers Independent Facilitators.

- People get a budget with full freedom to spend how they want.
- The budget includes Independent Facilitators to help them.
- Independent Facilitators receive no formal training
 - They mostly help people set up self-directed services.
- The FMS (Financial Management Services organization) pays the Independent Facilitator.
 - Some are paid quite well.
- Start-up is the most intense time.



Kansas:

- Kansas uses a model for Support Coordination or Case Management that is like Michigan's.



General Comments:

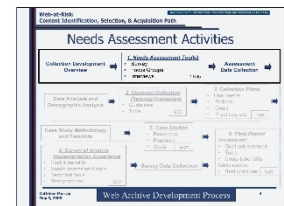
- In Michigan there are fewer options for services and the system is more complicated than in other states.

- If we can classify brokers separately from Support Coordination and Case Management, it would make things easier.

HCPCS Codes	
New Codes-continued	
- K0779	Repair/routine service DME non-oxygen equipment
- K0780	Repair/service oxygen equipment, 15 min
- L2861	Torsion mechanism knee/ankle
- L3891	Torsion mechanism wrist/elbow
- L5973	Ankle-foot system dorsiflexion and/or plantar flexion includes power source
- L8031	Breast prosthesis with adhesive
- L8032	Reusable nipple prosthesis
- L8627	Cochlear Implant Device external speech processor replacement
- L8628	Cochlear Implant Device external controller replacement
- L8629	Cochlear Implant Device transmit coil and cable
- L8692	Non-oscillated sound processor, body worn, includes headband

- We talked about some changes that were being considered by DWHIN. Good luck Annette!

- Residential Assessment DWHIN is using something called a Residential Assessment on everyone, no matter where they live.



- We talked about the Department's October deadline for conflict-free services. (Providers aren't believing the deadline is real)



- It should increase the use of Independent Support Coordinators.

- **What People are doing in Michigan**

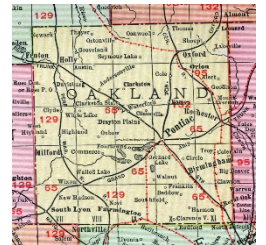
- Community Living Services - Annette



- At Community Living Services brokering is done by Independent Support Coordinators.
 - Everyone interviews at least two Independent Support Coordinators.
 - FMS pays
 - People can bring people they think would be qualified but need to meet the job requirements.
 - They must meet the Support Coordinator position requirements. They are QIDPs (Qualified Intellectual Disability Professionals, I think).

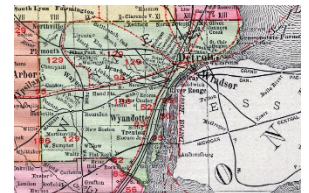
- Oakland County - Annette

- Self-Determination Coordinators write people's plan of service in Oakland County.



- Wayne County - Annette

- In Wayne County the Self-Determination Coordinators (internal) do it all. Community Living Services has 70 Independent Support Coordinators.

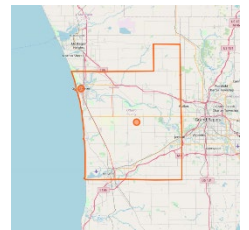


- In Macomb they wanted the role called broker (vs. Independent Support Coordinator). They will not require a bachelor's degree.



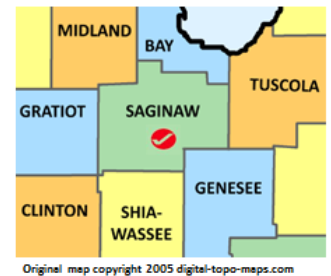
Ottawa County - Beth

- They are having a hard time finding someone to hire – maybe due to staffing crisis.
- A few folks have hired their own person to be broker paid through their individual budget.
 - The Brokers are really working on finding and scheduling staff, understanding the budget reports, and finding community resources.



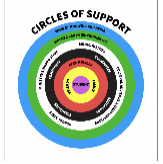
Saginaw County - Kalen

- They followed Ottawa's lead.
- They have had credentialing questions. What are necessary and who completed it.
- They also had supervision questions.
 - It was explained that now it is Support Coordinator oversight for independent folks, and Support Coordinator supervision for CMH staff.



- **What we Want:**

- Brokers helping people connect with their circle



- Brokers helping people find community resources



- Separate code for brokers

- Laura said it doesn't make sense to require QIDP for brokers.

- We all know people who are more than qualified to be Independent Facilitators and Support Broker that don't need/have credentials. The positions are not classified correctly.



Job Requirements

- Support Coordination, Independent Support Coordination, and Independent Brokering all got put together with Targeted Case Management two years ago.
- Support Brokering isn't a clinical service, but it is lumped in with clinical services. Tedra asked if this was an advocacy point?
- Since the positions are wrapped together, we can't see what's going on.

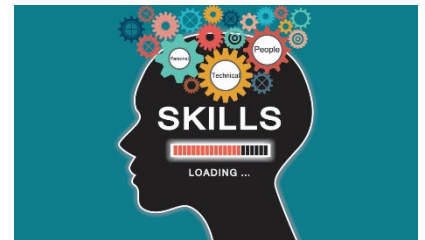
- It would be great if we could make changes without dealing with EDIT (I can't remember what EDIT is spelled out, sorry. It is the group that is in charge of the billing codes for the Department.).



- Laura said that when she's talked to other states, they think that putting brokering under Support Coordination is a good idea. Laura warns them of the problems we have.
- Competencies (skills) are needed, not a bachelor's degree.
 - Broker skills are not taught in schools, so it doesn't matter if you have a bachelor's degree.

- **Support Broker Skills Needed:**

- **Understanding of person-centered planning**
- **Ability to develop and maintain circles of support**
- **Know how to help people with budgeting and managing a budget**
- **Awareness of community resources to connect people**
- **Understanding of supervision to help employers manage their staff**
- **May need certain skills (housing, transportation, etc.)**



➤ Jan mentioned that she hopes there's flexibility in designing the broker role to meet individual needs.

➤ Beth was wondering whether to have a group available with expertise in areas (housing for example)?

- It was suggested Peers can help people with specific issues like housing, transportation, ride share, etc.

They can help build a skill and navigate if needed. They can help with things that don't need long-term follow-up.

- As an example, Stephanie shared her experience being a Peer Mentor. She helped someone figure out all the steps (budget, roommate, area to live, bus line, stores, etc.) needed to move out.



➤ We need to make sure conflict-free isn't limited to just case management. This might be our opportunity to make sure brokers, etc., are part of the process.

➤ It helps that other states have done stuff before to help with concerns about whether something is okay to do with Medicaid.



➤ We would like assurance from the Department they will use our recommendations or suggestions, or whatever they are.

- We will hold one more broker meeting. We will develop proposed action items, description of qualifications, etc. Have a blueprint for the state.
- It was suggested it would be nice to know what questions people not using (and using) broker services would have. It would be nice to know what the “yikes” moments are when reviewing what we put together.

- We need to be ready to deal with excuses from the Department about why they can't work on broker issues.



- The more ready-to-use the information we give them (the Department) is, the greater the possibility it will be used.

- The Department is hiring a Developmental Disability Specialist. The position description is being completed and then it can be posted. More might be available from the DD PIT (Practice Improvement Team).



- Jill would like to know what the position requirements are. 😊

- Annette asked us if the state ever got a separate broker code, would we want encounter reporting or 15-minute reporting?

- Jan wants face-to-face and non-face-to-face combined (direct and non-direct or stuff done with a person or stuff done on a person's behalf) because there is a lot of non-direct service done on behalf of the individual. The indirect service is confusing for staff (with 15-minute reporting) and encounter reporting might make it easier.

- Stephanie told us we need to remember we're dealing with people's lives!
 - People don't need more complexity – simple is good!



The meeting ended here.

- **Expanding Brokers in Michigan** – We never quite make it to this item before the meeting ends.

3. MDHHS Anything Urgent? – Laura



- Will the independent facilitation group be able to fix the Support Broker definition?
- Conflict-free and the budgeting process

4. Other

**OTHER
STUFF!**

Future Meeting Dates



- 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](#)