



7-10-24

Join Zoom Meeting

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Meeting ID: 840 8129 9787

• +1 312 626 6799 US (Chicago)

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## Budget Authority Workgroup Agenda



### 1. Welcome

Jan Lampman, Courtney Trunk, Beth Durkee, Angela Martin, Sheryl Kuenzer, Tayler McQuay, Heather Hallett, Marie Eagle, Kalen Steger, Stephanie Laird, Tedra Jackson-Washington, Shannon Gielow, Melissa Frash, Todd Koopmans, Jill Gerrie

We talked about the weather where we live.

Because the agenda was long, I put all meeting notes and comments in **purple** to make it easier to read.

### 2. Describe Broker Qualifications and Duties



#### Meeting Comments:

- Do not make Support Coordinator role less intense because they need to know the person to facilitate their plan.
- Medicaid reporting is complicated. It's not clear when two people can provide support at the same time.
- Credentials might be needed for certain activities.
- Need room for Support Brokers to help with non-professional, creative stuff.

- Brokers can help people with things that don't really fall under the Support Coordinator's job description.

## Do we want to make brokers a separate service from Support Coordinators? (separate billing code)

### Meeting Comments:

- Yes, we want a separate code.
- A separate code will help better define roles.
- Include non-traditional roles for Support Brokers.
- Support Coordinator has specific duties in Medicaid manual.
- Broker can help people with all kinds of tasks that don't fit under the Support Coordinator duties. Things like staffing, more day-to-day tasks vs. monthly tasks.

HCPCS Codes	
<b>New Codes-continued</b>	
• 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-ossointegrated sound processor, body worn, includes headband



## • What we Want

**Require all CMHs provide Support Broker services**

### Meeting Comments and Notes:

- Tedra asked and The CMS definition for Brokers follows:
  - “A supports broker/consultant/counselor must be available to each individual who elects the self-direction option. The supports



broker/consultant/counselor supports the individual in directing their services, and serves as a liaison between the individual and the program, assisting individuals with whatever is needed to identify potential personnel requirements, resources to meet those requirements, and the services and supports to sustain individuals as they direct their own services and supports. The supports broker/consultant/counselor acts as an agent of the individual and takes direction from the individual.”

- This definition would help show this wasn’t intended to be a clinical service.

➤ **CMS HCPCS Code: T2041: Support Broker Service**

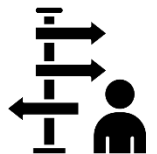
Support brokers provide assistance to individuals in self-directing their own services, helping with the management of their budget, and facilitating access to needed services.



➤ **CMS Technical Guidance:**

- “Service/function that assists the participant (or the

participant’s family or representative, as appropriate) in arranging for, directing and managing services. Serving as the agent of the participant or family, the service is available to assist in identifying immediate and long-term needs, developing options to meet those needs and accessing identified supports and services.



- Practical skills training is offered to enable families and participants to independently direct and manage waiver services. Examples of skills training include providing information on recruiting and hiring personal care workers, managing workers and providing information on effective communication and problem solving.

- The service/function includes providing information to ensure that participants understand the responsibilities involved with directing their services.” (Part 1).
- The extent of the assistance furnished to the participant or family is specified in the service plan.
- **“This service does not duplicate other waiver services, including case management.”** (Part 2)

➤ **Broker Training**

- People directing their services need to budget for worker training that will be needed.
- We talked about whether it would be helpful to have some kind of standard training for Brokers. Not necessarily from CMH – we don’t need 46 different versions.
  - ✓ Should the training be based on competencies?
  - ✓ Talked about a basic training for all brokers that would be the same throughout the state.
  - ✓ We talked about DDI’s Independent Facilitation training and whether a model like that would be useful.



- **Quality** – how do we measure it? ***We need to make suggestions.***



- Peer-delivered services can provide some lessons of things we would like to avoid.
- We need parity in system requirements, making sure CMHs have required employees (need to include peers) for all folks.

- We talked about whether the Support Broker should work for an agency or the person directly.
  - In southeast Michigan there is at least one agency that has Support Brokers. There are other brokers that are independent and are paid by a FMS (Financial Management Services organization), directly hired by person.
  - There was concern about an agency model that provides Support Brokers.
  - The Arc Massachusetts has Supports Brokers SUPPORTbrokers - The Arc of Massachusetts “All brokers are independent contractors who have been certified by The Arc. Certification involves a review of education, experience and references, as well as a criminal record check. Additionally, each broker must complete initial and ongoing training and follow a strict Code of Ethics. Individuals and families are asked to complete an evaluation at the conclusions of services.”
  - It is important to be clear who is the employer. The person! Often when an agency is involved, people assume the agency is their employer.
  - There is a conflict of interest if both the Supports Coordinator (or Case Manager) and the Support Broker work for the same agency.
  - Will need to comply with conflict-free stuff – also a good reason for a separate code.
  - California uses the T2041 and a 2051(per diem).
  - We talked about whether to use a per diem (a daily rate) vs.15-minute requirement.



HCPCS Codes	
<b>New Codes-continued</b>	
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-	K0740 Repair/service oxygen equipment, 15 min
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- ✓ We talked about the difficulty figuring out a per diem (daily) rate. Could it be a weekly or monthly per diem? How would the rate per diem be figured?

- Developmental Disabilities Institute is not the official Independent Facilitator training, they are an option. Needs to be **approved training**.



- ✓ So, if we have training that's independent of the Department – we need to consider

- ✓ Talked about OCHN's peer training. Quarterly meetings that provide support and information to peers (collect numbers too). Would also be something to consider.

- ✓ All CMHs need to provide peer services – equity issue! And enough peers to handle the workload.

- ✓ Maybe have someone (MDHHS, an agency, etc.) hold meetings/training opportunities for all brokers across the state.

- Brokers helping people understand budgets and monthly statements.



- Todd hopes the Department will consider our work more than a recommendation.

- A Broker registry that includes which areas a Broker would be willing to work.

- Like what DDI does for Independent Facilitators.

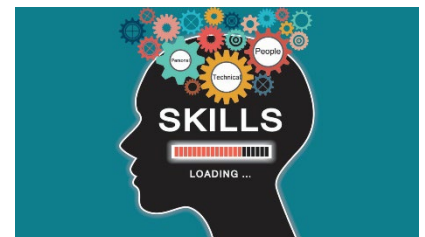
- OCHN does their own peer training. They provide quarterly meetings for all peers for support. Plus, updated information and training to maintain/learn

skills. They also collect numbers of encounters and people supported. The meetings help to get rid of the feeling of isolation.

- Broker support – does an agency need to coordinate? Maybe someone (the Department or an outside organization) holds the meetings for support.
  - Beth – “We also talked about hiring a person here at the CMH that would organize, not hire, peers, brokers, etc. Bringing them together to share ideas, make sure they understand the MA rules, etc.....”
  - Do we need another meeting to streamline recommendations? Yes, we will use our August meeting.
  - Training issue – we don’t want 46 different trainings. So, there could be a **basic training**. Then there could be additional training led by person for whom the broker is working.
- Todd would like assurance from the Department they will use our recommendations or suggestions, or whatever they are.
- Talked about the new Beneficiary Advisory Council (BAC) requirement for Medicaid.

● **Support Broker Skills Needed:**

- Understanding of person-centered planning
  - Need to know more than just basic understanding – to provide support to person (know about planning tools, etc.)



- ✓ From Beth, “Maybe have requirements based on the specific things the broker is going to do? So, maybe they don't

need to know about the PCP (person-centered planning) tools if they aren't going to help with PCP? Maybe they don't need to understand circles of support if they aren't going to help with that? So, have a list of some of these most used functions and list qualifications required for each. The person can identify if they want the broker to do any of those things and then identify other additional functions they would like the broker to do?"

- Is it okay to know where to look up information about topics vs. knowing how to do something? It depends on why the Support Broker was hired.
  - Could someone have more than one Support Broker? In the old days it was okay.
- 
- Ability to develop and maintain circles of support (help person facilitate)
  - Ability to help people with budgeting and managing a budget
  - Awareness of community resources and peers to connect people
  - Understanding of supervision to help employers manage their staff
  - May need certain skills (housing, transportation, etc.) based on what's needed or wanted.





- Can Broker sign time sheets? Can people designate someone to sign time sheets?
  - In general, the group thought the broker could help the employer, but was not comfortable with the broker being the person that signed time sheets.
    - ✓ Having someone else sign time sheet feels weird. They could help the employer to sign. The person that signs the time sheets needs to be a person who can verify the hours that were worked.
  
- Is this the list? Are we saying brokers need all these skills?
  
- One state has a list of items a Support Brokers could help with (like person-centered planning meeting, transportation, etc.). Then there would be training associated with the items. So, Support Brokers wouldn't need training in areas that they won't be involved. Maybe look at Direct Care Worker duties? So, could the training be tracked by FMS (Financial Management Services organization)?
  - Baseline training, maybe values-based (person-centered planning, etc.), then Brokers could have a portfolio (list of things they can help with) of things they could add in addition.
  
- CLS (community living service) – The wording in the requirements says people with expertise/knowledge in an area don't need training in that area.
  - So, if the broker was going to help someone start up a business they wouldn't need training if they have their own business. People don't have to have training that's not needed.

- Maybe brokers could build a portfolio with areas they have experience.

The meeting ended here. We decided to have another meeting about Support Brokers to finalize our recommendations/whatever and see if there are any questions we need answered.

- **Broker Duties** adapted from the Boggs Center chart and information from Minnesota  
<https://boggscenter.rwjms.rutgers.edu/documents/BOGGS/Publications/Self-Direction/UnderstandingSDSinNJRoleofSupportsBroker-ENG.pdf>.

- Brokers support people to make informed choices.
- Brokers contribute to the planning process based on what they learn about the person.
- Brokers may help facilitate and maintain a circle of support.
- Brokers help people build skills as an employer.
- The Broker may assist the person and/or representative with:
  - Deciding wages for workers
  - Understanding and monitoring the budget
  - Understanding statements and mail/email from the Financial Management Services (FMS) organization
  - Making decisions about service use to make sure that the person is not over or under using services as outlined in the IPOS (Individual Plan of Service).

**Job Description**  
For Engineer Positions

This form is used to provide a concise description of the specific job for the employee and the job, which will be used to determine the position and grade of the job.

**Section A: Specific Role Profile**  
The specific role profile is defined by the duties and activities performed in the position of the job, along with the current tasks of the job and a brief description of the main duties.

**Role Details**

Job Title:	LEAD	LEAD
Job Grade:	Grade X	
Location:		
Reporting to:		
Job Function:		
Job Category:		
Job Code:		
Responsible to:		
Responsible for:		

**Role Purpose**

**Role Responsibilities**

**Section B: Generic Role Profile**  
The generic role profile is defined by the main duties and activities performed in the position of the job, along with the current tasks of the job and a brief description of the main duties.



- The Supports Broker can help the person recruit staff by writing and placing ads, etc.
- The Broker may help the person and/or representative with:
  - Interviewing
  - Picking which person is best for the job
  - Checking references
  - Collecting all needed paperwork to make sure that the person meets the qualifications for the position.
- Supports Brokers may help find additional training for staff or provide them with specific training.
- Brokers can help with setting up timesheet approval and sending them to the FMS for payment.
- Brokers can help the person and/or representative follow Medicaid rules including staff documentation of activities.
- Brokers can help organize, review, and maintain documentation.



### 3. Expand Brokers in Michigan

### 4. Develop Proposed Action Items & a Blueprint for the State



### 5. Ask people using self-directed services and those who support them to review our materials. SAM? Others? Peer Mentors?

## 6. MDHHS Anything Urgent? – Laura



## 7. Other



## Future Meeting Dates

- **08/14/24 – Brokers - Finalize document, questions that need to be answered**
- **09/11/24 – Past PAS Teams**
- **10/09/24**
- **11/13/24**
- **12/11/24**

