

Support Broker Information

Questions:

- Can this information be included in an update to the self-directed services technical guidance?
- Could the information be included in the provider manual (there's going to be a self-directed services section)?
 - Angela and Laura will present this to the DD PIT (Practice Improvement Team)
 - Plus, it will be presented to the DD Council Program Committee
 - Program Committee first and then DD PIT
- How will the information be communicated to CMHs?

Jill add reference from IMPACT story about brokers

<https://publications.ici.umn.edu/impact/37-3/professionalizing-the-supports-broker-role>

Introduction:

- Support Brokers are needed to ensure success and provide the support needed to those who wish to direct their services. This is very true for those without support networks.
 - This role is important due to the staffing crisis
 - The use of brokers would help meet conflict-free standards
 - Brokers are rarely used, and few are available in Michigan (outside of the southeast)
- **According to CMS:**
“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.” [Self-Directed Services | Medicaid](#)

Michigan needs:

- A **separate billing code for Supports Brokers** is needed. Currently the HCPCS (Healthcare Common Procedure Coding System) code for Support Broker is the same as that for case managers/support coordinators.
 - Support Broker services are not clinical and are different from those provided by Case Managers/Supports Coordinators. This greatly limits who can be a Support Broker. With a new code, the requirements for a Support Broker could be based on the support they provide.
 - Currently Support Coordinators are required to provide oversight (or supervision) of Support Brokers. This is a conflict of interest. The Support Broker is supposed to work for the individual directing their services.
 - Current Support Broker Requirements: “Qualifications of supports coordinator assistants and independent services and supports brokers are a minimum of a high school diploma and equivalent experience (i.e., possesses knowledge, skills and abilities similar to supports coordinator qualifications) and functions under the supervision of a qualified supports coordinator. Independent services and supports brokers must meet these qualifications and function under the guidance and oversight of a qualified supports coordinator or case manager.”
Taken from the Medicaid Manual, Version Date: July 1, 2024, Behavioral Health and Intellectual and Developmental Disability Supports and Services, Page 108.
 - There is a CMS (Center for Medicare and Medicaid Services) HCPCS code for Support Brokers, T2041: Support Broker Service
 - CMS Technical Assistance regarding Support Brokers states, **“This service does not duplicate other waiver services, including case management.”**

- Ability to bill in other than 15-minute increments and a rate that includes non-direct time. Perhaps a weekly or monthly rate?
- **All CMHs/PIHPs provide Support Broker services**

Proposed Support Broker Duties:

Support Brokers help people (or their family or representative, as wanted) successfully arrange for, direct, and manage services. The Support Broker acts as an agent of the individual and takes direction from the individual.

Support Brokers may be hired for ongoing support or short-term to assist with a specific activity or task.

Brokers may:

- Help facilitate and maintain a circle of support (a group of people that meets regularly to help an individual get the life they desire)
- Help people find community resources
- Support people to make informed choices
- Contribute to the planning process based on what they learn about the person
- Help people build skills as an employer
- Assist the person and/or representative to:
 - Decide wages for workers
 - Understand and monitor the budget
 - Understand statements and mail/email from the Financial Management Services (FMS) organization
 - Make 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).

- Help the person recruit staff by writing and placing ads, etc.
- Help the person and/or representative:
 - Interview staff
 - Pick which person is best for the job
 - Check references
 - Collect all needed paperwork to make sure that the person meets the qualifications for the position
- Help find additional training for staff or provide them with specific training
- Help set up timesheet approval and giving it to the FMS for payment
- Help the person and/or representative follow Medicaid rules including staff documentation of activities
- Help organize, review, and maintain documentation

Proposed Support Broker Requirements:

- A high school diploma or equivalent
- If hired for a short-term objective, the broker is expected to have knowledge in the service/support needed.
- For those providing on-going support the following may be required:
 - Understanding of person-centered planning and ability to support a person through the process
 - Ability to help an individual develop and maintain a circle of support
 - Awareness of community resources and available peer support networks

- Ability to help people with budgeting and managing a budget, including understanding/reviewing monthly reports from the FMS to keep track of spending
- Understanding of supervision to help employers hire and manage their staff
- Ability to help with record keeping/organization as required by Medicaid

Proposed Training:

To avoid 46 different Support Broker trainings, a basic training that includes the philosophy, values, and ethics of self-directed services, and required documentation could be available. To avoid unnecessary training:

- Additional training would be available, based on need, for specific topics like facilitating and maintaining circles of support, the person-centered planning process, the budget process, etc.
- If the potential broker already has expertise and or training in an area, training in that area would not be required.