

Self-Direction
*Designing for
Scale and Capacity*
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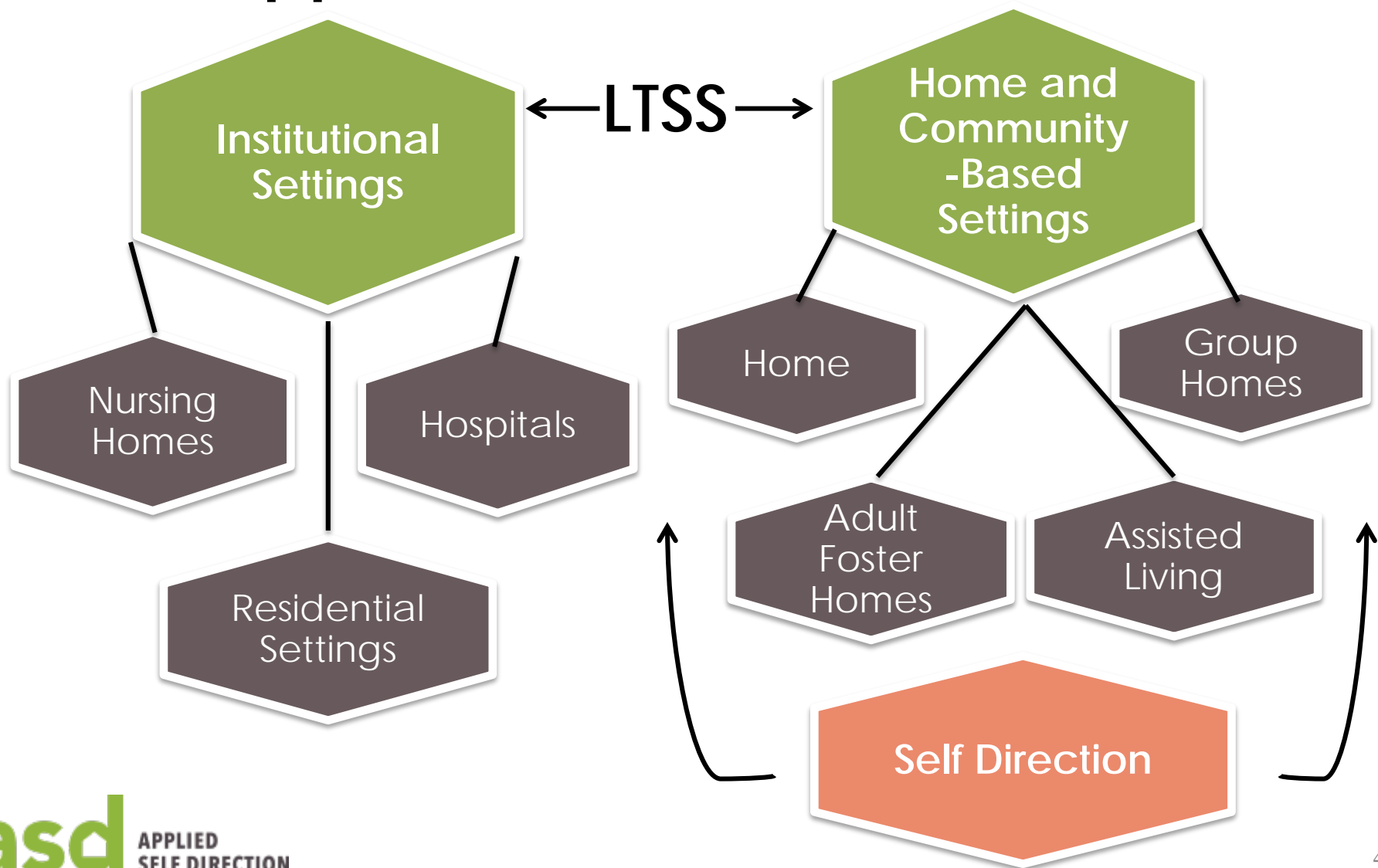
Today

- Key Decisions when Designing your Self-Direction Program
 - Decisions Affecting Workforce
 - Financial Management Services
 - Information & Assistance
- Get Help with Program Design

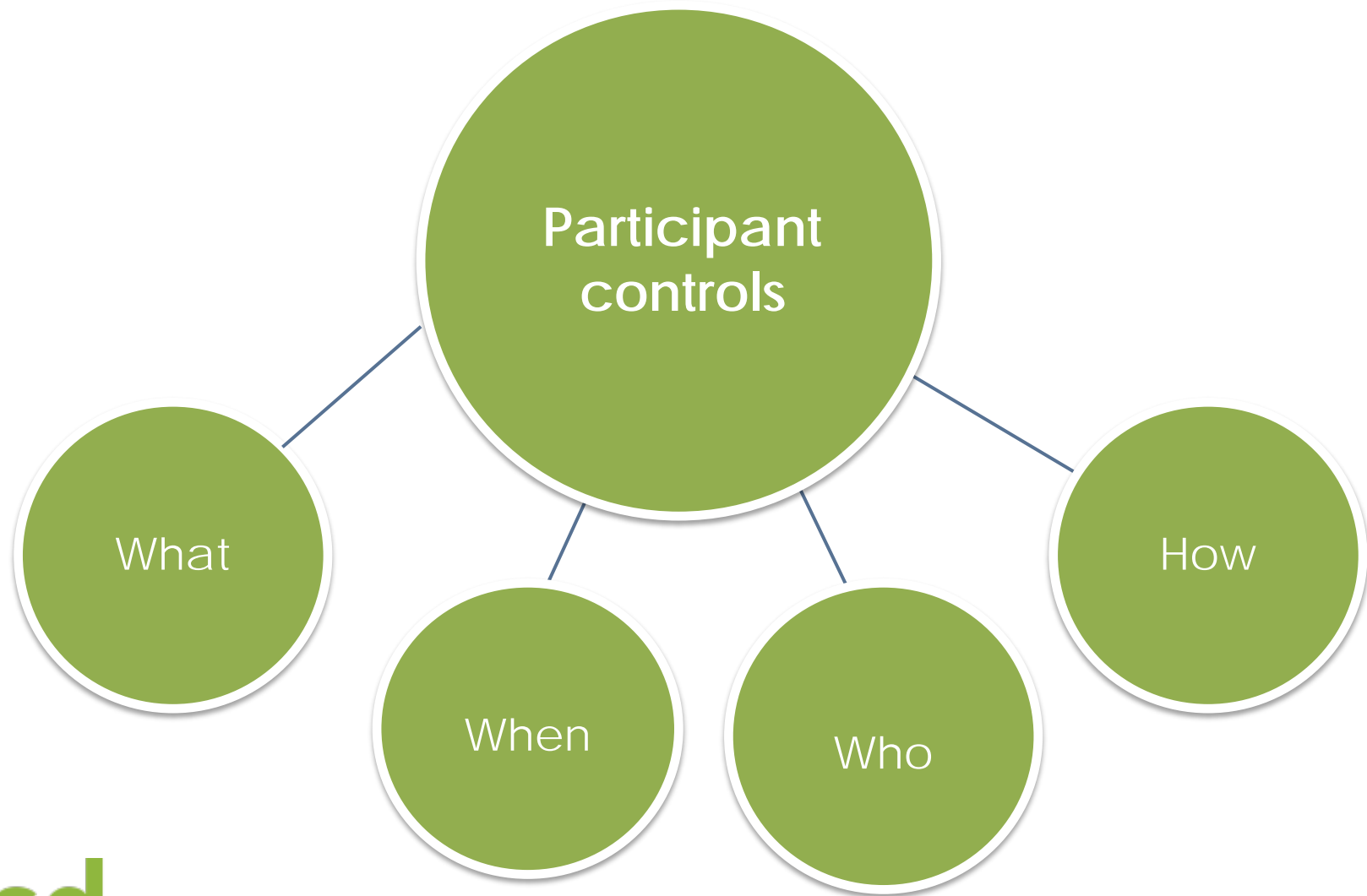
What is Self-Direction?



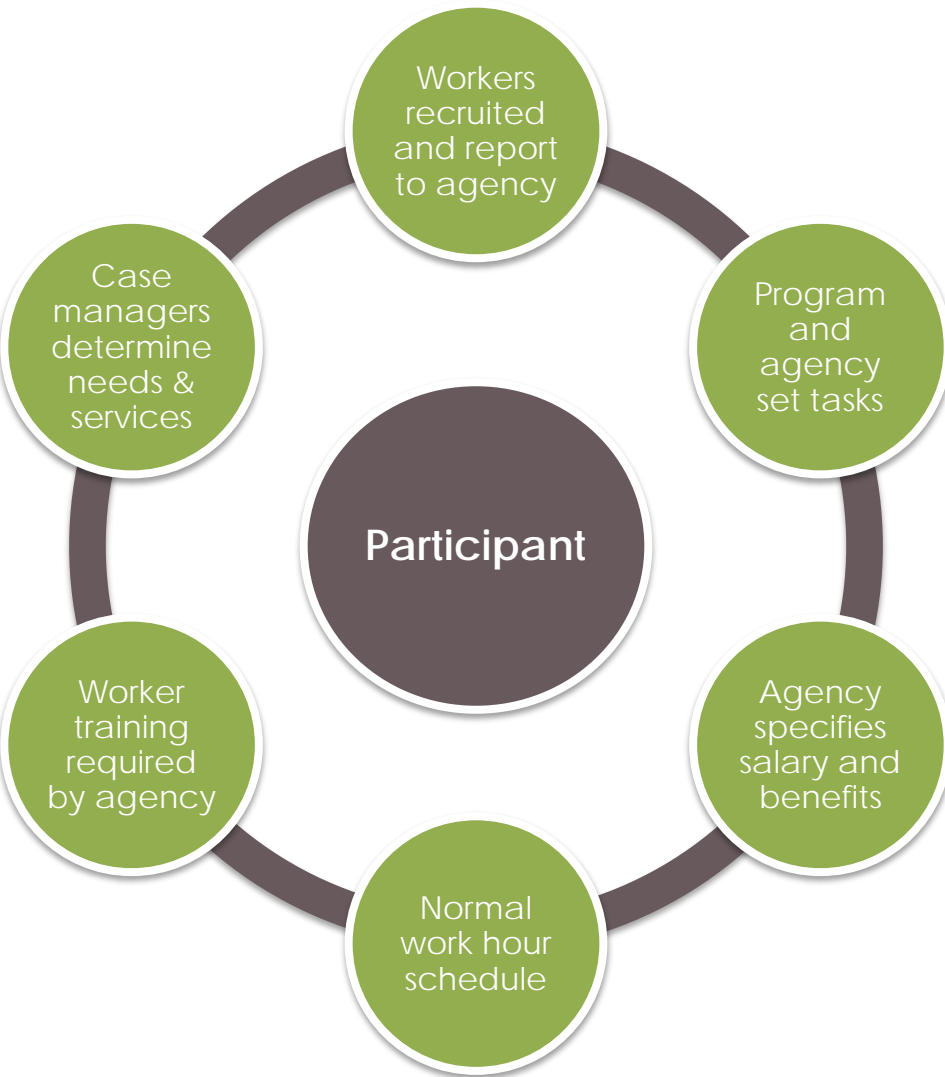
Self Direction in Long-Term Services and Supports (LTSS)



What is Self Direction?



Traditional Services



Self-Directed Services



Self-Direction Enrollment and Program Size

- Total enrollment is over 1,000,000
- Number of programs is approximately 250
- Average program size is about 4,000 participants; the range is from 2 to 500,000
- Thirty percent increase in number of participants served since 2013

Does Self-Direction Work?



Cash & Counseling Demonstration and Evaluation

- Study Populations

- Adults with disabilities (Ages 18-64)
- Elders (Ages 65+)
- Children with developmental disabilities (FL only)

- Evaluation

MATHEMATICA
Policy Research

UMBC
AN HONORS UNIVERSITY IN MARYLAND

Self-directing participants were up to 90% more likely to be very satisfied with how they led their lives.



Self-direction significantly reduced participants' unmet personal care needs.



Primary caregivers were significantly more satisfied with their lives in general.



Self-direction did not result in the increased misuse of Medicaid funds or abuse of participants.



Key Program Design Decisions



Workforce



Employer Authority and Budget Authority

Employer Authority

- Participant recruits, hires, supervises, and manages worker
- Participant must fulfill employer/payroll related tasks

Two Authorities in Self-Direction

Budget Authority

- Participant manages a budget
- Participant free to make decisions about purchasing other goods and services

Workforce Questions and Solutions

- Will your program allow individuals to hire family members?
 - ❑ Spouses
 - ❑ Siblings
 - ❑ Parents of adult children
 - ❑ Children
 - ❑ Other
- Finding workers in personal care can be difficult
 - ❑ Self-direction attracts workers who may otherwise not work in this field
- Ample anecdotal evidence of success in rural areas



Financial Management Services



What Does an FMS Entity Do?

FMS entities support participants by performing administrative tasks so that:

- Participants can focus on managing their services and supports
- Tax, employment and insurance regulation compliance is maintained
- Payments to participants' providers are made in accordance with budget
- Additional controls are in place to detect and prevent fraud and abuse

FMS Models

Fiscal/
Employer
Agent

Two Financial
Management
Services (FMS)
Models

Agency
with
Choice

- Participant is common law employer
- Participant hires own workers
- F/EA handles payroll duties
- F/EA liable for federal taxes

- Participant selects a worker who is employed by the agency
- Co-employer relationship
- Participant free to make decisions about purchasing other goods and services

One, a Few or Many FMS Entities?



FMS as Medicaid
Service – service
FMAP

FMS as Medicaid
Administrative
Function – Admin
FMAP of 50%

Information & Assistance



Counselor's Role: Information and Assistance

- Often referred to as Self-Directed Case Manager, Support Coordinator, Support Broker, or Options Counselor.
- Works with participant to create a plan to self-direct
- Provides guidance with recruiting, hiring and managing staff

Counselor's Role: Information and Assistance (continued)

- Differs from the traditional case manager
 - ❑ Focuses on supporting the self-directed experience
 - ❑ Facilitates vs. manages
 - ❑ Very personalized approach
 - ❑ Attention to positive personal outcomes
 - ❑ Advises participant on problem solving strategies



Information & Assistance Design Decisions

- Allow individuals to choose their counselor or be assigned one?
- Allow any counselor who meets qualifications to be one or restrict who can be a counselor by RFP, RFQ etc?
 - Medicaid Service match if choice of any qualified counselor
 - Medicaid Administrative match if constrain number of counselors
- Independent counselors vs. agency-hired and managed counselors?
- Allow individual friends and family members to be counselors?



Thank You!

Interested in Self-Direction?
Become a member!

Program, Stakeholder and FMS Membership Options Available

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