



# Support Broker Training: Self-Direction and Care Management Services - How They Work Together

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May 6, 2024

# About Partners Health Plan



**Partners Health Plan (PHP)** is a non-profit organization and operates the nation's only fully integrated duals (Medicare/Medicaid) plan for people with Intellectual and Developmental Disabilities (IDD).

## PHP Benefits Include:

- **\$200 every month** that can be used for items at the pharmacy, groceries, and for home delivered meals and utilities.
- **Free transportation** to and from medical and other important appointments.
- **Expedited Self-Direction** process and approvals.



## The PHP Vision:

PHP, as a trusted partner and advocate for people with developmental disabilities and their families, strives to help our members achieve their life goals, improve their personal health and fully participate in their communities of choice.



## Self-Direction and Care Management Services - How They Work Together

- Review the Role of the Care Manager as defined by OPWDD
- Define the Role of the Care Manager in Self-Direction
- Frequently Asked Questions about Care Management in Self-Direction
- Open Q&A

# A Few Notes



While this training is intended for all Support Brokers and FIs, there may be some information that will be specific to those of you who support a person enrolled in PHP's FIDA-IDD plan vs. a Care Coordination Organization / Health Home (CCO/HH).

In these instances, we will provide information that will apply to anyone self-directing and receiving Care Management services, as well as any specific information for those enrolled in the FIDA-IDD plan or a CCO/HH.



There will be an open Q&A at the end of the presentation. Please submit your questions throughout the presentation using the Q&A function, and your questions will be read aloud and answered to the best of our ability during the open Q&A portion of the training.

If a question cannot be answered during the open Q&A, we will contact you directly and/or include information in the training follow-up resources.

# What is the Role of the Care Manager?

OPWDD: “The coordination of an individual’s care is done through a dedicated Care Manager who oversees and coordinates access to all services.”

The Care Manager **supports the member as they facilitate their Life Plan Meeting** (to the extent the person prefers to do so) and **ensures that all relevant and pertinent information** is gathered from the Care Planning Team, including habilitation providers, and reviewed to inform development of and updates to the Life Plan at the Life Plan meeting.

**Such information may include but is not limited to:**



\*Medical/Health  
Status



Plan of Nursing  
Services



Behavioral  
Support Plans



Medication  
updates/changes



Habilitation  
needs



Safeguard  
needs

# What is the Role of the Care Manager in Self-Direction?

## For Self Direction, the Care Manager will:



Ensure the member is enrolled in the **HCBS Waiver** prior to SD approval.



Ensure the member is discharged from **any certified programs which are being discontinued and replaced** by self-directed services.

- CCO/HH will contact the program to remind them to submit the DDP-1 to update the TABS report.
- PHP-FIDA does not submit DDP-1; they submit an internal form to update the TABS report.



Help **identify Brokers and FIs** for the member to pursue self-directed services.



Update the **DDP-2** at least every 2 years or as needed.

# What is the Role of the Care Manager in Self-Direction?

## For Self Direction, the Care Manager will:



Work with the **SD Broker to ensure that the proper paperwork is submitted** if the member indicates the need for a change or amendment to their self-directed services at the Life Plan review.

- The CCO/HH Care Manager will ensure the paperwork contains justification for self-directed services to submit along with the SART.
- PHP-FIDA Care Manager completes this process internally (SARTs are not required.) Changes to the Life Plan will occur once the amendment/change is reviewed and approved by the FI and PHP Self-Direction Liaison (State-funded services still need to go through the DDRO for approval.)



Be **invited to planning meetings** and **act as the link** between the DDRO SD Liaison and the Circle of Support/Planning Team.



# Frequently Asked Questions



Do Self- Direction budgets differ depending on which Care Management services a person receives?



They do not differ. The person's budget is **determined by their DDP-2 scores** regardless of which Care Management services they receive. However, PHP assumes responsibility for paying out Medicaid-funded services. State-funded services look the same for CCO/HH and FIDA-IDD and still need approval by OPWDD and are paid out by NYS.



Who handles benefits and entitlements for a person receiving Care Management services?



People who live in a non-certified settings, the Care Manager will support them with applying and maintaining benefits, including SSI, SSD, SNAP, and HEAP. Typically, if the person lives in a certified residential setting, the agency supports benefits and entitlements.



Can a person receive FSS if they have Self-Direction?



Yes, FSS is available to those with Self-Direction, but it is on a first-come, first-serve basis so resources can be used up earlier in the year. However, if someone is enrolled in a CCO/HH, they cannot receive FSS Respite.



## How do Life Plans differ depending on the type of Care Management services a person receives?

Life Plans are published every six months. During Life Plan meetings, services are reviewed and assessed for appropriateness for service authorization.



- Life Plans for people enrolled in a CCO/HH need to be reviewed twice per year and the current Life Plan stays in effect until the new Life Plan is published.
- For PHP members, Life Plan meetings are held every 6 months and Life Plans are effective for 6 months at a time. PHP Life Plans include all service authorizations in Section IV, including Medical, DME, Speech, OT, PT, etc.



What are some benefits that a person enrolled in Care Management services receive that would not need to be included in the Self-Direction budget?



For people enrolled in either a CCO/HH or PHP FIDA-IDD, PCA/CDPAS (Personal Care) are benefits that would not need to be included in the Self-Direction budget.

For those enrolled in PHP FIDA-IDD, members receive an OTC Benefit Card if they live in a non-certified setting, to be used towards OTC items, healthy food and money towards utilities, as well as no-cost transportation and gym reimbursement.



## What are some differences between self-directed services under a CCO/HH and the FIDA-IDD plan?

**Note:** If someone is currently receiving self-directed services under a CCO/HH, and decides to enroll in the PHP FIDA-IDD plan, there is **No change** to their budget, FI, and SB.

	CCO/HH	PHP
New SD Enrollment	OPWDD approves request (up to 1 month) & must attend OPWDD Self-Direction Info Session	<b>Notify CM.</b> Once FI selected and Care Manager submits DDP2, initial budget process can begin
Start-Up Budget	OPWDD approves in @1 month	<b>PHP approves</b> in 5-10 business days
Self Direction Budget	OPWDD approves in up to 3 months	<b>PHP approves</b> the Medicaid Funded SD Services portion of the budget
Support Broker Billing	Support Brokers can begin to bill against the start-up budget – Up to 1 month	Support Brokers can <b>begin to bill against the start-up budget – 5-10 business days</b>
CNBA	OPWDD approval – up to 3 months	Medicaid Funded Services are <b>approved in 5-10 business days</b>



Open  
Q&A

## Thank you for joining us!

**Stay tuned for invitations to upcoming Support Broker trainings.**

Visit our website for more information about Self-Direction with Partners Health Plan, and for other helpful resources for Support Brokers and Fiscal Intermediaries: [Self Direction with PHP - Partners Health Plan \(phpcares.org\)](https://phpcares.org)

