

Self Direction Assistance (SDA): An Optional Service of the Medicaid Waiver for Adults with I/DD

The Arc of Illinois

Ligas Family Advocate Program

Welcome:

- Blair Williams, SDA, Active Visions, a Developmental Disabilities Service Provider
- Over 12 years of experience in the field
- Former Assistant Director Home-Based Program
- Former Home-Based Director
- Currently moving into position as Director of Programs

Active Visions

Active Visions, Inc. serves more than 500 children and adults with developmental and intellectual disabilities throughout Chicago and the surrounding suburbs. We strive to empower individuals and families, tailoring our services to meet unique needs. Our services include residential (CILA/Family CILA/Intermittent CILA) management and oversight, facilitation of the Home-Based Program, and an up and coming Day Program.

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Key goals of webinar:

- Understanding the basics of the Home Based Services Program
- Identifying key responsibilities of an Independent Service Coordinator
- Identifying key responsibilities of a Self-Direction Assistant (SDA), including service navigation and family support
- Outlining how an SDA's role does not duplicate the role of an ISC
- How an individual uses waiver funding from the monthly budget to pay for the services of an SDA
- Agency based Personal Support Worker (PSW) –for individuals who need a provider's assistance in finding a PSW

Alphabet Soup of Acronyms

- HBS = Home Based Services program (You or your family manage the supports)
- CILA = Community Integrated Living Arrangement
- IDD = Intellectual/Developmental Disability
- ISC = Independent Service Coordination Agency (manages PUNS, gateway to developmental disability services in Illinois)
- PAS –pre-admission screening (done after PUNS selection by ISC to determine final eligibility for waiver funding)
- DDD = Division of Developmental Disabilities (A division of the Illinois Department of Human Services)
- DRS = Division of Rehabilitation Services (offers a Home Services Program and facilitates the Supported Employment Program in IL; primary program for employment support)
- PSW = Personal Support Worker (PSW is term used in the Home Based Program)
- DSP = Direct Support Professional (DSP is term used in CILA/Developmental Disability Provider managed support services)
- PSH = Permanent Supportive Housing
- SSI = Supplemental Security Income
- SSDI = Social Security Disability Income

Purpose of Home-based Services

- **What is the Purpose of Home-Based Services?**
 - The purpose of Home-Based Services (HBS) is to purchase needed services that will help you continue living safely and successfully in your own home, condominium, house, apartment or permanent supportive housing apartment or with your family. HBS is a "self-directed" program in that individuals, guardians and families have the responsibility to arrange and manage their own services and supports.

Understand the Key Components of Home Based Services

- **Individual** – Person receiving Waiver funding and Support Services
- **Personal Support Worker** – Person hired by individual or family to provide support services
- **Employer of Record** – Person identified to monitor/manage PSW and keep records of time, training, and services provided
- **Access Services** – Fiscal Agent for state of Illinois; manages payroll and provides paychecks to PSW
- **Self Direction Assistant (SDA)** – Assist in record keeping and submission of payroll to ACCE\$
- **Independent Service Coordination** – Gateway to developmental disability services; assists with difficulties, develops Personal Plan, addresses Crisis Needs. The ISC is your first point of contact for most questions about DD services.

The key difference between Home-based and CILA is who manages the services

Home Based Services

- An individual with a disability (and their parent or guardian if needed) will DIRECT their own services. They will be in charge of hiring, training, and maintaining the services that they want and need.

CILA Services

- An individual with a disability prefers to have a Developmental Disability provider manage all of their support services. They will receive services without managing them.

You can move from self-directed services to provider directed CILA services but must work with your ISC and show why the Home-based Services Program no longer meets your needs.

What is the Home-Based Services Program?

- An individual with an intellectual or developmental disability, who has been selected from the PUNS list and approved for funding, decides that they want to be in charge of managing their own services. They, in partnership with their parent or guardian when needed, will:
 - Decide who they would like to hire for personal support services
 - Train their Personal Support Worker (PSW)
 - Schedule their Personal Support Worker
 - Identify an “Employer or Record”
 - Set the pay rate for their PSW
 - Partner with ACES\$ Services to manage payroll for their PSW
 - Consider the use of a Self Direction Assistant (SDA) for assistance with planning and paperwork
 - Services are provided in the family home or a home of your choice, as well as in the community; services provided are based on your Personal Plan

Home-based Services Budgeted Monthly Allotment

- **HBS** provides a monthly budget that you can use to purchase needed services and supports, as identified in your Personal Plan.
- **Your HBS monthly budget does not come to you in cash or a check but is a set amount available for you to purchase services.**
Remember that HBS is to be used for your personal benefit Consumer - not for the benefit of your family, guardians or service providers.
- HBS provides a monthly allotment in the amount of 3 times (current) SSI per month. This is the amount that is currently paid (not the amount the recipient may be receiving!)
- The 2020 monthly amount for adults is $\$783 \times 3 = \2349.00
- \$2349.00 is max funding for services per month



Building a plan that meets your needs:

- DD Services
- Natural Supports
- Community Resources

- **Think through:**

- What do you need assistance with in your daily life?
- What can you do on your own?
- Are you able to spend time alone? Do you like to be alone?
- Who helps you with your needs now?
- Do you prefer to live in your family home or on your own (alone or with a roommate of your choosing)?
- What activities are you involved in? What activities do you want to be involved in?
- Do you have a job? Do you want a job? What kind of support do you need to be successful at work?
- Do you have ongoing medical needs?
- Do you need help managing money and paying bills?
- How do you get to where you want to go?

What are your Natural Supports?

Consider how you might utilize Home Based Support

- -- Individualized Service
- and Support Advocacy
- -- Supported employment
- SEP*
- -- Behavior Counseling
- (Individual and Group)
- -- Behavior Intervention
- and Treatment
- -- Psychotherapy
- -- Support Services Team
- -- PT/OT/Speech Therapy*
- -- Adaptive Equipment*
- -- Assistive Technology*
- -- Home Accessibility &
- Vehicle Modifications*
- -- Self-Direction Assistance
- -- Personal Support
- -- Temporary Assistance
- (if personal support
- worker unavailable)*
- -- Nursing
- -- Emergency Home
- Response Services
- -- Transportation
- (non-medical)
- -- Training and Counseling
- for Unpaid Caregivers
- -- Out of home respite
- -- Adult Day Care*
- -- Community Day Service
- (CDS) program
- -- Temporary Intensive
- Staffing (in CDS
- program only)*
- -- Other Day Program
- (formerly sheltered
- workshop)*
- *** requires authorization and prior approval from DDD**

Key Resources to explore

- Illinois Consumer Handbook for Home-Based Services
 - http://www.dhs.state.il.us/page.aspx?item=101181#a_toc29
- Illinois Medicaid and SNAP online application: Assistance with healthcare, food, cash assistance
 - <https://www.abe.illinois.gov>
- Social Security
 - www.ssa.gov/applyonline/

Role of Self Direction Assistant (SDA)

- Helps individual and family arrange, direct and manage support services in the Home-Based Services (HBS) Program
- Provides education and practical training to help individual and family gain the skills needed to independently manage support services OR an individual can retain an SDA continuously
- Provides education and information to individual and family to ensure they understand their role and responsibilities with HBS
- Must be a Qualified Intellectual Disability Professional (QIDP)
- Must not duplicate the role of the Independent Service Coordination Agency (ISC)
- Current hourly cost to be paid from monthly HBS allotment for an SDA is \$46.61

Other key services of SDA

- Participate in meetings with the ISC regarding the Discovery Process and the development of the Personal Plan
- Assist with Medicaid Spend-down forms and submission of forms to the DHS Family and Community Resource Centers (FCRCs)
- Assist the Employer of Record with completion of the implementation Strategy Form
- Help with the process of recruiting, hiring, and managing Personal Support Workers (PSWs) –including help with understanding requirement to pass background checks, the role of the PSW, and the role of the fiscal agent (ACES)
- Assistance with or training on billing for PSWs, including training on timekeeping for families who have hired their own PSWs
- Assistance with monthly budget planning
- Help with Service Agreement Changes
- Sending Service Agreements and Time Sheets to ACCE\$, the fiscal intermediary for adults with the Home and Community Based waiver for adults with I/DD

Additional services of an SDA

- Working with DD providers and ACES\$ to adjust incorrect bills
- Help with communication and problem solving for PSWs that have been hired directly by the family
- Provision of training to individual, family or PSW to help with individual's skill acquisition
- Assistance with Prior Approval Requests (Ex. Temporary Assistance, Assistive Technology, Therapies, Home Modificaiton)
- Acting as Representative Payee for SSI or SSDI benefits (infrequent)
- Assisting with financial accounts
- Advocacy and facilitation with professional relationships (Ex. Medical providers, DD providers, housing providers)
- Medical advocacy, help at medical appointments, support in communicating medical needs and help getting medical supplies
- Help with refiling medication and connecting with pharmacies
- Assistance with after-hours or emergency needs

And more:

(from
<https://www.dhs.state.il.us/page.aspx?item=93863>)

- Assistance with housing/Landlord issues (Ex. Applications, evictions, pest control, acquiring needed furniture)
- Help with utilities
- Assistance with charity applications
- Acquiring employment and educational supports
- Help with law enforcement/court involvement
- Acquiring food and household needs when there is limited or no income available
- Help with getting needed computer/technology and related education
- Help with getting free gym memberships, bus passes and related services
- Assistance with end-of-life planning, preplanning and necessary arrangements for clients and their family members
- Provision of IEP advocacy

An SDA does not perform the duties of an ISC! Some examples...

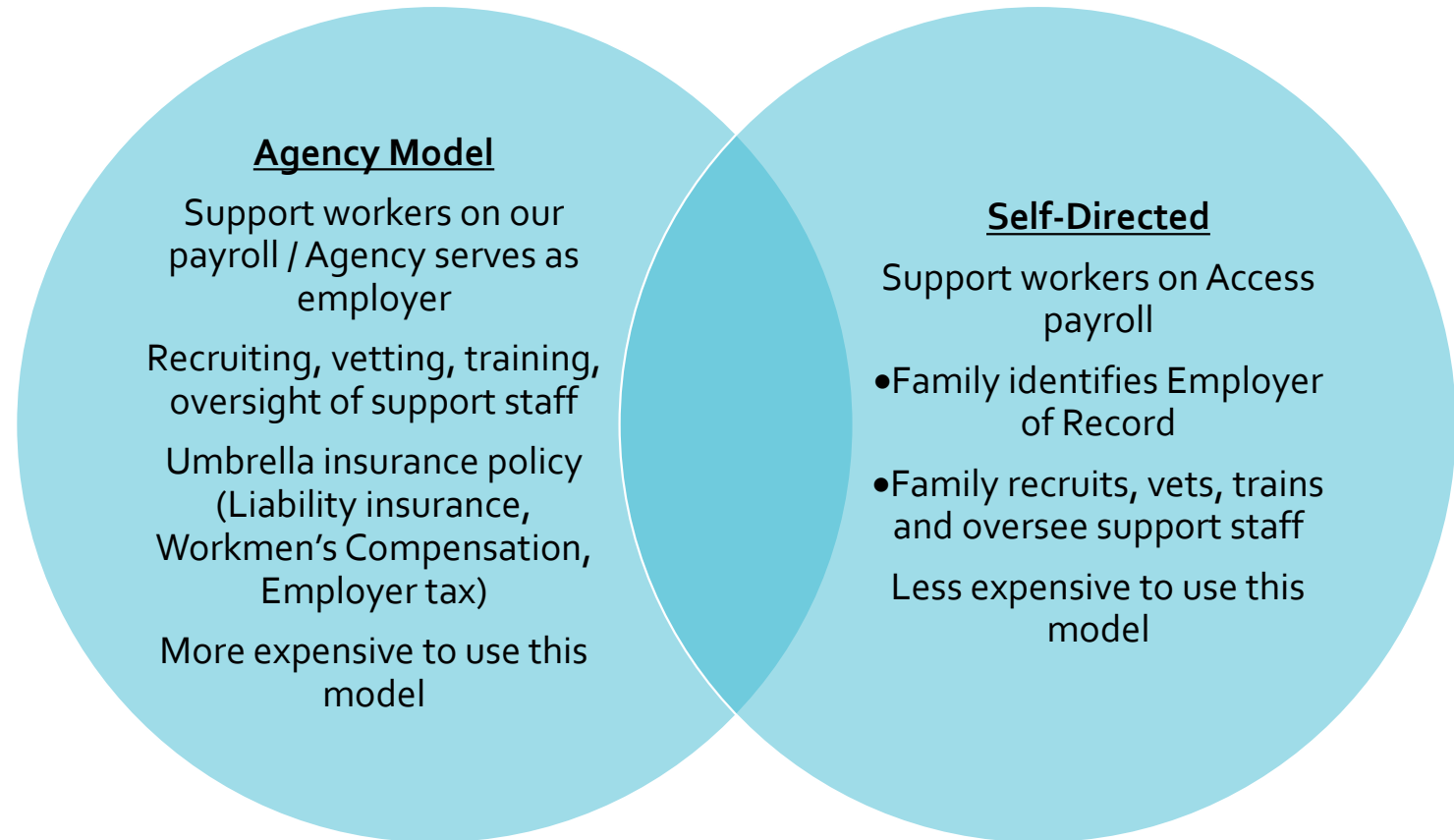
- Development of an individual's Person-Centered Plan; the update of the plan at least annually
- Provision of case management type services (i.e. locating other waiver providers)
- Conducting monitoring visits to ensure implementation of the Person-Centered Plan and to ensure the health, welfare and safety of the individual, (but an SDA can visit the home to provide services)
- Notifying individuals of their Waiver rights and right to appeal on from 1201 and 1202
- Providing training to individual, family, or PSW on individual behavior reduction (If assistance is needed, can purchase behavioral supports through monthly waiver funding)

Agency versus Self-Directed Model

Both Programs:

- Assistance with benefits
- Budget oversight
- Facilitation of program (One-time funding requests, Emergency funding, etc.)
- Bimonthly/quarterly visits (you choose)
- Connection to resources (DT, ABA, guardianship, Special Needs)
- General advocacy for your loved one
- Assistance with paperwork
- Liaison with other providers (SSA, Public Aid, school, etc.)
- We typically charge between 3-5 hours per month (\$139.83-\$233.05). *Rates vary depending on service needs and distance.*

Agency versus Self-Directed Model (continued)



Both models require fingerprinting and annual background checks for all support staff

Active Visions can do a combination of both programs as well

Michael's Story

This is Michael and his sister Mary. Michael is a client who receives SDA services with Active Visions. Michael lives at home in Chicago with his mother who is in her 90's and his sister Mary who lives in the upstairs apartment with her family. When I met him, he was in his early 50's and had a long work history. Michael enjoys his job working in food service at Wrigley Field. When I met Michael, he had been using the Home-Based Program to attend a day program once a week. That was his **only** service. Medicaid was being cancelled every few months due to Spenddown issues and him keeping too much money (over the \$2000 income limit) in his checking account. He **had never received SSI and although he should have been eligible as a Disabled Adult Child, he was not receiving Medicare.**



Michael's Story (continued)

Here are the highlights of what Michael, Mary and I accomplished working together:

Applied with Michael for SSI and SSDI

When Michael was denied for both, helped the family identify and work with a Social Security Attorney who would eventually win the case (and over \$20,000 in back pay)

Provided the family with information/resources to set up a Special Needs Trust

Completed a Qualified Medicare Beneficiary (QMB) form so that once Michael began to receive Medicare, Medicaid would pay the premium

Completed the application on Michael's behalf for a free ride transit card

Assisted with all Medicaid issues and provided resources for an ABLE account so that Michael could save money and protect his benefits

Helped Mary apply through Access as a PSW. Completed time sheets on her behalf and ensured the budget was used in full each month.

Questions?

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