



DEPARTMENT OF HEALTH & HUMAN SERVICES

Centers for Medicare & Medicaid Services

Region 10  
2201 Sixth Avenue, MS/RX 43  
Seattle, Washington 98121

**APR 21 2011**

Richard Armstrong, Director  
Department of Health and Welfare  
Towers Building – Tenth Floor  
Post Office Box 83720  
Boise, Idaho 83720-0036

**RE: Idaho State Plan Amendment (SPA) Transmittal Number 10-015**

Dear Mr. Armstrong:

The Centers for Medicare & Medicaid Services (CMS) Seattle Regional Office has completed its review of Idaho State Plan Amendment (SPA) Transmittal Number 10-015. This amendment adds 1915(i) State plan Home and Community Based Services (HCBS) benefits for children with developmental disabilities.

This SPA is approved effective July 1, 2011.

If you have any questions or comments, please contact me, or have your staff contact Daphne Hicks at (206) 615-2400 or [daphne.hicks@cms.hhs.gov](mailto:daphne.hicks@cms.hhs.gov).

Sincerely,

A handwritten signature in black ink that reads "Carol J.C. Peverly".

Carol J.C. Peverly  
Acting Associate Regional Administrator  
Division of Medicaid and Children's Health  
Operations

cc:

Leslie Clement, Administrator, Idaho Department of Health and Welfare  
Rachel Strutton, State Plan Coordinator, Idaho Department of Health and Welfare

<b>TRANSMITTAL AND NOTICE OF APPROVAL OF STATE PLAN MATERIAL</b>	1. TRANSMITTAL NUMBER: <b>10-015</b>	2. STATE <b>IDAHO</b>
	3. PROGRAM IDENTIFICATION: TITLE XIX OF THE SOCIAL SECURITY ACT (MEDICAID)	
FOR: HEALTH CARE FINANCING ADMINISTRATION	4. PROPOSED EFFECTIVE DATE <b>July 1, 2011</b>	
TO: REGIONAL ADMINISTRATOR HEALTH CARE FINANCING ADMINISTRATION DEPARTMENT OF HEALTH AND HUMAN SERVICES		

5. TYPE OF PLAN MATERIAL (Check One):

- NEW STATE PLAN       AMENDMENT TO BE CONSIDERED AS NEW PLAN       AMENDMENT

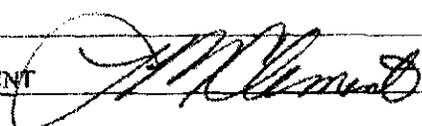
COMPLETE BLOCKS 6 THRU 10 IF THIS IS AN AMENDMENT (Separate Transmittal for each amendment)

6. FEDERAL STATUTE/REGULATION CITATION: Section 6086 of the Deficit Reduction Act of 2005, and Section 2402(b) through 2402(f) of the Affordable Care Act	7. FEDERAL BUDGET IMPACT: N/A
8. PAGE NUMBER OF THE PLAN SECTION OR ATTACHMENT: <b>Supplement 1 to Attachment 3.1-A, page 33a (P+E)</b> <del>Attachment 3.1-C, Enhanced Benchmark Plan, page 49h, and new pages 59-103</del> <b>new Supplement 1, to Attachment 3.1-A, Attachment 4.19-B, new pages 45, 46 and 47 pages 1-47 (P+E)</b>	9. PAGE NUMBER OF THE SUPERSEDED PLAN SECTION OR ATTACHMENT (If Applicable): <del>Attachment 3.1-C, Enhanced Benchmark Plan, page 49h (P+E)</del>

10. SUBJECT OF AMENDMENT:  
Add 1915(i) State plan HCBS benefit for children with developmental disabilities.

11. GOVERNOR'S REVIEW (Check One):

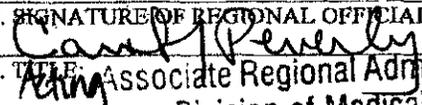
- GOVERNOR'S OFFICE REPORTED NO COMMENT       OTHER, AS SPECIFIED:  
 COMMENTS OF GOVERNOR'S OFFICE ENCLOSED  
 NO REPLY RECEIVED WITHIN 45 DAYS OF SUBMITTAL

12. SIGNATURE OF STATE AGENCY OFFICIAL: 	16. RETURN TO: Leslie M. Clement, Administrator Idaho Department of Health and Welfare Division of Medicaid PO Box 83720 Boise ID 83720-0036-009
13. TYPED NAME: LESLIE M. CLEMENT	
14. TITLE: Administrator	
15. DATE SUBMITTED: <b>9/30/10</b>	

FOR REGIONAL OFFICE USE ONLY

17. DATE RECEIVED: <b>10/01/2010</b>	18. DATE APPROVED: <b>APR 21 2011</b>
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PLAN APPROVED - ONE COPY ATTACHED

19. EFFECTIVE DATE OF APPROVAL: <b>JUL 01 2011</b>	20. SIGNATURE OF REGIONAL OFFICIAL: 
21. TYPED NAME: <b>Carol J.C. Peverly</b>	22. TITLE: <b>Associate Regional Administrator</b> Division of Medicaid & Children's Health

23. REMARKS:

Pen and ink changes authorized by the state on 2/22/11.  
Pen and ink changes authorized by the state on 3/9/11

4/07/2011 - State authorized pen and ink changes to box 8.

**IDAHO MEDICAID  
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Supplement 1 to Attachment 3.1-A, Program Description

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**1915(i) STATE PLAN HOME AND COMMUNITY-BASED SERVICES**

**A. Children with Developmental Disabilities**

**1915(i) State plan Home and Community-Based Services  
Administration and Operation**

The State implements the optional 1915(i) State plan Home and Community-Based Services (HCBS) benefit for elderly and disabled individuals as set forth below.

1. **Services.** *(Specify service title(s) for the HCBS listed in Attachment 4.19-B that the State plans to cover):*

Respite
Habilitative Supports
Family Education
Community Support Services
Support Broker
Financial Management Services

2. **Statewide.** *(Select one):*

<input checked="" type="checkbox"/>	The State implements the 1915(i) State plan HCBS benefit statewide, per §1902(a)(1) of the Act.
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3. **State Medicaid Agency (SMA) Line of Authority for Operating the State plan HCBS Benefit.** *(Select one):*

<input type="checkbox"/>	The State plan HCBS benefit is operated by the SMA. Specify the SMA division/unit that has line authority for the operation of the program <i>(select one)</i> :	
<input checked="" type="checkbox"/>	The Medical Assistance Unit <i>(name of unit)</i> :	Division of Medicaid
<input type="checkbox"/>	Another division/unit within the SMA that is separate from the Medical Assistance Unit <i>(name of division/unit)</i> <i>This includes administrations/divisions under the umbrella agency that have been identified as the Single State Medicaid Agency.</i>	
<input type="checkbox"/>	The State plan HCBS benefit is operated by <i>(name of agency)</i>	
	a separate agency of the State that is not a division/unit of the Medicaid agency. In accordance with 42 CFR §431.10, the Medicaid agency exercises administrative discretion in the administration and supervision of the State plan HCBS benefit and issues policies, rules and regulations related to the State plan HCBS benefit. The interagency agreement or memorandum of understanding that sets forth the authority and arrangements for this delegation of authority is available through the Medicaid agency to CMS upon request.	

## IDAHO MEDICAID STANDARD STATE PLAN

### Supplement 1 to Attachment 3.1-A, Program Description

#### Distribution of State plan HCBS Operational and Administrative Functions.

X (By checking this box the State assures that): When the Medicaid agency does not directly conduct an administrative function, it supervises the performance of the function and establishes and/or approves policies that affect the function. All functions not performed directly by the Medicaid agency must be delegated in writing and monitored by the Medicaid Agency. When a function is performed by an agency/entity other than the Medicaid agency, the agency/entity performing that function does not substitute its own judgment for that of the Medicaid agency with respect to the application of policies, rules and regulations. Furthermore, the Medicaid Agency assures that it maintains accountability for the performance of any operational, contractual, or local regional entities. In the following table, specify the entity or entities that have responsibility for conducting each of the operational and administrative functions listed (check each that applies):

(Check all agencies and/or entities that perform each function):

Function	Medicaid Agency	Other State Operating Agency	Contracted Entity	Local Non-State Entity
1 Individual State plan HCBS enrollment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 State plan HCBS enrollment managed against approved limits, if any	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Eligibility evaluation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 Review of participant service plans	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Prior authorization of State plan HCBS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Utilization management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Qualified provider enrollment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Execution of Medicaid provider agreement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Establishment of a consistent rate methodology for each State plan HCBS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 Rules, policies, procedures, and information development governing the State plan HCBS benefit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 Quality assurance and quality improvement activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Specify, as numbered above, the agencies/entities (other than the SMA) that perform each function):

Eligibility evaluation: Independent Assessment Provider

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*(By checking the following boxes the State assures that):*

5.  **Conflict of Interest Standards.** The State assures the independence of persons performing evaluations, assessments, and plans of care. Written conflict of interest standards ensure, at a minimum, that persons performing these functions are not:
- related by blood or marriage to the individual, or any paid caregiver of the individual
  - financially responsible for the individual
  - empowered to make financial or health-related decisions on behalf of the individual
  - providers of State plan HCBS for the individual, or those who have interest in or are employed by a provider of State plan HCBS; except, at the option of the State, when providers are given responsibility to perform assessments and plans of care because such individuals are the only willing and qualified provider in a geographic area, and the State devises conflict of interest protections. *(If the State chooses this option, specify the conflict of interest protections the State will implement):*

N/A

6.  **Fair Hearings and Appeals.** The State assures that individuals have opportunities for fair hearings and appeals in accordance with 42 CFR 431 Subpart E.
7.  **No FFP for Room and Board.** The State has methodology to prevent claims for Federal financial participation for room and board in State plan HCBS.
8.  **Non-duplication of services.** State plan HCBS will not be provided to an individual at the same time as another service that is the same in nature and scope regardless of source, including Federal, State, local, and private entities. For habilitation services, the State includes within the record of each individual an explanation that these services do not include special education and related services defined in the Individuals with Disabilities Improvement Act of 2004 that otherwise are available to the individual through a local education agency, or vocational rehabilitation services that otherwise are available to the individual through a program funded under §110 of the Rehabilitation Act of 1973.

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**Number Served**

**1. Projected Number of Unduplicated Individuals To Be Served Annually.**

*(Specify for year one. Years 2-5 optional):*

Annual Period	From	To	Projected Number of
Year 1	July 1, 2011	June 30, 2012	3,195
Year 2	July 1, 2012	June 30, 2013	3,387
Year 3	July 1, 2013	June 30, 2014	3,590
Year 4	July 1, 2014	June 30, 2015	3,805
Year 5	July 1, 2015	June 30, 2016	4,033

**2.  Annual Reporting.** *(By checking this box the State agrees to):* annually report the actual number of unduplicated individuals served and the estimated number of individuals for the following year.

**3. Optional Annual Limit on Number Served.**

<input checked="" type="checkbox"/>	The State does not limit the number of individuals served during the year.
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**Financial Eligibility**

1. **X Income Limits.** *(By checking this box the State assures that):* Individuals receiving State plan HCBS are in an eligibility group covered under the State's Medicaid State plan, and who have income that does not exceed 150% of the Federal Poverty Level (FPL). The State has a process in place that identifies individuals who have income that does not exceed 150% of the FPL

2. **Medically Needy.** *(Select one):*

<input checked="" type="radio"/>	The State does not provide State plan HCBS to the medically needy.
<input type="radio"/>	The State provides State plan HCBS to the medically needy <i>(select one):</i>
<input type="radio"/>	The State elects to disregard the requirements at section 1902(a)(10)(C)(i)(III) of the Social Security Act relating to community income and resource rules for the medically needy.
<input type="radio"/>	The State does not elect to disregard the requirements at section 1902(a)(10)(C)(i)(III).

**Needs-Based Evaluation/Reevaluation**

1. **Responsibility for Performing Evaluations / Reevaluations.** Eligibility for the State plan HCBS benefit must be determined through an independent evaluation of each individual. Independent evaluations/reevaluations to determine whether applicants are eligible for the State plan HCBS benefit are performed *(select one):*

<input type="radio"/>	Directly by the Medicaid agency
<input checked="" type="radio"/>	By Other <i>(specify State agency or entity with contract with the State Medicaid agency):</i> Contracted Independent Assessment provider(s) will be determined according to state purchasing requirements.

2. **Qualifications of Individuals Performing Evaluation/Reevaluation.** The independent evaluation is performed by an agent that is independent and qualified. There are qualifications (that are reasonably related to performing evaluations) for the individual responsible for evaluation/reevaluation of needs-based eligibility for State plan HCBS. *(Specify qualifications):*

Qualified Mental Retardation Professional (QMRP) in accordance with 42 CFR 483.430a.
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3. **Process for Performing Evaluation/Reevaluation.** Describe the process for evaluating whether individuals meet the needs-based State plan HCBS eligibility criteria and any instrument(s) used to make this determination. If the reevaluation process differs from the evaluation process, describe the differences:

Participants applying for 1915(i) state plan option services will be referred to the independent assessment provider (IAP) for initial eligibility determination. The IAP will evaluate the participant using the Scales of Independent Behavior-Revised (SIB-R) and an inventory of individual needs to determine if the participant meets the needs-based criteria. Reevaluations must be completed annually for current participants. The independent assessor must reassess the participant, or establish and document that the existing assessments reflect the participant's current needs.

4.  **Needs-based HCBS Eligibility Criteria.** *(By checking this box the State assures that):* Needs-based criteria are used to evaluate and reevaluate whether an individual is eligible for State plan HCBS.

The criteria take into account the individual's support needs, and may include other risk factors: *(Specify the needs-based criteria):*

- Require assistance due to substantial limitations in three or more of the following major life activities - self care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living or economic self sufficiency; and
- Reflect the need for a combination and sequence of special, interdisciplinary services due to a delay in developing age appropriate skills occurring before the age of 22.

5.  **Target Group(s).** Under the waiver of Section 1902(a)(10)(B) of the Act, the State limits 1915(i) state plan option services to a group or subgroups of individuals:

Children, birth through age seventeen (17), who are determined to have a developmental disability in accordance with Sections 500 through 506 under IDAPA 16.03.10 "Medicaid Enhanced Plan Benefits" and Section 66-402, Idaho Code.

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6. **X Needs-based Institutional and Waiver Criteria.** *(By checking this box the State assures that):* There are needs-based criteria for receipt of institutional services and participation in certain waivers that are more stringent than the criteria above for receipt of State plan HCBS. If the State has revised institutional level of care to reflect more stringent needs-based criteria, individuals receiving institutional services and participating in certain waivers on the date that more stringent criteria become effective are exempt from the new criteria until such time as they no longer require that level of care. *(Complete chart below to summarize the needs-based criteria for State Plan HCBS and corresponding more-stringent criteria for each of the following institutions):*

**Needs-Based/Level of Care (LOC) Criteria**

State plan HCBS needs-based eligibility criteria	NF (& NF LOC waivers)	ICF/MR (& ICF/MR LOC waivers)	Applicable Hospital* LOC (& Hospital LOC waivers)
<p>Require assistance due to substantial limitations in three or more of the following major life activities - self care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living or economic self sufficiency; and Reflect the need for a combination and sequence of special, interdisciplinary services due to a delay in developing age appropriate skills occurring before the age of 22.</p>	<p>The participant requires nursing facility level of care when a child meets one (1) or more of the following criteria:  <b>01. Supervision Required for Children.</b> Where the inherent complexity of a service prescribed by the physician is such that it can be safely and effectively performed only by or under the supervision of a licensed nurse or licensed physical or occupational therapist.  <b>02. Preventing Deterioration for Children.</b> Skilled care is</p>	<p><b>01. Diagnosis.</b> Persons must be financially eligible for Medicaid; must have a primary diagnosis of being intellectually disabled or have a related condition defined in Section 66-402, Idaho Code and Section 500 through 506 of these rules; and persons must qualify based on functional assessment, maladaptive behavior, a combination of both, or medical condition; and  <b>02. Must Require Certain Level of Care.</b> Persons living in the community must require</p>	<p>The state uses criteria defined in 42 CFR 440.10 for inpatient hospital services.</p>
	<p>needed to prevent, to the extent possible, deterioration of the child's condition or to sustain current capacities, regardless of the restoration potential of a child, even where full recovery or medical improvement is not possible.  <b>03. Specific Needs for Children.</b> When the plan of care, risk factors, and aggregate of health care needs is such that the assessments, interventions, or</p>	<p>the level of care provided in an ICF/ID, including active treatment, and in the absence of available intensive alternative services in the community, would require institutionalization, other than services in an institution for mental disease, in the near future; and  <b>03. Functional Limitations.</b>  a. Persons Sixteen Years of Age or Older. Persons (sixteen (16) years of age or older) may qualify</p>	

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	<p>supervision of the child necessitates the skills of a licensed nurse or a licensed physical therapist or licensed occupational therapist. In such cases, the specific needs or activities must be documented by the physician's orders, progress notes, plan of care, and nursing and therapy notes.</p> <p><b>04. Nursing Facility Level of Care for Children.</b> Using the above criteria, plus consideration of the developmental milestones, based on the age of the child, the Department's will determine nursing facility level of care.</p>	<p>based on their functional skills. Persons with an age equivalency composite score of eight (8) years and zero (0) months or less on a full scale functional assessment (Woodcock Johnson Scales of Independent Behavior, or SIB-R, or subsequent revisions) would qualify; or</p> <p><b>b. Persons Under Sixteen Years of Age.</b> Persons (under sixteen (16) years of age) qualify if their composite full scale functional age equivalency is less than fifty percent (50%) of their chronological age; or</p> <p><b>04. Maladaptive Behavior.</b></p> <p><b>a. A Minus Twenty-Two (-22) or Below Score.</b> Individuals may qualify for ICF/ID level of care based on maladaptive behavior. Persons will be eligible if their General Maladaptive Index on the Woodcock Johnson Scales of Independent Behavior (SIB-R) or subsequent revision is minus twenty-two (-22) or less; or</p> <p><b>b. Above a Minus Twenty-Two (-22) Score.</b> Individuals who score above minus twenty-two (-22) may qualify for ICF/ID level of care if they engage in aggressive or self injurious behaviors of such intensity that the behavior seriously endangers the safety of the individual or others, the behavior is directly related to developmental disability, and the person requires active treatment</p>	
		<p>requires active treatment</p>	

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		<p>to control or decrease the behavior; or</p> <p><b>05. Combination Functional and Maladaptive Behaviors.</b> Persons may qualify for ICF/ID level of care if they display a combination of criteria as described in Subsections 585.05 and 585.06 of these rules at a level that is significant and it can be determined they are in need of the level of services provided in an ICF/ID, including active treatment services. Significance would be defined as: (3-19-07) a.</p> <p><b>Persons Sixteen Years of Age or Older.</b> For persons sixteen (16) years of age or older, an overall age equivalency up to eight and one-half (8 1/2) years is significant in the area of functionality when combined with a General Maladaptive Index on the Woodcock Johnson SIB-R up to minus seventeen (-17), minus twenty-two (-22) inclusive; or</p>	
		<p><b>b. Persons Under Sixteen Years of Age.</b> For persons under sixteen (16) years of age, an overall age equivalency up to fifty-three percent (53%) of their chronological age is considered significant when combined with a General Maladaptive Index on the Woodcock Johnson SIB-R between minus seventeen (-17), and minus twenty-one (-21) inclusive; or</p> <p><b>06. Medical Condition.</b> Individuals may meet ICF/ID level of care based</p>	

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		<p>on their medical condition if the medical condition significantly affects their functional level/capabilities and it can be determined that they are in need of the level of services provided in an ICF/ID, including active treatment services.</p>	
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*(By checking the following boxes the State assures that):*

7.  **Reevaluation Schedule.** Needs-based eligibility reevaluations are conducted at least every twelve months.
8.  **Adjustment Authority.** The State will notify CMS and the public at least 60 days before exercising the option to modify needs-based eligibility criteria in accord with 1915(i)(1)(D)(ii).
9.  **Residence in home or community.** The State plan HCBS benefit will be furnished to individuals who reside in their home or in the community, not in an institution. The State attests that each individual receiving State plan HCBS:
  - (i) Resides in a home or apartment not owned, leased or controlled by a provider of any health-related treatment or support services; or
  - (ii) Resides in a home or apartment that is owned, leased or controlled by a provider of one or more health-related treatment or support services, if such residence meets standards for community living as defined by the State. *(If applicable, specify any residential settings, other than an individual's home or apartment, in which residents will be furnished State plan HCBS. Describe the standards for community living that optimize participant independence and community integration, promote initiative and choice in daily living, and facilitate full access to community services):*

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**Person-Centered Planning & Service Delivery**

*(By checking the following boxes the State assures that):*

1.  There is an independent assessment of individuals determined to be eligible for the State plan HCBS benefit. The assessment is based on:
  - An objective face-to-face assessment with a person-centered process by an agent that is independent and qualified;
  - Consultation with the individual and if applicable, the individual's authorized representative, and includes the opportunity for the individual to identify other persons to be consulted, such as, but not limited to, the individual's spouse, family, guardian, and treating and consulting health and support professionals caring for the individual;
  - An examination of the individual's relevant history, including findings from the independent evaluation of eligibility, medical records, an objective evaluation of functional ability, and any other records or information needed to develop the plan of care;
  - An examination of the individual's physical and mental health care and support needs, strengths and preferences, available service and housing options, and when unpaid caregivers will be relied upon to implement the plan of care, a caregiver assessment;
  - If the State offers individuals the option to self-direct State plan HCBS, an evaluation of the ability of the individual (with and without supports), or the individual's representative, to exercise budget and/or employer authority; and
  - A determination of need for (and, if applicable, determination that service-specific additional needs-based criteria are met for), at least one State plan home and community-based service before an individual is enrolled into the State plan HCBS benefit.
2.  Based on the independent assessment, the individualized plan of care:
  - Is developed with a person-centered process in consultation with the individual, and others at the option of the individual such as the individual's spouse, family, guardian, and treating and consulting health care and support professionals. The person-centered planning process must identify the individual's physical and mental health support needs, strengths and preferences, and desired outcomes;
  - Takes into account the extent of, and need for, any family or other supports for the individual, and neither duplicates, nor compels, natural supports;
  - Prevents the provision of unnecessary or inappropriate care;
  - Identifies the State plan HCBS that the individual is assessed to need;
  - Includes any State plan HCBS in which the individual has the option to self-direct the purchase or control ;
  - Is guided by best practices and research on effective strategies for improved health and quality of life outcomes; and
  - Is reviewed at least every 12 months and as needed when there is significant change in the individual's circumstances.
3. **Responsibility for Face-to-Face Assessment of an Individual's Support Needs and Capabilities.** There are educational/professional qualifications (that are reasonably related to performing assessments) of the individuals who will be responsible for conducting the independent assessment, including specific training in assessment of individuals with physical and mental needs for HCBS. *(Specify qualifications):*

<p>At a minimum, the qualifications of the individuals conducting the independent assessment include:</p> <ol style="list-style-type: none"><li>1. Qualified Mental Retardation Professional (QMRP) in accordance with 42 CFR 483.430 which includes;<ol style="list-style-type: none"><li>a. Having at least one (1) year experience working directly with persons with mental retardation or other developmental disabilities or;</li><li>b. Being licensed as a doctor of medicine or osteopathy, or as a nurse or;</li><li>c. Having at least a bachelor's degree in one of the following professional categories: psychology, social work, occupational therapy, speech pathology, professional recreation, or other related human services professions.</li></ol></li><li>2. Have training and experience in completing and interpreting assessments.</li></ol>
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- 4. Responsibility for Plan of Care Development.** There are qualifications (that are reasonably related to developing plans of care) for persons responsible for the development of the individualized, person-centered plan of care. *(Specify qualifications):*

Individuals meeting Qualified Mental Retardation Professional (QMRP) qualifications in accordance with 42 CFR 483.430a are qualified to develop the plan of care with direct Department oversight.

- 5. Supporting the Participant in Plan of Care Development.** Supports and information are made available to the participant (and/or the additional parties specified, as appropriate) to direct and be actively engaged in the plan of care development process. *(Specify: (a) the supports and information made available, and (b) the participant's authority to determine who is included in the process):*

Participants who select State plan HCBS are given an orientation to developmental disability services by the Department or its contractor. Participants and their parent/legal guardian may develop their own plan or designate a paid or unpaid plan developer. If the participant and parent/legal guardian chooses to develop their own plan or use an unpaid plan developer, the Department is available to assist in completing all required components. Family-centered planning must include at a minimum the parent/legal guardian, and the plan developer. With the parent/legal guardian's consent, the family-centered planning team may also include additional family members or individuals who are significant to the participant.

Participants and their parent/legal guardian who choose family-direction receive an orientation on family-direction and training from the Department. Families may select a qualified support broker to assist with writing the Support and Spending Plan, or they may choose to become a qualified support broker approved by the Department. As outlined in IDAPA 16.03.13, "Consumer-Directed Services," the participant and parent/legal guardian decides who will participate in the planning sessions in order to ensure the participant's choices are honored and promoted. The family may direct the family-centered planning meetings, or these meetings may be facilitated by a chosen support broker. In addition, the participant and parent/legal guardian selects a circle of support. Members of the circle of support commit to work within the group to help promote and improve the life of the participant in accordance with the participant's choices and preferences, and meet on a regular basis to assist the participant and parent/legal guardian to accomplish their expressed goals.

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- 6. Informed Choice of Providers.** *(Describe how participants are assisted in obtaining information about and selecting from among qualified providers of the 1915(i) services in the plan of care):*

Once participants are determined eligible for services, they and their families are given an opportunity to participate in orientation training about developmental disability services in Idaho. During family orientation, participants and their families are provided with a list of all approved providers in the state of Idaho, which is organized by geographic area. This provider list includes the website link for the children's DD website at [www.redesignforchildren.medicaid.idaho.gov](http://www.redesignforchildren.medicaid.idaho.gov) so that participants and families have access to the most current providers in their area and across the state. Both the orientation and the provider list include a statement that the family may choose any willing and available provider in the state. Families are also informed of how to navigate the website to access the list of providers as well as how to access other helpful resources available to them.

Families are also provided with resources on interviewing potential providers and are encouraged to contact multiple providers to identify the provider that can best meet their needs. In addition, families are informed that who they select is their choice and they may change their choice of providers if they want. The plan developer is utilized to assist families in selecting service providers at the family's request.

- 7. Process for Making Plan of Care Subject to the Approval of the Medicaid Agency.** *(Describe the process by which the plan of care is made subject to the approval of the Medicaid agency):*

In both the traditional and family-directed options, the plan is developed by the participant and parent/legal guardian with their support team. The support team is typically comprised of the plan developer or a support broker, the parent/legal guardian, at least one involved care giver and any friends, family or support staff that the family wants to invite. The number of people who can be involved is not limited. Besides the parent/legal guardian, the plan developer is the only person who is required to be a member of the support team.

In the traditional model, the plan developer submits the plan of service to the Department at least 45 days prior to the expiration date of the current plan of service. This requirement is stated in IDAPA 16.03.10. The Department has 45 days to review the plan of service, discuss any issues with the plan developer, request changes as needed, and enter the authorization into the MMIS.

Participants and their parents or legal guardians who choose to family-direct their services submit their Support and Spending Plan directly to the Department for review and authorization. The Department has ten (10) days to review the plan. The participant and parent/legal guardian, and their circle of supports are in charge of how long the plan development process takes. The process may take from a few days to much longer, depending on the needs and wants of the participant, their family and the support team.

The IAP conducts and/or collects a variety of assessments and determines the participant's individualized budget at the time of initial application and on an annual basis, for both the traditional and the family-directed option.

The IAP conducts the following assessments at the time of the initial application for children's DD services:

- Scales of Independent Behavior – Revised (SIB-R) functional assessment.
- Medical, Social and Developmental Assessment Summary.

At the time of annual re-determination, the IAP conducts and/or reviews the following:

- The Medical, Social and Developmental Assessment Summary is reviewed and updated.
- The SIB-R results are reviewed and another assessment performed if there are significant changes in the participant's situation or the reassessment criteria are met.

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The following assessments are gathered on an as-needed basis or may be used as historical information at the time of both initial and annual re-determinations:

- Psychological evaluations, including evaluations regarding cognitive abilities, mental health issues and issues related to traumatic brain injury.
- Neuropsychological evaluations.
- Physical, occupational and speech-language pathology evaluations.
- Developmental and specific skill assessments.

The results of a physical examination by the participant's primary care physician are provided to the IAP on an annual basis. The physician can provide information using the Medical Care Evaluation Form and/or by submitting a narrative report.

The service and support desires and needs of participants measured by the Scales of Independent Behavior Revised (SIB-R), historical record of service expenditures, when available, and the characteristics of persons served measured by the Idaho Individual Budget Screen are used by the IAP in a stepwise regression analysis to develop a prospective individual budget for each participant. This budget-setting is completed by the IAP in advance of the family-centered planning process and is used in the development of a plan of service.

Participants using traditional State plan HCBS, and their support team, must be assessed for health and safety issues. Participants using the family-directed option, and their support team, must complete safety plans related to any identified health and safety risks and submit them to the Department.

In the traditional option, the participant and parent/legal guardian's needs, goals, preferences and health status are summarized on the plan of service. This document is a result of the family-centered planning meeting listing a review of all assessed needs and participant and parent/legal guardian preferences. In addition, the plan developer is responsible to collect data status reviews from all paid providers, synthesize all of the information and include it on the plan of service. The participant's parent/legal guardian sign the plan of service to indicate it is correct, complete, and represents the participant and parent/legal guardian's needs and wants.

Family-directed participant's needs, goals, preferences, health status, and safety risks are summarized on the Support and Spending Plan and in the Family-Direction workbook. The circle of supports, using family-centered planning, develops these documents and submits them to the Department at the time of initial/annual plan review.

Participants and their parent/legal guardian, along with other members of the support team can receive information regarding State plan HCBS through several methods:

- The Department of Health and Welfare web site for Children's DD Services will have a page giving a detailed explanation for each service provided under the 1915(i) state plan option. This information will be posted on the website following federal and state approval, and is anticipated to be posted no later than the implementation date of July 1, 2011. The URL for the web site is:  
[www.redesignforchildren.medicaid.idaho.gov](http://www.redesignforchildren.medicaid.idaho.gov).
- The IAP manual includes a list of all State plan HCBS with a description of what each service entails. The IAP uses this page to explain the various options to initial applicants.
- The IAP provides each new applicant with a Consumer Tool Kit which includes a listing of agencies in the local area that provide developmental disabilities services for children.

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- The plan developer is charged with verbally explaining the various programs and options to the participant and parent/legal guardian during the family-centered planning process, under the traditional option.
- The support broker is charged with assisting the participant and parent/legal guardian to assess what services meet their needs, under the family-direction option.

Idaho requires that a family-centered planning process be utilized in plan development to ensure that participant goals, needs and preferences are reflected on the plan of service or on the Support and Spending Plan.

Plan developers, which can include a paid or unpaid person, are trained in family-centered planning, and possess the education and experience needed to assist families in making decisions about their child's course of treatment and Medicaid services. The child's goals, needs, and resources are identified through a Comprehensive Review process that includes review of assessments and history of services, and family-centered planning.

Participants and their parent/legal guardian who choose to family-direct must attend training offered by the Department prior to submitting a Support and Spending Plan. Completion of this training is documented in the family-direction quality assurance database. The training covers participant and parent/legal guardian responsibilities in family-direction and the process of developing a Support and Spending Plan. The family-directed option utilizes a workbook and a support broker to ensure that the participant's individual goals, needs and preferences are thoroughly explored and prioritized during the plan development process.

Children's State plan HCBS participants typically receive a variety of services and other supports to address their needs and wants. The family-centered planning team works to ensure that the plan of service adequately reflects the necessary services. The plan of service is a single plan that includes the goals, objectives and assessment results from all of a child's services and supports in the child's system of care. The plan of service will demonstrate collaboration is taking place among providers and that objectives are directly related to the goals of the family.

Under the traditional option, the responsibility is placed on the plan developer, plan monitor, IAP, and Department to complete the plan development process.

- The IAP is responsible to submit the assessment and individualized budget to the plan developer.
- The plan developer and monitor is responsible to:
  - Ensure that services are not duplicative, and are complimentary and appropriate
  - Work with the members of the family-centered planning team and providers to ensure that the service needs of the participant are reflected on the plan of service
  - Act as the primary contact for the family and providers
  - Link the family to training and education to promote the family's ability to competently choose from existing benefits
  - Complete a comprehensive review of the child's needs, interests, and goals
  - Assist the family to allocate funding from their child's individualized budget
  - Monitor the progress of the plan of service
  - Ensure that changes to the plan of service are completed when needed
  - Facilitate communication between the providers in a child's system of care

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Under the family-directed option, the responsibility is placed on the participant and parent/legal guardian to coordinate services with assistance from the Department and F/EA as required.

- The IAP is responsible to submit the assessment and individualized budget to the Department.
- The family and a support broker use the Family-Direction Workbook and the family-centered planning process to identify the participant's needs and develop a Support and Spending Plan.
- The Department reviews the plan to ensure that all health and safety risks are covered.
- The Fiscal/Employer Agent (F/EA) ensures that duplication of payment does not occur.

Each participant using traditional services must select and use a paid or unpaid plan monitor who will monitor the plan. The family-centered planning team must identify the frequency of monitoring but at a minimum it must occur at least annually. In addition, the plan must be monitored for continuing quality. Plan monitoring ensures that the plan of service continues to address the participant's goals, needs and preferences by requiring:

- Contact with the parent/legal guardian at least annually or as needed to identify the current status of the program and changes if needed. Changes may be made to the plan when a service is added or eliminated, when service objectives or goals are changed, when there is a change in provider, or when the child's level of needs change. The plan should be changed to ensure that the services continue to align with the child's individualized budget and that the family is up to date on the services their child is receiving.
- Contact with service providers to identify barriers to service provision.
- Discuss satisfaction regarding quality and quantity of services with the family.
- Review of provider status reports and complete a plan monitor summary after the six month review and for annual plan development.

Participants and their parent/legal guardian who family-direct their services may choose to assume the responsibility of plan monitoring themselves, utilize members of the circle of supports, or require a support broker to perform these duties. This decision is made in the circle of supports during the family-centered planning process and is reflected in the Family-Direction workbook.

Each participant is required to complete a new plan of service annually. The IAP sends written notification 120 days prior to the expiration of the current plan. The notice requests that the family schedule a meeting with the IAP to begin the process of eligibility re-determination and annual budget determination. Families will work closely with the plan developer and at any time can determine the need to add, decrease, or change services. Both plans and addendums will be reviewed by the Department.

Participants and their parent/legal guardian who are family-directing their services are required to complete a new Support and Spending Plan annually. Families can request changes be made to their Support and Spending plan at any time during the plan year by completing a plan change form and submitting to the Department for review.

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- 8. Maintenance of Plan of Care Forms.** Written copies or electronic facsimiles of service plans are maintained for a minimum period of 3 years as required by 45 CFR §74.53. Service plans are maintained by the following (*check each that applies*):

<input checked="" type="checkbox"/>	Medicaid agency	<input type="checkbox"/>	Operating agency	<input type="checkbox"/>	Case manager
<input type="checkbox"/>	Other ( <i>specify</i> ):				

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**Services**

**1. State plan HCBS.** (Complete the following table for each service. Copy table as needed):

<b>Service Specifications</b> (Specify a service title for the HCBS listed in Attachment 4.19-B that the State plans to cover):			
Service Title:	Respite		
<b>Service Definition (Scope):</b>			
<p>Respite is provided to the participant on an intermittent or short-term basis because of the absence or need for relief of the primary unpaid caregiver. Respite services are provided in a variety of settings and may be provided on an hourly or daily basis.</p> <p>Respite is available in response to a family emergency or crisis, or may be used on a regular basis to provide relief to the caregiver. Respite may be provided in the participant's home, the private home of the respite provider, a developmental disabilities agency, or in community settings.</p> <p>Respite may only be offered to participants who have an unpaid primary caregiver living in the home who requires relief.</p> <p>Limitations:</p> <ul style="list-style-type: none"> <li>• Payment for respite services are not made for room and board.</li> <li>• Respite cannot be provided during the same time other HCBS are being provided to a participant.</li> <li>• Respite cannot be provided on a continuous, long-term basis where it is part of daily services that would enable an unpaid caregiver to work.</li> <li>• Respite services shall not duplicate other Medicaid reimbursed services.</li> </ul>			
Additional needs-based criteria for receiving the service, if applicable (specify):			
N/A			
Specify limits (if any) on the amount, duration, or scope of this service for (choose each that applies):			
<input checked="" type="checkbox"/>	Categorically needy (specify limits):		
	Subject to individualized budget maximums.		
<input type="checkbox"/>	Medically needy (specify limits):		
<b>Provider Qualifications</b> (For each type of provider. Copy rows as needed):			
<b>Provider Type (Specify):</b>	<b>License (Specify):</b>	<b>Certification (Specify):</b>	<b>Other Standard (Specify):</b>
<b>Developmental Disabilities Agency</b>		Developmental Disabilities Agency (DDA) certificate as described in Idaho Administrative	Individuals must meet the minimum general training requirements defined in IDAPA rule "Developmental Disabilities Agencies", and in addition must meet the following qualifications to provide respite in a DDA:

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		Code.	Providers must meet the qualifications prescribed for the type of services to be rendered or must be an individual selected by the participant and parent/legal guardian; have received care giving instructions in the needs of the participant who will be provided the service; demonstrate the ability to provide services according to a plan of service; have good communication and interpersonal skills and the ability to deal effectively, assertively and cooperatively with a variety of people; be willing to accept training and supervision; be free of communicable diseases; and pass a criminal background check.
<b>Respite Care Provider</b>			Individuals must meet the minimum general training requirements defined in IDAPA rule "Developmental Disabilities Agencies", and in addition must meet the following qualifications to provide respite: Providers must meet the qualifications prescribed for the type of services to
			be rendered or must be an individual selected by the participant and parent/legal guardian; have received care giving instructions in the needs of the participant who will be provided the service; demonstrate the ability to provide services according to a plan of service; have good communication and interpersonal skills and the ability to deal effectively, assertively and cooperatively with a variety of people; be willing to accept training and supervision; be free of communicable diseases; and pass a criminal background check.
<b>Verification of Provider Qualifications</b> (For each provider type listed above. Copy rows as needed):			

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Provider Type (Specify):	Entity Responsible for Verification (Specify):	Frequency of Verification (Specify):
<b>Developmental Disabilities Agencies</b>	Department of Health and Welfare	<ul style="list-style-type: none"> <li>- At initial provider agreement approval or renewal</li> <li>- At least every three years, and as needed based on service monitoring concerns</li> </ul>
<b>Respite Care Provider</b>	Department of Health and Welfare	<ul style="list-style-type: none"> <li>- At initial provider agreement approval or renewal</li> <li>- At least every three years, and as needed based on service monitoring concerns</li> </ul>
<b>Service Delivery Method. (Check each that applies):</b>		
<input type="checkbox"/> Participant-directed	<input checked="" type="checkbox"/> Provider managed	
<b>Service Specifications (Specify a service title for the HCBS listed in Attachment 4.19-B that the State plans to cover):</b>		
Service Title:	Habilitative Supports	
<b>Service Definition (Scope):</b>		
<p>Habilitative Supports provides assistance to a participant with a disability by facilitating their independence and integration into the community. This service provides an opportunity for a participant to explore their interests and improve their skills by participating in natural environments.</p> <p>Habilitative Supports is not active treatment. Instead, the participant learns through interactions in typical community activities. Integration into the community enables participants to expand their skills related to activities of daily living and reinforces skills to achieve or maintain mobility, sensory-motor, communication, socialization and relationship building, and participation in leisure and community activities.</p> <p>This service is only provided in the participant's home or in community settings when integration into the community is an identified goal. These supports may serve to reinforce skills or lessons taught in school, therapy or other settings, but are not intended to supplant services provided in school or therapy, nor are they intended to supplant the primary caregiver.</p> <p>The supports provider must maintain a log of the habilitative support services in the participant's record documenting the provision of activities outlined in the plan of service. Supports that take place in both the home and community must ensure the participant is actively participating in age appropriate activities and is engaging with typical peers.</p>		

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Provider Type <i>(Specify):</i>	Entity Responsible for Verification <i>(Specify):</i>	Frequency of Verification <i>(Specify):</i>
<b>Developmental Disabilities Agencies</b>	Department of Health and Welfare	<ul style="list-style-type: none"> <li>- At initial provider agreement approval or renewal</li> <li>- At least every three years, and as needed based on service monitoring concerns.</li> </ul>
<b>Respite Care Provider</b>	Department of Health and Welfare	<ul style="list-style-type: none"> <li>- At initial provider agreement approval or renewal</li> <li>- At least every three years, and as needed based on service monitoring concerns.</li> </ul>
<b>Service Delivery Method.</b> <i>(Check each that applies):</i>		
<input type="checkbox"/> Participant-directed	<input checked="" type="checkbox"/> Provider managed	
<b>Service Specifications</b> <i>(Specify a service title for the HCBS listed in Attachment 4.19-B that the State plans to cover):</i>		
Service Title:	Habilitative Supports	
<b>Service Definition (Scope):</b>		
<p>Habilitative Supports provides assistance to a participant with a disability by facilitating their independence and integration into the community. This service provides an opportunity for a participant to explore their interests and improve their skills by participating in natural environments. Habilitative Supports is not active treatment. Instead, the participant learns through interactions in typical community activities. Integration into the community enables participants to expand their skills related to activities of daily living and reinforces skills to achieve or maintain mobility, sensory-motor, communication, socialization and relationship building, and participation in leisure and community activities.</p> <p>This service is only provided in the participant's home or in community settings when integration into the community is an identified goal. These supports may serve to reinforce skills or lessons taught in school, therapy or other settings, but are not intended to supplant services provided in school or therapy, nor are they intended to supplant the primary caregiver.</p> <p>The supports provider must maintain a log of the habilitative support services in the participant's record documenting the provision of activities outlined in the plan of service. Supports that take place in both the home and community must ensure the participant is actively participating in age appropriate activities and is engaging with typical peers.</p>		

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<b>Limitations:</b>			
- Habilitative Supports must be necessary to ensure the participant's safety if he or she cannot be left unsupervised due to health and safety concerns or cannot be cared for in the community in a normalized child care center due to the severity of their diagnosis.			
- Habilitative Supports cannot be provided during the same time other HCBS are being provided to a participant.			
- Habilitative Supports shall not duplicate other Medicaid reimbursed services which include but are not limited to: Respite, Psychosocial Rehabilitation and Partial Care.			
Additional needs-based criteria for receiving the service, if applicable ( <i>specify</i> ):			
N/A			
Specify limits (if any) on the amount, duration, or scope of this service for ( <i>chose each that applies</i> ):			
<input checked="" type="checkbox"/>	Categorically needy ( <i>specify limits</i> ):		
	Subject to individualized budget maximums		
<input type="checkbox"/>	Medically needy ( <i>specify limits</i> ):		
<b>Provider Qualifications</b> ( <i>For each type of provider. Copy rows as needed</i> ):			
<b>Provider Type</b> ( <i>Specify</i> ):	<b>License</b> ( <i>Specify</i> ):	<b>Certification</b> ( <i>Specify</i> ):	<b>Other Standard</b> ( <i>Specify</i> ):
<b>Developmental Disabilities Agency</b>		Developmental Disabilities Agency (DDA) certificate as described in Idaho	Individuals must meet the minimum general training requirements defined in IDAPA rule "Developmental Disabilities Agencies", and in addition must meet the following qualifications to provide habilitative supports in a DDA:
		Administrative Code.	Must be at least 18 years of age; must be a high school graduate or have a GED; demonstrate the ability to provide services according to a plan of service; have good communication and interpersonal skills and the ability to deal effectively, assertively and cooperatively with a variety of people; be willing to accept training and supervision; be free of communicable diseases; demonstrate knowledge of infection control methods; agree to practice confidentiality in handling situations that involve participants; pass a criminal background check; and complete a competency course approved by the Department related to the support staff job requirements.
<b>Verification of Provider Qualifications</b> ( <i>For each provider type listed above. Copy rows as needed</i> ):			

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Provider Type (Specify):	Entity Responsible for Verification (Specify):	Frequency of Verification (Specify):
<b>Developmental Disabilities Agencies</b>	Department of Health and Welfare	<ul style="list-style-type: none"> <li>- At initial provider agreement approval or renewal</li> <li>- At least every three years, and as needed based on service monitoring concerns</li> </ul>
<b>Service Delivery Method. (Check each that applies):</b>		
<input type="checkbox"/> Participant-directed	<input checked="" type="checkbox"/> Provider managed	
<b>Service Specifications (Specify a service title for the HCBS listed in Attachment 4.19-B that the State plans to cover):</b>		
Service Title:	Family Education	
<b>Service Definition (Scope):</b>		
<p>Family education is professional assistance to families to help them better meet the needs of the participant. It offers education to the parent/legal guardian that are specific to the individual needs of the family and child as identified on the plan of service. Family education is delivered to families to provide an orientation to developmental disabilities and to educate families on generalized strategies for behavioral modification and intervention techniques specific to their child's diagnoses. Family education may also provide assistance to the parent/legal guardian in educating other unpaid caregivers regarding the needs of the participant.</p>		
<p>Family education providers must maintain documentation of the training in the participant's record documenting the provision of activities outlined in the plan of service. When family education is provided in a group setting, the group should consist of no more than five (5) participants' families.</p>		
<b>Additional needs-based criteria for receiving the service, if applicable (specify):</b>		
N/A		
<b>Specify limits (if any) on the amount, duration, or scope of this service for (chase each that applies):</b>		
<input checked="" type="checkbox"/>	<b>Categorically needy (specify limits):</b>	
	Subject to individualized budget maximums.	
<input type="checkbox"/>	<b>Medically needy (specify limits):</b>	

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<b>Provider Qualifications</b> (For each type of provider. Copy rows as needed):			
<b>Provider Type</b> (Specify):	<b>License</b> (Specify):	<b>Certification</b> (Specify):	<b>Other Standard</b> (Specify):
<b>Developmental Disabilities Agency</b>		Developmental Disabilities Agency (DDA) certificate as described in Idaho Administrative Code.	Individuals must meet the minimum general training requirements defined in IDAPA rule "Developmental Disabilities Agencies", and in addition must meet the following qualifications to provide family education in a DDA: Must hold at least a bachelor's degree in a health, human services, educational, behavioral science or counseling field from a nationally accredited university or college; must have one year experience providing care to children with developmental disabilities; must complete competency coursework approved by the Department to demonstrate competencies related to the requirements to provide family education; and must complete a supervised practicum.
<b>Verification of Provider Qualifications</b> (For each provider type listed above. Copy rows as needed):			
<b>Provider Type</b> (Specify):	<b>Entity Responsible for Verification</b> (Specify):		<b>Frequency of Verification</b> (Specify):
<b>Developmental Disabilities Agencies</b>	Department of Health and Welfare		- At initial provider agreement approval or renewal - At least every three years, and as needed based on service monitoring concerns
<b>Service Delivery Method.</b> (Check each that applies):			
<input type="checkbox"/>	Participant-directed	<input checked="" type="checkbox"/>	Provider managed
<b>Service Specifications</b> (Specify a service title for the HCBS listed in Attachment 4.19-B that the State plans to cover):			
<b>Service Title:</b>	Community Support Services		
<b>Service Definition (Scope):</b>			

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<p>Community Support Services provide goods and supports that are medically necessary and/or minimize the participant's need for institutionalization and address the participant's preferences for:</p> <ul style="list-style-type: none"> <li>- Personal support to help the participant maintain health, safety, and basic quality of life.</li> <li>- Relationship support to help the participant establish and maintain positive relationships with immediate family members, friends, or others in order to build a natural support network and community.</li> <li>- Emotional support to help the participant learn and practice behaviors consistent with their goals and wishes while minimizing interfering behaviors.</li> <li>- Adaptive support to help a child to learn new adaptive skills or expand their existing skills.</li> <li>- Transportation support to help the participant accomplish their identified goals.</li> <li>- Adaptive equipment identified in the participant's plan that meets a medical or accessibility need and promotes their increased independence.</li> <li>- Skilled Nursing.</li> </ul>	
<p>Additional needs-based criteria for receiving the service, if applicable (<i>specify</i>):</p>	
<p>N/A</p>	
<p>Specify limits (if any) on the amount, duration, or scope of this service for (<i>choose each that applies</i>):</p>	
<input checked="" type="checkbox"/>	<p>Categorically needy (<i>specify limits</i>):</p>
	<p>Subject to the individualized budget amount.</p>
<input type="checkbox"/>	<p>Medically needy (<i>specify limits</i>):</p>

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<b>Provider Qualifications</b> (For each type of provider. Copy rows as needed):			
<b>Provider Type</b> (Specify):	<b>License</b> (Specify):	<b>Certification</b> (Specify):	<b>Other Standard</b> (Specify):
<b>Community Support Agency</b>	If required to identify goods or supports. For example, a Community Support providing speech-language pathology must have a current speech-language pathology licensure.	If required to identify goods or supports.	Must have completed employment/vendor agreement specifying goods or supports to be provided, qualifications to provide identified supports, and statement of qualification to provide identified supports.
<b>Community Support Provider</b>	If required for identified goods or supports. For example, a Community Support providing speech-language pathology must have current speech-language pathology license.	If required for identified goods and supports.	Must have completed employment/vendor agreement specifying goods or supports to be provided, qualifications to provide identified supports, and statement of qualification to provide identified supports.

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<b>Verification of Provider Qualifications</b> (For each provider type listed above. Copy rows as needed):		
<b>Provider Type</b> (Specify):	<b>Entity Responsible for Verification</b> (Specify):	<b>Frequency of Verification</b> (Specify):
<b>Community Support Agency</b>	Participant and parent/legal guardian Paid Support Broker (if applicable) Department of Health and Welfare (during retrospective quality assurance reviews)	Initially and annually, with review of employment/vendor agreement
<b>Community Support Provider</b>	Participant and parent/legal guardian Paid Support Broker (if applicable) Department of Health and Welfare (during retrospective quality assurance reviews)	Initially and annually, with review of employment/vendor agreement
<b>Service Delivery Method.</b> (Check each that applies):		
<input checked="" type="checkbox"/> Participant-directed	<input type="checkbox"/> Provider managed	
<b>Service Specifications</b> (Specify a service title for the HCBS listed in Attachment 4.19-B that the State plans to cover):		
<b>Service Title:</b>	Financial Management Services	
<b>Service Definition (Scope):</b>		
<p>The Department will offer financial management services through any qualified fiscal employer agent (FEA) provider through a provider agreement.</p> <p>FEA providers will complete financial consultation and services for a participant who has chosen to family-direct their services in order to assure that the financial information and budgeting information is accurate and available to them as is necessary in order for successful family-direction to occur.</p> <p>A. Payroll and Accounting. Providing payroll and accounting supports to participants that have chosen the family-directed community supports option;</p> <p>B. Financial Reporting. Performing financial reporting for employees of each participant;</p> <p>C. Financial Information Packet. Preparing and distributing a packet of information, including department approved forms for agreements, for the participant and family hiring their own staff;</p> <p>D. Time Sheets and Invoices. Processing and paying timesheets for community support workers and support brokers, as authorized by the participant and parent/legal guardian according to the participant's Department authorized support and spending plan;</p> <p>E. Taxes. Managing and processing payment of required state and federal employment taxes for the participant's community support worker and support broker;</p>		

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F. Payments for goods and services. Processing and paying invoices for goods and services, as authorized by the participant and parent/legal guardian according to the participant's support and spending plan;

G. Spending information. Providing each participant and parent/legal guardian with reporting information and data that will assist the participant and parent/legal guardian with managing the individual budget;

H. Quality assurance and improvement. Participation in department quality assurance activities.

FEA providers complete financial services and financial consultation for participants and their parent/legal guardian that is related to a family-directed participant's individual budget. The FEA assures that the financial data related to the participant's budget is accurate and available to them and their parent/legal guardian as necessary in order for successful family-direction to occur. FEA qualifications and requirements and responsibilities as well as allowable activities are described in Idaho Administrative Rules.

Additional needs-based criteria for receiving the service, if applicable (*specify*):

N/A

Specify limits (if any) on the amount, duration, or scope of this service for (*choose each that applies*):

Categorically needy (*specify limits*):

Only participants who select the family-directed option may access this service.

The FEA must not either provide any other direct services (including support brokerage) to the participant to ensure there is no conflict of interest; or employ the parent/legal guardian of the participant or have direct control over the participant's choice.

The FEA providers may only provide financial consultation, financial information and financial data to the participant and their parent/legal guardian, and may not provide counseling or information to the participant and parent/legal guardian about other goods and services.

Medically needy (*specify limits*):

**Provider Qualifications** (*For each type of provider. Copy rows as needed*):

Provider Type ( <i>Specify</i> ):	License ( <i>Specify</i> ):	Certification ( <i>Specify</i> ):	Other Standard ( <i>Specify</i> ):
<b>Fiscal Employer/Agent</b>			Agencies that provide financial management services as a FEA must be qualified to provide such services as indicated in section 3504 of the Internal Revenue Code.

**Verification of Provider Qualifications** (*For each provider type listed above. Copy rows as needed*):

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Provider Type <i>(Specify):</i>	Entity Responsible for Verification <i>(Specify):</i>	Frequency of Verification <i>(Specify):</i>
<b>Fiscal Employer/Agent</b>	Department of Health and Welfare	At the time of application, as indicated by a readiness review to be conducted by the Department for all FEA providers and thereafter at least every three years by Department review.
<b>Fiscal Employer/Agent</b>	Department of Health and Welfare	At the time of application, as indicated by a readiness review to be conducted by the Department for all FEA providers and thereafter at least every three years by Department review.
<b>Service Delivery Method. (Check each that applies):</b>		
<input checked="" type="checkbox"/> Participant-directed	<input type="checkbox"/> Provider managed	
Service Title: Support Broker		
Service Definition (Scope):		
<p>Support brokers provide counseling and assistance for participants and their parent/legal guardian with arranging, directing, and managing services. They serve as the agent or representative of the participant to assist in identifying immediate and long-term needs, developing options to meet those needs, and accessing identified supports and services. This includes providing participants and their parent/legal guardian with any assistance they need for gathering and reviewing their budget and financial data and reports prepared and issued to them by the FEA. Practical skills training is offered to enable families to remain independent. Examples of skills training include helping families understand the responsibilities involved with directing services, providing information on recruiting and hiring community support workers, managing workers and providing information on effective communication and problem-solving. The extent of support broker services furnished to the participant and parent/legal guardian must be specified on the support and spending plan.</p>		
<p>Support broker services may include only a few required tasks or may be provided as a comprehensive service package depending on the participant and parent/legal guardian's needs and preferences. At a minimum, the support broker must:</p> <ul style="list-style-type: none"> <li>- Participate in the family-centered planning process.</li> </ul>		

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<ul style="list-style-type: none"> <li>- Develop a written support and spending plan with the participant and family that includes the supports the participant needs and wants, related risks identified with the participant's wants and preferences, and a comprehensive risk plan for each potential risk that includes at least three backup plans should a support fall out.</li> <li>- Assist the participant and family to monitor and review their budget through data and financial information provided by the FEA.</li> <li>- Submit documentation regarding the participant and parent/legal guardian's satisfaction with identified supports as requested by the Department.</li> <li>- Participate with Department quality assurance measures, as requested.</li> <li>- Assist the participant and parent/legal guardian with scheduling required assessments to complete the Department's annual re-determination process as needed, including assisting the participant and parent/legal guardian to update the support and spending plan and submit it to the Department for authorization.</li> </ul> <p>In addition to the required minimum support broker duties, the support broker must be able to provide the following services when requested by the participant and parent/legal guardian:</p> <ul style="list-style-type: none"> <li>- Assist the participant and parent/legal guardian to develop and maintain a circle of support.</li> <li>- Help the participant and family learn and implement the skills needed to recruit, hire, and monitor community supports.</li> <li>- Assist the participant and parent/legal guardian to negotiate rates for paid Community Support Workers.</li> <li>- Maintain documentation of supports provided by each Community Support Worker and participant and parent/legal guardian's satisfaction with these supports.</li> <li>- Assist the participant and parent/legal guardian to monitor community supports.</li> <li>- Assist the participant and parent/legal to resolve employment-related problems.</li> <li>- Assist the participant and parent/legal to identify and develop community resources to meet specific needs.</li> </ul> <p>Support Brokers provide counseling and assistance for families by arranging, directing and managing services. This includes providing families with any assistance they need for gathering and reviewing their budget and financial data and reports prepared and issued to them by the FEA. Support Broker qualifications, requirements and responsibilities as well as allowable activities are described in Idaho Administrative Rules.</p>
Additional needs-based criteria for receiving the service, if applicable ( <i>specify</i> ):
N/A
Specify limits (if any) on the amount, duration, or scope of this service for ( <i>choose each that applies</i> ):

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<input checked="" type="checkbox"/>	Categorically needy <i>(specify limits):</i> Only participants who select the Family-Directed Option may access this service. Support brokers may not act as a fiscal employer agent, instead support brokers work together with the participant and parent/legal guardian to review participant financial information that is produced and maintained by the fiscal employer agent.		
<input type="checkbox"/>	Medically needy <i>(specify limits):</i>		
<b>Provider Qualifications</b> <i>(For each type of provider. Copy rows as needed):</i>			
<b>Provider Type</b> <i>(Specify):</i>	<b>License</b> <i>(Specify):</i>	<b>Certification</b> <i>(Specify):</i>	<b>Other Standard</b> <i>(Specify):</i>
<b>Support Broker</b>			Specific requirements outlined in Idaho Administrative Code - IDAPA 16.03.13 include review of education, experience, successful completion of Support Broker training and ongoing education.  The parent/legal guardian can be an unpaid support broker for the participant and are subject to the same qualification requirements as paid support brokers.
<b>Verification of Provider Qualifications</b> <i>(For each provider type listed above. Copy rows as needed):</i>			
<b>Provider Type</b> <i>(Specify):</i>	<b>Entity Responsible for Verification</b> <i>(Specify):</i>		<b>Frequency of Verification</b> <i>(Specify):</i>
<b>Support Broker</b>	Department of Health and Welfare		At the time of application, annual review of ongoing education requirement, and by participant and parent/legal guardian when entering into employment agreement.
<b>Service Delivery Method.</b> <i>(Check each that applies):</i>			
<input checked="" type="checkbox"/>	Participant-directed		<input type="checkbox"/> Provider managed

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2. **X Policies Concerning Payment for State plan HCBS Furnished by Relatives, Legally Responsible Individuals, and Legal Guardians:** There are policies pertaining to payment the State makes to qualified persons furnishing State plan HCBS, who are relatives of the individual. There are additional policies and controls if the State makes payment to qualified legally responsible individuals or legal guardians who provide State Plan HCBS. *(Specify (a) who may be paid to provide State plan HCBS; (b) how the State ensures that the provision of services by such persons is in the best interest of the individual; (c) the State's strategies for ongoing monitoring of services provided by such persons; (d) the controls to ensure that payments are made only for services rendered; and (e) if legally responsible individuals may provide personal care or similar services, the policies to determine and ensure that the services are extraordinary (over and above that which would ordinarily be provided by a legally responsible individual):*

Respite is the only State plan HCBS that may be provided by relatives of a participant. A parent/legal guardian cannot furnish State plan HCBS, but other relatives may be paid to provide respite services whenever the relative is qualified to provide respite as defined in this application. There are numerous safeguards in place to ensure that payments are only made for services rendered including oversight by provider agencies, family-centered planning teams, circles of supports, fiscal/employer agent, and by the Department through review and approval of plan of services and retrospective quality assurance reviews.

All providers are precluded from being in a position to both influence a participant and parent/legal guardian's decision making and benefit financially from these decisions. Payments for family-directed services rendered are made only after review and approval by the participant and parent/legal guardian and review by the Fiscal Employer Agent. Additionally, the participant's Support Broker and Circle of Supports are available to address any conflicts of interest.

**Individual Budget Amount:** There is a limit on the maximum dollar amount of HCBS State Plan services authorized for each specific participant.

(a) All HCBS services are included in the budget.

(b) The service and support desires and needs of participants measured by the Scales of Independent Behavior Revised (SIB-R), historical record of service expenditures, when available, and the characteristics of persons served measured by the Idaho Individual Budget Screen are used in a stepwise regression analysis to develop a prospective individual budget for each waiver participant. The budget-setting methodology will correlate a participant's characteristics with the participant's individual budget amount, so participants with higher needs will be assigned a higher individual budget amount. Maximum dollar amounts will be based on individual assessed needs. This budget-setting is completed by the Independent Assessment Providers (IAP) in advance of the family-centered planning process and is used in the development of an Action Plan.

(c) The individual budget is based on the perspective that funding should be tied principally to individual need. The model seeks out the factors that contribute the most to explaining observed variance in costs and discards those that do not appear to influence cost. A review

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will be done on an annual basis to evaluate the current variables to determine if they continue to contribute to the cost of individuals. In the end, the model identifies the mix and weight of variables that best fits the array of observed costs across the individuals receiving services. Ongoing monitoring of the statistical model, complaints, appeals, and participant outcomes will be conducted by the Department to ensure that assigned budgets are sufficient to assure health and safety of participants in the community. When the Department determines that a change needs to be made to the individual budget methodology, participants will be sent notification of the change prior to implementation.

(d) Participants who believe that their assigned budget does not accurately reflect their needs may appeal the decision and request a fair hearing.

(e) The Department has processes in place for participants to be re-evaluated and have a new budget assigned when the participant has a change in condition that requires additional services or higher cost services. Participants may request a re-evaluation by submitting documentation of changes to individualized needs to the TCM. If the documentation supports the need for additional budget funds, the TCM forwards the request to the IAP for a new individual budget evaluation. If the documentation does not support the need for additional budget funds, the TCM provides written notification to the participant of the decision and the right to appeal.

(f) Participants are notified of their eligibility for HCBS services and given an annual individual budget at the time of their initial determination or annual re-determination. Each participant receives written notification of the set budget amount. The notification includes how the participant may appeal the set budget amount decision. Individual budgets are re-evaluated annually by the IAP and written notification of the set budget amount are sent annually.

A summary of the individual budget methodology is included in IDAPA rules. Any time a change is made the rules are published and open for public comment. In addition, whenever changes are made to the methodology Idaho will notify all families and providers of the change prior to implementation.

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**Participant-Direction of Services**

*Definition: Participant-direction means self-direction of services per §1915(i)(1)(G)(iii).*

**1. Election of Participant-Direction. (Select one):**

<input type="radio"/>	The State does not offer opportunity for participant-direction of State plan HCBS.
<input checked="" type="radio"/>	Every participant in State plan HCBS (or the participant's representative) is afforded the opportunity to elect to direct services. Alternate service delivery methods are available for participants who decide not to direct their services.
<input type="radio"/>	Participants in State plan HCBS (or the participant's representative) are afforded the opportunity to direct some or all of their services, subject to criteria specified by the State. <i>(Specify criteria):</i>

**2. Description of Participant-Direction. (Provide an overview of the opportunities for participant-direction under the State plan HCBS, including: (a) the nature of the opportunities afforded; (b) how participants may take advantage of these opportunities; (c) the entities that support individuals who direct their services and the supports that they provide; and, (d) other relevant information about the approach to participant-direction):**

Idaho's family-direction option provides a more flexible system, enabling participants and their parent/legal guardian to exercise more choice and control over the services they receive which helps them live more productive and participatory lives within their home communities. This option is provided within the existing system so that it is sustainable and reflects the value of this option for all participants and their parents/legal guardians who choose to direct their own services and supports. The process supports participant and parent/legal guardian preferences and honors their desire to family-direct their own services; how and when supports and services are provided; and who will assist them in developing and monitoring a realistic support and spending plan that accurately reflects their individual wants and needs.

Once participants are determined eligible for State plan HCBS, an individualized budget is developed for each participant. The budget model provides participants with an individual budget and a maximum level of funding that varies according to individual needs, and allows for spending flexibility within the set budgeted dollars. The support need is determined from an evaluation completed using a uniform assessment tool. Upon completion of the assessment, the individualized budget is reviewed with the participant and parent/legal guardian by the Department or its contractor.

Participants then have the option to choose Family-Directed Services (FDS). The FDS option allows eligible participants and their parent/legal guardian to choose the type and frequency of supports they want, to negotiate the rate of payment, and to hire the person or agency they prefer to provide those supports. Participants and the parent/legal guardian must use a support broker to assist them with the family-directed process. This can be accomplished in one of

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two ways: The family may choose to hire an approved support broker to perform specific duties as needed, or the parent/legal guardian may choose to act as an unpaid support broker with the ability to perform the full range of support broker duties. If a parent/legal guardian wishes to act as an unpaid support broker for the participant, they must complete the support broker training and be approved by the Department. Paid support broker services are included as part of the community support services that participants and their parent/legal guardian may purchase out of their allotted budget dollars.

Support broker duties include planning, accessing, negotiating, and monitoring the family's chosen services to their satisfaction. They can assist families to make informed choices, participate in a family-centered planning process, and become skilled at managing their own supports. The support broker possesses skills and knowledge that go beyond typical service coordination. The support broker assists participants and parents/legal guardians to convene a circle of supports team and engages in a family-centered planning process. The circle of supports team assists participants and parents/legal guardians in planning for and accessing needed services and supports based on their wants and needs within their established budget.

The FDS option gives participants and their parent/legal guardian the freedom to make choices and plan their own lives, authority to control the resources allocated to them to acquire needed supports, the opportunity to choose their own supports and the responsibility to make choices and take responsibility for those choices. Families and support brokers are responsible for the following:

- Accepting and honoring the guiding principles of family-direction to the best of their ability.
- Directing the family-centered planning process in order to identify and document support and service needs, wants, and preferences.
- Negotiating payment rates for all paid community supports they want to purchase.
- Developing and implementing employment/service agreements.

Families, with the help of their support broker, must develop a comprehensive support and spending plan based on the information gathered during the family-centered planning. The support and spending plan is reviewed and authorized by the Department and includes participant's preferences and interests by identifying all the supports and services, both paid and non-paid, and the participant's wants and needs to live successfully in their community.

Participants and their parent/legal guardian choose support services, categorized as "family-directed community supports," that will provide greater flexibility to meet the participant's needs in the following areas:

**My Personal Needs** - focuses on identifying supports and services needed to assure the person's health, safety, and basic quality of life.

**My Relationship Needs** – identifies strategies in assisting an individual to establish and maintain relationships with immediate family members, friends, spouse, or other persons and build their natural support network.

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My Emotional Needs – addresses strategies in assisting an individual to learn and increasingly practice behaviors consistent with the person’s identified goals and wishes while minimizing interfering behaviors.

My Learning Needs - identifies activities that support an individual in acquiring new skills or improving established skills that relate to a goal that the person has identified.

Participants and their parent/legal guardian choosing the Family-Directed Services option in Idaho are required to choose a qualified financial management services provider to provide Financial Management Services (FMS). The FMS provider is utilized to process and make payments to community support workers for the community support services contained in their support and spending plan. FMS providers have primary responsibility for monitoring the dollars spent in accordance with the itemized spending plan and for ensuring payment itemization and accuracy. Financial management service providers also manage payroll expenses including required tax withholding, unemployment/workers compensation insurance; ensuring completion of criminal history checks and providing monthly reports to the participant, parent/legal guardian and support broker if applicable. Financial Management service providers offer services on behalf of the participant in accordance with Section 3504 of the IRS code and the IRS Revenue Procedure 70-6, which outlines requirements of financial management service providers who are fiscal employer agents.

**3. Limited Implementation of Participant-Direction.** *(Participant direction is a mode of service delivery, not a Medicaid service, and so is not subject to statewideness requirements. Select one):*

<input checked="" type="radio"/>	Participant direction is available in all geographic areas in which State plan HCBS are available.
<input type="radio"/>	Participant-direction is available only to individuals who reside in the following geographic areas or political subdivisions of the State. Individuals who reside in these areas may elect self-directed service delivery options offered by the State, or may choose instead to receive comparable services through the benefit’s standard service delivery methods that are in effect in all geographic areas in which State plan HCBS are available. <i>(Specify the areas of the State affected by this option):</i>

**4. Participant-Directed Services.** *(Indicate the State plan HCBS that may be participant-directed and the authority offered for each. Add lines as required):*

Participant-Directed Service	Employer Authority	Budget Authority
Community Support Services	X	X
Support Broker Services	X	X
Financial Management Services	X	X

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**5. Financial Management. (Select one):**

<input type="radio"/>	Financial Management is not furnished. Standard Medicaid payment mechanisms are used.
<input type="radio"/>	Financial Management is furnished as a Medicaid administrative activity necessary for administration of the Medicaid State plan.
<input checked="" type="radio"/>	Financial Services are furnished through a third party entity. <i>Specify whether governmental and/or private entities furnish these services.</i> <input type="checkbox"/> Governmental entities <input checked="" type="checkbox"/> Private entities

**6.  Participant-Directed Plan of Care. (By checking this box the State assures that):** Based on the independent assessment, a person-centered process produces an individualized plan of care for participant-directed services that:

- Be developed through a person-centered process that is directed by the individual participant, builds upon the individual's ability (with and without support) to engage in activities that promote community life, respects individual preferences, choices, strengths, and involves families, friends, and professionals as desired or required by the individual;
- Specifies the services to be participant-directed, and the role of family members or others whose participation is sought by the individual participant;
- For employer authority, specifies the methods to be used to select, manage, and dismiss providers;
- For budget authority, specifies the method for determining and adjusting the budget amount, and a procedure to evaluate expenditures; and
- Includes appropriate risk management techniques, including contingency plans, that recognize the roles and sharing of responsibilities in obtaining services in a self-directed manner and assure the appropriateness of this plan based upon the resources and support needs of the individual.

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**6. Voluntary and Involuntary Termination of Participant-Direction.** *(Describe how the State facilitates an individual's transition from participant-direction, and specify any circumstances when transition is involuntary):*

The Department assists participants and the parent/legal guardian with this transition and assures that authorization for services under family-direction do not expire until new services are in place. The Department provides technical assistance and guidance as requested by participants and their parent/legal guardian, support brokers, and circles of support. Transition from family-direction to traditional services will not take more than 120 days and in most cases will be accomplished in 60 to 90 days. This transition time is spent re-determining the LOC needs, development of a new plan, and review and authorization of the new plan. The participant remains in family-direction until this process is completed so that there is no interruption in services. If at any time there are health and safety issues, the Department works closely with the participant and parent/legal guardian to ensure that the participant's health and safety is protected. This may include utilizing the Crisis Network Team to address any immediate crises and/or authorizing an emergency 120-day transition plan to assure a smooth transition from family-directed services to traditional services.

Only demonstrated danger to the participant's health and safety would result in the involuntary termination of the participant's use of family-direction. In these cases, the Department will work closely with the parent/legal guardian and support broker to identify necessary changes to the plan of service, authorize emergency services if necessary, and facilitate any other activities necessary to assure continuity of services during this transition.

**7. Opportunities for Participant-Direction**

**a. Participant-Employer Authority (individual can hire and supervise staff).** *(Select one):*

<input type="radio"/>	The State does not offer opportunity for participant-employer authority.
<input checked="" type="radio"/>	Participants may elect participant-employer Authority <i>(Check each that applies):</i>
<input type="checkbox"/>	<b>Participant/Co-Employer.</b> The participant (or the participant's representative) functions as the co-employer (managing employer) of workers who provide State plan HCBS. An agency is the common law employer of participant-selected/recruited staff and performs necessary payroll and human resources functions. Supports are available to assist the participant in conducting employer-related functions.
<input checked="" type="checkbox"/>	<b>Participant/Common Law Employer.</b> The participant (or the participant's representative) is the common law employer of workers who provide State plan HCBS. An IRS-approved Fiscal/Employer Agent functions as the participant's agent in performing payroll and other employer responsibilities that are required by federal and state law. Supports are available to assist the participant in conducting employer-related functions.

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**b. Participant–Budget Authority (individual directs a budget). (Select one):**

<input type="radio"/>	The State does not offer opportunity for participants to direct a budget.
<input checked="" type="radio"/>	<p>Participants may elect Participant–Budget Authority.</p> <p><b>Participant-Directed Budget.</b> <i>(Describe in detail the method(s) that are used to establish the amount of the budget over which the participant has authority, including how the method makes use of reliable cost estimating information, is applied consistently to each participant, and is adjusted to reflect changes in individual assessments and service plans. Information about these method(s) must be made publicly available and included in the plan of care):</i></p> <p>The service and support desires and needs of participants measured by the Scales of Independent Behavior Revised (SIB-R), historical record of service expenditures when available, and the characteristics of persons served measured by the Idaho Individual Budget Screen are used in a stepwise regression analysis to develop a prospective individual budget for each participant. This budget-setting is completed in advance of the family-centered planning process and is used in the development of a family-centered plan. Participants and their parent/legal guardian using the family-directed pathway have the flexibility to choose providers and negotiate the rate of payment for their services. This flexibility allows them to make choices and prioritize needs in order to stay within an identified budget. Any participant has a right to an administrative hearing on decisions made by the Department concerning the family-directed support. Participant outcomes will be monitored using Quality Indicators and visitations from Department quality management staff.</p> <p>The individualized budget is based on the perspective that funding should be tied principally to individual need. The model seeks out the factors that contribute the most to explaining observed variance in costs and discards those that do not appear to influence cost. A review will be done on an annual basis to evaluate the current variables to determine if they continue to contribute to the cost of individuals. In the end, the model identifies the mix and weight of variables that best fits the array of observed costs across the individuals receiving services.</p> <p>This budget setting methodology process is reviewed with each participant and parent/legal guardian, during the initial and annual level of care assessment. It is documented publicly through the Administrative rulemaking process and published in the Idaho Administrative Code.</p> <p><b>Expenditure Safeguards.</b> <i>(Describe the safeguards that have been established for the timely prevention of the premature depletion of the participant-directed budget or to address potential service delivery problems that may be associated with budget underutilization and the entity (or entities) responsible for implementing these safeguards):</i></p>

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The participant and parent/legal guardian's selected Fiscal Employer Agent will have the individual budget and the approved supports and services from the support and spending plan. They will send monthly statements to participants and their parent/legal guardian on a monthly basis to inform them on the status of expenditures. The support broker will assist the family to review these statements to assure spending is on track. Employment agreements are developed for each community support worker that are descriptive to what is expected and how they will be paid.

As part of the QA process, Medicaid staff monitor to assure that processes are in place to monitor these expenditures. Each fiscal agent is required to: 1) Have a system in place to perform a quarterly quality management (QM) analysis activity on a statistically significant sample of overall participant records; 2) Have documented, approved policies and procedures with stated timeframes for performing a quarterly quality management analysis activity on a statistically significant sample of overall participant records; 3) Have internal controls documented and in place for performing a quarterly QM analysis activity on a statistically significant sample of overall participant records; 4) Forward QM reports to the Department within thirty (30) working days from the end of each quarter. In addition to reviewing these quarterly reports, the Department also conducts a full service performance check on each fiscal agent provider at least every 3 years (all policies and procedures, and all the task and services as agreed upon in the provider agreement).

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**Quality Improvement Strategy**

*(Describe the State's quality improvement strategy in the tables below):*

Discovery Activities					Remediation	
Requirement	Discovery Evidence (Performance Measures)	Discovery Activity (Source of Data & sample size)	Monitoring Responsibilities (agency or entity that conducts discovery activities)	Frequency	Remediation Responsibilities (Who corrects, analyzes, and aggregates remediation activities; required timeframes for remediation)	Frequency of Analysis and Aggregation
Service plans address assessed needs of 1915(i) participants, are updated annually, and document choice of services and providers.	1. Participants report satisfaction with their participation in activities within their communities.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare.	Annually	Department of Health and Welfare	Annually
	2. Service plans are reviewed and approved prior to the expiration of the participant's current plan of service.	100% of individual service plans (ISP) will be reviewed by the Department for prior authorization.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	3. Participants report their comments, questions and ideas were solicited and encouraged during the person-centered planning meeting.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	4. Participants report they make choices about their everyday life.	Compliance is based on weighted measure of series of PES questions. Annual PES will be completed for a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually

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	5. Participants report they received support to learn something new in the past year.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	6. Participants report they know their plan developer/monitor.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	7. Participants report their plan developer / monitor helps them get what they need.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	8. Requests to modify plans of service are reviewed and approved or denied within fifteen (15) days of their receipt.	Plan Authorization complete using representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	9. Claims indicate utilization consistent with the service type, scope, amount, duration and frequency approved on the participant's service plan.	System Data is reviewed for a representative sample with +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	10. Number and percent of service plans reviewed that addressed participant's functional needs as identified by the assessment.	100% of Service Plans are reviewed yearly by the Department and its contractor, and Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually

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	11. Number and percent of participants report they were given a choice when selecting service provider(s).	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence Interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	12. Number and percent of participants reviewed who reported they have access to the services and supports they need.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence Interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	13. Number and percent of participants reviewed whose plan goal was achieved or modified in the past year.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence Interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
Providers meet required qualifications.	1. Number and percent of direct care staff meets state requirements for training.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence Interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	2. Number and percent of service providers, by provider type, who require licensure or certification have a current license or certificate at the time they provide Medicaid services to DD participants	System Data will be used to verify that 100% of service providers have current certification or licensure as required.	Department of Health and Welfare	Every 3 years	Department of Health and Welfare	Every 3 years
	3. Number and percent of non-licensed, non-certified service providers, by provider type, who demonstrate compliance with minimum provider requirements	System Data will be used to verify that 100% of service providers serving a representative sample of participants demonstrate compliance with minimum provider requirements.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually

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The SMA retains authority and responsibility for program operations and oversight.	3. Number and percent of deficiencies corrected by the contractor as identified by the Department contract monitor	System Data is used to verify that 100% of all contractual obligations are addressed.	IAP Contractor	Ongoing and Quarterly	Department of Health and Welfare	Quarterly
The SMA maintains financial accountability through payment of claims for services that are authorized and furnished to 1915(i) participants by qualified providers.	1. Number and percent of demonstrated 1915i service providers fraudulent billing patterns investigated by DHW and action taken.	System Data is used to verify that 100% of the time appropriate investigation and follow up occurs when fraudulent billing is identified.	Department of Health and Welfare	Ongoing	Department of Health and Welfare	Ongoing and Annually
	2. Number and percent of invoices paid by Fiscal/Employer Agent in excess of the amount approved for identified support categories on each participants support and spending plan.	System Data will be used to demonstrate that 100% of the time appropriate Department investigation and follow up occurs when fraudulent billing is identified.	Department of Health and Welfare	Provider performance monitoring – Ongoing  Financial Audits - Quarterly	Department of Health and Welfare	Ongoing, Quarterly and Annually
The State identifies, addresses and seeks to prevent incidents of abuse, neglect, and exploitation, including the use of restraints.	1. Number and percent of direct service providers who have signed a self declaration form and have not disclosed any designated crimes prior to working with participants.	System Data will demonstrate that 100% of service providers providing direct services to participants in the representative sample have signed declaration forms.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	2. Number and percent of participants who reported that their service providers were reliable.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually

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	3. Number and percent of participants who reported that they are free from abuse, neglect and exploitation.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	4. Number of participants reviewed that reported they know the person/place to go to in order to report abuse.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	5. Number and percent of critical incidents that are investigated consistently with priority guidelines.	System data is used to verify the 100% of the time incidents are investigated consistently with guidelines.	Department of Health and Welfare	Ongoing	Department of Health and Welfare	Quarterly and Annually
	6. Number and percent of participants who reported support staff treated them with respect.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	7. Number and percent of participants who have had an annual medical evaluation.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	8. Number and percent of participants reviewed who have had a dental exam once every 6 months.	Participant Experience Survey (PES) will be completed annually on a representative sample with a +/- 5% confidence interval.	Department of Health and Welfare	Annually	Department of Health and Welfare	Annually
	9. Number and percent of critical incidents substantiated by type.	System data is used to verify the 100% of the time critical incidents are substantiated by type of incident.	Department of Health and Welfare	Ongoing	Department of Health and Welfare	Quarterly and Annually
	10. Number of substantiated complaints, by type.	System data is used to verify the 100% of the time complaints are substantiated by type of complaint.				

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<b>System Improvement:</b> <i>(Describe process for systems improvement as a result of aggregated discovery and remediation activities.)</i>				
Methods for Analyzing Data and Prioritizing Need for System Improvement	Roles	Responsibilities	Frequency	Method for Evaluating Effectiveness of System Changes
<input type="checkbox"/> PES results are gathered; <input type="checkbox"/> Regional complaints and incident reports are investigated <input type="checkbox"/> Individual plans of service are reviewed by the Department	<b>Quality Management Staff</b>	This is a group of staff across seven regions of Idaho, with knowledge of quality improvement interventions, and who are responsible for collecting and reporting data to the Department.	Ongoing	Data is gathered and submitted to the Department's analyst.
<input type="checkbox"/> Results of PES are reviewed and analyzed, and tabulated; <input type="checkbox"/> Complaints and Critical Incidents are reviewed analyzed, and tabulated <input type="checkbox"/> Plan of service information is analyzed	<b>Department Analyst</b>	This is department staff identified that lead statewide data collection activities, analysis, and reporting activities related to quality management. This staff is responsible for creating and implementing data collection tools.	Ongoing	The analyzed data is presented to the QA team for review and prioritization.
<input type="checkbox"/> Quarterly meetings: Quarterly the committee reviews analyzed data to develop recommendations for program improvements, and reviews actions taken and progress made toward implementing previous approved system improvements <input type="checkbox"/> Annual meeting: Meets annually to prioritize findings and develop recommendations for specific system improvements for the coming year. This recommendation will be submitted to administration for approval and assignment.	<b>Quality Management Team</b>	The QM team is responsible for steering the quality assessment and improvement process, and issues related to parallel data collection. It is responsible for formally recommending specific program improvements to Department administration.	Quarterly	Annual QM report is submitted to administration.
<input type="checkbox"/> Quarterly QM Report <input type="checkbox"/> Annual QM Report	<b>Quality Management Manager</b>	The QM manager takes overall responsibility for leading team members, finalizing quarterly and yearly QM reports, leading the process of prioritizing needs for system improvements, and implementing approved system improvements.	Quarterly and Yearly Report	Overall data findings and recommendations are submitted to the QM Team for review prior to finalization.

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**Methods and Standards for Establishing Payment Rates**

**1. Services Provided Under Section 1915(i) of the Social Security Act.** For each optional service, describe the methods and standards used to set the associated payment rate. *(Check each that applies, and describe methods and standards to set rates):*

<input type="checkbox"/>	HCBS Case Management
<input type="checkbox"/>	HCBS Homemaker
<input type="checkbox"/>	HCBS Home Health Aide
<input type="checkbox"/>	HCBS Personal Care
<input type="checkbox"/>	HCBS Adult Day Health
<input checked="" type="checkbox"/>	HCBS Habilitation Refer to attachment 4.19-B
<input checked="" type="checkbox"/>	HCBS Respite Care Refer to attachment 4.19-B
For Individuals with Chronic Mental Illness, the following services:	
<input type="checkbox"/>	HCBS Day Treatment or Other Partial Hospitalization Services
<input type="checkbox"/>	HCBS Psychosocial Rehabilitation
<input type="checkbox"/>	HCBS Clinic Services (whether or not furnished in a facility for CMI)
Other Services:	
<input checked="" type="checkbox"/>	Family Education Refer to attachment 4.19-B
Supports for Participant Direction:	
<input checked="" type="checkbox"/>	Community Support Services Refer to attachment 4.19-B
<input checked="" type="checkbox"/>	Support Broker Refer to attachment 4.19-B
<input checked="" type="checkbox"/>	Financial Management Services Refer to attachment 4.19-B

31. 1915(i) State Plan HCBS – Children with Developmental Disabilities

**Methods and Standards for Establishing Payment Rates**

1. **Services Provided Under Section 1915(i) of the Social Security Act.** For each optional service, describe the methods and standards used to set the associated payment rate. *(Check each that applies, and describe methods and standards to set rates):*

<input type="checkbox"/>	HCBS Case Management
<input type="checkbox"/>	HCBS Homemaker
<input type="checkbox"/>	HCBS Home Health Aide
<input type="checkbox"/>	HCBS Personal Care
<input type="checkbox"/>	HCBS Adult Day Health
<input checked="" type="checkbox"/>	<p>HCBS Habilitation</p> <p>Individual and Group - The reimbursement methodology adds many cost components together to arrive at a 15 min unit rate for the Habilitative Supports Individual and Group, we use the (BLS) mean wage (Idaho) for all others (BLS code 31-1011) which uses reasonable payroll rate studies. Then, this hourly wage is inflated by using (GI) index. In SFY 2010 (2 months) it was .5% and SFY 2011 it is .8%. Using the Survey results we use direct care staff multipliers for employer related, program related, and general &amp; administrative percentages. These multipliers are decreased to accommodate the average payroll rate currently paid for these services along with the BLS cost for employer related payroll expenses. Lastly, we add costs for paid leave time for direct care staff based on BLS (MWD) report.</p> <p>The dollar figure arriving from the calculations is divided by the ratio provided. The hourly rate then is brought into a quarterly unit rate, or the target rate. The final unit rate is 85.5% of the target rate. We are using the most current DD/MH rates dictated by Idaho code 56-118 and used to calculate the 85.5% adjusted target rate.</p>
<input checked="" type="checkbox"/>	<p>HCBS Respite Care</p> <p>Individual and Group - The reimbursement methodology adds many cost components together to arrive at a 15 min unit rate for the Respite Individual and Group, we use the Bureau of Labor statistics (BLS) mean wage (Idaho) for all others (BLS code 39-9099) which uses reasonable payroll rate studies. Then, this hourly wage is inflated by using Global Insights Mountain States Market Basket (GI) inflation index. In SFY 2010 (2 months) it was .5% and SFY 2011 it is .8%. Using the Survey results we use direct care staff multipliers for employer related, program related, and general &amp; administrative percentages. These multipliers are decreased to accommodate the</p>

<p>average payroll rate currently paid for these services along with the BLS cost for employer related payroll expenses. Lastly, we add costs for paid leave time for direct care staff based on BLS Mountain West Division's (MWD) report.</p>	
<p>The dollar figure arriving from the calculations is divided by the ratio provided. The hourly rate then is brought into a quarterly unit rate, or the target rate. The final unit rate for Respite Individual is 77% of the target rate. The final unit rate for Respite group is 100% of the target rate. We are using the most current DD/MH rates dictated by Idaho code 56-118 and used to calculate the 77% and the 100% respectfully for the adjusted target rate.</p>	
<p>For Individuals with Chronic Mental Illness, the following services:</p>	
<input type="checkbox"/>	<p>HCBS Day Treatment or Other Partial Hospitalization Services</p>
<input type="checkbox"/>	<p>HCBS Psychosocial Rehabilitation</p>
<input type="checkbox"/>	<p>HCBS Clinic Services (whether or not furnished in a facility for CMI)</p>
<p>Other Services:</p>	
<input checked="" type="checkbox"/>	<p>Family Education</p> <p>The reimbursement methodology adds many cost components together to arrive at a 15 min unit rate for Family Education Individual and Group, we use the (BLS) mean wage (Idaho) for all others (BLS code 29-1129) which uses reasonable payroll rate studies. Then, this hourly wage is inflated by using (GI) index. In SFY 2010 (2 months) it was .5% and SFY 2011 it is .8%. Using the Survey results we use direct care staff multipliers for employer related, program related, and general &amp; administrative percentages. These multipliers are decreased to accommodate the average payroll rate currently paid for these services along with the BLS cost for employer related payroll expenses. Lastly, we add costs for paid leave time for direct care staff based on BLS (MWD) report.</p> <p>The dollar figure arriving from the calculations is divided by the ratio provided. The hourly rate then is brought into a quarterly unit rate, or the target rate. The final unit rate is 76.6% of the target rate. We are using the most current DD/MH rates dictated by Idaho code 56-118 and used to calculate the 76.6% adjusted target rate.</p>
<p>Supports for Participant Direction:</p>	
<input checked="" type="checkbox"/>	<p>Community Support Services</p> <p>The participant and parent/legal guardian negotiates the rate with community support staff, ensuring the rates negotiated do not exceed the prevailing market rate.</p>

X	<b>Support Broker</b> The participant and parent/legal guardian negotiates the rate with the support broker, ensuring the negotiated rate does not exceed the maximum hourly rate for support broker services established by the Department.
X	<b>Financial Management Services</b> Financial Management Services -Reimbursement methodology for FMS is based on a market study of other state Medicaid program rates for FMS to gather a range which allows the Department to accept a Per Member Per Month (PMPM) rate within the range determined from the market study. The established PMPM payment rates for each department approved qualified FMS provider will be published on a fee schedule by the Department. This fee schedule will be updated at least yearly, and when new providers are approved. This information will be published for consumer convenience to the IDHW Medicaid website, and by request.

