



## WORKSHOP CATALOG (v2)

as of 2-20-2025

# IDDA TRAINING CENTER

**ITC workshops are developed to be short and intensive learning experiences designed to present practical skills, techniques, strategies, and ideas in an interactive manner. ITC topics will be presented from the user's perspective with information presented in compliance to government regulations and policies. There will be productive time set aside for attendee interaction and collaboration.**

**Who should attend? Parents and caregivers of transitioning students and adults; Support Brokers, SDS Team members; D2D administration staff; anyone interested in DDA HCBS waiver benefits.**



**IDDA**  
Consulting & Network



## IDDA Training Center (ITC)

We are excited to announce the opening of the IDDA Training Center (ITC). ITC's mission is to empower individuals and caregivers to cultivate their core values, visions, and goals to ultimately identify and utilize the best resources for enhancing their quality of life.

ITC offers in-depth guidance and training to individuals and caregivers on navigating the Maryland Developmental Disabilities Administration (DDA) Waiver Program. While we assist both traditional and self-directed (SDS) individuals, our primary emphasis is on supporting those utilizing the DDA SDS service method.

Participants will gain access to the latest research, best practices, and innovative approaches to improve the quality of life for those they support. ITC's goal is to present topics to provide specific, measurable, and time-bound objectives to identify and achieve meaningful holistic outcomes.

- ITC emphasizes the importance of community integration and support, helping attendees understand how to connect with community resources and services.
- ITC will provide comprehensive training programs, seminars, and information-sharing events.
- ITC's training activities will combine theoretical knowledge and practical skills, covering various essential topics related to administering an individual's DDA SDS program.



When attending an ITC activity, you can expect a comprehensive and supportive learning environment designed to help you acquire new skills and knowledge.

Here are some key aspects:

- **Structured Program:** ITC will provide a well-organized program covering essential topics and skills relevant to creating strategies and developing methodologies to achieve the individual's person-centered outcomes and goals. This will support the development of holistic plans (PCP) with service and support trajectories which reinforce upwardness, quickly identify actions trending towards downwardness, and fosters effective solutions. In addition, and in resource support of these PCPs, ITC will provide learning experiences to locating resources for PCP implementation, staff recruitment, and development of cost-effective budgets and spending plans.
- **Experienced Instructors:** Knowledgeable and experienced instructors and activity leaders who provide experienced training and information shared. ITC's goal is to utilize the most current and relevant DDA policies and procedures and equip attendees in their application to their individual needs and challenges.
- **Hands-On Practice:** Opportunities for practical, hands-on experience to apply what you've learned in real-world scenarios.
- **Resources and Materials:** Access to current learning materials, resources, and tools to support your learning experience.
- **Networking Opportunities:** Opportunities for relationship building and networking to identify current best practices and appropriate resources.

The ITC aims to provide a well-rounded and enriching experience that equips you with the skills and knowledge needed to succeed in supporting individuals to experience their best life using the full range of resources available for them.

# IDDA Training Center Workshop Series

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## General Description

This webinar series will provide general information and is not intended to specifically address individual issues and concerns. However, the information shared will help you to address and solve many issues being experienced. ITC’s goal for these workshops is to empower you with the information you need to start productively supporting the management and administration of your participant's SDS program.

## Condition for Use/Disclaimer

This workshop series is intended for general informational purposes only and does not constitute regulatory advice or guidance. The presentations are based on the facilitator’s personal experiences and reflect their opinion regarding the policies, processes, practices, and procedures issued or performed by the DDA and its FMCS and CCS agencies. This information is not intended to replace the direction provided by these agencies or other duly authorized government entities. During each workshop presentation links to the reference material will be provided. Before making any decisions or taking any action, please refer to these reference materials to ensure workshop information is accurately presented and applicable to your individual circumstances. As your primary source of information, seek advice from your CCS and utilize other useful resources that may assist in serving your information, advisory, or research needs.

## Workshop Facilitator

### **Paulette S. Roseboro**



After more than 30 years of federal government service in the acquisition and contracting field Paulette, over the past decade, has immersed herself in gaining knowledge, understanding, and skills to proactively advocate for her daughter and now other individuals with intellectual and developmental disabilities and their families and caregivers.

Paulette is the primary caregiver of her adult daughter, Brianna, who has Down Syndrome. Through Paulette's research around intellectual and developmental (IDD) disabilities programs and resources, she has acquired a unique understanding, from the view point of a parent/caregiver, of the effects (positive and negative) policies, operations, and service processes have on individuals and families seeking supports and services to meet their needs.

Paulette now works and shares information with other parents and caregivers and others in her community. Her desire is to foster, improve, and develop better collaborative relations between all stakeholders and participant team members. The result is to allow the individual to live the most independent, safe, and self-directed life in consideration of their strengths, gifts, and talents. This includes increasing their independence (with and without supports) at home and in the community, foster their involvement in family and community activities and to meet their career goals, as desired.

In starting a grass-root, parent-lead organization, Paulette truly believes families need not struggle as they do to obtain person-centered information and resources to support their loved one's desires for a quality good life. She strives for productive communications between seemingly opposing team members and stakeholders to develop an overall goal for individuals with IDD to experience, to the greatest extent possible, independent, meaningful, integrated, and self-fulfilling lives.

She works with families to empower them to reach within their family and community structures and resources to discover, develop, and receive the greatest benefit from all the various resources within their community. This includes broadening the way individuals, families, and communities think about supporting their intellectually disabled neighbors in their desire to experience fulfilling lives.

Paulette is the founder of IDDA Consulting and Network, LLC, a parent-to-parent IDD sharing network. In addition, through IDDA Paulette founded JAM, a program dedicated to providing enriching skill building activities for individuals with IDD. Over the past 3 years, JAM has provided dance and music and singing performances at various local venues.

Paulette is also a Family and Caregiver Mentor, Advocate, and Coach; PCP Planning Facilitator; HCBS Waiver Administrator; DDA Certified Support Broker (former); Prince George's County CoP Local Facilitator; and Certified Ambassador, Charting the LifeCourse

*A holistic plan looks at the whole person (including their family and natural supports). The focus is not just their physical and mental health but also their intellectual and developmental challenges while considering their learning and behavior disorders within their family and community environments. Their support should inclusively consider their physical, emotional, social and spiritual wellbeing. ~ IDDA*



## WORKSHOP TOPICS

### CtLC Framework and Its Relationship to Creating the PCP **(NEW)**

The Charting the LifeCourse (CtLC) methodology is embedded in all DDA waivers and most policies for person-centered planning. CtLC principles can be essential tools for developing an individual's annual person-centered plan (PCP). While the CCS writes the PCP, understanding CtLC principles and tools, such as trajectory and integrated star, helps the team prepare strategies provide vital information to the CCS for creating a comprehensive "Good Life" PCP. This webinar introduces individuals and their team members, within their strategic roles, to CtLC as implemented within DDA, focusing on using the trajectory and integrated star of supports.

### Walk thru the HCBS Waivers and Related Information

This workshop's goal is to provide:

- An overview of CMS guidelines and DDA's approved waiver applications
- HIPPA Compliance
- A review of some basic terminology presented in the COMAR and the DDA Waivers.
- Guide attendees through the documents for general orientation on format and content.
- Give some insight into how to use this information to advocate and support participant's management of their waiver program.

### Walk thru the DDA SDS Policies, Guidelines, and Manual

This workshop's goal is to provide:

- An overview of primary policies, guidelines, and procedures documents.
- A review of additional terminology.
- Guide attendees through the documents for general orientation on format and content.
- Give some insight into how to use this information to advocate, develop SDS program strategies, and support participant's management of their waiver program.

### Waiver Services – Personal Supports, Respite, Community Development, IFDGS, Assistive Technology, Transportation (Independent)

Using the information presented in the DDA Waivers and other related regulatory policies, guidelines, and processes, highlight the service descriptions and requirements.

### Waiver Services – Behavior Supports, Nursing Supports, Environmental Assessment and Modifications, Family and Peer Mentoring, Housing Supports, and Supported Employment

Using the information presented in the DDA Waivers and other related regulatory policies, guidelines, and processes, highlight the service descriptions and requirements.

## Roles and Responsibilities - DDA/Hdqrs/ROs-CCS-SB-FMCS

Using the information presented in the DDA Waivers and other related regulatory policies and guidelines point out the authorities, responsibilities and tasks including program limitation and restrictions for these critical roles. We will compare the difference and relationship between LTSS and FMCS portal regarding the support of the participants' program.

## Building The Participant-Employer's TEAM – Leadership, Task Execution, and Advisory and Accounting and HR Supports

We will go over the ongoing primary responsibilities and tasks useful in the management and administration of a participant's SDS program. Based on the regulatory policies and procedures we will review the participant's employer of record's obligations and duties, the relationship of relatives as staff, legally responsible individuals, SSA representative payees, and others. Also, we will consider how day-to-day administration can play a role on the team and how supported decision making could be used. We will also review Conflict of Interest (COI) and PORII policy requirements.

## Walk Thru the Participant-Employer's Recruitment and HR/Personnel Responsibilities – 2 Sessions

We will look at labor requirements and tasks related to recruitment, hiring/onboarding, employee training, employee/service evaluations, employee incentives, employee job descriptions, discipline, etc. benefits, staff schedules, handbooks, EVV. Considerations regarding staffing using employees and/or vendors; and relatives/family vs non-relatives. Using vendor agreement and service descriptions. It is recommended attendees have access to their FMCS portals during the workshop.

## Walk Thru the Participant-Employer's Accounting and Fiscal Responsibility

Approving Timesheets and vendor invoices and reimbursements, budget, expenditure and reconciliations. The relationship between the Budget *Sheet* and FMCS Budget/*Statement Reports*. It is recommended attendees have access to their FMCS portals during the workshop.

## Building The Participant-Employer's SDS Program – 2 Sessions

For now, the future and when family is gone. Finding resources and activities; scheduling, maintaining the participant's calendar; and program administration. We will review the difference between the role and tasks of the CCS and Support Broker, as presented in DDA policies. Further we will compare these roles to staff providing supporting services/tasks under Day-to-Day Administration. Also, what reports FMCS is to provide to help in management of the participant's SDS program.

## Preparing For Initial and Renewal - Part 1 – PCP and Service Schedule and Supporting forms – 2 Sessions

This workshop is designed to provide a deeper understanding of the primary SDS documents. Although helpful for renewal this information is useable throughout the PY.

1. We will look at the parts of the PCP and some of the information to be included. We will discuss the relationship between the PCP and the Schedule, PCP outcomes, and Budget Sheet.

2. There will be a discussion about the difference between the PCP-Service Authorization (PCP-SA or DSA) and allocation.
3. Including we will look at the various annual forms and information that need to be completed and maintained (with the CCS and FMCS) updated throughout the PY.
4. We will discuss PCP modifications and when required.
5. Share related DDA policies and forms and published FMCS procedures and forms.

## Preparing for Initial and Renewal - Part 2 – Budget and Supporting Forms – 2 Sessions

We will look at what is needed for preparing the Budget Sheet and supporting documents; employee and vendor standard and exception rates; employee benefit costs; providing for allocated cost and cost related to unallocated items; and PY spend planning. We will discuss budget modifications and when required.

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### REMINDER!!! MDH and DDA Compliance Mandates

Anyone paid to provide a Medicaid waiver service, including participant employees, is considered a Medicaid Provider, subject to all laws and regulations associated with being a Medicaid Provider. (*Self-Directed Services Manual Revised Date: November 6, 2024, page 24*)

Anyone paid to provide a Medicaid waiver service, including vendors, is considered a Medicaid Provider, subject to all laws and regulations associated with being a Medicaid Provider. (*Self-Directed Services Manual Revised Date: November 6, 2024, page 43*)

Participants and their designated representatives are required to comply with the requirements set forth in the applicable DDA-operated Medicaid waiver programs and all applicable federal, State, and local laws, regulations, and any Department policies and procedures.

The Department has the authority to terminate participants from the Self-Directed Service delivery model or from the Medicaid waiver program if any of the following circumstances occur:

Failure of the participant, legal guardian, or the participant's designated representative (as applicable) to comply with any applicable federal, State, or local law, regulation, policy, or procedure; or  
Failure of the participant, legal guardian, or the participant's designated representative (as applicable) to manage funds within the participant's DDA-approved annual budget, including expending or attempting to expend funds inconsistent with the participant's DDA-approved annual budget. (*Self Directed Services Comprehensive Policy. Retrieved 10/26/2024 – pages 21-22*).

**Future webinars are in the final planning stages. ITC desires to assist participants and their teams including their employee and vendor have the opportunity to identify, understand and be compliant to the application regulations.**