

# Glossary of Self-Direction Terms

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**Center for Medicare and Medicaid Services (CMS)** – CMS is a federal agency within the United States Department of Health and Human Services. Formerly the Health Care Financing Administration (HCFA), CMS is responsible for Medicare, Medicaid, and other programs.

**Community Habilitation and Support Services Waiver (CHSS)** – This is one of Georgia's Home and Community Based Waivers for people with mental retardation/developmental disabilities. It was originally designed and implemented to support the closure of Brook Run, an ICF/MR facility that was located in the metro Atlanta area and is currently structured as a per diem bundled service and rate program.

**Department of Community Health (DCH)** – State of Georgia Department of Community Health is responsible for insuring nearly two million people, maximizing the state's health care purchasing power, planning coverage for uninsured Georgians, and coordinating health planning for state agencies.

**Department of Human Resources (DHR)** - State of Georgia Department of Human Resources is a large umbrella-type department of state government providing a wide range of social services and assistance through four major divisions (Aging Services, Family and Children Services, Mental Health, Development Disabilities and Addictive Diseases, and Public Health).

**Division of Medical Assistance (DMA)** – As the largest division in the Department of Community Health, the Division of Medical Assistance administers the Georgia Medicaid program, which provides health care for people who are aged, blind, disabled or indigent. DMA works in partnership with DHR/MHDDAD in implementing the home and community-based Medicaid Waiver programs for people with mental retardation/developmental disabilities and with DHR/DAS in implementing the home and community-based Medicaid Waiver programs for older adults.

**Division of Mental Health, Developmental Disabilities and Addictive Diseases (MHDDAD)**  
The DHR Division of Mental Health, Developmental Disabilities, and Addictive Diseases serves people of all ages including those with the most severe mental illnesses, developmental disabilities and addictive diseases under the auspices of the Department of Human Resources. MHDDAD administers the Home and Community-Based Medicaid waiver programs for people with developmental disabilities in partnership with the Department of Community Health/Division of Medical Assistance.

**Emergency Back-Up System** – This system is a formal arrangement used by the state to assure emergency back-up and/or emergency response capability in the event those providers of services and supports essential to the individual's health and welfare are not available.

**Employer (of Record)** – The waiver participant or family/representative recruits, hires, manages and dismisses any support workers in self-direction and assumes responsibilities as the employer of record.

**Financial Support Services** – Financial support services include: (1) assisting the participant to understand billing and documentation responsibilities; (2) performing payroll responsibilities; (3) writing checks for approved goods and services on behalf of the participant; (4) tracking and monitoring individual budget expenditures; and (5) identifying expenditures that are over or under the budget.

**Fiscal Agent** – A fiscal agent manages funds, makes payments, and accounts for expenditures made on behalf of the consumer as directed by the consumer, family or circle of support. The fiscal agent is not a direct service provider but handles the business end of securing services and supports.

**Home and Community-Based Waiver Program** – A Home and Community-Based Waiver Program is a program to provide enhanced home and community support services to those Medicaid beneficiaries who would otherwise require institutional care. Section 1915 (c) of the Social Security Act enables states to request a waiver of applicable federal Medicaid requirements to provide these enhanced home and community support services.

**Incident Management System** – This system is a formal plan, development and implement by the state, to define, identify, investigate, and resolve incidents, events or occurrences which jeopardize the health and welfare of participants.

**Independence Plus Initiative** – The Independence Plus Initiative is a collaborative effort of the Department of Human Resources' Division of Mental Health, Developmental Disabilities and Addictive Diseases and Division of Aging Services and the Department of Community Health, Division of Medical Assistance. Grant funding from the Centers for Medicare and Medicaid Services is supporting this initiative. The overall goal of the initiative is to develop a comprehensive system of self-directed supports and services for individuals with disabilities (developmental disabilities, physical disabilities, traumatic brain injury) and elderly people. The federal grant is also funding the development of a self-determination pilot for adults with serious mental illness.

**Individual Budget** – The individual budget is the total dollar value of services and supports, as specified in the plan of care, under the control and direction of the program participant.

**Individual Budgeting** – Individual budgeting is the process and procedures for the development of the individual budgets for program participants.

**Mental Retardation Waiver Program (MRWP)** – This is one of Georgia's two Home and Community Based Waivers for people with mental retardation/developmental disabilities. It is the original waiver that was initiated in 1989 and serves the majority of the waiver recipients.

**Quality Assurance** – Quality assurance refers to all actions taken to ensure that standards and procedures are adhered to, and that delivered services and supports meet performance requirements.

**Quality Improvement** – Quality improvement is a systematic approach to the continuous study and improvement of the processes of providing services to meet the needs of the individuals served. The goal of quality improvement activities is to improve the overall functioning of the agency and to increase quality outcomes for consumers.

**Person-Centered Planning** - Person-centered planning is a values-driven process for planning services and supports for an individual. Those services and supports enable the individual to live where he or she wants to live. The planning process honors the individual's preferences, choices, and abilities. The person-centered planning process typically involves families, friends, and professionals as the individual desires or requires.

**Self-Determination** – Self-determination is the ability of individuals to make the choices that allow them to exercise control over their own lives, to achieve the goals to which they aspire and to acquire the skills and resources necessary to participate fully and meaningfully in society. Self-Determination has four basic rights and responsibilities: freedom, control of own life, chosen supports, and community involvement.

**Self-Directed Service Delivery System** – Self-Directed Service Delivery System includes all activities and procedures associated with the direct provision of services and supports through an approach in which individuals and families direct their own care and make decisions about how service resources are allocated.

**Self-Directed Supports** – Self-directed supports refer to a system of activities that assist the participant to develop, implement and manage the support services identified in the consumer's individual budget. Examples include supports brokerage and financial management services.

**Self-Direction** – Self-direction is a philosophy and orientation to the delivery of home and community-based services whereby informed individuals make choices about the services they receive. They can assess their own needs, determine how and by whom these needs should be met, and monitor the quality of services received. Self-direction may exist in differing degrees and may span many types of services. It ranges from the individual independently making all decisions and managing services directly to an individual using a representative to manage needed services. The unifying force in the range of self-directed and personal choice models is that individuals have the primary authority to make choices that work best for them, regardless of the nature or extent of their disability or the source of payment for services.

**Support Broker** – The supports broker serves as a personal agent who works on behalf of the participant and is under the direction of the participant. The broker serves as a link between the participant and the program, assisting the participant with whatever is needed to identify potential personal requirements, resources to meet those requirements, and the services and supports to sustain the participant as he/she directs his/her own services and supports.

**Supports Brokerage** – Supports brokerage assists participants with recruiting, hiring, managing and dismissing a service worker, identifying and accessing community resources, and serving as the agent on behalf of the participant.

**Waiver** – A waiver is a program that “waives” or sets aside certain federal requirements to allow Medicaid dollars to pay for services provided in the person’s home or community.