

FAMILY AND PEER MENTORING SUPPORTS

I. APPLICABILITY

A. This policy applies to:

1. People receiving Developmental Disabilities Administration funded services through its Traditional or Self-Directed Services Delivery Model;
2. Their family and/or legal representatives; and
3. Coordinators of Community Services; Self-Directed staff, vendors, Support Brokers; Financial Management and Counseling Services agencies; DDA providers; and DDA staff.

II. IMPLEMENTATION DATE

- A. This policy begins 30 days after posting and overrides all other policies or guidance related to Family and Peer Mentoring Supports.
- B. In the event of a federal public health or state of emergency, this policy may be overruled by any and all federal authorities.

III. PURPOSE

This policy describes the requirements and guidance for Family and Peer Mentoring Supports funded through DDA-operated Medicaid Waiver Programs or State funds.

IV. DEFINITIONS

- A. "Coordination of Community Services" are targeted case management services to help people receiving and or requesting services funded by the DDA. Targeted case management services are provided in accordance with [COMAR 10.09.48](#).
- B. "Coordinator of Community Services" or "CCS" is an individual who provides Coordination of Community Services. They can be either an employee or a contractor of a DDA provider.

- C. "DDA Medicaid Waiver Program" is one of the three Medicaid Home and Community-Based Waiver programs operated by the Developmental Disabilities Administration (DDA) that serve eligible children and adults with intellectual and developmental disabilities. These programs are approved by the Centers for Medicare & Medicaid Services and include the:
1. Family Supports Waiver;
 2. Community Pathways Waiver;
 3. Community Supports Waiver.
- D. "DDA Provider" is an individual or entity that is licensed or certified and/or approved by the Maryland Department of Health to provide DDA-funded services to people in accordance with the DDA's requirements.
- E. "Department" is the Maryland Department of Health.
- F. "Financial Management and Counseling Services" or "FMCS" [formerly called Fiscal Management Services or "FMS"] are services provided to support a person using the DDA Self-Directed Services Delivery Model in using their budget authority and, if applicable, employer authority. FMCS services include, but are not limited to:
1. Processing claims for payment for Waiver Program services in accordance with the person's Self-Directed budget allocation; and
 2. Verifying that the DDA provider, vendor, or direct support staff meet all qualifications to provide the Waiver Program service.
- G. "Legal guardian" is either:
1. A natural or adoptive parent of a person under the age of 18; or
 2. A person who has been appointed by a court order as guardian of the person.

- H. "Legally responsible individual Person" is an individual who has a legal obligation under the provisions of Maryland law to care for another individual. This includes:
1. A parent of a minor (either natural or adoptive), legal guardian; or
 2. A person otherwise legally responsible for the care of a minor.
- I. "LTSSMaryland" is an electronic information system, developed and supported by the Department. It is used by the DDA, the CCS, and DDA Providers to create, review, and maintain records about:
1. An individual's eligibility status for DDA-funded services; and
 2. The individual's Person-Centered Plan, and services and funding authorized by the DDA.
- J. "Organized Health Care Delivery System (OHCDS)" is a public or private organization that delivers health services. OHCDS are approved by the Department of Health to provide Waiver Program services to people, in accordance with, [COMAR 10.22.20](#)
- K. "Peer Mentor" or "Mentor" is a person with a developmental disability or a family member who provides support and guidance to a person with a developmental disability or a family member of an individual with a disability, as outlined in this policy.
- L. "Person" is an individual who receives DDA-funded services.
- M. "Person-Centered Plan" or "PCP" is a written plan developed through a planning process, driven by the person with a developmental disability to:
1. Identify their goals and preferences;
 2. Identify services to support them to pursue their personally defined outcomes in the most integrated community setting;
 3. Direct the delivery of services that reflect their personal preferences and choice; and

4. Identify their specific needs that must be addressed to ensure their health and welfare.
- N. "Regional Office" or "RO" refers to one of the DDA's four local offices. ROs are the point of contact for applicants, people getting DDA-funded services, their families, and DDA providers living and working in the counties they serve. Each RO has the authority to review individual Person-Centered Plans and approve funding for services. The Regional Offices include the:
1. Central Maryland Regional Office, serving Anne Arundel, Baltimore, Howard, and Harford Counties and Baltimore City;
 2. Eastern Shore Regional Office, serving Caroline, Cecil, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico, and Worcester Counties;
 3. Southern Maryland Regional Office, serving Calvert, Charles, Montgomery, Prince George's, and St. Mary's Counties; and
 4. Western Maryland Regional Office, serving Allegany, Carroll, Frederick, Garrett, and Washington Counties.
- O. "Relative" is a natural or adoptive parent, step-parent, or sibling of an applicant or person getting DDA-funded services, who is not also a legal guardian or a legally responsible individual Person.
- P. "Self-Directed Services Delivery Model" or "SDS Model" is a model of service delivery that the DDA provides through its Waiver Programs. In the Self-Directed Services Delivery Model, the person (not the provider) has:
1. The power and responsibility for overseeing, coordinating, and directing the services they have been approved to receive;
 2. Budget authority over how the Medicaid funds are spent to purchase authorized services; and
 3. Employer authority to recruit, hire, train, and supervise the staff and service providers they want to hire.

- Q. "Self-directing" is a way of arranging services that empowers the person, with the support from their team, by expanding the degree of choice and control over the services and supports they receive. It gives the person decision-making authority and lets them take responsibility as the legal employer for managing their services with the support of a team they select.
- R. "Support Broker" is an individual who provides Support Broker services to people enrolled in the Self-Directed Services Delivery Model in accordance with applicable requirements.
- S. "Traditional Service Delivery Model" is a service delivery model that the DDA provides through its Waiver Programs. In the Traditional Service Delivery Model the person chooses a DDA Provider who is responsible for overseeing, coordinating and providing the person's approved services.
- T. "Waiver Program Service" is a service funded by a DDA-operated Medicaid Waiver Program.

V. POLICY

- A. Family and Peer Mentoring Supports connect a person and their family member(s), including siblings, to:
 - 1. Other people with developmental disabilities; and
 - 2. Family members of people with developmental disabilities who have shared lived experiences.
- B. Family and Peer Mentors provide support and guidance to a person and their family.
- C. Family and Peer Mentors can explain community services and programs and suggest strategies to people and their families to achieve their goals.
- D. Family and Peer Mentoring Supports can help people and their family members/caregiver learn about and access community resources beyond those offered through a DDA Waiver.

- E. Family and Peer Mentoring Supports are available to people who need them as documented in their Person-Centered Plan (PCP).

VI. STANDARDS

A. Family and Peer Mentoring Supports

1. Family and Peer Mentoring Supports are provided from an experienced Peer Mentor to:
 - a. A person getting DDA-funded services;
 - b. Their family member/caregiver who is the primary unpaid support; or
 - c. Both
2. Family and Peer Mentoring Supports include:
 - a. Connecting a person and their relatives with a Mentor;
 - b. Follow-up actions to ensure the match between the Mentor and the person and their family member(s) is successful and meaningful.
3. A Family or Peer Mentor can be:
 - a. A person with a developmental disability;
 - b. A parent or family member of a different family that includes a person with a developmental disability;
4. Family and Peer Mentors:
 - a. Provide support and advice based on the Mentor's lived experience, to:
 - i. The person; and
 - ii. Parents and family members, including siblings, who provide unpaid supports to the person; and
 - b. Foster connections and relationships which build individual and family resilience;

- c. Listen to feelings, challenges, and concerns and build trust with the person and/or their family member(s), including siblings;
 - d. Share life experiences in a professional manor;
 - e. Provide links to community supports services and programs;
 - f. Share strategies they have used to achieve common goals of the person;
 - g. Provide support and guidance to the person and/or family member(s) to navigate a broad range of community resources beyond those offered through the Waiver
5. Benchmarks for a successful and meaningful match are:
- a. Trust is established;
 - a. Boundaries are established in the relationship; and
 - b. The person and/or family member(s):
 - i. Feels heard and supported in addressing challenges and concerns;
 - ii. Receives support in understanding state and local systems; and
 - iii. Develops knowledge, skills, and confidence to understand and access state and local systems for support.
6. A Mentor may attend meetings, when appropriate, to support the person to develop their plan. (For example, during Person-Centered Plan (PCP) and Individual Education Plan meetings.)

B. Exclusions

Family and Peer Mentoring Supports do not include:

1. Coordination of Community Services;

2. Determination of eligibility for enrollment in the Waiver Program;
3. Development of the person's PCP; and
4. Support Broker services.

C. Criteria to be Eligible

1. A person may be eligible to receive funding for Family and Peer Mentoring Supports if:
 - a. The person is enrolled in a DDA Medicaid Waiver Program; and
 - b. The person has an assessed need for this service, which is documented in their PCP.
2. The family member receiving Peer Mentoring Supports:
 - a. Is the person's parent, sibling, or other family member; and
 - b. Is a primary unpaid support to the person.
3. All other available and appropriate funding sources have been explored, exhausted, and documented in the person's PCP prior to accessing DDA funding for this service, including, but not limited to:
 - a. Maryland Medicaid State Plan;
 - b. Division of Rehabilitation Services (DORS);
 - c. State Department of Education; and
 - d. Department of Human Services.
4. If the person requires more Family and Peer Mentoring Supports than are covered and provided by the Medicaid State Plan, a request can be made under this Waiver service. However, the DDA Medicaid Waiver Program may only pay for additional costs that are:
 - a. Not covered;
 - b. Consistent with the DDA Medicaid Waiver Program's objectives of avoiding institutionalization; and

- c. Necessary to meet the goals in their PCP.
- 5. The request for service funding must meet all requirements in this policy, guidance and the DDA Medicaid Waiver Program.

D. Special Service Requirements and Limitations

- 1. Family and Peer Mentoring Supports will only be authorized for a maximum of eight (8) hours per day.
- 2. Mentors cannot provide Family and Peer Mentoring Supports to members of their own family.

E. Requirements to be Paid for Services

- 1. A provider of Family and Peer Mentoring Supports must be a:
 - a. Family and Peer Mentoring Supports Provider; or
 - b. Individual Family and Peer Mentor.
- 2. Under the Traditional Services Delivery Model, the provider of Family and Peer Mentoring Supports must:
 - a. Be certified by the DDA;
 - b. Ensure that staff meet all qualifications as outlined in the approved DDA Medicaid Waiver Program application at the time-of-service delivery;
 - c. Verify the certifications, and experience of all Family and Peer Mentors vendors with whom they contract or employ;
 - d. Keep a copy of the credentials and documented experience of all Family and Peer Mentors; and
 - e. Give a copy of the credentials and documented experience of all Family and Peer Mentors to the DDA, upon request.
 - f. Maintain documentation and records regarding delivery of services in accordance with the applicable laws, regulations, policies, and guidance, and the DDA Medicaid Waiver Program application.

3. An individual Family and Peer mentor must:
 - a. Be certified by the DDA;
 - b. Be at least 18 years old;
 - c. Have a Bachelor's Degree or demonstrated life experiences and skills to provide the service;
 - d. Possess current First Aid and CPR certification;
 - e. Pass a criminal background check, and child protective services check if applicable;
 - f. Possess a valid driver's license, if driving as part of this service;
 - g. Have automobile insurance for automobiles used during this service;
 - h. Complete training designated by DDA;
 - i. Have three professional references that show their ability to provide this service;
 - j. Demonstrate financial integrity through IRS, the Department, and Medicaid Exclusion List checks;
 - k. Complete and sign any agreements required by the Department or the DDA;
 - l. Have a signed Medicaid Provider Agreement; and
 - m. Keep documentation and records regarding delivery of services in accordance with the applicable laws, regulations, policies, and guidance, and the DDA Medicaid Waiver Program application.
4. Under the Self-Directed Service Delivery Model all qualifications must be met:
 - a. As outlined in the approved DDA Medicaid Waiver Program application at the time of service delivery; and

- b. As confirmed by the Financial Management and Counseling Services (FMCS) agency.
5. People in the Self-Directed Services Delivery Model and their FMCS agencies must keep documentation and records regarding delivery of services in accordance with the applicable laws, regulations, policies, and guidance, and the DDA Medicaid Waiver Program application.

F. Rates/Billing

1. Rates shall be reasonable, customary, and necessary, as determined by the person's needs and recommended by their team.
2. Rates under the Traditional Service Delivery Model are posted on the [DDA Rates and Invoices](#) webpage and [LTSSMaryland](#) webpage.
3. Persons under the Self-Directed Service Delivery Model determine pay rates based on the reasonable and customary rates posted on the [DDA Self-Directed Forms](#) webpage.
4. Providers of Family and Peer Mentoring Supports and FMCS agencies must follow authorization and documentation in accordance with the [DDA Guidelines for Service Authorization and Provider Billing Documentation](#).
5. Under the Traditional Service Delivery Model, Family and Peer Mentoring Supports are billed in LTSSMaryland or PCIS2, based on [DDA guidance for Operating in PCIS2 and LTSSMaryland](#).
6. Under the Self-Directed Service Delivery Model the person must submit invoices as per their FMCS agency's policies and practices.

G. Legally Responsible Individuals, Legal Guardians, or Relatives Requirements

A legally responsible individual Person, relative, or legal guardian ~~of the person~~ cannot be paid by the Waiver Program, either directly or indirectly, to provide this Waiver Program service.

VII. LEGAL REFERENCES

- A. [Family Supports Waiver](#)
- B. [Community Pathways Waiver](#)
- C. [Community Supports Waiver](#)
- D. [COMAR 10.09.48](#)
- E. [COMAR 10.22.20](#)

VIII. RELATED POLICIES

- A. Family Caregiver Training and Empowerment Services

IX. REFERENCE MATERIALS

- A. [DDA - Service Authorization and Provider Billing Documentation Guidelines](#)
- B. [DDA Self-Directed Forms](#)
- C. [DDA Rates and Invoices](#)
- D. [Charting the LifeCourse Nexus](#)

X. ATTACHMENTS

- A. At a Glance - Family and Peer Mentoring Services
- B. Integrated Supports Star | Advocacy and Engagement