



N.C. Department of Health
and Human Services

Individual Budgets and Choice

September 30, 2015

Division of Medical Assistance

Division of Mental Health, Developmental
Disabilities and Substance Abuse Services



Topics

- What are individual budgets?
- Why use individual budgets?
- How is the individual budget calculated?
- Individual budgets, person centered planning and choice



What are Individual Budgets?

- Specific amount of funding based on a person's needs
- Person Centered Planning Tool
- Guideline
- Choice
- Flexible



Why Use Individual Budgets

- Fair and equal
- Sustainable
- More predictable
- Address waitlist



Individual Budgets

- Guidance – not a limit
- Changes as needed
- You choose services



Factors that Determine Individual Budgets

- Age (adult vs. child)
- Living arrangement
- Supports Intensity Scale (SIS) score
- Supplemental questions
- Historical spending
- Best fit model



Base Budget Services

- Services included with individual budget
- Day to day living services



Add-On Services

- Outside of base budget
- Increase health and safety
and / or
- Promote independence
- \$135,000 waiver maximum



Person Centered Planning and Choice

NC Innovations Waiver participants:

- Choose their own goals
- Choose the services that will help them reach their goals
- Choice is now at the center of the entire process



Person Centered Planning and Choice

1st Step - Get to Know the Individual

- “Discovery”
- Interests, strengths and values
- Personal goals



Person Centered Planning and Choice

2nd Step - Assessment

- Gathering information from team members
- Psychological and medical evaluations
- Risk Assessment
- Supports Intensity Scale (SIS)
- Many others



Person Centered Planning and Choice

3rd Step - Information Sharing:

- Services available
- Individual budget amount and purpose
- Relationship between individual budget and services
- How to make changes
- Planning services and supports for the year
- Actual services used for the previous year



Person Centered Planning and Choice

4th Step - Individual Support Plan (ISP)

- Choice is at the center
- Identify health and safety concerns
- Services based on goals and desired outcomes
- Care Coordinator records choices in the Plan



Person Centered Planning and Choice

5th Step – Send Plan for Review

- Utilization Management
- Utilization Review



Person Centered Planning and Choice

****A note about Medical Necessity**

The NC Innovations Waiver is a Medicaid program. Medicaid rules and regulations still apply.



N.C. Department of Health and Human Services

Questions or Comments?

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Or leave a voicemail message at:

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