



# iBudget

# Florida



agency for persons with disabilities  
*State of Florida*

# iBudget Florida

## The Waiver of the Future

Rick Scott, Governor  
Michael P. Hansen, Director



# iBudget Overview

- Focuses on individual budgets with flexibility to move service funds to meet needs
- Replaces the current tier waiver system:  
Tier 1, Tier 2, Tier 3, Tier 4

# iBudget Background

- 2009 General Appropriations Act (GAA) required a plan by February 2010
  - Agency for Persons with Disabilities (APD) researched other states' systems and best practices
  - APD worked with iBudget Florida stakeholders group to design a plan

# iBudget Background



- iBudget implementation was authorized in s. 393.0662, F.S., in 2010
- APD Rule 65G-4.0210 to 65G-4.0218 describes the iBudget algorithm and budget approval process
- *iBudget Medicaid Coverage and Limitations Handbook* (Rule # 59G-13.070 – provider handbook)



# Simplify the System



- Streamlines the service review and approval process
- Service reviews are more limited, focused, and streamlined, focusing on health and safety issues



# Simplify the System



- Organizes services into service families based on similarity of purpose of the services
- Business process efficiencies using technology



# Flexibility and Self Direction

- Individual decision making on the services needed
- Service array is revised to increase flexibility
- Flexibility to make changes within the iBudget allocation

# Equity

- Allocates funding based on the individual's age, living setting, characteristics, and circumstances
- No cost plan can be reduced by more than 50%

- Provides a process to cover extraordinary needs or one-time and temporary needs

# Sustainability



- Provides a predictable estimate of future funding needs
- Creates an efficient customer budgeting process with the waiver system used as the payor of last resort



# Sustainability

- Maximizes use of nonwaiver resources



# So What Is New?



- Much will stay the same, day-to-day
  - Providers
  - Majority of services and rates
  - Waiver support coordinators' important roles
  - Area offices
  - Residential options



# So What Is New?



- Equitable budgets while staying within our funding, as required by the Legislature
- Uses new method to decide budget amounts



# So What Is New?



- Funding is assigned at the beginning of the year
- Expectation: expenditure of services statewide will not exceed the agency's funding



# So What Is New?



- The individual decides how much to spend on specific services within the overall iBudget
- The individual can move funds around to meet changing needs—even funds that were unspent in previous months



# So What Is New?



- Streamlines or eliminates prior service authorization (PSA) process
- Services changes may often be made quickly
- Online system can often review and approve automatically
- If online system can't approve, APD staff will review



# So What Is New?



- New iBudget electronic system will help individuals and their WSCs plan and manage services
- Unique reporting features
  - Claims report
  - Service authorizations
  - Monitor service use



# So What Is New?



- Receive iBudget amount
- Review support plan needs and goals
- Approve cost plans
- Create service authorizations quarterly



# So What Is New?



- The individual has more choice over what services and how much of each service the individual receives!
- Individuals will be pre-approved for types of services (but not quantity, frequency, etc.)



# So What Is New?



- Must ensure health and safety
- Equitable budgets while staying within our funding, as required by the Legislature



# So What Is New?



- How the person plans for services
  - The budget is provided up front
- How to distribute the funds for the services needed
- Service authorizations will be quarterly and not annually



# What Services Have Changed?

Day activities renamed:

## Life Skills Development Services

- Companion =  
Life Skills Development Level 1
- Supported Employment =  
Life Skills Development Level 2
- Adult Day Training =  
Life Skills Development Level 3

# What Services Have Changed?

- Personal Supports service family
  - Respite Care for children is still a separate service
  - Combines the services of Personal Care Assistance, Respite for adults, Companion and In-Home Supports into one service—Personal Supports

# What Services Have Changed?

- Provider of Personal Supports is a broad provider type that can perform many different tasks needed by an individual
- The rate for Personal Supports is a blending of the rates from the four separate services

# CDC+ and iBudget Florida



- CDC+ option will continue
- CDC+ participants will have funding determined through their iBudgets
- CDC+ participants will “spend” iBudgets according to CDC+ policies



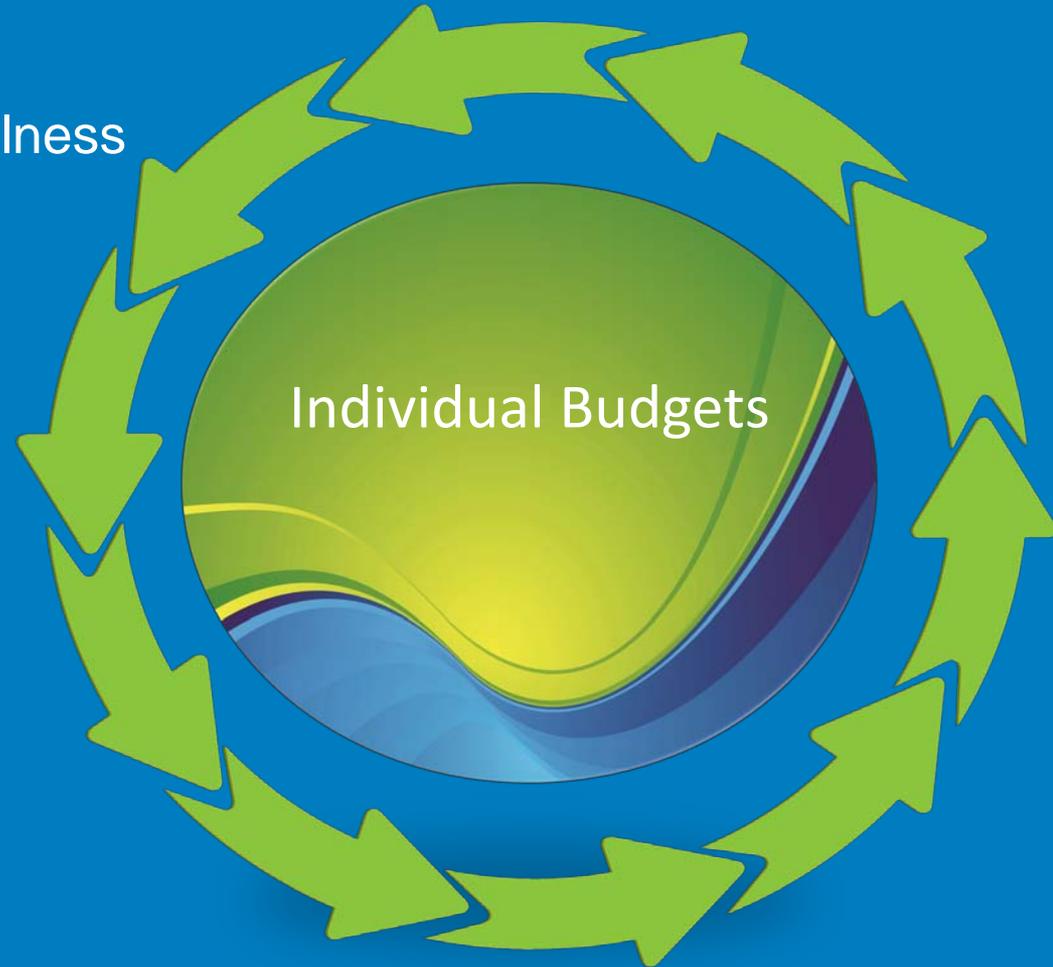
# Consumer Flexibility in Spending

## LEAST FLEXIBLE:

- Residential Services
- Therapeutic Supports and Wellness

## MOST FLEXIBLE:

- Life Skills Development
- Supplies and Equipment
- Personal Supports
- Support Coordination
- Transportation
- Dental Services



# Individual Budgets



## iBudget Allocation Methodology to Determine Individual Budgets



# iBudget Allocation Formula

AGE

QSI  
ASSESSMENT

- 1) Functional score
- 2) Behavioral score
- 3) Ability to transfer, self-protect, and maintain hygiene

LIVING  
SETTING



Determine Individual Budgets



# Individual Budgets



- If the existing cost plan is lower than the algorithm, the cost plan amount remains in effect
- No cost plan can be reduced by more than 50%



# Individual Budgets



- If the cost plan is higher than the algorithm amount, the iBudget algorithm will be individually reviewed to consider the individual's living setting, natural supports, family circumstances, and other factors affecting the level of service needed



# Individual Budgets



- No cost plan can be reduced by more than 50% - very few will receive this amount of reduction
- Notice will be sent with the final iBudget allocation



# Individual Budgets



- Statewide, approximately 60 percent of individuals may receive no reduction; their cost plans will remain the same
- Reductions will be based on individual reviews



# Individual Budgets

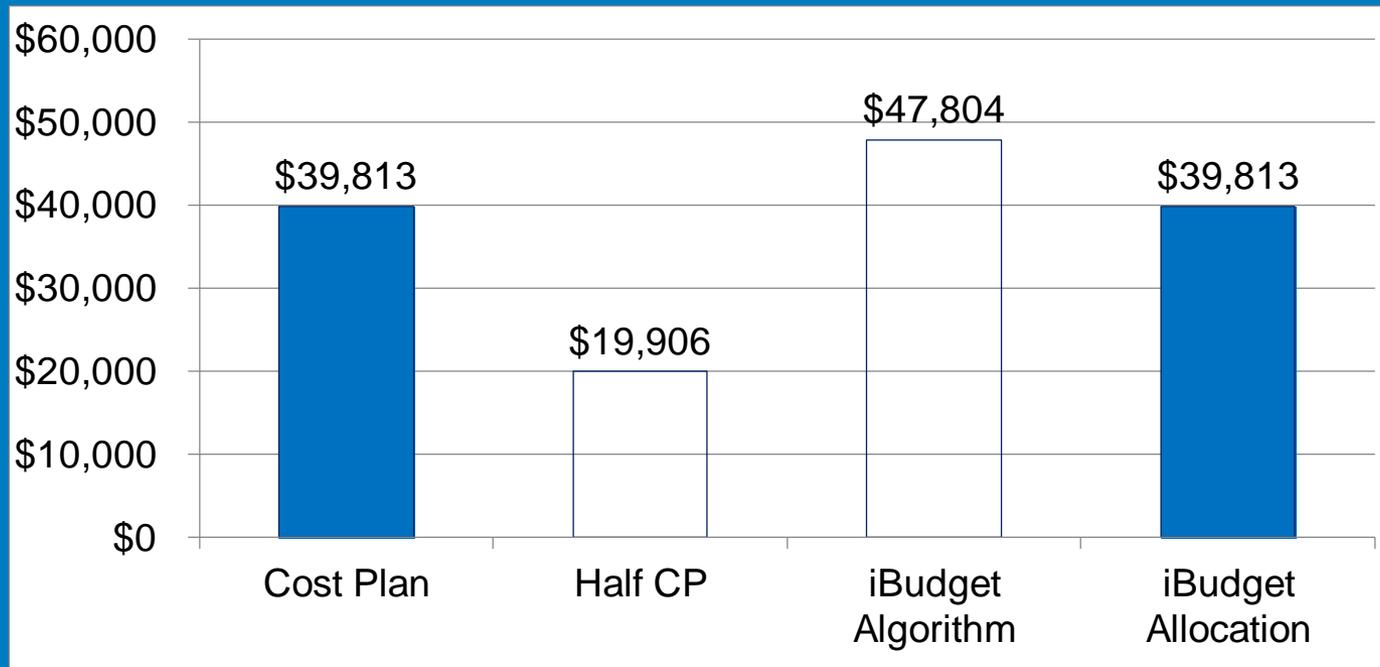


- Individual reviews will be conducted by the WSC and the area office and will be completed for all individuals who have a reduction to ensure needs are met and to avoid institutionalization



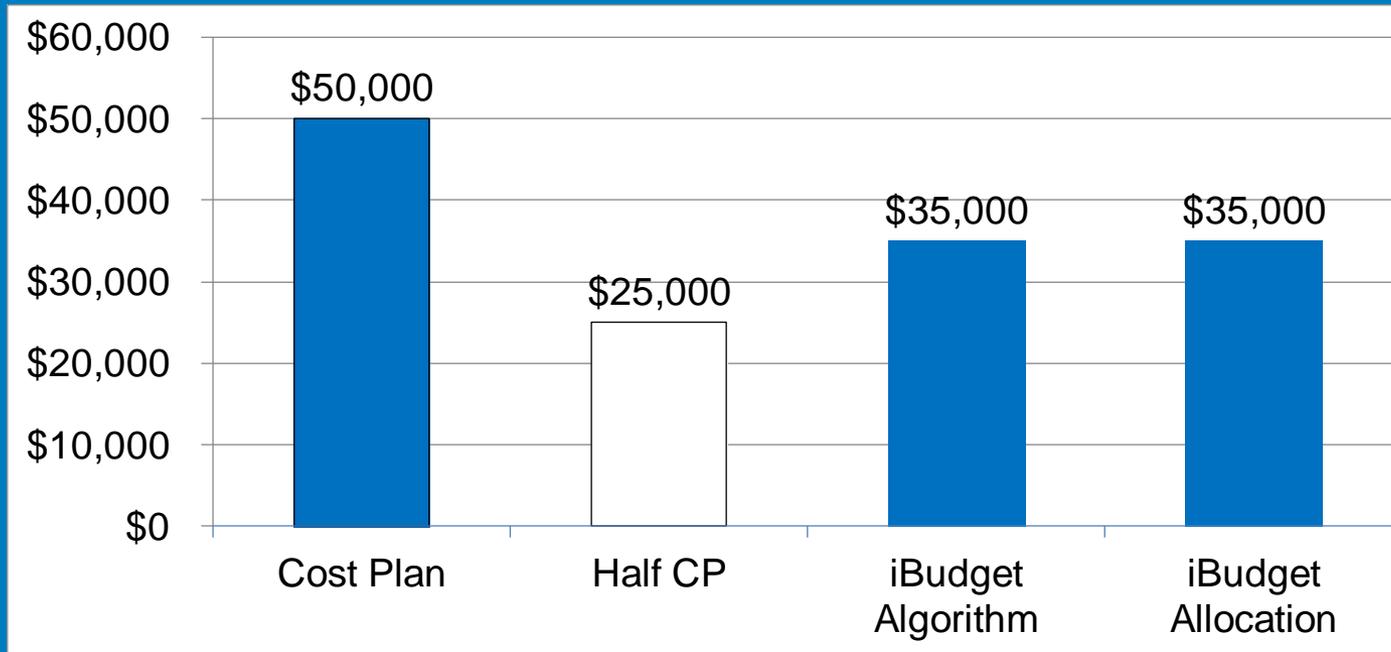
# Individual Budgets

## Example 1



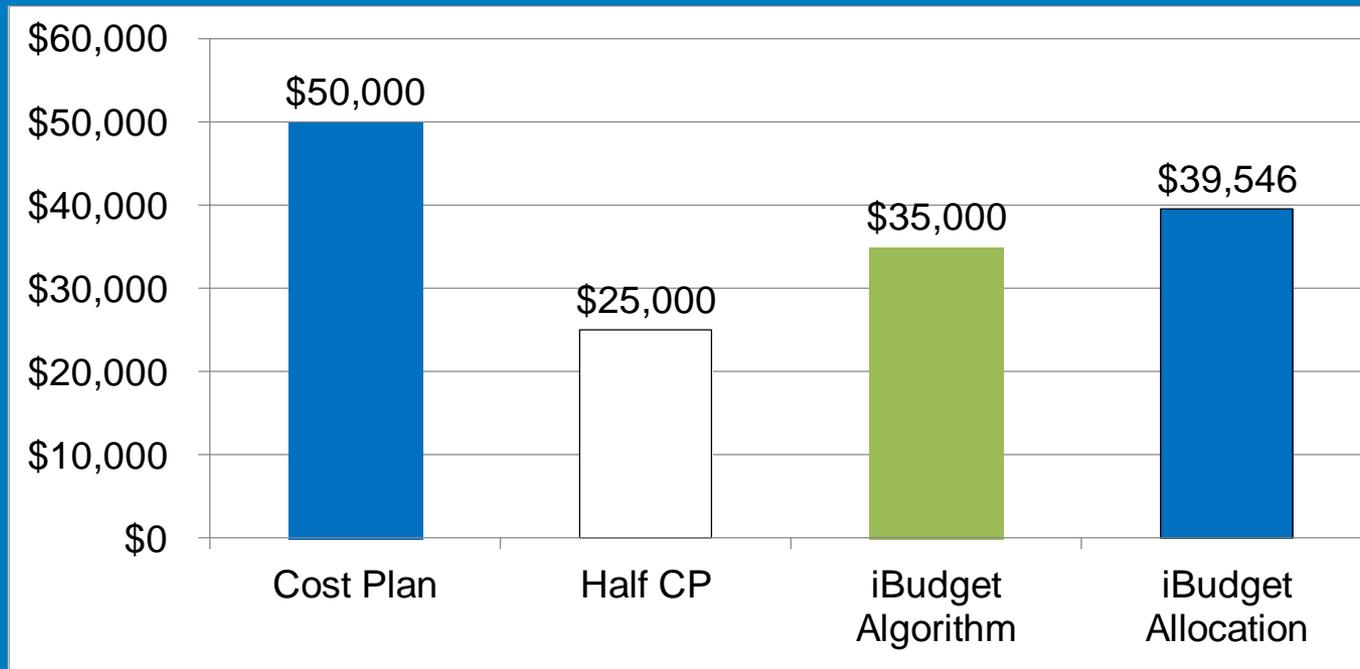
# Individual Budgets

## Example 2



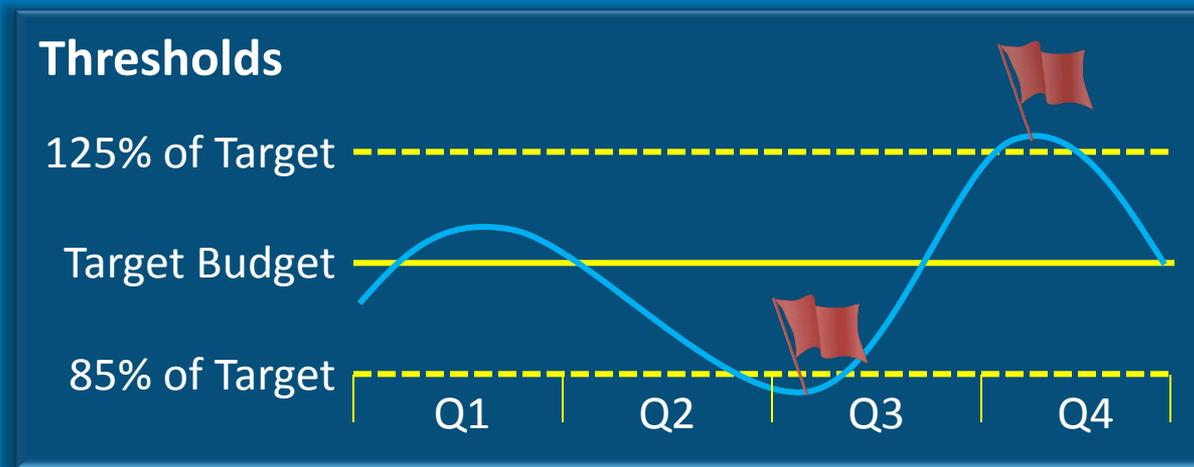
# Individual Budgets

## Example 3



# Program Overview

- System Controls
  - Over-budget alerts
  - Thresholds (flags for area office)



# iBudget Timeline

*5 Years*



**2009**

- Concept of individualized budgets begins at APD

**2010**

- Individual budgets for delivery of home and community-based services; iBudget system established

**2012**

- April – Areas 1 & 2 implement full iBudget program
- CDC+ will start July



**2011**

- May - Proof of concept; 4 families and 14 providers
- October - Areas 1 & 2 pilot the iBudget application

**2013**

- Implement statewide 2012-2013 fiscal year



Contact us online at  
**iBudgetFlorida.org**

