

HOME for Case Managers Training

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Christy Casey and Mindy Williams

LTSS Policy Program Managers

Iowa Medicaid

Pre-Test Link:

[https://www.surveymonkey.com/r/
HOME4CMs-3-Pre](https://www.surveymonkey.com/r/HOME4CMs-3-Pre)

Pre-Test Link:



HOME

Phase 1 Service Menus

Phase 1: AD Waiver Service Package

Service Packages: See Appendix C of the waivers for more information

/ **Daily Activities and Care:**

- Attendant Care (Skilled and Unskilled)
- Companion
- Home Health Aide
- Home Delivered Meals
- Home Maintenance Support
- Respite
- Transportation

/ **Help with Health Needs:**

- Positive Behavioral Support and Consultation
- Family Training
- Interim Medical Monitoring and Treatment
- Nursing
- Nutritional Counseling

/ **Equipment and Modifications:**

- Assistive Devices
- Home and Vehicle Modifications
- Personal Emergency Response System
- Specialized Medical Equipment

/ **Day Services:**

- Adult Day Care
- Prevocational Services
- Supported Employment

/ **Residential Services and Supports:**

- Assisted Living

/ **Self-Direction Supports:**

- Financial Management Service
- Independent Support Broker
- Individual Directed Goods and Services

/ **New Services:**

- Community Transition Services
- Peer Mentoring

Phase 1: CY Waiver Service Package

Service Packages: See Appendix C of the waivers for more information

/ **Daily Activities and Care:**

- Home Delivered Meals
- Respite
- Transportation
- Medical Day Care for Children

/ **Help with Health Needs:**

- Positive Behavioral Support and Consultation
- Family and Community Support

/ **Equipment and Modifications:**

- Assistive Devices
- Home and Vehicle Modifications
- Personal Emergency Response System

/ **Day Services:**

- Prevocational Services
- Supported Employment

/ **Self-Direction Supports:**

- Financial Management Service
- Independent Support Broker
- Individual Directed Goods and Services

/ **New Services:**

- Community Transition Services
- Peer Mentoring

Two New Waiver Services

Community Transition Services

- Community Transition Services are non-recurring set-up expenses that enable a member to establish services as a basic household when the member has a qualifying transition to a private residence.
 - A private residence is a living arrangement in which the member is directly responsible for the member's own living expenses.
- **Community Transition Services are covered only when:**
 - The expense is reasonable and necessary
 - Clearly identified in the member's person-centered service plan
 - The member is unable to meet the expense, **or** the item or service cannot be obtained from another source.
 - Services must be consistent with the waiver objective of avoiding institutionalization.
 - Refer to the approved 1915(c) waiver for complete service definition.

Qualifying Transitions

Community Transition Services may be covered for the following qualifying transitions:

- ▶ **A member transitioning from:**
 - An institution
 - Another provider-operated or provider-controlled living arrangement
- ▶ **To:** a private residence where the member is directly responsible for the member's own living expenses.
- ▶ **A youth transitioning to adult programs and services from:**
 - The family home
 - A psychiatric residential treatment facility
 - Intermediate care facility
 - Residential treatment program
 - Congregate foster or group home
 - State custody placement
 - Other provider-controlled residential setting
- ▶ **To:** a private residence where the youth will be directly responsible for the youth's own living expenses.

Covered expenses

► **Covered expenses are non-recurring set-up expenses necessary to establish a basic household and may include:**

- Security deposits required to obtain a lease on an apartment or home.
- Essential household furnishings and moving expenses required to occupy and use a community domicile, including furniture, window coverings, food preparation items, and bed and bath linens.
- Set-up fees or deposits for utility or service access, including land line telephone (NOT cellphone), electricity, heating, and water .
- Fees associated with obtaining legal or identification documents necessary for a housing application, such as a birth certificate, state-issued identification, or a criminal background check.
- Moving expenses (Examples: Moving boxes, truck rental..)
- Activities to assess need, arrange for, and procure the needed resources when the activities are directly related to the approved transition expenses.

Authorization, Amount, Frequency, and Duration

- ▶ A unit of service is one transition.
- ▶ One-time set-up expenses are limited to \$1,500 per member per qualifying transition.
- ▶ The \$1,500 limit includes all approved actual expenses, including applicable taxes and delivery or moving charges, and any approved provider activities to assess need, arrange for, and procure needed resources.
- ▶ Community Transition Services are not limited to once in a member's lifetime but is limited to once per 12-month rolling year.
 - A member may receive Community Transition Services for more than one qualifying transition when each transition separately meets the service requirements and is authorized in the person-centered service plan.

Case Manager Responsibilities

► The case manager is responsible for:

- Assessing the member's need for Community Transition Services during the person-centered planning process
- Confirming that the member has a qualifying transition
- Confirming that other funding sources are not available
- Requesting authorization
- Monitoring service delivery

► Case managers do not make purchases or submit claims for Community Transition Services.

Excluded Services

Costs of the following items and services shall not be covered as Community Transition Services:

- Furnishing living arrangements that are owned or leased by a waiver provider when the provision of the items or services is inherent to the service the provider is already furnishing. This includes provider owned or controlled HCBS residential settings.
- Room and board.
- Monthly rental or mortgage expenses.
- Escrow.
- Insurance.
- Food.
- Regular utility charges.
- Household appliances or items intended for purely diversional or recreational purposes.
- Voluntary relocation from one private residence to another private residence.
- Furnishings or household items that duplicate items included in another authorized waiver service, including items replicated under daily Supported Community Living when that service is authorized in the member's person-centered service plan.

Peer Mentoring Overview

- ▶ Peer Mentoring is provided by a peer who has lived experience, as defined below, and who draws from that lived experience as a waiver member, family member, or unpaid caregiver to support a waiver member.
- ▶ The goal of Peer Mentoring is to support the waiver member with acclimation to community living and maintaining community tenure.
- ▶ Peer Mentoring is an HCBS community-living support. It is not a clinical treatment service, case management or service coordination, general companionship, or a companion service for general socialization.

Peer Mentoring Authorization

- ▶ Peer Mentoring will be authorized only when tied to a specific assessed community-living need and subsequent goal with planned activities that are reasonably expected to help the member build the skills, confidence, relationships, or supports needed to live successfully in the community.
- ▶ Services must be authorized in the member's person-centered service plan and monitored by the case manager.

Peer Mentoring Assessment

The member must undergo an assessment that establishes:

1. The presence of an identified community-living need;
2. The need is appropriate for and would benefit from peer mentoring to support acclimation to community living and the maintenance of community tenure; and
3. The need and the role of peer mentoring in addressing it have been reviewed, discussed, and confirmed as critical to the member's community living goals by the member and their interdisciplinary team.

Peer Mentoring Requirements

The assessment and person-centered service plan must confirm:

1. The member demonstrates a need for a peer to mentor acclimation to community living and assist with maintaining community tenure.
2. The member's need demonstrates a health, safety, or institutional risk.
3. There are no other services or resources available to meet the need.
4. The member demonstrates that, within 365 days, the member can acquire the skills or establish other services or resources necessary to meet the need to maintain community living.
5. The provider responsible for delivering the service.

Peer Mentoring Requirements

The assessment and person-centered service plan must confirm:

1. Whether the service will be delivered one-to-one, in a group, through telehealth, or through a combination of allowable delivery methods.
2. For group Peer Mentoring, the number of HCBS members in the group and how the group activity remains individualized to the member's goals.
3. The basis for the peer mentor match, including how the peer mentor's lived experience is transferable to the member's community-living goals.
4. How duplication with other Medicaid or non-Medicaid services will be avoided.
5. When potentially comparable MCO B3 Peer Support services or Center for Independent Living (CIL) Peer Counseling are not used, why those services were unavailable, ineffective, insufficient, or not appropriate to meet the member's HCBS community-living need.

Authorization, Amount, Frequency, and Duration

- ▶ A unit of service is 15 minutes.
- ▶ Peer Mentoring is available up to 16 units, or four hours per day, for up to a period of 365 days following the initial service date.
- ▶ Peer Mentoring may be delivered one-to-one or in a group of no more than three HCBS members.
 - The three-member group limit is a hard cap.
 - When Peer Mentoring is delivered in a group, the service must still be individualized to each member's person-centered service plan goals and documented separately for each member.
 - Peer Mentoring ought to be delivered in a group setting only if it matches the member's preferences and there is an added benefit to the member for receiving the service in a group setting
 - (for example, learning from the other Peer Mentoring recipients' experiences).

Authorization, Amount, Frequency, and Duration

► A provider **shall not bill**:

- For more units than authorized in the member's person-centered service plan and service authorization.
- Peer Mentoring for the **same time period** in which **another Medicaid service is being provided** to the **same member** when the **services duplicate the same activity or support need**.

Excluded Services

Equipment

- **Purchasing or installation of:**
 - Telehealth equipment or technologies

Peer Mentoring

- **Provided by the member's:**
 - Family member
 - Legally responsible person
 - Relative
 - Legal guardian
- **Provided by a Peer Mentor:**
 - Living in the same provider-owned or operated setting as the member

Recreation

- **Activities that are:**
 - Solely diversional or recreational in nature

Companionship

- **General companionship, socialization, or recreational activities:**
 - Not tied to an assessed community-living goal in the member's person-centered service plan

Excluded Services

Professional Services & Activities

- **The following activities:**
 - Case management
 - Service coordination
 - Level-of-care determination

- Functional or financial eligibility determination
- Person-centered service planning

Clinical Services

- **Clinical treatment, behavioral health treatment, or behavioral health recovery support covered under:**

- B3 Peer Support
- Family Peer Support
- Recovery Coach
- Another state plan service

Duplicated Services

- **Services that duplicate:**
 - Family and Community Support
 - Supported Community Living
 - Companion
 - Transportation
 - Habilitation

- State plan services
- EPSDT
- Rehabilitation Act services
- Individuals with Disabilities Education Act services
- Other Medicaid or non-Medicaid services

Otherwise Available Services

- **Services available through:**
 - Another liable third party
 - A public program

- A private program
- A community resource

Case Manager Responsibilities

- ▶ The case manager is responsible for assessing the member's need for Peer Mentoring through the person-centered service planning process and needs assessment, requesting or arranging authorization in accordance with HHS and managed care organization requirements, authorizing and monitoring services in the person-centered service plan, and ensuring that Peer Mentoring does not duplicate other services or supports.
- ▶ The case manager is responsible for oversight to avoid duplication of services and to assure that state plan services and other services, including B3 mental health and substance use disorder services, are appropriately authorized and documented in the member's person-centered service plan as needed.
 - Where there is a potential for overlap with services funded through the Dept. of Education or Iowa Vocational Rehabilitation Services (under Section 110 of the Rehabilitation Act of 1973), those **services must first be exhausted or determined unavailable** under HHS policy before waiver Peer Mentoring is authorized.

Employment Services with HOME

Iowa's Employment Vision

**Competitive Integrated Employment
is the priority and expected
preferred outcome in the provision
of publicly funded services for all
working age Iowans with
disabilities.**

Why Focus on Employment?



- ▶ Employment is an essential part of recovery
- ▶ Most people want to work
- ▶ A typical role for adults in our society
- ▶ Cost-effective alternative to day treatment

Current HCBS Employment Services

Currently Available through:

- HCBS Brain Injury (BI) and Intellectual Disability (ID) Waivers
- State Plan HCBS Habilitation services

Prevocational Services

- Career Exploration

Supported Employment Services

- Individual Supported Employment
- Small Group Supported Employment
- Long Term Job Coaching
- Individual Placement and Support (IPS) - (Habilitation Only)

Future HCBS Employment Services

Employment Services Will be Available Through:

- Children and Youth (CY) Waiver
- Adult with Disabilities (AD) waiver

Includes Prevocational Services

- Career Exploration

Includes Supported Employment Services

- Individual Supported Employment
- Small Group Supported Employment
- Long Term Job Coaching

Supported Employment

Supports to obtain and keep a job in the community:

- ▶ Individual Supported Employment helps job seekers to obtain a job
- ▶ Long-term job coaching services provides ongoing support to work-related skills needed to secure an individual workers to enable them to keep a job
- ▶ Small-group supported employment services (2 to 8) workers receiving ongoing supports developing job



Supported Employment Outcomes

Work in the community
with people without
disabilities

Work in a job that meets
personal and career
goals

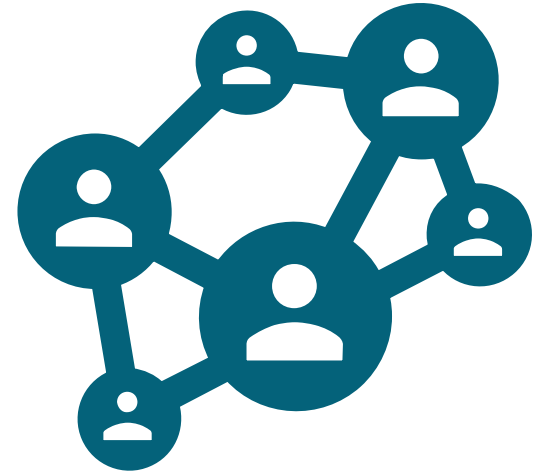
Earning wages that are
typical for the work
performed

Receiving the typical
benefits paid by the
employer for the work
performed

Prevocational Services

Supports to help develop skills to successfully transition to a job in the community:

- ▶ Working on goals that will lead to greater opportunities for a job in the community
- ▶ Developing soft skills for work
- ▶ Personal care and assistance may be a component of prevocational services
- ▶ Includes volunteer work, such as learning and training activities that prepare a member for entry into a job in the community



Prevocational Services - Career Exploration

Supports to develop a career plan and identify goals for obtaining a job in the community:

Provided in small groups of 4 or less

Provides experiences and information to help identify job interests and goals

Provides a written Career Plan

Career exploration activities might include:

Business tours

Informational interviews

Job shadows

Benefits education & financial literacy

Assistive technology assessment

Job exploration events

Important SE and Prevocational Points to Remember:

Services occur in integrated community settings

Workers are compensated at or above the minimum wage, but not less than the typical wage paid for the work

Service plans may include two or more types of nonresidential habilitation services

- e.g. day habilitation, individual supported employment, long-term job coaching, small group supported employment, and prevocational services

Only one service may be billed during the same period of time (e.g. the same hour) on the same date of service

Resource Sharing Between Iowa Medicaid and Iowa Vocational Rehabilitation Services



Job candidates **over age 24** who are eligible for both IVRS and HCBS



Medicaid pays for individual supported employment and long-term job coaching



IVRS funds may pay for customized employment and other employment services (discovery, workplace readiness assessment, etc.).

Resource Sharing Between Iowa Medicaid and Iowa Vocational Rehabilitation Services



Job candidates **under age 24** who are eligible for both IVRS and HCBS



IVRS funds may pay for customized employment and other employment services and job coaching up to 90 days on the job to stabilization.



A job candidate eligible for IVRS who is waiting for services from the HCBS programs can be served by IVRS



A job candidate eligible for HCBS who is waiting for services from IVRS can receive services through HCBS Habilitation or waiver program.

Resources

► HOME Webpage

- <https://hhs.iowa.gov/medicaid/about-medicaid/medicaid-projects/home-project>

► HCBS Employment Services Resources

- <https://hhs.iowa.gov/medicaid/services-care/home-and-community-based-services>

► Consumer Choices Option (CCO) Webpage

- <https://hhs.iowa.gov/medicaid/member-services/cco>

An aerial photograph of a rural landscape at sunset. The sun is low on the horizon, casting a warm, golden glow over the scene. The sky is filled with dark, silhouetted clouds. In the foreground, a dirt road runs diagonally from the bottom left towards the center. To the left of the road, there are several large, cylindrical metal silos and a few farm buildings. To the right of the road, there are more farm buildings, including a large red barn with a weathered roof. The fields are a mix of green and brown, suggesting different crops or stages of growth. The overall atmosphere is peaceful and serene.

Questions



Health and
Human Services