



***Bureau of Developmental Disabilities  
Services (BDDS) and  
Budget Modification Request (BMR)  
Policy***



# Overview of Today's Training

- Review BMR policy
- Understanding BMRs and BRQs
- Recommended BMR Timeline
- Individualized Support Team's Role
- BMR Submission and Review Process



# BMR Policy

Earlier this year, the Bureau Developmental Disabilities Services (BDDS) implemented a policy change for Budget Modification Requests (BMRs).

The policy became effective July 1, 2017.

Under the policy, BMRs must be submitted within forty-five (45) calendar days of the onset of the qualifying event.

# Purpose of the BMR policy



- To ensure that the Individualized Support Team's (IST) is involved in the discussion of whether an individual has experienced a temporary change in condition or status such that a BMR is needed to meet the individual's needs so the individual may remain in the community; and
- To ensure that providers and case managers submit BMRs to BDDS in a timely manner.

# Notice of Policy Change



BDDS released the policy on April 3, 2017, to provide ninety (90) days advance notice to allow the IST ample time to prepare for the July 1, 2017, implementation.



# Budget Modification Request

*Per 460 IAC 13-3-5:*

A BMR is a **temporary** request for funds in addition to the approved allocation and notice of action (NOA).



## Purpose of a BMR

A BMR addresses a *temporary need* that occurs for a short period of time.

A BMR is used for a situation that is expected to resolve itself. It addresses the temporary needs of an individual receiving services when the individual has a change in condition or status that will require the additional services or supports for the individual to remain in the community.

# Examples of a BMR



- An individual's housemate is admitted to a nursing home for a short-term stay of four (4) months. The roommate is expected to return to the shared housing living arrangement.
- An individual lives in the family home. The individual's primary caregiver has a medical condition that renders caregiver incapable of providing care of the individual for a short period of time (i.e. 1 to 6 months). The caregiver is expected to recover from their medical condition such that the caregiver should be able to resume caring for the individual.





# Budget Request Questionnaire

Per 460 IAC 13-3-6:

A Budget Request Questionnaire (BRQ) is a set of qualifying questions used to determine whether an individual has experienced a change in condition or status that is permanent in nature and as such requires the provision of additional services or supports for the individual to remain in the community such that the individual's budget needs to be increased.

- A BRQ is submitted by the individual's case manager.
- The BRQ is based on information provided by the IST.



## Purpose of a BRQ

A Budget Request Questionnaire (BRQ) is a request to review the individual's allocation due to a **permanent change**.



## Examples of a BRQ

- An individual lives in the family home and the caregiver passes away. The individual does not have another natural support or alternate caregiver to assume the role of primary caregiver. The individual is unable to remain in the community without additional supports or services.
- An individual is diagnosed with seizure disorder after having a seizure. The individual will need permanent new and ongoing medical interventions and medications.

# Recommended BMR Timeline



The timeline below serves as a guide to allow the entire IST to work together proactively and timely once a short-term need is identified for the individual.

- 1) An individual experiences a temporary event or status change and cannot remain in the community without additional supports and services. This event or status change is short-term and lasts longer than fourteen (14) consecutive days.
- 2) The provider notifies the individual's case manager within seven (7) days of identification of the temporary event or status change.
- 3) The case manager coordinates with the individual's IST to document the proposed modification within fourteen (14) days of receipt of provider's notice of the individual's temporary event or status change.

# Recommended BMR Timeline

(cont'd)



- 4) The case manager submits the BMR with supporting documentation and information within 10 days of meeting with the IST. The case manager is responsible for submitting the request and required supporting documents through the approved BDDS data entry system.
  
- 5) The individual's BDDS district office must provide an initial response to the team's BMR request within seven (7) days of receipt.

Case management companies are encouraged to develop their own internal policies and procedures to ensure compliance with the BMR policy.



# Example of Suggested Timeline

- On September 24, an individual living with one (1) other housemate, leaves the shared home which includes staffing suddenly for surgery/hospitalization. The remaining housemate will require additional funding during the roommate's hospitalization which lasts at least fourteen (14) days.
- By September 30, the provider notifies the case manager of the changed living arrangement that is anticipated to last fourteen (14) consecutive calendar days.
- Case manager arranges IST meeting/discussion regarding the change, and what the change means for the mutually shared client (individual still living at the shared home) by October 7.

# Example of Suggested Timeline

(cont'd)



- IST meeting takes place October 6.
- IST agrees BMR is needed September 24 through the month of October.
- Case manager collects all necessary data and submit BMR by October 16.
- The BMR needs to be submitted no later than November 8, which is 45-days from start of qualifying event that initiated the need for additional funds.

# Example of Suggested Timeline

(cont'd)



- Regardless of BMR submission date, BDDS district office has seven (7) days to provide one (1) of three (3) following actions:
  - Request additional information (if additional information is requested, once the BMR is returned to district office with requested information, the seven (7) day time limit for action once again goes into effect.)
  - Deny
  - Approve/forward to PAR unit
- If BMR was initially submitted by November 8—within suggested timeline—BMR is approved at district office by November 15.
- Once BMR is received by PAR unit from district office, the seven (7) day time limit for action is in effect.
- PAR unit will then take one (1) of three (3) same actions outlined in the first section above.
- If no request for additional information is needed, PAR unit approves by November 22.



# Importance of the IST's Role



- Although individuals' needs do arise suddenly/unexpectedly, the IST should work together proactively and continuously regarding a BMR once a short-term need is identified.
- The IST should also be communicating with one another frequently to ensure the BMR is submitted BDDS within forty-five (45) calendar days.

# BMR Submission Notification



- Providers will receive an email notification when BMRs are submitted by a case manager.
- It is the provider's responsibility to follow up with the case manager if a BMR was agreed upon by the IST and the provider does not receive an email notification that a BMR was submitted within 10 days of the IST meeting.
- Providers are responsible for regularly communicating with the case manager regarding the status of pending BMRs.



# BMR Review Process

- Once a case manager submits a BMR, it is first reviewed at the BDDS district office level within seven (7) days of submission date.
- The BDDS district office may return the BMR to the case manager requesting additional information.

# BMR Review Process

(cont'd)



- If the BDDS district office approves the BMR, it is submitted to the Personal Allocation Review (PAR) unit in the BDDS' central office.
- The PAR unit may return the BMR to the case manager to request additional information or approve/deny the BMR. The PAR unit shall approve/deny within seven (7) days of receipt from the BDDS district office.

# Important Things to Consider When Submitting a BMR



- Ensure there is no pending Cost Comparison Budget (CCB).
- Ensure there is no BMR already in process for the consumer.
- Ensure BMR is submitted within 45 calendar days of onset of the qualifying event.

# Questions?



For any questions regarding this review of the Budget Modification Request policy, please contact:

BQIS Help email: [BQIS.Help@Fssa.in.gov](mailto:BQIS.Help@Fssa.in.gov)

**OR**

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