



Developmental Disabilities Administration

Self-Directed Services Training Series

Module 3: Person-Centered Planning

Updated October 2025



Overview

- This training module will provide you with an overview of Person-Centered Planning in the Self-Directed Services model.
- This training is a summary of important information on this topic
- There is more information and requirements in the Medicaid waiver program applications, laws, regulations, guidance, and policies
- The most updated information regarding Self-Directed Services is published in the Self-Directed Services policy and manual that can be found on the DDA's website at <https://health.maryland.gov/dda/Pages/sdforms.aspx>
- Additional training modules are available that provide additional information on the topics presented in this overview training module

Person-Centered Planning

- All people have the right to live, love, learn, work, and engage in their community while reaching their goals and dreams!
- People with developmental disabilities have the right to make choices about their lives and the support they get.
- When planning, the **participant's voice** is the most important.



Getting to Know the Person (1 of 2)



The most important part of planning is getting to know **the person**.

- Who are they?
- What do they want for their life and what don't they want?
- What is their vision for their "Good Life?"

**Before discussing services and supports,
you need to know the person.**

Getting to Know the Person (2 of 2)

- Strengths
- Assets
- Needs
- Goals
- Challenges



Person-Centered Planning Tools and Strategies

- Focus Area Exploration (FAE)
- Health Risk Screening Tool
- Supports Intensity Scale



Person-Centered Planning Tools

Focus Area Exploration (FAE)

- Employment
- Communications
- Lifelong Learning
- Community Involvement
- Day-to-Day Life
- Finance
- Home and Housing
- Health and Wellness
- Relationships

The screenshot shows a web-based interface titled "Focus Area Exploration" with a double-star icon. Below the title is a note: "Focus area exploration questions should be discussed during the facilitation/interview prior to the PCP meeting using appropriate person centered planning methodologies (Pathways, Essential Lifestyle Planning, PATHS, and MAPS etc.).". The interface lists ten focus areas, each with a corresponding icon and an "Edit" button:

- Employment Focus Area (Icon: person at a desk)
- Communications Focus Area (Icon: speech bubble with a person)
- Lifelong Learning Focus Area (Icon: lightbulb)
- Community Involvement Focus Area (Icon: group of people)
- Day to Day Life Focus Area (Icon: sun)
- Finance Focus Area (Icon: dollar sign)
- Home and Housing Focus Area (Icon: house)
- Health and Wellness Focus Area (Icon: heart with a pulse line)
- Relationship Focus Area (Icon: two people)

Person-Centered Planning Tools



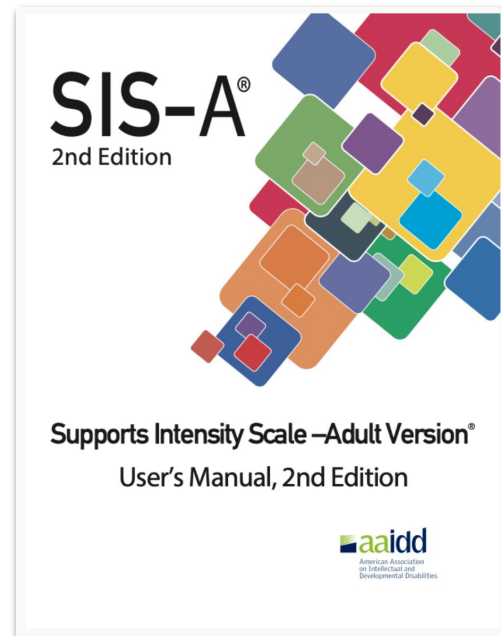
Health Risk Screening Tool (HRST)

- Early identification of health care needs, risks, and destabilization
- Measures health risk, not disability

Person-Centered Planning Tools

Supports Intensity Scale

Measures the intensity of personal, work, and social supports needed



Person-Centered Plans (1 of 2)

Person-Centered Plans (PCPs) include:

- Participant's vision for a good life
- Choice of service delivery model
- Informal, natural, and community resources
- Assessment tools and information to show unmet need(s)
- Identified risks and rights restrictions



Person-Centered Plans (2 of 2)

Person-Centered Plans (PCPs) include:

- List of requested Medicaid services to meet unmet needs
- Selected provider(s), vendor(s) and/or employees
- Description of how the services will be used



Community vs. Service Life

To support a “**community life**” versus a “**service life**,” the person-centered planning team should always explore generic, natural, community, local and other resources to support the participant in addressing any risks, and in meeting their needs and goals.



Types of Person-Centered Plans (1 of 2)

Initial Person-Centered Plans

- First Person-Centered Plan developed with the participant
- New Person-Centered Plan for a different Medicaid waiver program (change of waivers)

Annual Person-Centered Plans

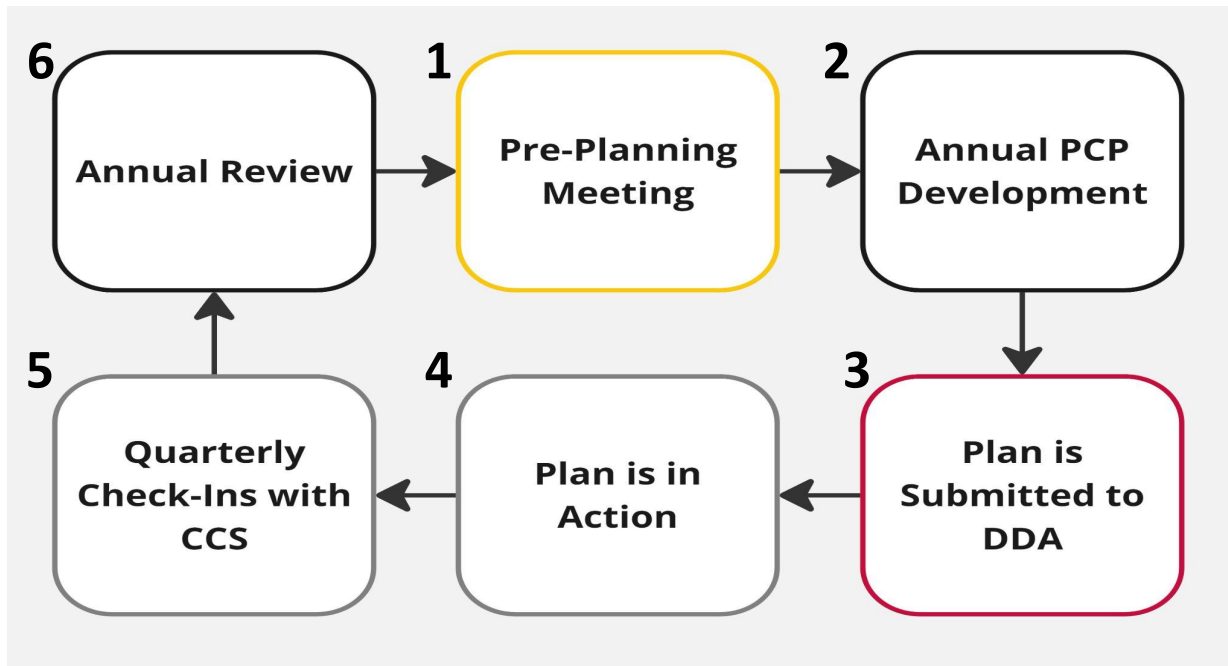
- After the Initial Person-Centered Plan
- Required to be completed within 365 days of the agreed annual plan date

Types of Person-Centered Plans (2 of 2)

Revised Person-Centered Plans

- **Developed when an active Person-Centered Plan requires changes**
 - Stopping existing services
 - Starting new services
 - Changing existing services
 - New outcomes
- **Requires an updated Self-Directed Services Budget Sheet**

Person-Centered Plan Development



Medicaid Waiver Services Available to Self-Direct

<u>Assistive Technology and Services</u>	<u>Family Caregiver Training & Empowerment Services</u>	<u>Respite Care Services</u>
<u>Behavioral Support Services</u>	<u>Housing Support Services</u>	<u>Shared Living</u>
<u>Community Development Services</u>	<u>Individual and Family Directed Goods and Services</u>	<u>Support Broker Services</u>
<u>Day Habilitation</u>	<u>Live-In Caregiver Supports</u>	<u>Supported Living</u>
<u>Employment Services</u>	<u>Nursing Support Services</u>	<u>Transition Services</u>
<u>Environmental Assessment</u>	<u>Participant Education, Training, and Advocacy Supports</u>	<u>Transportation Services</u>
<u>Environmental Modifications</u>	<u>Personal Supports</u>	<u>Vehicle Modifications</u>
<u>Family and Peer Mentoring Supports</u>	<u>Remote Support Services</u>	

Detailed Service Authorization (DSA)

- **LTSS*Maryland*** section that lists Medicaid waiver services
 - Service Name
 - Units per month
 - Annual service cost
- **Once approved, participants will create their individualized Self-Directed Services budget sheet**
- **Self-Directed Services budget sheets must match the total annual service costs in order to be processed by the Financial Management and Counseling Services provider**

Required Self-Directed Services Forms

- Rights and Responsibilities Form
- The Participant Agreement
- Relatives, Legally Responsible Persons, and Legal Guardians Providing Waiver Services Reporting Form (replaces the Family as Staff Form)

Maryland
DEPARTMENT OF HEALTH
DEVELOPMENTAL DISABILITIES
ADMINISTRATION

**DDA Funded Services
Participant Rights and
Responsibilities**

Background and Purpose

The Developmental Disabilities Administration (DDA) supports individuals with intellectual and developmental disabilities and their families to live lives of their choosing and thrive!

This document is intended to notify you of your rights and responsibilities as a participant enrolled in one of Medicaid's three DDA-operated Home and Community-Based Services Waiver Programs – Community Pathways Waiver, Community Supports Waiver, and Family Supports Waiver (each a "DDA Program") or DDA State funds.

These rights and responsibilities also apply to any legal guardian and/or designated representative acting on the participant's behalf.

By participating in one of the DDA's Programs, a participant, their legal guardian, and/or designated representative must comply with these rights and responsibilities, and all applicable laws, regulations, and requirements.

This document is intended to provide access to guidance regarding the DDA Program's requirements for participants, legal guardian or designated representative as set forth in the DDA's federally approved Medicaid Waiver Program application and any applicable laws or regulations.

General Rights & Responsibilities

I understand that:

1. In addition to my Coordinator of Community Services (CCS), I may identify other person-centered planning team members to assist me in planning my support and services and developing my trajectory to a good life.
2. I, my legal guardian(s) or designated representative(s) must be capable of making informed decisions regarding my DDA services ensuring there is: (a) no lapse or decline in the participant's quality of care; (b) no increased risk to the health or safety of the participant; and (c) no violation of laws, regulations, and requirements.
3. My Person-Centered Plan (PCP) documents my goals, objectives, needs and what services I seek to receive under the DDA Program.

Developmental Disabilities Administration Find Out More: 844-253-8894 | dda.health.maryland.gov Issued: 01.31.2022
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Resources (1 of 3)

- [Self-Directed Services Comprehensive Policy](#)
- [Self-Directed Services Manual](#)
- [DDA Self-Directed Services Overview](#)
- [Person-Centered Plan Overview](#)
- [DDA Guide To Services](#)
- [DDA Easy-To-Understand Guide to Services](#)
- [DDA Person-Centered Planning Webpage](#)
- [Person-Centered Planning Manual](#)

Resources (2 of 3)

- [Charting the LifeCourse \(CtLC\)](#)
 - [Person-Centered Planning](#)
 - [Family Perspective Planning](#)
 - [Planning for Life and Life Stages](#)

Resources (3 of 3)

Rights and Responsibilities

- [DDA Participant Rights and Responsibilities](#)
- [Derechos y Responsabilidades del Participante de los Servicios financiados por la DDA](#) (Spanish)
- [DDA Know Your Rights Flyer \(Box version\)](#)
- [DDA Know Your Rights Flyer \(Narrative\)](#)

Summary (1 of 2)

- The Person-Centered Plan is developed by the participant and Coordinator of Community Services with the support of other team members
- Only certain Medicaid waiver services are able to be self-directed
- Some services require a provider to provide the service, while some allow for a vendor or employee to provide the service

Summary (2 of 2)

- Required Self-Directed Services Forms
 - Participant Rights and Responsibilities Form
 - Participant Agreement
 - Family as Staff Form