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# Developmental Disabilities Administration
## Self-Directed Services Training Series
## Module 3: Person-Centered Planning

*Updated October 2024*

# 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

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# 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.**

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# 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

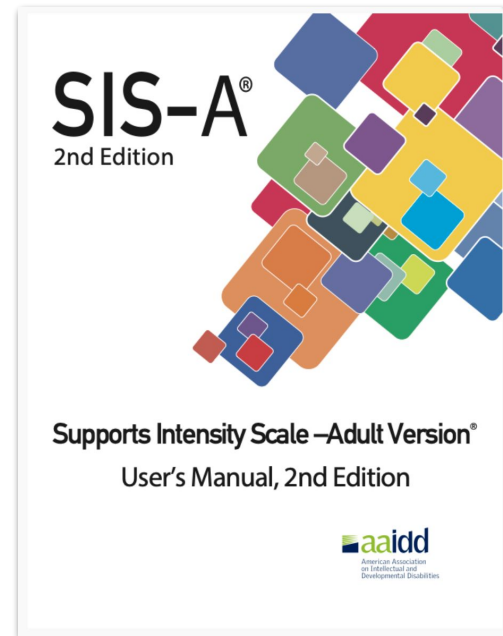# **Person-Centered Planning Tools**



## **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

SIS–A®
2nd Edition

Supports Intensity Scale –Adult Version®

User's Manual, 2nd Edition

aaidd
American Association
on Intellectual and
Developmental Disabilities

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# **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

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# 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

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# 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

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# 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**

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# Person-Centered Plan Development
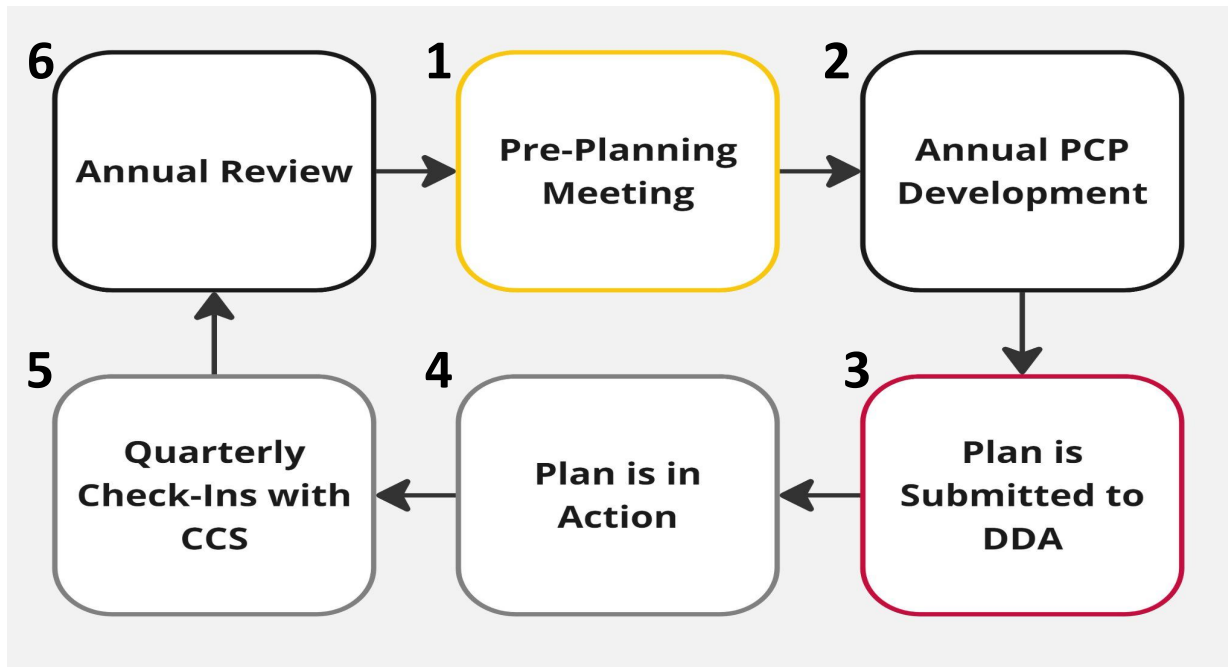
# **Medicaid Waiver Services Available to Self-Direct**

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

Reference: DDA-operated Medicaid Waiver Programs webpage

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# 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**

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# Required Self-Directed Services Forms

- Rights and Responsibilities Form
- The Participant Agreement
- The Family as Staff Form

# 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](#)

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# Resources (2 of 3)

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

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# **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)](#)

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# **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

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# Summary (2 of 2)

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

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