Discovery Process Guidelines

The purpose of the Discovery process is to gather information about a person’s preferences, interests, abilities, preferred environments, activities, and supports needed. It is important to structure the Discovery process so that the individual can take the lead in developing a plan which reflects their interests, preferences, future desires and abilities. The information gathered will then be used to develop the Personal Plan which supports a personal vision and identifies action steps to move toward the vision.

Independent Service Coordinator Responsibilities

- The Independent Service Coordinator (ISC) is responsible for the completion of the discovery process and Tool. This must be done in conjunction with the person and his/her guardian.
- The ISC must complete the discovery process for:
  - Children and adults currently enrolled in a DD Waiver. This should be done as a part of Individual Service and Support Advocacy (ISSA).
  - Children and adults newly transitioning to a DD Waiver with the following exceptions:
    - Ligas Class members
    - Crisis
- The ISC should not complete the Discovery Tool/process for individuals who are required to have a Ligas Transition Service Plan completed. The Ligas Transition Service Plan (LTSP) will serve as the Discovery process. The ISC can use information from the LTSP to develop the Personal Plan.
- The ISC must continue to complete and submit the Crisis Transition Plan and Funding Request form for individuals who are considered to be in Crisis (homeless, abuse, or neglect). The ISC then has 30 calendar days after the date the person begins DD Waiver services to conduct the discovery process and develop the Personal Plan.

The Process

- In preparing for the discovery process, consider the individual’s desired location and time to gather this information.
- The completion date of the Discovery Tool cannot be more than six (6) months from the date of the Personal Plan.
- The Discovery Tool should be updated at least annually, but can be updated more often if the individual/guardian request changes.
- The ISC must facilitate the discovery process and complete the Discovery Tool.
- The ISC should ask the individual who they want to participate in the initial discussions. They should consider inviting people that know, support, and respect them.
- If possible, the discovery process should include a face to face discussion with the individual/guardian (if applicable). In situations where the guardian is unable to be present, the ISC must document how information was received from the guardian.
The ISC can also obtain information from family members, provider agency staff, Personal Support Workers, teachers, therapists, friends, child care providers, etc.

The Discovery process is fluid and should be conducted over a period of time instead of in a single meeting.

Sources of Information

• The questions in the Discovery Tool are meant to guide conversations. It is not necessary to ask every question in each section, but it is necessary to address each section of the Tool.

• Prior to the meeting with the individual, the ISC should consider what supports may be needed to promote the person’s full participation (visual aids such as graphics/pictures to understand concepts, pen, paper, sign language interpreter, etc.).

• ISC can obtain information in various ways: conversations (face to face, phone, e-mails), record reviews, assessments/evaluations, provider agency notes and summaries.

• If a DD provider agency is currently providing services to the individual, the agency will send the ISC requested information/documents within 14 calendar days of receiving a request.

• When addressing risk, gather information from a variety of sources including the individual, guardian, family, staff, record review, and observation. Use the information gathered to document why the concern currently presents a risk or when the concern has presented significant risk in the past.

  o A separate risk assessment is not required but if an ISC chooses to use one it must include the following domains and the minimum components:
    - health/medical, safety at home, safety in the community, safety in the workplace, finances and behavioral supports.

Guiding the Conversation

• When gathering information:
  o Speak with the person using first person language and open ended questions, such as “What do you...”
  o Communicate with the individual/family using words that are easy to understand. Refrain from canned language and acronyms.
  o If conducting a discussion with multiple people, ask the individual for input before asking others present to respond.
  o Allow sufficient time for the individual to formulate thoughts and answer.
  o Encourage/support multiple styles of communicating thoughts and ideas (pictures, drawing, symbols and words).

• The ISC should consider having a separate discussion with the individual prior to gathering information from other sources.

• If the individual is unable to communicate in a way for the ISC to understand, ISCs will have to rely on caregivers/those who know the person best to complete the discovery process. You may also rely upon caregivers when conducting the Discovery process with young children.
Documenting the Information

- The Discovery Tool should be typed. Using bullet points is preferred.
- The ISC should provide a copy of the Discovery Tool to the individual/guardian once the Tool is considered complete (each section addressed and with the ISC signature).
- The most recent copy of the Discovery Tool should be kept on file with the ISC.
- The ISC should provide a copy of the Discovery Tool, as a part of the complete referral packet, to the provider agency selected by the individual/guardian. This should occur after the person has selected the provider(s) and given consent to make a detailed referral for services. If the individual is remaining with a current provider, a copy should also be given to this provider.
- The ISC must update the Discovery Tool at least annually but can do so more often if the preferences, abilities or needs of the person changes.
- The completed Discovery Tool will not require a review/approval from the Division of Developmental Disabilities.