



Person Centered Planning Process:
Discovery
Personal Plan
Implementation Strategies

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Life Choices System Transformation Recorded Series –Webinar 3

1

What's Changing for People in a Developmental Disability Waiver:

- Individual Service Plans
- Service planning based on Active Treatment
- Provider agency as case manager



2

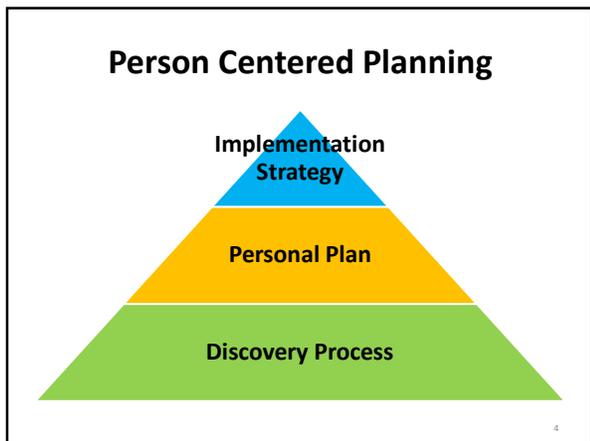
Person Centered Planning

The balance between what is *important to a person* and what is *important for* a person.



It is a way to identify strengths, preferences, needs and desired outcomes of a person.

3



The Discovery Process:

- Is designed to gather information on what is “important to” and what is “important for” the person
- Will be completed by the Independent Service Coordination (ISC) agencies who will record what they learn in the **Discovery Tool**.
- Is not a one-time event or meeting. The ISCs will gather information over a period of time.

5

The Discovery Process:

- Should begin with the individual, and include the guardian along with others chosen by the individual. Current providers/caregivers should also be included.
- Will consist of discussions, observations and record reviews.

6

Information Gathered During the Discovery Process:

- Must be updated at least annually, but can be updated anytime there is a change in preferences or needs
- Is used to develop the **Personal Plan**
- Can become a part of the referral packet sent to provider agencies

7

Sections of the Discovery Tool

- Self-Description
- Home
- Important Relationships
- Career and Income
- Health and Wellbeing
- Communication
- Life in the Community
- Recreation/Interests/Hobbies
- Choice and Decision-Making
- Future Plans



8

The Discovery Tool: Barriers & Risks

Barriers are factors that may prevent a desired outcome or makes it difficult for something to be achieved.

Risks are factors that could be exposing someone to harm or danger; it is also the possibility that something bad or unpleasant is likely to happen. It includes risks to the person who receives services as well as risks that the person may create for others.

9

The Personal Plan

- Single & integrated personal vision for a person's life
- Focuses on the desires, strengths, preferences, and needs of a person
- Will be developed by the Independent Service Coordination agency in conjunction with the individual and guardian. It can also include others who are invited, such as providers agencies.

10

Sections of the Personal Plan

- **Important Things to Know**
- **Home**
- **Important Relationships**
- **Career and Income**
- **Health and Wellbeing**
- **Communication**
- **Life in the Community**
- **Recreation/Interests/Hobbies**
- **Choice and Decision-Making**
- **Future Plans**

11

The Personal Plan will identify:

- The outcomes that the person desires in their life.
- What is important to the person regarding services.
- The strengths, preferences and supports needed of the person.
- Risk factors and plans to minimize risk.
- Choice of providers.

12

Outcomes



An event, occurrence, or condition **AFTER** services have been provided.

It is what the person expects.

13

Outcomes

- Should make sense for a person without a developmental disability.
- May reflect something the individual desires or prefers that is not currently present.
- May reflect something the individual desires or prefers that is already present and they want to maintain.
- Are not supports or services.
- May have to be prioritized by the individual and guardian.

14

The Personal Plan

- Must be signed by the individual, guardian and ISC. The Plan is considered complete with these signatures.
- Provider agencies will also sign the Plan, indicating their willingness to develop Implementation Strategies and to provide services based on what is identified in the Plan.
- Must be updated annually but can be done more often if needs or desires change.

15

Person Centered Planning Reminder:

1. Discovery Process

2. Personal Plan

Provider Identification
Funding Request to DDD



3. Implementation Strategy

16

Implementation Strategy

- Is developed by provider agencies.
- Describes how the provider agency will support the person to achieve their desires and meet their needs.
- Must be updated to reflect changes in the Personal Plan at least annually and more often if the person's needs or desires change.

17

Implementation Strategy

- Provider agencies can design their own format, but it must at least contain basic components.
- Must reflect ongoing review, monitoring and updating of supports as necessary.
- Must be completed within 21 calendar days from the date of the provider signature on or receipt of the Personal Plan.

18

**An Implementation Strategy
Must Include:**

- Outcome(s) identified in the Personal Plan.
- A description of how supports and services that will be addressed assist the individual to engage in community life and maintain control over personal resources.
- Opportunities to seek employment and obtain competitive integrated employment if desired.

19

**An Implementation Strategy
Must Include:**

- Functional goals/training areas and methods to measure progress.
- Documentation that services and supports are linked to an individual's strengths, preferences and assessed clinical and support needs.
- Risks and strategies to minimize risk.

20

**An Implementation Strategy
Must Include:**

- All services and supports to be provided regardless of provider or funding source, including type, methods, frequency, duration and staff assigned.
- Justification for any restriction(s) or modifications that limit the person's choice, access or otherwise conflict with Home and Community Based Waiver standards.

21

An Implementation Strategy Must Include:

- Basic descriptive, diagnostic, demographic and medical information
- Documentation for any situation where a person lives in a residential setting owned or controlled by a service provider and have requested modifications to community settings.

22

Next Steps

- Continue to Revise current Rules and forms to align with Person Centered Planning.
- Continue to inform stakeholders of changes.
- Continue to implement other Life Choices recommendations.



23

Want More Information?

Person Centered Planning Process For Medicaid
Waiver Services

[http://www.dhs.state.il.us/page.aspx?
item=96986](http://www.dhs.state.il.us/page.aspx?item=96986)

- Forms
- Guidelines
- Frequently Asked Questions

24

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25
