

Draft Person-Centered Service Plan/Individual Program Plan (IPP) Template & Agreement Form

April 25, 2024



Housekeeping



Interpretación en español: haga clic en el globo blanco en la parte inferior de la pantalla con la etiqueta "Interpretation." Luego haga clic en "Spanish" y seleccione "Mute original audio."



ASL interpreters have been "Spotlighted" and live closed captioning is active



This meeting is being recorded



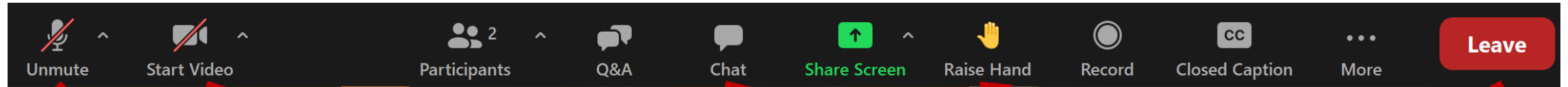
Materials are available at:

<https://www.dds.ca.gov/initiatives/stakeholder-events/>



Submit written comment via email to RCMeasures@dds.ca.gov

Zoom Tips



Unmute mic only when it's your turn to speak



Turn your webcam on/off

All attendees can type questions/comments in the Q&A

Chat is available for Workgroup members only

Workgroup members can raise your hand when you want to speak

Leave the webinar at the end of the meeting



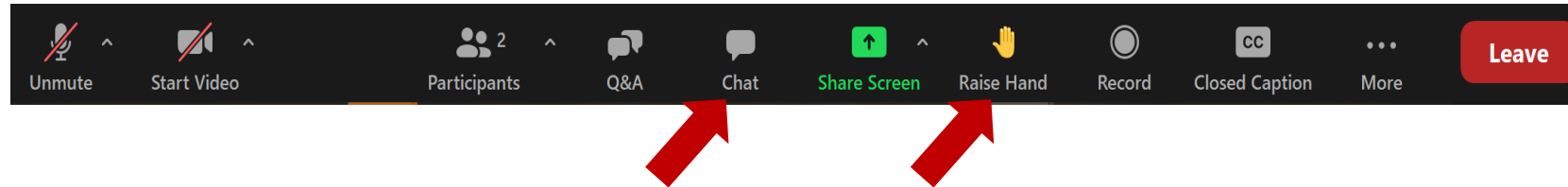
- For attendees, your video and microphone will not be available
- You will only see/hear workgroup members, DDS staff and presenters on screen



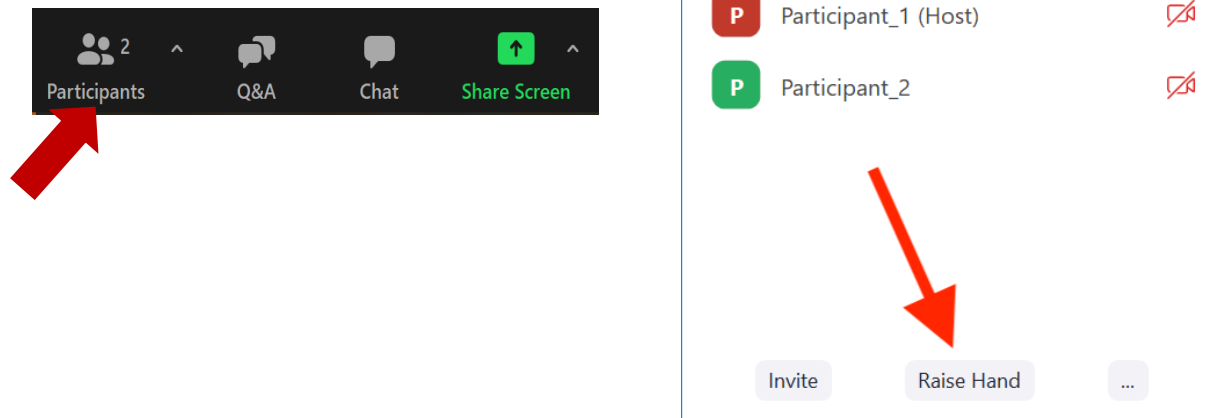
- Features will vary based on the version of Zoom and device you are using
- Some Zoom features are not available for telephone-only participants

Providing Public Comment

When the Public Comment Period is Open: Please “Raise Hand” to comment



You may need to click on “Participants” and a new window will open where you can “Raise Hand”



We will then open your microphone to allow you to speak

Agenda

Welcome

Timeline

Template and agreement form review and input

Public Comment

Timeline of IPP Development (1 of 3)

July 2021

RC Performance
Measures
Workgroup
established

[W&I Code 4620.5](#)

November 2022

RCs agree to
create and use the
same person-
centered service
plan document

August 2022

RC Performance
Measures
created by
workgroup

February 2023

RCs recommend to
use CVRC's IPP as
starting point for
creating new
template

Timeline of IPP Development (2 of 3)

May/June 2023

Met with RCPM Focus Groups, CAC and Service Access and Equity Focus Groups and presented template for input

July/August 2023

Presented IPP Template at RCPM Focus Group and Workgroup

July 2023

New law requires same IPP be used at all RCs starting January 1, 2025

[W&I Code 4435.1\(d\)](#)

August 2023

DDS team worked on template, signature form, user guide and verified everything followed state and federal laws

Timeline of IPP Development (3 of 3)

April 2024

Present revised version to RCs and other focus groups

May 7, 2024

Present template to RCPM workgroup

July 2024

Training for Service Coordinators begins and guide for individual and families is available

April 25, 2024

Host public meeting for feedback

June 2024

Final IPP template to RCs for use by January 1, 2025

Today

Monica's IPP (Sample)



Two Documents to be Reviewed Today

1. IPP with information about the person and required components:

- Introduction
- How this plan was developed
- Vision for the future
- Communication
- Decision-making
- Optional sections about areas of the individual's life and desired outcomes
- Emergency planning

This is a sample IPP on draft template and the content will vary for each individual

2. Service agreement/signature page with:

- Services, agreements to services, acknowledgements, additional information to discuss and signatures of the planning team

Note: You may hold feedback until the full document is reviewed.

Overview of Monica's IPP Sample IPP

(DRAFT) INDIVIDUAL PROGRAM PLAN FOR MONICA

Legal Name: Monica Smith

UCI Number: 9999999

Date of Birth: 4/22/1959

Meeting Date: 4/5/2024

Next Review Date: 4/4/2025

Type of Plan:

Initial, Annual, Biennial, Triennial

Amendment: [Select a reason]

INTRODUCTION

Things people should know about me:

I am focused on my health and staying active as I prepare to retire from work. I enjoy singing in my church choir. I am very close with my sister Rosalie.

What people like and admire about me:

I have the best smile and laugh. I am a good friend, great listener and am always willing to help my coworkers. My friends always say how dependable I am, and describe me as someone who loves to laugh, crack jokes, and brighten people's day.

Successes I want others to know about:

I am a proud dog mom. I rescued my dog Pepper, with help from my sister. I look forward to spending more time with Pepper. I have worked the same job for 15 years and am proud to say I am ready to retire.

Introduction: Monica *Sample IPP*

Things people should know about me:

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What people like and admire about me:

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Successes I want others to know about:

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How This Plan Was Developed *Sample IPP*

Where did my meeting happen?

My meeting was held in my apartment, as I requested.

What part did I choose to play in making my plan?

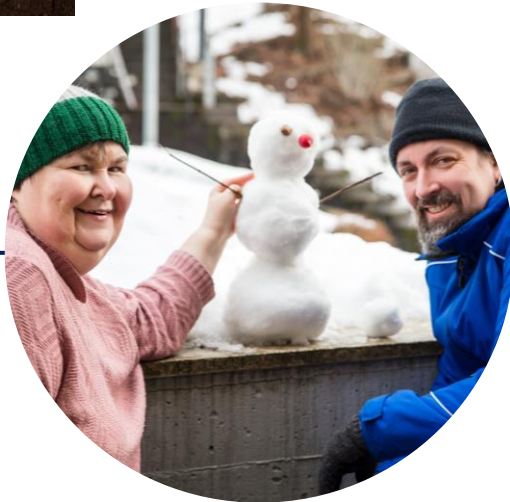
I took charge in making the decisions in this plan. I selected the date and the time of the meeting so my sister could join. I invited my support staff and my sister because I want to be sure my team was included to help plan my finances and support me in an active lifestyle when I retire.

Who also helped with my plan?

My sister Rosalie, Joan (my independent living staff), and Jake (my job coach). Carla, my service coordinator, also supported in planning.



Vision for the Future *Sample IPP*



My short and long-term visions:

I am getting ready to retire by the end of the year and have been working closely with my Independent Living Service (ILS) staff to help with my budget and spending so I can feel confident in managing my own finances. I want to better understand my budget before I retire. My sister, Rosalie, helps me research local community centers and senior centers for activities where I can spend time and meet new people. I would also like to find volunteer opportunities and find a dog park I can bring Pepper to so we can both stay active.

Communication Sample IPP

How I communicate with others:

I communicate my wants, needs and desires to others. People I am closest with understand me the best. When I am tired, I rely on my support team to help others understand my speech.

Important things you should know about how to communicate with me:

I love to talk with others. I will talk with anyone, about almost any subject; if you don't understand something I say, politely ask me to repeat it. I prefer phone calls or using Facetime over texting. If you do text me, I may not reply or may use one or two words to answer. Call me instead.





In the following areas, I need help making decisions:

I make my own decisions. I appreciate getting my family's opinion on big decisions related to my finances, where I live, and if I have a big health care decision to make. I do sometimes rely on other people to explain any contracts or formal legal documents I may need to sign. And I rely on my family or ILS staff to explain medical information with me.

The people who assist me with decisions are:

I am close to my brother and sister. My sister Rosalie lives close by, and she is happy to help me make decisions.

Additional Category/Areas for Discussion

Choice/Decision-
Making

Community
Participation

Education/
Learning

Employment

Healthcare/
Wellness

Home Life and
Housing

Income/Finances

Personal/
Emotional
Growth

Relationships

Safety
Considerations

Supports in the
Home

Transportation/
Getting Around

Overview of Monica's IPP Sample IPP

Employment

What is the desired outcome(s)?

I would like to retire from my job by the end of year.

What is currently happening?

I have been working at Sunrise Grocery for the past 15 years. As I get closer to retirement age, I have started working part time in the past year. I am ready to retire and have enough work credits to do so.

What is important to me?

It's important to me to give a proper goodbye to my coworkers and customers I have known for so long.

What is important for me?

It's important for me to transition to my new stage in life having the support from those around me and continuing to have a valued role in my community.

What needs to be done?

- 1) My job coach will work with me and Sunrise Grocery's Human Resources Department to discuss steps needed to retire from work. Job coach will help me plan my goodbye to my coworkers.
- 2) ILS staff will coordinate with me and my job coach to be sure the necessary paperwork is submitted to social security upon retirement.
- 3) Rosalie and I will research places in my community where I can spend time and meet new people, and also research volunteer opportunities where I can give back to my community. We will communicate with ILS and service coordinator if additional supports are needed in doing this.
- 4) Starting November 1, the employment provider and Rosalie will help me to identify any needs as I transition to retirement.

Select a Category/Area: Employment (1 of 2) *Sample IPP*

What is the desired outcome(s)?

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What is currently happening?

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What is important for me?

It's important for me to transition to my new stage in life having the support from those around me and continuing to have a valued role in my community.



Select a Category/Area: Employment (2 of 2) Sample IPP

What needs to be done?

- 1) My job coach will work with me and Sunrise Grocery's Human Resources Department to discuss steps needed to retire from work. Job coach will help me plan my goodbye to my coworkers.
- 2) ILS staff will coordinate with me and my job coach to be sure the necessary paperwork is submitted to social security upon retirement.
- 3) Rosalie and I will research places in my community where I can spend time and meet new people, and also research volunteer opportunities where I can give back to my community. We will communicate with ILS and service coordinator if additional supports are needed in doing this.
- 4) Starting November 1, the employment provider and Rosalie will help me to identify any needs as I transition to retirement.



Select a Category/Area: Community Participation (1 of 2)

Sample IPP

What is the desired outcome(s)?

I would like to have a place where I can volunteer and spend my time and stay connected to my community while meeting new people after I retire. I would also like to spend more time with my dog Pepper at a local dog park.

What is currently happening?

I am currently transitioning from work to retirement. My sister Rosalie started the initial review of community and volunteer options but has not had a chance to dive in completely. I would like to focus on retirement and once my time is freed up, I will also research more options in my community.

What is important to me?

It's important to me to stay active and volunteer at a shelter or senior center in my community once I am retired. I like to be helpful and love meeting new people. I want to spend more time with Pepper being active as well.



Select a Category/Area: Community Participation (2 of 2)

Sample IPP

What is important for me?

It's important for me to establish connections in places where I know someone; this helps me feel comfortable and safe.

What needs to be done?

- 1) My sister and I will explore and visit several community centers and other locations where I could possibly spend time in the future.
- 2) If additional supports are needed to research and secure volunteer options, the team will discuss at the next planning team meeting. My family and I will connect in three months to review progress. If the team would like to connect sooner, I will reach out to request a meeting.



Select a Category/Area: Healthcare/Wellness (1 of 2)

Sample IPP

What is the desired outcome(s)?

I would like to stay healthy and active. In doing so, I would like to take cooking classes and learn how to make healthy meals.

What is currently happening?

I had a recent emergency room visit and was prescribed additional medications for my chronic medical conditions. In my follow up visit with my primary physician, I was told my lab tests were not improving, and it was recommended I see a nutritionist. I have agreed to take the additional medications and want to wait to see the nutritionist until after I have retired, when I will have more time for additional appointments. I want to cut back on eating late night snacks and reduce my sugar intake.

What is important to me?

It's important I feel respected and supported in my health journey.

What is important for me?

It's important for me to learn how healthy eating can play a positive role in my health and help me stay active.



Select a Category/Area: Healthcare/Wellness (2 of 2)

Sample IPP

What needs to be done?

- 1) I will work with my ILS staff to meal prep each week. This includes creative ways to stay engaged in cooking and excited about healthy meal options.
- 2) ILS staff will help me eat from the list of foods provided by my doctor. My ILS staff will help me schedule an appointment with the nutritionist and support me to understand my new dietary needs.
- 3) Family will assist me to research cooking classes we can take together.
- 4) My Service Coordinator will send a referral for a nutritionist to my Health Care Management Plan Case Coordinator. My Service Coordinator will follow up with me and the Case Coordinator about any additional information that is needed.
- 5) My Service Coordinator will send a referral for CalFresh and will assist me with providing any information needed to access the program. ILS staff will assist me with completing the CalFresh application.



Select a Category/Area: Home Life and Housing (1 of 2)

Sample IPP

What is the desired outcome(s)?

I would like to continue living in my apartment with my roommate and would like to improve my budget so I can live comfortably in retirement.

What is currently happening?

I enjoy living in my apartment complex. I am very social and like many of my neighbors. My apartment is close to a shopping center where I can easily walk over with my roommate or friends. ILS staff help me budget my weekly bills to pay them on time and help me understand how much money is left over to pay for other items.

What is important to me?

It's important to me to maintain my independence and continue living in my own apartment.



Select a Category/Area: Home Life and Housing (2 of 2)

Sample IPP

What is important for me?

It's important for me to budget so I can afford my apartment and living expenses.

What needs to be done?

1. I will meet weekly with ILS staff for support in reviewing my budget.
2. ILS staff will help me maintain a monthly ledger to track my spending and expenses and help me budget.
3. ILS staff will assist me to access and maintain services and supports available to me to enjoy retirement: CalFresh, Section 8 housing, Medi-Cal and Social Security Income.
4. Service Coordinator will visit me quarterly to see how I am doing.



Emergency Planning *Sample IPP*

What is the emergency preparedness plan for me?

I work with my ILS staff to review my emergency evacuation plan every three months. I keep some emergency supplies which include extra food, a first aid kit, a flashlight, and a list of current medications. Since adopting Pepper, I have added a small bag of dog food, extra water, and an extra leash to my emergency supply list.

Who should be contacted in case of an emergency?

My emergency contact is my sister Rosalie. My ILS staff, job coach and my service coordinator have Rosalie's contact information.

Important things to know and do to support me in an emergency.

I take medications daily for several chronic medical conditions. In the event of an emergency, it is important to make sure I have packed my medications. I prefer someone I know well to check in on me and help me to move to a safe place. My sister Rosalie and I have agreed I will go to her house if a natural disaster occurs.



Recent Feedback Received

IPP template feedback:

- ✓ *Order of the content sections – Vision for the Future first in document; Emergency Planning at the end of plan*
- ✓ *Feedback to have sample IPP in first person*
- ✓ *Feedback to move desired outcome as first item*
- ✓ *Changed component of Goals to Vision for the Future*
- ✓ *Changed category Risks to Safety Considerations*
- Feedback on the guide accompanying the IPP, which has not been released

- ✓ *Italics indicate change made*



Monica's Agreement Form



Agreement Form/Signature Page (1 of 3) Sample IPP

(SAMPLE) Individual Program Plan Agreement Form

Name: Monica Smith

UCI Number: 99999999

Date of Birth: 4/22/1959

Medicaid Waiver? Yes No

Date This Review Occurred: 4/5/2024

Next Review Date: 4/4/2025

I wish to receive a copy of the plan in my preferred language of: English

Type of Plan:

Initial, Annual, Biennial, Triennial

Amendment: [Select a reason]

I (we) participated in the development or renewal of my Individual Program Plan (IPP). The services and supports that have been agreed upon and will be included in the IPP or will be changed from my previous plan are:

Agreement Form/Signature Page (2 of 3) Sample IPP

Desired Outcome: I want to retire by the end of the year.						
		Authorization				
Service/Support:	Supported By:	Start Date:	End Date:	How Much:	How Often:	Funded By:
Supported Employment	Employment for All	4/5/2024	12/31/2024	30 hours	Monthly	RC

Desired Outcome: I want to have places where I can volunteer and spend my time and stay connected to my community while meeting new people when I retire.						
		Authorization				
Service/Support:	Supported By:	Start Date:	End Date:	How Much:	How Often:	Funded By:
Transition from employment to volunteer opportunities	Family and Employment for All	11/1/2024	12/31/2024	30 hours	Monthly	RC
Volunteer Opportunity Support	Family and Service Coordinator	1/1/2025	4/30/2025	As needed	As needed	RC

Agreement Form/Signature Page (3 of 3) *Sample IPP*

Additional information on the Agreement Form includes:

- Authorization table for each Desired Outcome
- Agreement of Services: includes an area to list any services that the Planning Team could not agree upon
- Exceptions to settings requirements
- Acknowledgements
- Additional Information Discussed:
 - Self-Direction including Self-Determination and Participant Directed Services
 - 4731 Complaint process information
 - Whistleblower Policy
 - Employment First
 - National Voter Registration Act
 - Transportation Access Plan
- Additional Notes
- Signatures

Recent Feedback Received

Agreement Form/Signature Page feedback:

- ✓ *Position of items on Agreement Form*
- ✓ *Need a clearer distinction with “agree” or “disagree” to the services*
- Statutory requirements should be in plain language (i.e., Self-direction, 4731 complaint, etc.)
- Agreement form is bureaucratic
- Distinguish new vs. existing services

- ✓ *Italics indicate change made*



Next Steps

- Make additional edits based on today's feedback
- Present template to RCPM Workgroup on May 7
- Finish guide to individuals/families and regional centers
- Send final template to RCs in June
- Set up trainings with RCs beginning July



Public Comment

For participants on Zoom: Raise Hand

For participants on Live Stream: Email input

and/or questions to: RCMeasures@dds.ca.gov

