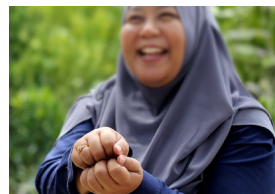


# Draft Person-Centered Service Plan/Individual Program Plan (IPP) Template & Agreement Form

May 23, 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



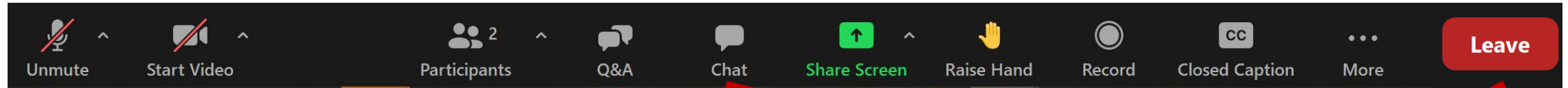
Materials are available at:

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



Submit written comment via email to [RCMeasures@dds.ca.gov](mailto:RCMeasures@dds.ca.gov)

# Zoom Tips



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

Chat is available is open to everyone

Leave the webinar at the end of the meeting



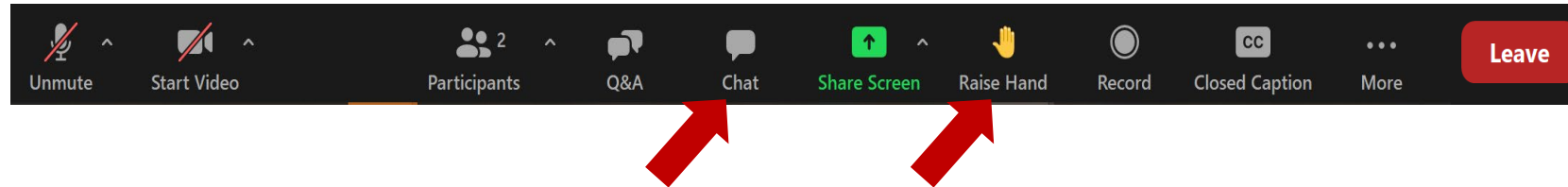
- For attendees, your video and microphone will not be available
- You will only see/hear DDS staff and presenters on screen



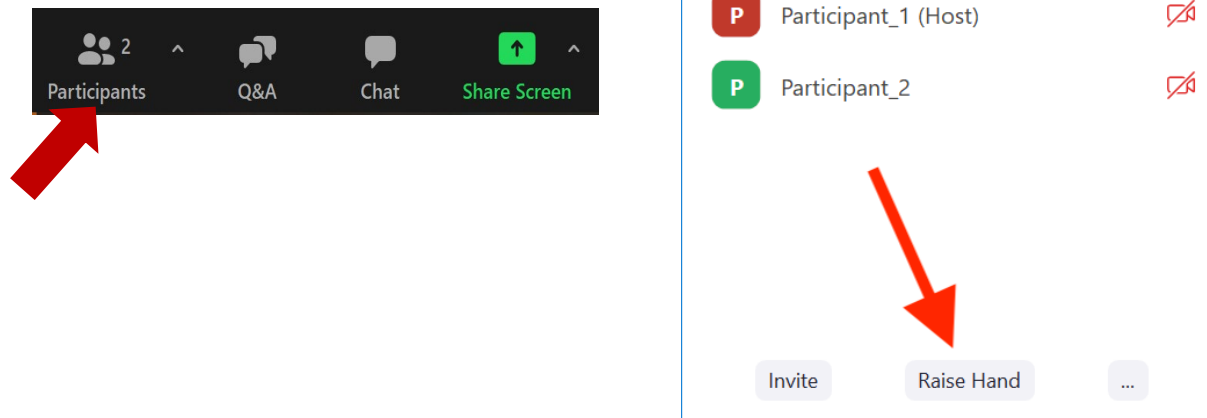
- Features will vary based on the version of Zoom and device you are using
- Some Zoom features are not available for telephone-only participants

# 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

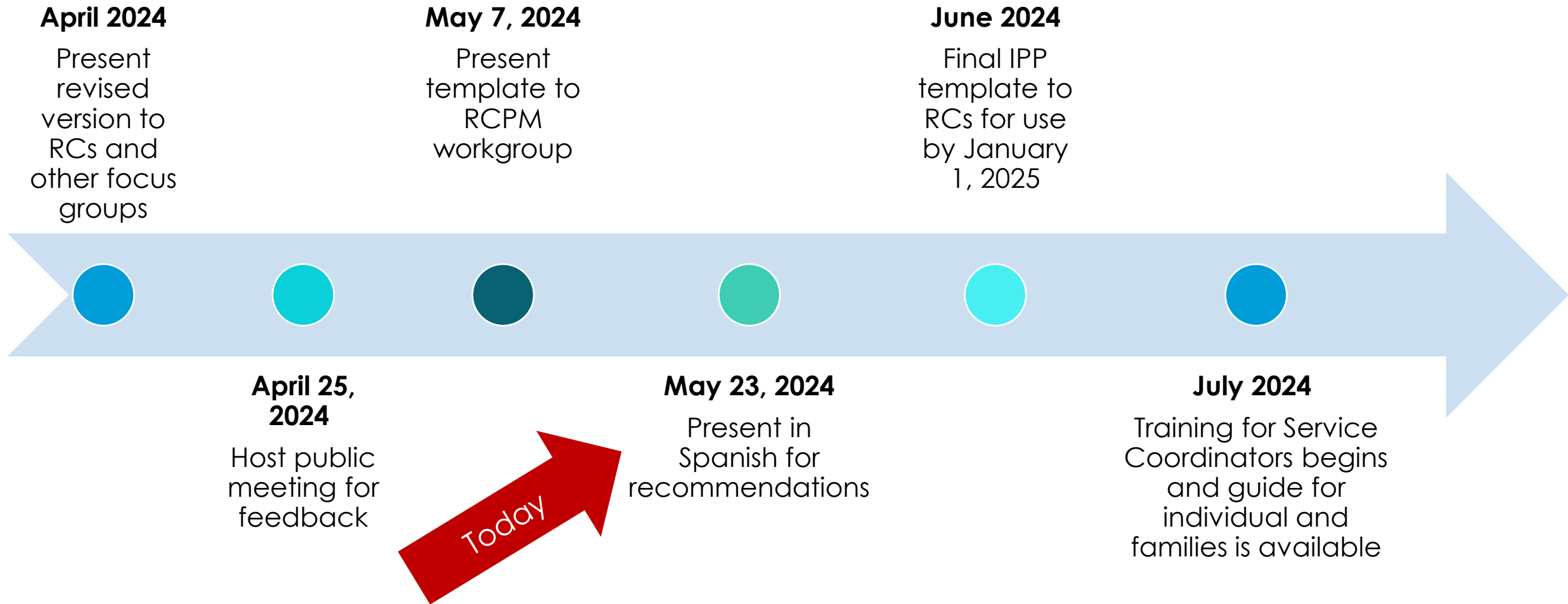
New law requires same IPP be used at all RCs starting January 1, 2025

[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)





## Carlos' 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 Carlos' IPP Sample IPP

## INDIVIDUAL PROGRAM PLAN/PERSON-CENTERED SERVICES PLAN FOR Carlos

**Legal Name:** Carlos R

**UCI Number:** 9999999

**Date of Birth:** 3/15/2011

**Meeting Date:** 3/8/2024

**Amendment Date:** [...N/A.....]

**Type of Plan:**

Initial, Annual, Biennial, Triennial

Amendment [Select a reason]

## INTRODUCTION

### Things you should know about Carlos:

Carlos is 13 years old. He is in the 8<sup>th</sup> grade at Middle School in Riverside, California. He is physically active, enjoys playing games outside and anything that goes fast. Carlos' favorite foods include taquitos, pizza, pasta, and protein shakes. During the holidays, Carlos enjoys making tamales with his mother and grandmother for the family.

### What people like and admire about Carlos:

Carlos' family says he is friendly, has a great smile and a contagious laugh, and loves to give hugs. He makes people feel special. Carlos is also very detail-oriented and organized.

### Successes Carlos wants others to know about:

Carlos recently learned how to make spaghetti and is very proud of that. He wants to cook his favorite dish for everyone.

# Introduction: Carlos Sample IPP

## **Things you should know about Carlos:**

Carlos is 13 years old. He is in the 8<sup>th</sup> grade at Middle School in Riverside, California. He is physically active, enjoys playing games outside and anything that goes fast. Carlos' favorite foods include taquitos, pizza, pasta, and protein shakes. During the holidays, Carlos enjoys making tamales with his mother and grandmother for the family.

## **What people like and admire about Carlos:**

Carlos' family says he is friendly, has a great smile and a contagious laugh, and loves to give hugs. He makes people feel special. Carlos is also very detail-oriented and organized.

## **Successes Carlos wants others to know about:**

Carlos recently learned how to make spaghetti and is very proud of that. He wants to cook his favorite dish for everyone.



# How This Plan Was Developed *Sample IPP*

## **Where did the meeting happen?**

Carlos' meeting took place at home at Carlos' request. The planning team sat around the dining room table together.

## **What part did Carlos choose to play in making this plan?**

Carlos listened and was involved throughout his IPP meeting. Carlos frequently got up to walk around the room excitedly before sitting back down. He prepared snacks for the meeting including Kool-Aid, cheese, crackers, and strawberries with the assistance of Mrs. R.

## **Who also helped with the plan?**

Mr. and Mrs. R, Carlos' parents, participated in the meeting. Ms. Saldovar, service coordinator, also helped with the development of his IPP.





# Vision for the Future *Sample IPP*



## **Carlos's short and long-term goals:**

**Short term:** Carlos is eager to make new friends. He wants to be able to see friends on the weekend outside of school.

**Long term:** Carlos is excited about high school and looking forward to earning a diploma. He wants to go to college in the future.

# Communication Sample IPP

## **How Carlos communicates with others:**

Carlos communicates what he wants and needs with others using short and direct phrases. When he is excited, he moves around a lot and might get up from a conversation to take a break. Carlos is a great negotiator and if you promise him or commit to doing something, he will hold you to it. When Carlos is frustrated, he gets loud with his voice and body language.

## **Important things you should know about how to communicate with Carlos:**

Carlos is a visual learner, and the use of pictures and visual timers is helpful for Carlos to understand what and when something is happening. Carlos adjusts best when he is given a 5-minute notice before transitioning to his next activity. It allows him to finish the activity he is working on. Carlos' mom and dad use a timer on their phone to let Carlos know when it is time to transition.





**In the following areas, Carlos needs help making decisions:**

Carlos acts fast when he knows what he wants. In some situations, he needs help slowing his actions down to be more intentional about his decisions and actions, especially when they involve other people.

**The people who assist with decisions are:**

Mr. and Mrs. R support Carlos to slow down and communicate what it is he wants, prompting him to communicate what he is going to do and ask before doing anything that involves other people. Mr. and Mrs. R support Carlos to make decisions he can for himself, like what to eat and what to wear and what he wants to do in his free time.



# 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 Carlos' IPP (1 of 3) *Sample IPP*

## Community Participation

### **What is the desired outcome?**

Carlos wants to develop friendships with other kids in his community.

### **What is currently happening?**

Carlos has positive interactions with peers at school and has expressed he would like to have friends to hang out with on the weekend. Carlos will follow instructions one step at a time and with some help, can actively participate in group activities. Carlos likes to run and play basketball. When he is playing basketball with his peers, he has a big smile on his face. Carlos passes the ball to his friends when they clap and encourage him to pass the ball back to them. He likes being the one to throw the ball into the basket, and sometimes will get upset if the ball is not passed to him to score the point. Mrs. R wants to further encourage positive interactions with peers and new friends and is seeking funding for a membership at the local YMCA as they are unable to privately pay for the program.

# Select a Category/Area: Community Participation (2 of 3) Sample IPP

## **What is important to Carlos?**

It is important to Carlos to have meaningful interactions with kids his age, especially in doing things he likes such as playing basketball. Having fun, laughing, smiling, and spending some time running outside every day is important to Carlos.

## **What is important for Carlos?**

It is important for Carlos to feel welcomed and be part of a group. It is important for Carlos to learn how to take turns when playing with friends and share the excitement of others scoring a point for the team too.



# Select a Category/Area: Community Participation (3 of 3) Sample IPP

## What needs to be done?

1. Funding for the YMCA membership needs to be secured. The Regional Center's service coordinator will connect Carlos' parents to the local YMCA which is enrolled with a Financial Management Service (FMS) agency and is accessible through Participant Directed Services. The Regional Center will authorize funds for a monthly membership through the FMS agency from April 1, 2024 through March 31, 2025.
2. Carlos' parents will share Carlos' Person Centered One Page Profile with the YMCA to assist with supporting integration into the program and interactions with kids his age.
3. Carlos' parents will communicate with the service coordinator if there is a need to revisit this service before Carlos' IPP annual review due by April 1, 2025.



# Select a Category/Area: Home Life and Housing (1 of 3) Sample IPP

## **What is the desired outcome?**

Carlos will continue to live with his parents, Mr. and Mrs. R, in their family home. Mr. and Mrs. R want to help Carlos strengthen coping skills when things don't go as planned.

## **What is currently happening?**

Mr. and Mrs. R work full time and are home in the evenings, actively involved in Carlos' activities and life. Carlos has two older sisters who live in the family's home while attending college. Carlos looks up to his sisters who are very busy in their social lives outside the home. He is happiest when they are home, and they each have their own unique relationship with Carlos. The family has a pet dog who helps Carlos self-regulate when he feels anxious. Carlos has recently been anxious or upset more often, and there are a range of things that cause these feelings. Some examples of things that have caused Carlos to be upset are: Carlos cannot find the YouTube video he is wanting to watch, not being able to skip ahead during TV advertisements, if someone is making food without involving him, when he hears the vacuum cleaner, or when he is asked to take a break from TV and do homework or participate in chores. Carlos lets his family know he is upset by standing up and yelling the same sound very loudly over and over, and more recently this has escalated to Carlos pinching himself or even hitting his head. In these instances, his family acts quickly to keep him from hurting himself. Carlos responds well to keeping a routine and uses a daily visual schedule which helps him stay on task. When Carlos helps his parent with chores at home he will earn \$10.00. He can spend his earned money on items of his preference (Hot Cheetos). His parents have very little time to themselves and would benefit from taking a break.

# Select a Category/Area: Home Life and Housing (2 of 3 ) *Sample IPP*



## **What is important to Carlos?**

It is important to Carlos to have routine, and to be encouraged and positively supported to keep that routine. He thrives on praise and to be included in family activities like cooking. Carlos likes to have his belongings in order and in his space. His dog, Buddy is important to Carlos. They've been buddies for 5 years.

## **What is important for Carlos?**

It is important for Carlos to have a plan to get back to a positive place when he is upset, so that he does not hurt himself. It is important for Carlos to learn how to express his wants and needs without hurting himself.



# Select a Category/Area: Home Life and Housing (3 of 3 ) *Sample IPP*

## **What needs to be done?**

Carlos will continue to live at home with his parents and sisters. Carlos' family would like support in communicating with Carlos when he is upset and helping him through those moments. The Regional Center will provide information to Carlos and his family about accessing behavioral services through their health insurance. Based on the respite assessment tool, Mr. and Mrs. R would also benefit from 10 hours/ month of respite services. Mr. and Mrs. R have an extended family member in mind that may assist and will discuss the family member's willingness to become a respite provider through a Financial Management Service (FMS) agency. Once that decision is made, Mrs. R will inform the service coordinator to set up a respite purchase of service authorization.

- 1) Service Coordinator will provide information to Carlos and his family about positive behavioral support services that may be available through the family's health insurance plan.
- 2) Mr. and Mrs. R will communicate with the service coordinator once their family member confirms availability of providing respite.





# 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*



# Carlos' Agreement Form



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

**Name:** Carlos R

**UCI Number:** 99999999

**Date of Birth:** 3/15/2011

**Medicaid Waiver?**  Yes  No

**Date This Review Occurred:** 3/8/2024

**Next Review Date:** 3/1/2025

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

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)/Person-Centered Services Plan (PCSP). The services and supports that have been agreed upon and will be included in the IPP/PCSP or will be changed from my previous plan are:

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

<b>Desired Outcome:</b> Carlos wants to develop friendships with other kids in his community.						
		<b>Authorization</b>				
<b>Service/Support:</b>	<b>Supported By:</b>	<b>Start Date:</b>	<b>End Date:</b>	<b>How Much:</b>	<b>How Often:</b>	<b>Funded By:</b>
Membership to YMCA	Financial Management Services (FMS)	4/1/2024	3/31/2025	1	Monthly	RC
<b>Desired Outcome:</b> Carlos will continue to live with his parents, Mr. and Mrs. R, in their family home. Mr. and Mrs. R want to help Carlos strengthen coping skills when things don't go as planned.						
		<b>Authorization</b>				
<b>Service/Support:</b>	<b>Supported By:</b>	<b>Start Date:</b>	<b>End Date:</b>	<b>How Much:</b>	<b>How Often:</b>	<b>Funded By:</b>
Behavioral Support	Medi-Cal	4/1/2024	3/31/2025	To be determined	To be determined	RC
Respite	FMS	To be determined	3/31/2025	10 hours	Monthly	RC
Safety Alert Bracelet	Safety Alert	4/1/2024	3/31/2025	1	Annual	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
- Finish guide to individuals/families and regional centers
- Send final template to RCs in June
- Set up trainings with RCs beginning July





# Public Comment

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Raise hand to speak

Send comments and/or questions to:

[RCMeasures@dds.ca.gov](mailto:RCMeasures@dds.ca.gov)

