Life Outcomes Improvement System (LOIS) Input Update Webinar

October 30, 2025





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 & recording will be available at: https://www.dds.ca.gov/lois



If you have questions after today's update, email them to: LOIS@dds.ca.gov

AGENDA

- 1. Introductions
- The LOIS Project & Background
- Our Approach to Listening
 - Participation Totals

4. What We Heard

Overall, LOIS Should...

- Improve Communication & Collaboration
- Support Transparency & Accountability
- Centralize Information & Education
- Authorization & Payment Processes
- Support Person-Centered Planning & Outcomes
- Improve Accessibility & Usability
- Advance Consistency Across RCs
- 5. What's Next



DDS LEADERSHIP



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BACKGROUND & GOAL



LOIS will be a new, user-friendly online system designed to make it easier for individuals with intellectual and developmental disabilities, families, and service providers to manage services, access their info, and communicate with regional centers.

LOIS LISTENING SESSIONS (TOWN HALLS)

The Department, with the support of Mission Analytics Group, hosted in-person and virtual town halls across California to hear directly from individuals, families, & service providers about what they would like to see included in LOIS.

- We collected information from in-person and online feedback, chats, polls, reactions, and surveys.
- This webinar will review what we have learned so far from the July 30 to October 24, 2025, listening sessions.
- The following slides summarize what you told us you want the LOIS system to do.



OUR APPROACH TO LISTENING

July - October 2025

We heard from individuals served and families at in-person and virtual Town Halls

- Sacramento
- Berkeley
- Central Valley
- Los Angeles
- San Diego
- Very Northern CA (Virtual)
- 3 Virtual Town Halls

We also held virtual meetings for service providers

- Residential Services
- ILS, SLS, & Personal Care Employment
- Employment Services Providers
- Specialized Therapeutic & Professional Services
- Day Services
- SDP Vendors of Respite, Employer of Record & Participant Direction
- Early Start & Infant Development
- Transportation

PARTICIPATION TOTALS

	Sessions	Attendees
Individual and Family Town Halls	9	221
In Person	5	85
Virtual	4	136
Service Provider Webinars	8	446
Total	17	667

PEOPLE APPRECIATED THE TOWN HALLS

Individual & Family Town Hall - Survey Results				
	In Person	Virtual	Total	
I felt comfortable to share in the Town Hall	95%	97%	96%	
I would like to attend future meetings on LOIS	94%	89%	92%	

"I was excited that DDS is looking for feedback from [the] public, very personcentered view. Loved that all ideas were encouraged. Public was not talked at, but included."

- Individual from Sacramento
In-Person Event

"It was nice to give feedback and feel heard - seems like DDS is really listening to the community."

- Individual from the Virtual Town Hall Event

"I was excited to learn more about the innovative ideas to improve our ability to best support our clients."

 Attendee from SDP, Vendors of Respite, Employer of Record & Participant Directed Webinar

Summarizing the Town Hall Input

Mission combined what we heard/read from the 17 Town Halls and Webinars (notes, transcripts, comments, chat, polls)

Step 1: We identified 7 high-level themes

Step 2: We marked input by theme and by subject within theme

Step 3: We ranked the seven themes by how frequently they came up, and within the themes, how frequently each topic came up

We'll walk through the 7 themes, highlighting the top 2 topics in each and then provide an overview of other topics

OVERALL, LOIS SHOULD...

- Improve Communication & Collaboration
 - Support Transparency & Accountability
 - (i) Centralize Information & Education
 - \$ Enhance Authorization & Payment Processes
 - Support Person-Centered Planning & Outcomes
 - | Improve System Accessibility & Usability
- Advance Consistency Across Regional Centers

LOIS could improve Communication & Collaboration by providing:

1. Space for document sharing & collaborative editing

- ✓ The ability to upload documents would reduce time & errors from manual entry
- ✓ Allow individuals and families to view/comment on Individual Program Plans (IPPs) and supporting documents to prepare and finalize IPPs
- ✓ Allow service coordinators, individuals and families to view and comment on Individual Service Plans (ISPs)
- ✓ Support information accuracy and correct errors
- ✓ Validate information by uploading supporting documentation
- ✓ Reduce the need to submit documents across different systems

"There are a lot of times when they have referrals, they have a lot of documents that are going back and forth. And it's hard to send all those files, so if there was a way LOIS could store those for interested parties to access, that that could be very beneficial."

Residential Service Provider Town
 Hall Attendee

LOIS could improve Communication & Collaboration by providing:

2. The option for real-time messaging with regional center staff & notifications

- ✓ Live chat or messaging options
- ✓ Notifications sent for status changes such as approvals or denials
- ✓ Meeting reminders
- Receive announcements or updates through notifications
- ✓ Centralized portal for communication that allows for messages to be responded to by multiple regional center staff

"[Somewhere] you can contact your service coordinator, not just via email, but if it's your SDP coordinator or their manager or somebody, of the officer of the day, if it's just a general questions that you have. To be able to click on that and then send them [a message] through the portal itself, that's an option that some of these platforms already have built in."

-Berkeley Town Hall Participant

LOIS could Improve Communication & Collaboration by providing:

- 1. Space for document sharing and collaborative editing
- 2. The option for **real-time messaging** with regional center staff and **notifications**
- Up-to-date service coordinator contact information, including managers
- 4. Notification of service coordinator changes
- 5. Access to a master calendar for scheduling meetings (IPP, etc.)
- 6. A resource for emergency and crisis communication
- 7. Opt-in for alerts for changes (staff turnover, schedule changes)

LOIS could SUPPORT TRANSPARENCY & ACCOUNTABILITY by providing

 Visibility into key processes and timelines for individuals, families, and vendors

- ✓ A visual tracker that lets users know where things are in the approval process and the timeline for the next step
- ✓ Insight into the process following the sharing of documents, authorizations, and requests
- ✓ Clear expectations about process timelines
- ✓ Indication of who is responsible for each phase of a process

"I'm in self-determination, so if I've submitted a spending plan update, what's the status of that? Has it been received? Is it being looked at? Are we waiting on something? Is there information? What's the status? When's the last time someone looked at it?"

- Sacramento Town Hall Participant

LOIS could SUPPORT TRANSPARENCY & ACCOUNTABILITY by providing

2. Access for individuals and families to view historical records

- ✓ View past IPPs and other documents to support person-centered planning
- ✓ Allow for control over past individuals' records – what is shared and not shared
- Use past documents as a starting point, as appropriate
- ✓ Support smoother transitions with new vendor or regional center access to past records
- ✓ Alleviate record-keeping administrative burden for individuals and families

"There has been a couple of emails that my service coordinator sent me, and they disappear after 60 days. So with LOIS, making sure that documentation, it's there permanently to have easy [access]."

- Berkeley Town Hall Participant

LOIS could **SUPPORT TRANSPARENCY & ACCOUNTABILITY** by providing:

- 1. Visibility into key processes and timelines
- 2. Access for individuals and families to view historical records
- 3. Support for **service coordinator responsiveness** and an opportunity to escalate requests or communications
- 4. Ability for individuals and families to **track IPP/goal progress**, including unmet needs
- 5. Ability to share and view feedback on vendors
- 6. Ability to track and view Special Incident Report (SIR) submissions
- 7. An opportunity to **track service hours** in real-time

Make LOIS a centralized place for INFORMATION & EDUCATION, by including:

1. **Training resources and tutorials/educational** videos on LOIS and the regional center systems would be helpful

- ✓ Video "how-to" for individuals, families, and vendors on common activities (required forms, choosing services, etc.)
- ✓ Train-the-trainer approach and onsite support at regional centers to help people navigate the new system
- ✓ Links and easy access to existing educational information, resources and past trainings
- ✓ A storage system for service guides, check-ins, common documents/forms
- ✓ Information on the regional center for the public

"Families ask me what to expect, and I try to explain it as best as I can, but I'm sure I'm missing something. It would be nice to be able to direct the family to using the LOIS system. Maybe an orientation could be offered to families via LOIS."

- Early Start Town Hall Participant

Make LOIS a centralized place for INFORMATION & EDUCATION, by including:

2. Opportunity to find/discover service options, such as **searchable databases/service menus**

- ✓ A comprehensive service menu for all regional center services
 - Searchable by characteristics (i.e., age range, geography, interests, etc.)
 - Includes a description of the service and the vendors that provide each service
 - Contact information for vendors to learn more about their services (i.e., schedule a tour)
- ✓ Linkage to the Provider Directory under development

"I don't even know what's available for my almost 20-year-old, which makes it hard for me to convince him to do things outside of the home. I would want from this system some sort of searchable database: this is my age; these are my interests; this is my disability level. I don't know how you would do that, but being able to find things that interest him, that he's searching, not mom is searching."

– Berkeley Town Hall Participant

Make LOIS a centralized place for INFORMATION & EDUCATION, by including:

- Training resources and tutorials/educational videos on LOIS and the regional center system
- 2. Opportunity to find/discover service options, such as **searchable databases/service menus**
- 3. A forum for community resources and provider directories
- 4. Tools to help individuals, families, and vendors understand regional center processes and requirements
- 5. Resources that support self-advocacy
- 6. Resources with easy-to-understand definitions for acronyms and jargon

With LOIS, AUTHORIZATION & PAYMENT PROCESSES could:

1. Enhance functionality for billing & invoicing:

- ✓ Ability to search for invoices
- ✓ Flags indicating missing information
- ✓ Ability to run reports based on queries (i.e., invoice status, UCI, etc.)
- Contact information for who to contact to resolve errors and ask questions
- ✓ Option to upload internal billing document to reduce manual entry

"I think that's a lot of what I'm seeing about this system, is the ability to potentially automate for RCs, since they have just an unbelievable weight to bear, and then for the vendors to make it easier, and then, of course, for the families to access that information."

- Early Start Town Hall Participant

With LOIS, AUTHORIZATION & PAYMENT PROCESSES could:

2. Streamline service authorization & vendorization protocols

- ✓ Fillable forms with the option for electronic signatures
- ✓ Opportunity to upload forms and supporting documents
- ✓ Auto-populate duplicate information across forms
- ✓ Checklists for each vendor process with links to more information and resources
- ✓ Abbreviated process for adding service codes to existing vendorizations
- ✓ Data exchange with partner agencies (DOR, DSS) to reduce information requested for vendors

"When I was treating kiddos, the service coordinator would say 'you're approved, start the services,' but then we always get this contradicting message, which is, 'you can't start services until you get the actual authorization.' But you don't want to delay, you know that the child needs the service, and so you're conflicted. It would be nice to be able to make it so that we can minimize that gap."

- Early Start Town Hall Participant

With LOIS, AUTHORIZATION & PAYMENT PROCESSES could:

- 1. Enhance functionality for billing and invoicing
- 2. Streamline service authorization and vendorization protocols
- 3. Improve Purchase of Service (POS) management and visibility
- 4. Automate data exchange and system integration
- 5. Create faster regional center processing times
- 6. Increase payment accuracy and easier error resolution
- 7. Create Consistent POS formats and billing procedures

The LOIS system could **SUPPORT PERSON-CENTERED PLANNING & OUTCOMES** by:

1. Including features that facilitate IPP preparation, accessibility, & flexibility

- ✓ Easy online access to IPPs for individuals, families, and vendors
- Modular IPPs that can be completed and reviewed in segments, over the course of several meetings
- Meeting reminders with preparatory materials (agenda, drafts, questions)
- ✓ Option to send comments and questions in advance of IPP meetings
- ✓ Easy ways to correct errors and request updates
- ✓ User-friendly electronic signatures

"It would be great if LOIS can have a repository of the final IPP and other documents a client may need to access frequently. In this way, clients can self-serve and not rely on the service coordinator."

-Evening Town Hall Participant

The LOIS system could SUPPORT PERSON-CENTERED PLANNING & OUTCOMES by:

2. Allowing individuals to control their information with **consent & permissions management**

- ✓ Individuals would like to know and have a say in who has access to their information
- ✓ Limit information sharing by role and permission level (tiered access)
- ✓ Individuals should be informed of their right to share or not share information through LOIS
- ✓ Include the ability for individuals to redact or remove unwanted information
- ✓ Include an option to block access to certain documents or information

"So as a mom, I want to get in my computer, iPad or iPhone, with my username and password, I can set up the profile of my child, along with the Service Coordinator, I could just set up the level of sharing. What I'm going to share. Now we send paper everywhere, so the access with the cyber security is even more secure."

- San Diego Town Hall Participant

The LOIS system could **SUPPORT PERSON-CENTERED PLANNING & OUTCOMES** by:

- 1. Including features that facilitate IPP preparation, accessibility, and flexibility
- 2. Allowing individuals to control their information with **consent and permissions management**
- 3. Offering resources that prompt **planning for the future**, including caregiver transitions
- 4. Prompting individuals to **engage in goal setting and monitoring progress** toward their goals
- Capturing and tracking life outcomes and individual preferences (e.g., housing)
- 6. Ensuring LOIS and virtual communication does not replace in-person engagement or shift responsibility to individuals or families

Focus on **System Accessibility & Usability** is needed, including:

1. Addressing digital access barriers including limited internet, varied technology literacy, multi-factor authentication & encryption alternatives

- ✓ Simple, easy-to-navigate user interface
- ✓ To support access in communities with limited internet:
 - Seamless access across devices, especially phones
 - Option to access an offline version of the system
- ✓ Consider alternatives to multi-factor authentication

"The people served must be at the center of this tool. But not everyone has access to stable internet, modern devices, or the skills necessary to navigate an online system like LOIS. My suggestion is that LOIS incorporate options such as simplified versions that work with limited connectivity, telephone helplines, and training accessible to users and their families. This way, we can ensure that LOIS is a truly inclusive tool designed for all people served."

-Northern CA Town Hall Participant (translated from Spanish)

Focus on **System Accessibility & Usability** is needed, including:

2. Accommodating the user's preferred language, literacy level, & other needs

- ✓ Offer translation of documents and access support in preferred language, including ASL (i.e. videos)
- ✓ Document and accommodate cultural and religious preferences
- ✓ Limit use of jargon and use plain language and visual supports throughout
- ✓ Make accessible with screen readers and other assistive technology and offer the ability to auto-narrate selected text
- ✓ Translate Department directives & regulations into more plain language

"The whole individual-family interface needs to be personcentered, simple, and easy for individuals, families to connect with and process, including visuals. Not flooded with overly technical language. To be used, people need to be able to connect and relate to it, be able to navigate, etc."

– Evening Town Hall Session Participant

Focus on **System Accessibility & Usability** is needed, including:

- Addressing digital access barriers including limited internet, varied technology literacy, multi-factor authentication, and encryption alternatives
- 2. Accommodating the user's preferred language, literacy level, and accommodation needs
- 3. Balancing access and privacy with permission-based access controls
- 4. The exploration of **artificial intelligence** (AI) for individualized support, such as service recommendations
- 5. The ability to access LOIS across multi-platforms including phone, tablet, and computer

The new LOIS system is a chance to **ADVANCE CONSISTENCY ACROSS RCs** with:

- 1. Standardized forms, documents, and informational material for all 21 regional centers
- ✓ Consistent templates and fillable forms
 to reduce to errors
- ✓ Central location with standardized forms and tools (applications, referral forms, etc.)
- ✓ Form submission process that allows use for multiple purposes (across service codes or regional centers)

"Standardization is very important.

If I'm preparing a spending plan
for SDP, one service coordinator
says "oh no, the calculation is not
like that." So I have a written an
explanation what [it] means,
rounding out what it means when
you carry errors by the decimals,
two decimals, all decimals, I have
to explain."

-San Diego Town Hall Participant

The new LOIS system is a chance to **ADVANCE CONSISTENCY ACROSS RCs** with:

2. Consistent processes & policies for vendors and individuals

- ✓ Implement key processes like vendorization and IPP consistently across regional centers
- ✓ Ensure vendor requirements are consistently shared and interpreted across regional centers
- ✓ Standardize time expectations and escalation procedures
- ✓ Train regional centers to promote consistency in practice

"This [regional center] decides, no, it's like this. But this one said, No, it's like that, and if we want any coordination between them, it's back to DDS, and DDS might say 'Well, we don't' know what to do yet' and it creates frustration."

- San Diego Town Hall Participant

The new LOIS system is a chance to ADVANCE CONSISTENCY ACROSS RCs with:

- 1. Standardized forms, documents, and informational material for all 21 regional centers
- 2. Consistent processes and policies for vendors and individuals
- 3. Portability across regional centers so information shared by vendors and individuals with one regional center can be accessed by another regional center, when appropriate
- 4. Consistent timelines for regional center processes, including response expectations

REVIEW OF LOIS TIMELINE



Releasing a RFI will improve the Department's understanding of how potential software vendors can support the development of LOIS

During the RFI process the Department will:

- Work with interested, potential software vendors to learn how LOIS requirements can be met by their solutions
- Develop initial potential cost & timeline estimates for designing, developing, testing and launching LOIS

NEXT STEPS

The Department will:

- Release the Request for Information (RFI) in November 2025 & post it online at www.dds.ca.gov/lois
- Get additional details from the community to answer software vendor questions, if needed
- Continue to spread awareness of the LOIS project statewide
- Help people understand & stay connected throughout the LOIS project

We are excited to take this next step in the project with you!

THANK YOU!

Get Updates about LOIS in Your Inbox: Sign up for our Bridges newsletter!





www.dds.ca.gov/newsletter