BDDS Portal Provider Training 7:
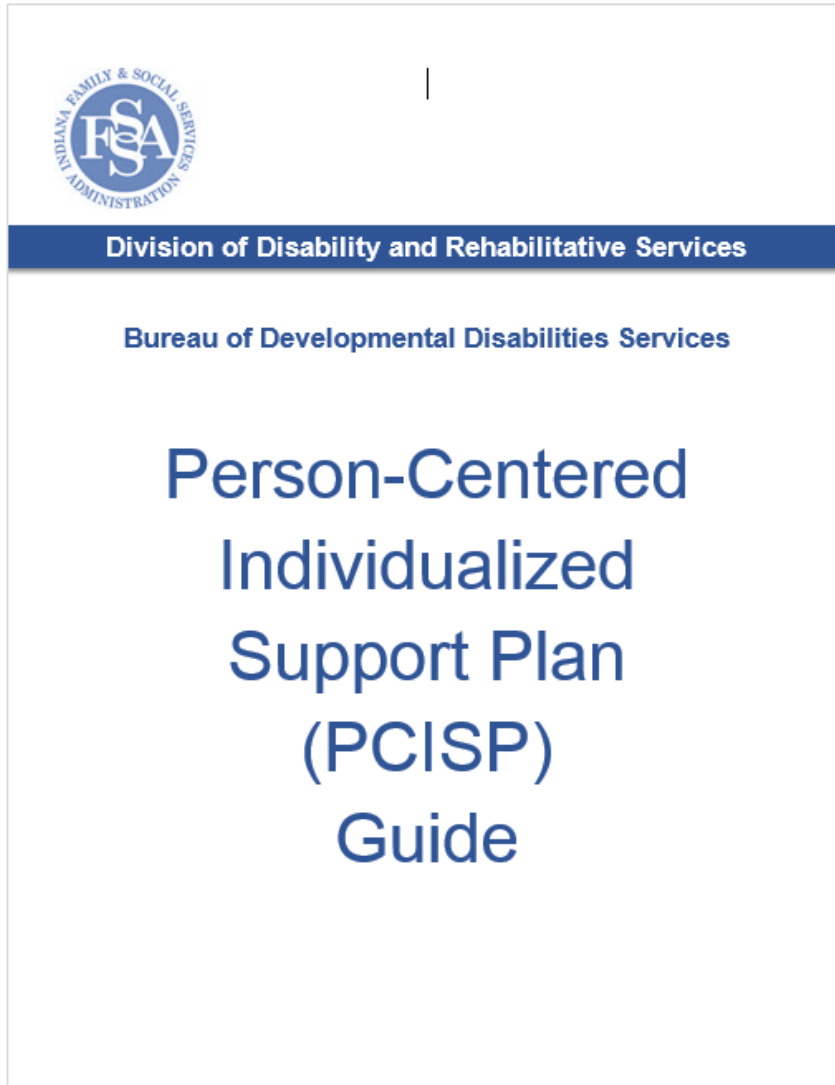
Person-Centered Individualized Support Plan (PCISP)

September 25, 2018

PCISP Guidance

Division of Disability and Rehabilitative Services

Bureau of Developmental Disabilities Services

Person-Centered Individualized Support Plan (PCISP) Guide

The Person-Centered Individualized Support Plan Guide has been developed to provide additional information on the person-centered planning process, meetings, and content development.

http://www.in.gov/fssa/ddrs/5437.htm

PCISP Guidance

PERSON CENTERED PLANNING THROUGH THE LIFECOURSE

Just over a year ago, the Division of Disability and Rehabilitative Services (DDRS) opened a dialogue with all stakeholders on the need for transformation in how Indiana provides services and supports to its citizens with intellectual and developmental disabilities. Since then, we've consulted with self-advocates, families, case managers, providers and other stakeholders to better understand our collective vision for services and supports for Hoosiers with disabilities and what we can do to transform our approach to move us toward supporting individuals and families in their community. As a first step, the division chose to focus its initial efforts on person-centered planning (PCP) and case management. These areas were targeted due to the central role both play in supporting individuals and families in designing meaningful plans to encourage effective supports and services to get individuals closer to their definition of a good life.

The division is excited about these future changes and will be working on the following activities to reflect changes to person-centered planning and case management:

- Update policies, procedures and guidance related to PCP and case management;
- Statewide training series to provide concrete, face-to-face learning opportunities regarding person-centered planning and the role of case management; and
- Regular updates to stakeholders on our progress toward new person-centered planning implementation to ensure transparency and up to date information.

ANNOUNCEMENTS

- Future changes: Person-centered planning & individualized support plan (July 26, 2017)
- Save the date: Case manager trainings (July 28, 2017)
- Person-centered planning through the LifeCourse (August 9, 2017)

WEBINARS

- Facilitating a pathway to a 'good life' for hoosiers with disabilities
  - PowerPoint
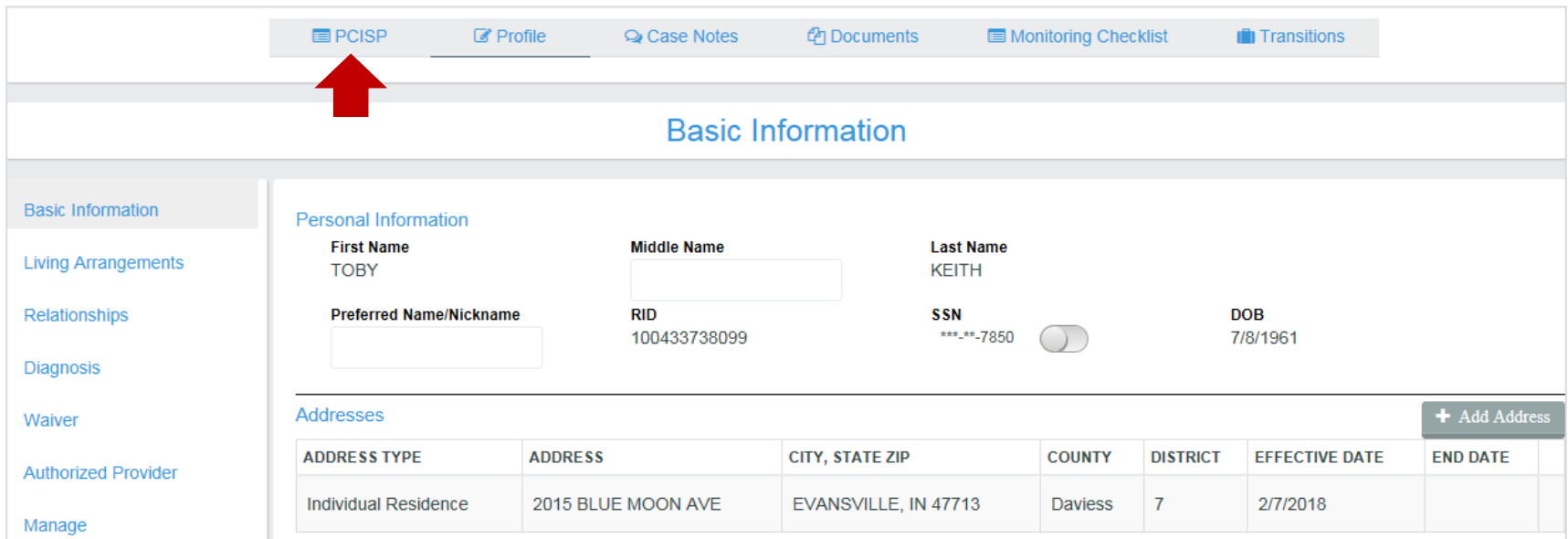- Facilitating a pathway to a "good life" for hoosiers with disabilities PPT (September 2017)

GUIDES

- Person Centered Individualized Support Plan (PCISP) Guide

Sidebar navigation:

About DDRS

Intellectual & Developmental Disabilities Task Force

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Programs & Services

Developmental Disability (BDDS)

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2014 Medicaid Disability Eligibility Changes

DDRS Announcements

DDRS Policies

Information for Consumers

Home and Community-Based Services Final Rule Statewide Transition Plan

Order of Selection

Person Centered Planning through the LifeCourse

http://www.in.gov/fssa/ddrs/5437.htm

PCISP

The PCISP is accessed through the PCISP link on the individual specific navigation bar.

PCISP

The user is directed to the individual's PCISP page. The top grid will display any PCISPs currently in development.

PCISP

The bottom grid will contain finalized PCISPs.

PCISP

PCISP in development

Effective Dates	Edition Type	Created Date	Last Edited	
		09/24/18	09/24/18	🗑

◀◀ ◀ **1** ▶ ▶▶ 1 - 1 of 1 items

Finalized PCISPs

Effective Dates	Edition Type	Finalized Date	Serial #	
6/1/2018 - 5/31/2019	Initial	09/04/18	201809040001	⬇ 🗑

PCISPs may be access in entry format by clicking anywhere on the line

PCISP

PCISPs may be access in entry format by clicking anywhere on the line or downloaded by clicking the download icon. *The following screenshots are taken using the entry format.*

PCISP: General Overview

The General Overview page is just that, an overview. The first section includes:
- The Edition Type – Initial, Update or Annual
- The selected CCB for the new PCISP
- The living arrangement recorded in the Profile
- The Provider Owned or Controlled Setting response recorded in Living Arrangements and
- The date the team meeting was held

PCISP: General Overview

PCISPs are written for the same 365 day cycle as the Service Plan (formerly CCB).

PCISP: General Overview

* Edition Type	Update ▼	* Select a CCB	CIH - Update ▼
Effective Dates	10/01/2017 - 09/30/2018	* Life Stage	Transition ▼
Living Arrangement	Living with One Housemates (sharing RHS staff)	Living in a provider owned or controlled setting?	Yes
* Date of Team Meeting	03/01/2018 📅		

The life stage is not assigned to an individual based on age, but should be a reflection of the individual's current experience. Team discussion should determine the life stage to be selected from the drop down menu. Additional information and resources are found in the PCISP Guide.

PCISP: General Overview

The Living Arrangement and Provider Owned or Controlled Setting information is automatically populated from information recorded in the individual's profile.

PCISP: General Overview

The Date of Team Meeting should reflect the date the Individualized Support Team (IST) met to discuss outcomes, risks, and to further review and develop the PCISP.

PCISP: General Overview

The PCISP includes a section for listing everyone participating in the IST meeting.

PCISP: General Overview / Individual's at my Team Meeting

Individuals at My Team Meeting			
Name	Company	Relationship	
Barbara Behaviorist	Best Behaviors, Inc.	Behavior Specialist	🗑
Cathy Case-Manager	CMCO	Case Manager	🗑
Ekta Keith		Sibling	🗑
Polly Provider	ABC Provider	Residential Staff	🗑
Willie Wilson		Best Friend	🗑

|◄ ◄ **1** ► ►| 1 - 5 of 5 items

When complete, the grid should include all persons in attendance at the IST meeting. Contact information for those listed and included in the Profile as relationships will auto-populate in the finalized document.

PCISP: General Overview

At the bottom, the meeting facilitator and recorder appear.

PCISP: General Overview / PCISP Edition Prepared By

PCISP Edition Prepared by					
* Facilitator	Cathy Case-Manager	* Relationship	Case Manager	* Email Address	Cathy@cmco.com
* Recorder	Cathy Case-Manager	* Relationship	Case Manager	* Email Address	Cathy@cmco.com

While the meeting facilitator may vary, the recorder or author of the PCISP will be the case manager.

PCISP: General Overview

PCISP: About Me

About Me
An individual shares their admirable qualities and vision of what their good life includes.

* What people like and admire about me:

I am friendly and outgoing. I like everyone and make friends easily.

* My strengths and assets are:

I love to cook and help make dinner for myself and my housemates. When I cook I feel like I am contributing to what happens in my home. to My favorite meal is spaghetti.

* My good life includes:

Playing with my kitten outside when the weather is nice. Seeing my family every week. I like my housemates but would like to live with my sister one day.

About Me allows for a strengths-based introduction of the individual.   It provides the individual and those closest to them the opportunity to share and describe their gifts, assets, and competencies. Fields include:
- What people like and admire about me;
- My strengths and assets are; and
- My good life includes.

PCISP: Life Domains

- Daily Life and Employment
- Community Living
- Safety and Security
- Healthy Living
- Social and Spirituality
- Citizenship and Advocacy
- Other Areas of Importance

General ✔

About Me ✔

Daily Life and Employment ✔

Community Living ✔

Safety & Security ✔

Healthy Living ✔

Social & Spirituality ✔

Citizenship & Advocacy ✔

Other Areas ✔

Appendix ✔

Service Plan ✔

PCISP: Life Domain Sections

- Personal Focus
- Vision of a Preferred Life
- Team Discussion on Outcomes
- Actions/Activities for my [life domain] Safety
- Natural Supports

The sections in each life domain are identical however some, particularly Healthy Living, contain additional questions.

Please see the PCISP Guide for detailed information relating to the purpose and use of each section.

PCISP: Life Domains

Personal Focus

* What's important to and for me and what do others need to know to support me in the area of daily life and employment?

Based on discussion with the individual and his or her guardian, this section should include a description of what the individual thinks is important to have a good life in the area of daily life and employment.

What assessment tools were used in identifying these?

Assessment tools are listed here.

Specify how I communicate with others and the best way to communicate with me.

See the PCISP guide for information on communication.

Vision of a Preferred Life

What is currently happening in this domain?

This section is to include information that will inform the reader about the current daily activities on the individual.

What I prefer for this life domain:

This section is to include information that will inform the reader about the individual's preferred vision for daily life and employment.

* = Field requires content for finalization

PCISP: Life Domains / Desired Outcomes

Desired Outcome

What Is the desired outcome?

Enter desired outcome.

Strategies for implementation:

Enter strategies for implementation.

Action Steps Needed:

Enter action steps needed.

How will progress be measured:

Enter how progress will be measured.

Who? When?:

Enter who and when.

Desired Outcomes can be found within each life domain.
This information includes:

- The desired outcome
- Strategies for implementation
- Action steps needed
- How progress will be measured
- Who? When?

PCISP: Life Domains / Team Discussion on Outcomes

Team Discussion on Outcomes

Team Discussion on Outcomes

The team discussion on outcomes is recorded here.

The Team Discussion on Outcomes sections are included in each life domain and are used to record the teams discussion on outcomes including modifications or adjustments to the plan and to celebrate the individual's achievements.

PCISP: Life Domains / Actions/Activities for My Safety

Actions/Activities for My Safety

Actions/Activities for My Daily Life & Employment Safety ☐ N/A

I am at risk for falling. My Fall Risk Plan has been attached to this PCISP.

Has informed consent and HRC approval been received and uploaded into the Document Library? | NA ▼

Risk identification and discussions on risk are entered in the Actions/Activities for my Safety section of the related life domain, in this example, the risk for falling is identified. It is not necessary to include the content of the individual's risk plan as it is attached to the PCISP.

PCISP: Life Domains / Actions/Activities for My Safety

Actions/Activities for My Daily Life & Employment Safety

* **Actions/Activities for My Daily Life & Employment Safety** ☐ N/A

Enter actions and activities for the individual's safety for this life domain.

Has informed consent and HRC approval been received and uploaded into the Document Library? ▼

Yes

No

NA

Because the risk plan for falling does not include restrictions, the Human Rights Committee (HRC) question is marked NA or Not Applicable.

PCISP: Life Domains / Actions/Activities for My Safety

Actions/Activities for My Daily Life & Employment Safety

Actions/Activities for My Daily Life & Employment Safety ☑ N/A ⬅

In cases where there is a not need for risk information to be entered within a life domain, checking the NA box removes the text field and HRC question.

PCISP: Life Domains / HCBS Required Questions

- CMS HCBS Final Rule Questions
  - Community Living
  - Safety and Security
  - Healthy Living
  - Social and Spirituality
  - Citizenship and Advocacy

For individuals residing in a provider owned or controlled setting, five of the seven life domains include questions required by the Centers on Medicare and Medicaid Final Rule.

PCISP: Life Domains / HCBS Required Questions

HCBS Required Questions

* Does the individual have privacy in their sleeping or living quarters? [▼]

* Does the individual's living quarters have lockable entrance doors, with the individual and appropriate staff having keys to doors as needed? [▼]

* If the individual shares living quarters, did the individual have a choice of roommates? [▼]

* Does the individual have the freedom to furnish and decorate their sleeping or living quarters within the lease or other agreement? [▼]

Each HCBS question requires a yes or no response.

PCISP: Life Domains / HCBS Required Questions

HCBS Required Questions

* Does the individual have privacy in their sleeping or living quarters? [No ▼]

* HCBS Remediation:

[   ]

* Does the individual's living quarters have lockable entrance doors, with the individual and appropriate staff having keys to doors as needed? [▼]

* If the individual shares living quarters, did the individual have a choice of roommates? [▼]

* Does the individual have the freedom to furnish and decorate their sleeping or living quarters within the lease or other agreement? [▼]

When the response to any question is NO, an additional text field will appear and the case manager will include the required information.

PCISP: Life Domains / HCBS Required Questions

HCBS Final Rule Required Information for No responses:
- Identify a specific and individualized assessed need;
- Document the positive interventions and supports used prior to any modifications to the person-centered service plan;
- Document less intrusive methods of meeting the need that have been tried but did not work;
- Include a clear description of the condition that is directly proportionate to the specific assessed need;
- Include a regular collection and review of data to measure the ongoing effectiveness of the modification;
- Include established time limits for periodic reviews to determine if the modification is still necessary or can be terminated;
- Include informed consent of the individual; and
- Include an assurance that interventions and supports will cause no harm to the individual.

PCISP: Life Domains / Natural Supports

Natural Supports

Enter the natural supports providing assistance as identified under Vision of a Preferred Life.

Need	Support	Relationship	Frequency	
Ride to Church	First Community Church Bus	Church's ride program	Sunday's at 9:00 a.m.	🗑

The Natural Supports section provides a location to record family members, friends, neighbors, community associations, etc. who provide supports to the individual related to the life domain.

PCISP / Appendix

Appendix
Historical Info, Contacts & Meetings, Risk Plans and other Documents

* Historical Information

Contact & Meetings

* I would like my Case Manager to contact me:

* I choose to have team meetings:

* My next team meeting should be scheduled in:

Indicate how often I am notified of the following:

* Medical Condition

* Developmental Status

* Behavior Status

* Risk of Treatment

* Right to Refuse Treatment

The PCISP appendix page includes sections for:
- Historical information;
- Contact and meetings;
- Notification of conditions and treatment,

PCISP / Appendix

- Person responsible for maintaining the file; and

PCISP / Documents

Documents								
Documents							Upload Document	Link Document
Category	Sub-Type	Month/Year	Upload Date	Uploaded...	Comments	Document Name		
Risk Plans	Safety	Mar 2018	3/25/2018	BDDS: James...		KeitTob199199199199-Risk Plan-03.03.2018.pdf	⬇	⧆
Assessments	Life Course	Mar 2018	3/25/2018	BDDS: James...		KeitTob199199199199-IntegratedStar-03.03.2018.pdf	⬇	⧆

- Documents attached to the PCISP

PCISP / Documents

Documents							👤 Upload Document	🔗 Link Document
Category ▼	Sub-Type ▼	Month/Year ▼	Upload Date ▼	Uploaded... ▼	Comments ▼	Document Name ▼		
Risk Plans	Safety	Mar 2018	3/25/2018	BDDS: James...		KeitTob199199199199-Risk Plan-03.03.2018.pdf	⬇	⚙
Assessments	Life Course	Mar 2018	3/25/2018	BDDS: James...		KeitTob199199199199-IntegratedStar-03.03.2018.pdf	⬇	⚙

Documents can be viewed by clicking the download button

PCISP / Service Plan

Service Plan
A cumulative view of HCBS Waiver Services identified on the selected CCB.

Enter a brief description of the need for each waiver service identified below.

Need	Service Type:	Service Code:	Service Provider:	Effective Range:	Rate	# of Units:	Cost
Service need is entered here.	Case Management	CMGT	CMCO	10/1/2017 - 9/30/2...	$131.25	12	$1,575.00
	Community Habilit...	CHIO	ABC, Inc,	10/1/2017 - 9/30/2...	$24.85	588	$14,611.80
	Music Therapy	MUTH	Mary's Music Ther...	10/1/2017 - 9/30/2...	$10.78	144	$1,552.32
	Res Hab/supp-ove...	RH2O	ABC, Inc.	10/1/2017 - 9/30/2...	$21.97	2316	$50,882.52
	Transportation-lev...	TRN2	ABC, Inc.	10/1/2017 - 9/30/2...	$21.00	250	$5,250.00
							Service Plan Total: $73,871.64

The Service Plan page populates based on the service plan (formerly CCB) linked to the PCISP. Information includes:

- Service types;
- Service codes;
- Provider names;
- Effective date range;
- Rate;
- Number of units; and
- Costs.

BDDS Portal Trainings
https://www.in.gov/fssa/ddrs/5437.htm

- BDDS Portal Provider Training 1: Accessing the BDDS Portal
- BDDS Portal Provider Training 2: User Management (for System Administrators)
- BDDS Portal Provider Training 3: My Cases / Caseload Assignment
- BDDS Portal Provider Training 4: Navigating the Portal
- BDDS Portal Provider Training 5: Individual Profile
- BDDS Portal Provider Training 6: Document Library
- BDDS Portal Provider Training 7: PCISP
- BDDS Portal Provider Training 8: Viewing the Monitoring Checklist
- BDDS Portal Provider Training 9: Viewing Transitions