

# Changes to Service Planning for Home and Community-based Services



Texas Department of Aging and  
Disability Services

# Why make changes to service planning?



- ❧ Changes in service planning needed to address difficulties with the current service planning process including:
  - ❧ Communication barriers
  - ❧ Repetition
  - ❧ Time spent on development/paperwork
  - ❧ Disconnect between what the individual wants from services and how the services were delivered

# How do the changes effect service planning?

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- ❧ Workgroup comprised of stakeholders from advocacy groups, local authorities, service providers and DADS was developed to address identified concerns with service planning. Changes made by the workgroup:
  - ❧ Emphasizes developing a “Support Team” for each individual.
  - ❧ Streamlines the process and make it easier to understand.
  - ❧ Create Discovery Guide and revise Person Directed Plan (PDP) so information directly contributes to content of the Implementation Plan (IP).

# PHASE I



# TESTING

# Phase I of the testing



- ❧ Four Local Authorities (LA) were identified by the Texas Council of Community Centers for initial testing.
- ❧ Each LA identified two individuals and the providers that support them to participate in the testing.

# Phase I (continued)



- Each LA and provider was requested to test the proposed planning for the selected individuals using the revised documents (the discovery guide, team approach and the proposed PDP and the proposed IP).
- The LAs and providers who participated in the testing shared their experience implementing the proposed changes with the workgroup.

# PHASE II



# TESTING

# Phase II of the Testing



- ❧ All Local Authorities participated in Phase II of the testing.
- ❧ Each LA identified two service coordinators who would participate in the testing and assist with Phase III training.
- ❧ Each selected service coordinator identified an individual and notified the individual's provider agency that they had been selected to participate in the testing.
- ❧ The individual's provider agency identified which of their staff would participate in the testing and assist with Phase III (training).

# Phase II (continued)



- ❧ Each LA and provider was requested to test the proposed planning for the selected individuals using the revised documents (the discovery guide, team approach and the proposed PDP and the proposed IP).
- ❧ Feedback was requested through the use of online survey, phone calls, and e-mail, from all Phase II participants:
  - ❧ Individuals receiving services and their LARs and other supports,
  - ❧ Service Coordinators, and
  - ❧ HCS provider representatives.

PHASE III



TRAINING

# Phase III: Training



- ❧ Preparing for statewide training
  - ❧ Feedback from service coordinators , HCS program providers, and individuals along with their LARs who participated in Phase I and Phase II testing was used to make revisions to the proposed service planning forms and tools.
  - ❧ Volunteers from the phase I and II of the testing assisted in developing the statewide training curriculum.

# Phase III (continued)



- ❧ Statewide trainings conducted by service coordinators and providers who participated in testing.
- ❧ Training focus: the experiences of individuals, families, service coordinators and providers working together as a “support team”
  - ❧ using the proposed planning forms; and
  - ❧ emphasizing teamwork;
  - ❧ using information gained from and about the person when planning;
  - ❧ using the new methods of documenting the results of planning.

# Phase III (continued)



- ❧ Statewide face to face training on the changes to service planning: April - June 30, 2013.
- ❧ All attendees requested to give feedback to the workgroup through the use of an online survey.
- ❧ Feedback from training requested to refine the process, forms, tools, etc.

# Timelines



# Timelines



By September 1, 2013:

- ❧ Implementation of revised planning changes by all LAs and HCS program providers begins. The use of the revised forms will occur at the time of the individual's annual renewal of the IPC.

By September 1, 2014:

- ❧ Full implementation of revised planning changes by all LAs and HCS program providers.

# Essential Elements of Service Planning



- Person-Centered Thinking
- Discovery
- Person-Directed Planning
- Implementation

# Essential elements



☞ Changes in service planning promote these essential elements:

☞ Person-centered thinking: “THINK people first!”

☞ Discovery: “DISCOVER what’s important!”

☞ Person-directed planning: “PLAN a future!”

and

☞ Implementation: “ACT with purpose!”

# The “Support Team” Approach

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- ⌘ An emphasis on the support team approach is an effort to bring together individuals and all those involved in supporting the individual in achieving the outcomes they want in their lives.
- ⌘ A successful support team depends on open communication, collaboration, teamwork and ensuring the individual is included in all aspects of service planning.

# Changes to Service Planning in HCS



- **The Discovery Process**
- **The HCS Handbook**
- **The Person Directed Plan**
- **The Implementation Plan**

# Changes: Discovery Tool and the Discovery Guide



- ❧ DADS form 8665-DT (Discovery Tool) will be replaced with the revised Discovery Tool which will be an appendix in the HCS Handbook (Appendix IV) and will be added to the HCS Handbook September 1, 2013
- ❧ The new Discovery Guide will be an appendix in the HCS Handbook (Appendix III) and will be added to the HCS Handbook September 1, 2013

# Discovery Tool (revised)



- ❧ The “Discovery Tool” has been revised. This optional tool is used to suggest exploration and organization of information critical to completion of the Service Coordination Assessment. It is not intended to serve as an interview tool.
- ❧ This tool also provides information for service coordinators on ways to use the information gathered during the discovery process.

# Discovery Guide (new)



- ❧ A new tool for discovery (the “Discovery Guide”) has been developed to describe how to discover information about a person.
- ❧ The “Discovery Guide” can be used as a resource to service coordinators and providers on how to obtain information from or about the individual.
- ❧ This guide also provides information for service coordinators on ways to use the information gathered during the discovery process to complete the person directed plan action plan page(s).

# Changes: HCS Handbook

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- ❧ The following sections have been revised to provide descriptive language to support the changes to service planning (revisions will be added to the HCS Handbook September 1, 2013):
  - ❧ HCS Handbook Section 4000: Person Directed Planning Process
  - ❧ HCS Handbook Section 7000: Implementation Plan

# Changes:

## Person Directed Plan(PDP)



- ❧ Changes made to DADS Form 8665 (Person Directed Plan) include:
  - ❧ Adding information that was previously contained in DADS form 8583 - Contact Information (making this form no longer be necessary).
  - ❧ Adding a person-centered “One-Page Profile”, the format of which is based on work by The Learning Community for Person Centered Practices (TLCPCP).
  - ❧ Decreasing repetition of information throughout the document.
  - ❧ Simplifying the form and make it easier to determine what the individual wants.

# Changes: Implementation Plan (IP)



- ☞ The changes made to the DADS Form 2125\* (Implementation Plan):
  - ☞ Connects outcomes from the PDP for the service component directly to the IP.
  - ☞ Provides additional columns to show how service units were calculated.
  - ☞ Provides a space to sign/date when the implementation plan has been discontinued.

*\*Note: DADS form 2125 is an optional form but contains the “required elements” of an implementation plan.*

# Thank You!!!



# For more information



More information (including links to the forms and tools related to service planning) can be found at the DADS webpage dedicated to the changes in service planning in HCS:

[dads.state.tx.us/providers/HCS/serviceplanning.html](http://dads.state.tx.us/providers/HCS/serviceplanning.html)

Questions related to the changes to service planning in HCS can be submitted to:

[hcs@dads.state.tx.us](mailto:hcs@dads.state.tx.us)