

SELF DIRECTION * IMPORTANT WORDS AND PHRASES

Advocate is the designated person that supports the Self-Direction Participant with navigating the journey of Self-Direction. The Advocate may be a parent, guardian or trusted family member. The Advocate is the point person and is in constant communication with the Participant and all related and necessary local, state and federal government agencies to ensure that all the steps necessary are addressed and the Participant's best interests are front and center.

Budget Authority provides the individual/family with the authority to make self-direction budget decisions.

Circle of Support (COS) is the interdisciplinary team surrounding the Eligible Person offering guidance, ideas and suggestions regarding staffing, community opportunities and use of budget to create and meet the personal VISION. The Participant/Self-Advocate is the CEO. Circle members are the trusted Board. Circle members include the Participant's Advocate and other natural supports - family, and friends. The Care Manager and Broker are automatic Circle members. The COS may include clinicians (medical & behavioral health) and other paid supporters.

Care Coordination Organization (CCO) formed by developmental disability service providers effective July 1, 2018. A CCO is staffed by **Care Managers (CM)** with training and experience in the field of developmental disabilities. Eligible Person chooses to enroll in **BASIC** (HCBS supports only) or **Health Homes** (coordinates medical (Department of Health), behavioral (Office of Mental Health) and OPWDD-HCBS supports, services and community resources

Care Manager connects Eligible Person to HCBS supports and services to create your **Life Plan**. Care Managers help coordinate services across systems. Care Manager is involved in the assessments of function and individual service needs.

Community Habilitation supports facilitating and promoting independence and community integration. Generally people performing this job are referred to as Com Hab Staff or Direct Support Professionals (DSP).

Com Hab Staff hired by the participant and Circle of Support are known as **Direct Service Professional (DSP) or Com Hab support staff**. Staff will provide the needed supports at home and in the community to the participant. Circle of Support looks to identify a mix of skills and attributes when recruiting DSPs and determines the staff schedule, assignments and compensation (within FI guidelines) and are self-hired in a Budget Authority plan.

Coordinated Assessment Survey is a new OPWDD assessment tool that will be administered by an OPWDD vendor to gather information about the Participant and the level of function and needs. A score will be used to calculate the Personal Resource Account.

Developmental Disabilities Profile 2 (DDP2) a needs assessment tool used by OPWDD. Scores from this assessment are used to calculate the Personal Resource Account

Developmental Disabilities Regional Office (DDRO) are the local OPWDD offices overseeing and coordinating delivery of services and supports.

Employer Authority gives the self-direction participant and representatives the authority to make staffing decisions including recruiting, training, scheduling, supervising and setting hourly rates.

Family Support Services Program (FSS) offer regional grant programs to families who are caring for a relative with a developmental disability and do not have Medicaid to be able to receive the full spectrum of OPWDD supports. These are state funded and include family reimbursed respite, recreation, counseling, training and information and referral services. Connect with your local DDRO for more information.

Fiscal Intermediary (FI) is a not-for-profit agency that serves as employer of record for all self-hired staff for plans with Employer Authority and must conduct mandatory background checks, collects service-related documentation, provides payroll and benefit services. Under Plans with Budget Authority, FI's receive all Medicaid money allocated by OPWDD to reimburse/pay for Self-Direction services and supports. Each FI has rules and recordkeeping requirements to be met by Eligible Person, the Circle of Support and the self-hired staff.

Home & Community Based Services Waiver (HCBS): Medicaid-funded supports and services for OPWDD eligible people with developmental disabilities that allow them to live at home and remain engaged within their community. By submitting an application for Home & Community Based Waiver, the individual waives their rights to be institutionalized. Examples: **Traditional Services** include day programs, respite programs, programs without walls, pre-vocational programs, and residential group homes. **Self-Direction** is an alternative to Traditional Services.

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“I AM” or “PATHS” Assessment is the computer-generated assessment tool used by the Care Manager as a way to gather information about the Participant to establish a Life Plan. The Advocate and the Participant and all Circle of Support members are invited to participate in these conversations.

Life Plan reflects life goals and changing needs. Care Manager will review and prepare personal information, engage in conversations with the Eligible Person to learn about wants, needs and preferences. Life Plan discussion is in the presence of Eligible Person and people he/she chooses, including Broker and other COS members. Life Plan will be reviewed routinely and updated as needed in the event of significant life change. Life Plan generates **Staff Action Plan** written by the Broker that details the strategies for supporting the person: skills acquisition/retention, staff supports, and having new experiences.

Natural Supports are family members, community friends and anyone else who has a relationship with the person and is not paid in this capacity. Natural Supports are the people we turn to when we have reasons to celebrate, need some help and just enjoy their company.

Participant is the focus person of the Self-Direction plan. The Participant may choose to be referenced as the **Self-Advocate**.

Person-centered Planning is a process that aims to understand the individual's vision for a meaningful life, considering strengths, abilities, challenges, needs and planning for future outcomes consistent with the vision plan. The Care Manager will engage with the Eligible Person, family, friends, and who ever the Eligible Person wants to include in the process to have a multi-faceted view of the Eligible Person. It is always recommended that the Eligible Person participate as much as possible in these discussions...“Nothing about us without us!”

Personal Resource Allocation (PRA) the allotted Self-Direction budget amount determined by OPWDD based on functional needs and service needs assessments currently **DDP2** and future Coordinated Assessment System (**CAS**)

Self Direction (SD) is a way of providing HCBS services that offers increased choice and control. A person choosing SD can choose an agency to help self direct (**Agency-Supported SD**). Self-Direction with Full Budget and Employer Authority (**SD-Full Budget Authority**) provides individual choice in the process for purchasing supports and services according to the budget (**Budget Authority**) and recruit, dismiss, train, manage staff to support the person (**Employer Authority**) with the help from a **Fiscal Intermediary (FI)** and **Support Broker**.

Self-Direction Budget provides funding for the supports and services needed by the Participant from among these categories: family education & training, family reimbursed respite, board stipend, camp, clothing allowance, coaching, community classes, internet service, live-in caregiver, memberships, paid neighbor, phone service, staff activity fees, transition programs (non-matriculating), translation services, transportation and utilities.

Self-Direction Broker has completed the mandatory training through OPWDD to act as a liaison among Eligible Person, their family and OPWDD. Broker meets with Eligible Person and family to draft a **Self-Direction Plan** based upon person-centered conversations designed to uncover Eligible Person's strengths and skills and to determine service and support needs and is in agreement with the **Personal Resource Allocation (PRA)**:

Two types of Brokers and can be one Person: Start-up Broker drafts, submits and revises as needed the person-centered **Self-Direction Plan** until OPWDD has accepted it and funds have been allocated to FI and the Self-Direction Plan is **“launched”**. **Support Broker** supports a Self-Direction Plan after launch to provide ongoing supports to Circle of Support and to ensure that the Self-Direction Plan is in compliance. Support Broker becomes a member of Circle of Support. Start- up Broker & Support Broker could be the same individual but not required.

Self-Direction Liaison is a person or persons at DDRO who provides training on Self-Direction to individual and circles of support, support brokers, and FI's. SD Liaisons review and approve Self-Direction budgets at local level before going to Albany.

Staff Action Plan is generated by the goals in a Life Plan and become the job tasks for self-hired staff.

Supported Employment refers to the budget line for supported employment services that lead to the Eligible Person having paid employment. (Volunteering can be supported by Com Hab). ACCES-VR services must have been exhausted or failed. These supports are performed by trained Job Coaches and Job Developers and may be self-hired or agency-supported.

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Traditional Services are services and supports provided by local agencies to OPWDD eligible people. All services and supports are provided in group settings and include day programs, respite, supported employment, pre-vocational programs. These programs may be purchased using the Self-Direction budget.