



## **Partnering for Improved Self-Directed Services**

Thursday, March 14<sup>th</sup> at 2:30 PM - 3:30 PM

Rosalie Austin, Steve Johnson, Sue Stone, Family Leaders in Ottawa County

Liz Krantz, Ottawa County Community Mental Health

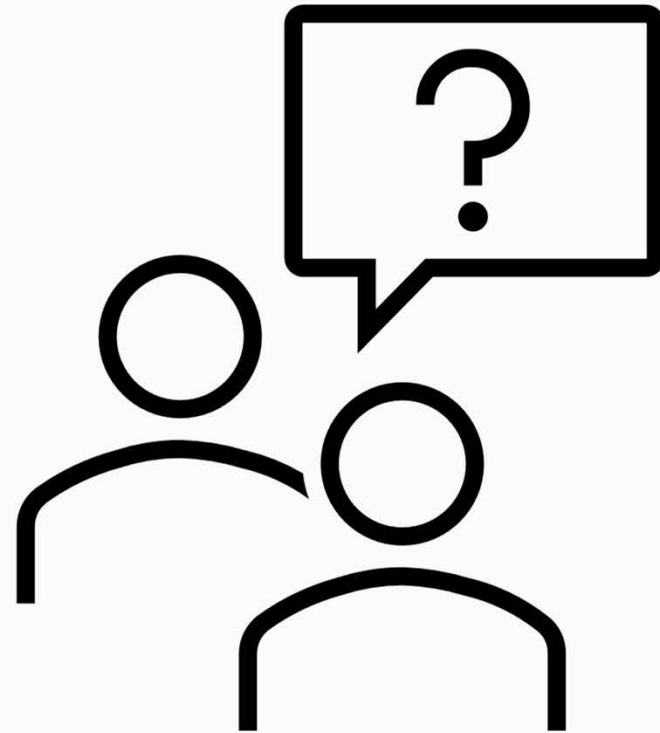
Jan Lampman, Community Drive, Inc.

Angela Martin, Michigan Developmental Disabilities Institute, Wayne State University



# Who is joining us today?

- Using the conference app
- Please describe yourself (mark all that apply):
  - Person with a disability
  - Family member of a person with a disability
  - Professional working in the field of disabilities

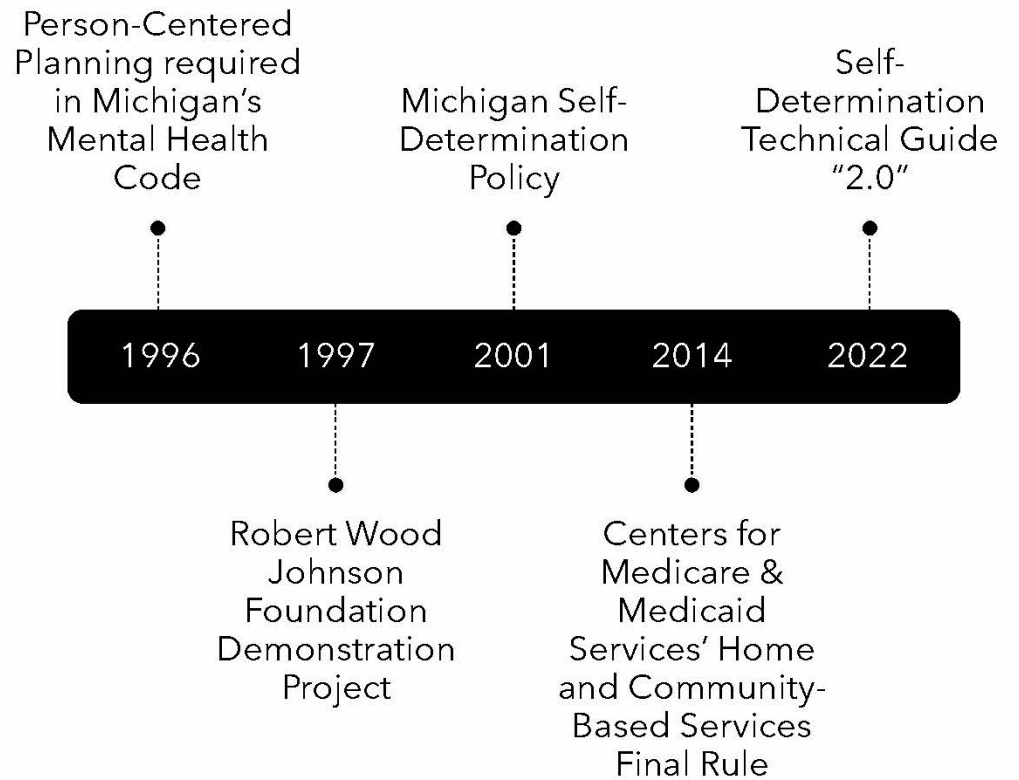


## Project Goal

Partners Advancing Self-Determination's (PAS) goal is to increase the availability and use of arrangements that support self-determination, also known as self-directed services, for people with developmental disabilities in Michigan.



# Michigan's Path Towards Self- Determination





## Project Facts

In collaboration with MDHHS, provided free state-level technical assistance, training, and support to local PAS Advancement Teams wishing to improve or refine their self-directed services processes.

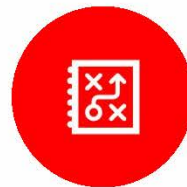


★ Local Advancement Teams (6)

# Team Application



Why is your team applying to participate in Partners Advancing Self-Determination?



What are the biggest challenges to self-determination at your local Community Mental Health agency or Prepaid Inpatient Health Plan?



Identify your PAS Advancement Team members (names, titles, relationships)



PAS Advancement Team commitments

# Preparing the team



Michigan's Self-Determination History



Person-Centered Planning including tools



Home & Community Based Services Rule



Team Operating Agreement



# Ottawa PAS Priorities

1

**Improve self-directed arrangements**

2

**Inform individuals and family members**

3

**Remove barriers to self-directed arrangements**

4

**Address the direct care crisis**



# Thoughts & experience: Family Leaders

Rosalie Austin

Steve Johnson

Sue Stone



# Thoughts & experience

Liz Krontz

Ottawa County Community  
Mental Health



**COMMUNITY  
MENTAL HEALTH**

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**O T T A W A   C O U N T Y**

## Why did we want to start this process?



Ottawa Community  
Mental Health:  
Wanted to improve  
our process and  
increase  
participation.



Individuals, Families:  
Wanted to simplify  
and understand the  
process and get  
more people  
involved.



- All:
- Feelings of distrust, misunderstanding, miscommunication
  - Work together effectively
  - Make Self-Direction accessible, effective

# What did we want to accomplish?

Get to know each other on a more personal basis to facilitate a good working relationship

Set ground rules for working together (keeping an open mind, assuming positive intent, all ideas are good, judgment free zone, 'what's said here, stays here until we're ready to share')

Highlight the importance of person-centered planning as it relates to self-direction and self-directed services

To help everyone understand what Self-Direction and self-directed services are, how do you get started, what the process looks like, and how to make it successful

# What did we want to accomplish? (Continued)

Created a Self-Determination Guide for individuals wanting to know more

Brainstorm ways to make the budget reports simpler while still including the information that families want

Provide guidance to families on hiring and managing direct care staff

Create fidelity checklists so the process is uniform and easy to understand for staff/families

Engage in meetings with the ISD to improve transition planning

# Map



## WELCOME

- The Supports Coordinator/Case Manager, Independent Supports Coordinator, Supports Coordinator Aide, or S-D Coordinator meets with you/family throughout the process.
- Explanation self-directed services and the benefits.
- Training on Self Direction including the services and supports you can control.

## PRE PLANNING

- Before planning, an independent facilitator is available to assist with process.
- Select FMS and Supports Broker
- Identify strengths, gifts, talents, needs, goals for life.
- Decide on FMS & Broker

## PERSON-CENTERED PLANNING MEETING

- Identify strengths, gift, talents, needs, and how to reach goals.
- Decide services & supports and which to direct.
- Explore community resources.
- Budget developed.

## S-D AGREEMENT

## CELEBRATE & EVALUATE

- CMH: Employer Training.
- EMPLOYER: Employee Training.
- FMS: Tracks employee training and keeps employer updated; lets employer and CMH know of any issues.

## ONGOING TRAINING

## ONGOING MONITORING OF SERVICES & SUPPORTS

- CMH: Individual Plan of Service (IPOS), budget, employer training needs, documentation.
- EMPLOYER: time sheets, payroll, budget, IPOS, training needs, employee schedules & services, documentation.
- FMS: Time sheets, payroll, other expenses, budget, training needs.

## MEET WITH FMS FISCAL MANAGEMENT SERVICES

- Before meeting, employer & FMS contract paperwork is sent to employer/family member.
- Meeting then held to review paperwork & answer questions.
- You can begin recruiting employees with help from family, friends and supports brokers
- FMS does the background check.
- After passing background check, a start date is chosen.
- FMS pays bills & employees.

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- Before planning, an independent facilitator is available to assist with process.
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- Identify strengths, gifts, talents, needs, goals for life.
- Decide on FMS & Broker

## PERSON-CENTERED PLANNING MEETING

- Verify strengths, gift, talents, needs, and how to reach goals.
- Decide services & supports and which to direct.
- Explore community resources.
- Budget developed.

## S-D AGREEMENT

## MEET WITH FMS

### FISCAL MANAGEMENT SERVICES

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## CELEBRATE & EVALUATE

# Workgroups



Self-Determination Manual



Budgeting Tools



Additional activities



Fidelity

# Self-Determination: Yes, you can do that!

An Introduction to the Who, What, Where, When, Why, and How of Self-Determination and Self-Directed Services.



**COMMUNITY  
MENTAL HEALTH**  
OTTAWA COUNTY

February 2024

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# Individual Budgeting Template

## SELF-DIRECTED SERVICES/CHOICE VOUCHER REQUEST COMMUNITY MENTAL HEALTH OF OTTAWA COUNTY

### INSTRUCTIONS:

1. Fill all applicable fields only and submit the completed form by attaching it to an email and sending to appropriate DD/MI supervisor for approval.
2. Once the request is approved, the supervisor will sign the bottom and forward the form to the Self-Directed Services Coordinator via email, who will enter the request into the MSO system.
3. The Self-Directed Services Coordinator will send copies of this form to the FI and the SC/CM and their supervisor, and upload a copy to Avatar.


<b>Consumer Name</b>	<b>Diagnosis</b>	<b># Weeks</b>	<b>Start Date</b>	<b>End Date</b>
0	0	0	1/0/1900	1/0/1900
<b>Consumer Number</b>	<b>Fiscal Intermediary</b>	<b>Consumer Type</b>		
0	<input type="checkbox"/> Community Alliance <input type="checkbox"/> GuardianTrac	If applicable:		
<b>Date of Birth</b>	<b>Case Manager or Supports Coordinator</b>	Child Waiver (CV)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
1/0/1900	0	HAB Waiver (SD)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>PLEASE COMPLETE ACCORDING TO IPOS</b>		SED Waiver (CV)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

<b>Service Code &amp; Unit Type</b>	<b>New auth # or n/a:</b>		<b>Date of Change:</b>			
H2015 CLS	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	Hours	0	\$0.00	\$0.00
			Units	0	\$0.00	\$0.00
	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease		0	\$0.00	\$0.00
	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease		0	\$0.00	\$0.00
	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease		0	\$0.00	\$0.00
	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease		0	\$0.00	\$0.00
			Total		\$0.00	

**NOTES:**



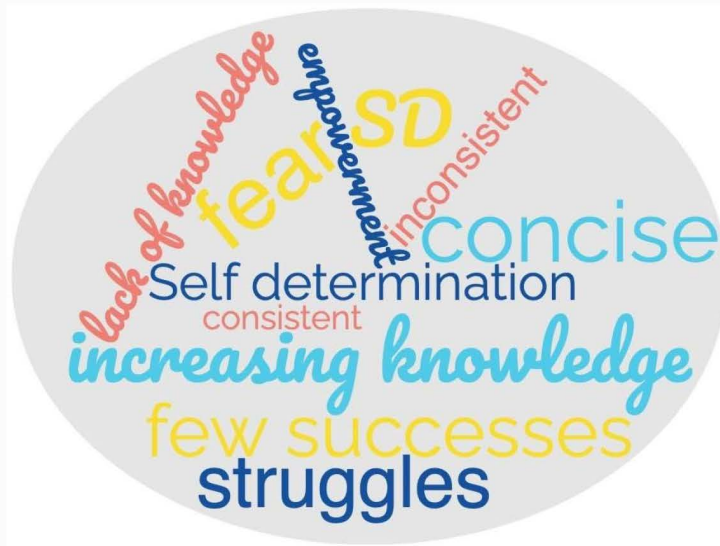
## After PAS: The work kept going!

- Updated Self-Determination Agreement
  - Updated Self-Determination Policy
  - Started a Parent Advisory Group (monthly meetings) and have since expanded the membership
  - Created a Job Description and Progress Note Template for Support Brokers
  - Intermediate School District staff agreed to participate in *Charting the Life Course*
  - Developed a process to help decide when an employer may need to have a higher rate than the standard rate
- 

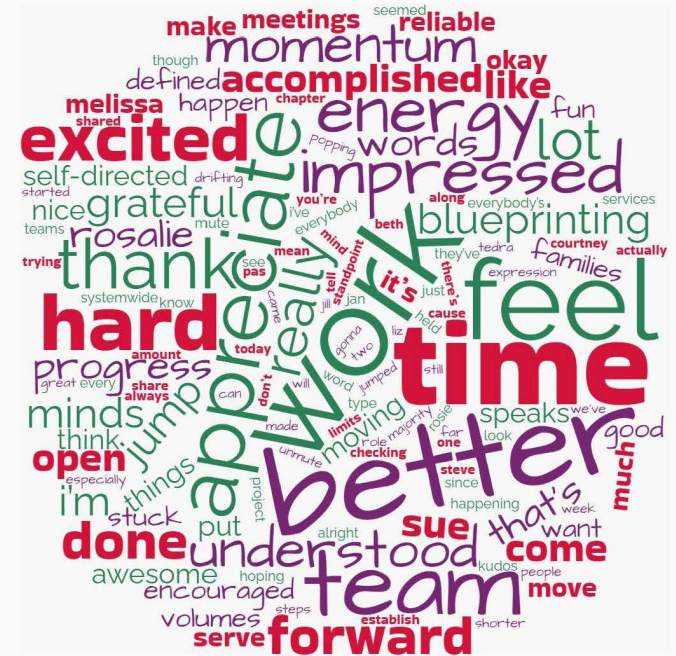
# Growth and change over time



Month 1



Month 8



## Future Goals & Continued Work

Continued parent input via the Parent Advisory Group, but also including individuals with disabilities

Keep working on communication between Fiscal Management Services and employers to make sure employers are getting the information they need in a timely manner

Keep working on advocating for better direct care worker wages

Continuing to brainstorm new and better ways to get the word out about Self-Direction

Continuing to share our experiences at conferences!

Continue to improve Self-Directed Services and the IPOS (individual plan of service) by thinking:  
IPOS = I- POS-SIBILITIES

## To learn more, contact:

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PAS Project Coordinator

The Arc Michigan

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E: [jill.gerrie@arcmi.org](mailto:jill.gerrie@arcmi.org)

W: <https://arcmi.org/projects/partners-advancing-self-determination/>

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# Questions

