

## ISAC Recommendation #2: Promote Self-Direction, Choice, and Control



Personal choice and control over all aspects of life must be supported for every person. Choice about where to live, whom to live with, what to do for a living, and how to have fun all are key choices in life, as are seemingly small choices: such as what to eat, what to wear, when to wake up in the morning, and when to go to bed. It is important to be able to trust the people who provide assistance, to feel confident that they respect you and your right to manage your life, and to enjoy each other's company.

Self-direction works when individuals have clear and understandable information, opportunities to exercise choice, and assistance with making decisions when needed. Self-direction is only possible when family, friends, and people who provide supports respect the individual's preferences and their right to make mistakes, and facilitate the implementation of the individual's decisions.

**Primary Objective:** Greater participant utilization of self-direction opportunities.

Current Strategy	Accomplishments that support this Strategy	Recommendation for this Strategy (retain, revise, replace)
<p>1. Simplify the process for people to direct their services to reduce time and effort needed to use the model.</p> <ul style="list-style-type: none"> <li>Revise/simplify the PA Guide to Participant-Directed Services (PDS) to make the guide more accessible to people unfamiliar with PDS models.</li> <li>Simplify bulletins and announcements about Vendor/Fiscal Employer Agent (VF/EA) and Agency with Choice (AWC) to establish clear and consistent expectations for VF/EA and AWC performance.</li> <li>Clarify the documentation required to comply with state and federal regulations regarding PDS services.</li> </ul>	<ul style="list-style-type: none"> <li>ODP in conjunction with the Temple Institute on Disabilities developed an easy-to-understand handout that describes and promotes self-direction for the IM4Q Local Programs to distribute when interviewing participants. The document is also being used by other entities to provide a clear and accessible description of self-direction to interested participants.</li> <li>ODP has revised and updated the AWC bulletin to align with the Chapter 6100 regulations; the revised bulletin is more streamlined in terms of language and layout to make the document more accessible to stakeholders as well as to clarify the roles and expectations of the AWC, the Managing Employer, the AE, and the SCO. The bulletin is currently undergoing internal review and will be released for public comment in the near future. ODP's goal is for</li> </ul>	<p>Retain – Revision of the PA Guide to Participant-Directed Services (PDS) to make the guide more accessible to people unfamiliar with PDS models will begin following the release of the revised VF/EA and AWC bulletins.</p>

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	<p>the bulletin to be released with an effective date of July 1, 2019.</p> <ul style="list-style-type: none"> <li>• Development of a revised Vendor/Fiscal Employer Agent (VF/EA) Bulletin is slated to begin in September 2019; the bulletin will undergo the same streamlining process as described in AWC, above.</li> </ul>	
<p>2. Provide information and education about self-direction to individuals, self-advocates, families, supports coordinators, and providers.</p> <ul style="list-style-type: none"> <li>• Provide training to participants, common-law employers, supports service workers, and natural supports on real world methods to manage the self-direction process in the VF/EA and AWC models through the PA Family Network and Self Advocates United as 1.</li> </ul>	<p>ODP will increase its efforts to enact this strategy upon Revision of the PA Guide to Participant-Directed Services as described above.</p>	<p>Retain.</p>

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<ul style="list-style-type: none"> <li>Conduct targeted outreach to AEs/SCOs with low participation in PDS to encourage increased use of PDS.</li> <li>Support the PA Family Network to educate families about the self-direction option.</li> </ul>		
3. Expand the availability of support brokerage services. <ul style="list-style-type: none"> <li>Clarify that supports broker can be authorized as the only PDS on an individual's ISP.</li> <li>Remove supports broker services from P/FDS capitation to increase service accessibility (Waiver Amendment V).</li> <li>Allow supports broker services for participants in a waiver residential</li> </ul>	All of the identified objectives have been met.	Replace (See "new strategies" below)

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habilitation setting who have a plan to transition to a private residence and to self-direct their services through an AWC or VF/EA FMS when they are in a private residence (Waiver Amendment V).		
4. Assure the availability of fiscal intermediary services. Permit more than one AWC to operate within a county/AE, allowing greater access to AWC services and expanded participant choice.	<p>The revised AWC bulletin described above contemplates the ability for more than one AWC to operate within a given county/AE; whether this will be retained in the final bulletin will not be known until completion of internal and external review.</p> <p>If it is not retained, ODP will continue to explore options for multiple AWCs in the same county/AE.</p>	Retain.

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5. Provide training to Agencies with Choice. Provide training to AWCs on operation and ODP recommendations to increase consistency of practice.	Once the revised AWC bulletin has been finalized, AWC training on the revised bulletin will be provided that includes how consistency of practice will be achieved. This training will be provided before the bulletin goes into effect.	Retain.
6. Provide individuals, self-advocates, and families budget authority. Offer a new service definition, "Participant-Directed Goods and Services," providing P/FDS Waiver participants \$2,000 per fiscal year to purchase services, equipment, or supplies not otherwise provided through other services offered in this waiver, the Medicaid State Plan, EPSDT or a responsible third-party, such as Medicare or private insurance.	This objective been met.	Replace (See "new strategies" below)

New Strategies and/or Strategies that have been implemented but were not included in the original 2016 list

**1. Expand this focus of this recommendation beyond the self-direction models.** Personal choice and control over all aspects of life must be supported for every participant, not just those who self-direct. The “Individual Rights” sections of Chapter 6100 and the four Human Services Licensing chapters updated to mirror Chapter 6100 (Chapters 2380, 2390, 6400, and 6500) include extensive requirements to support individual choice and control over all aspects of their everyday lives. ODP’s regulatory professionals will closely monitor compliance with these requirements. Following implementation of the 6100 regulatory package, ODP will have the ability to identify patterns of noncompliance relating to personal choice: the frequency with which a given regulation is violated, the nature of the specific violations, and common root causes of noncompliance. This information will be used to help support the provision of technical assistance and training relating to self-direction, choice, and control.

**2. Build Capacity in Understanding and Supporting People with Nontraditional Communication Needs with an Emphasis on self-direction, choice, and control.** As was noted in *ISAC Recommendation #1: Assure Effective Communication*, ODP has learned that there is a great deal of misunderstanding about nontraditional communication needs and the ability of people with such needs to effectively communicate. ODP intends to raise awareness about the link between effective communication and the ability to control one’s own life. The means by which awareness will be raised and performance measured have not yet been established.