

SCPA Core competencies – Tier 1: Modules 101 – 110

SCPA 101 provides instruction for using the online modules and is omitted from the PDF version. Learners must complete module 101 when accessing the online courses in the state learning management system.

Hint: Click on the module title to navigate to the module.

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SC/PA 102: What It Means to Provide Good Case Management (Part 1)

1. SCPA Introduction to Case Management - Part 1 (Unit 7-A)

1.1 Introduction to Case Management – Part 1



Notes:

1.2 Welcome to Core Competencies

Welcome to Core Competencies

Throughout the Core Competency courses, we will focus on specific core information on a wide range of topics, in various levels of detail.

We will not cover everything that you will do in your job.



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1.3 Your core job functions

Your core job functions

Your job includes many essential functions, such as...

- Assessing a person's needs.
- Facilitating planning.
- Choice advising.
- Providing resources.
- Ensuring a person's rights are protected.



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1.4 Your core job functions

Your core job functions

Your job includes many essential functions, such as...

- Monitoring services and quality assurance.
- Documenting all your work.
- Completing required paperwork.
- Ensuring funding guidelines are met.



These will be addressed in separate core competency courses.

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1.5 In this course

In this course...

- Basics of what it means to provide good case management, such as...
 - Effective communication and listening
 - Professionalism and courtesy
 - Information and referral



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1.6 At your organization



At your organization

Although this course will cover core concepts, we will not go into details about what is expected of you every day in your work.

- Complete all other required training at your organization, as well as get to know the people for whom you are providing case management services.
- Talk with your supervisor to make sure you know what is expected.

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1.7 Who provides case management

Who provides case management services in Oregon?

In Oregon, people who provide case management services to people who experience intellectual or developmental disabilities (I/DD) are most often called **Services Coordinators (SC)** or **Personal Agents (PA)**, depending on their organization and/or service setting.



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1.8 Who provides case management

Who provides case management services in Oregon?

- There are also people who provide specialized case management services to children:
 - Office of Developmental Disabilities Services (ODDS) **Residential Specialists**
 - **Children's Intensive In-Home Services (CIIS) Services Coordinators.**



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1.9 People are not “cases”

People are not “cases”



Throughout the core competency courses, you will notice that the job of *case management* is differentiated from *being a case manager*.

- Core Competency courses refer to people in the role of case management by their job titles.
- This is intentional and done to emphasize the fact that people who experience disabilities are not “cases to be managed.”

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1.10 Thank you for all of your hard work and dedication.

Services Coordinators,
Personal Agents, and
Residential Specialists
provide tremendously
valuable services to
people.



**Thank you for all of your hard work
and dedication.**

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1.11 It's not about knowing everything

It's not about knowing everything



You are required to be familiar with a vast amount of information as well as to be able to locate and access resources.

- This doesn't mean that you have to know everything—although with time, SCs/PAs come to know quite a lot.

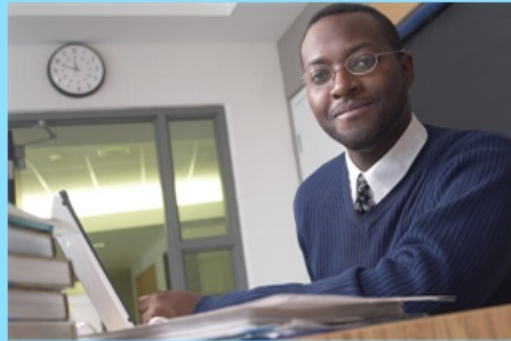
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1.12 Professional judgment

Professional judgment

You will be required to exercise good judgment and make decisions that impact people's lives daily.

- Know what your core responsibilities are and where you can use your own judgment.
- Talk to your supervisor if you have a question.



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1.13 Soft Skills

Soft Skills



At the core of what it means to provide good case management are “soft skills.”

- These are not sets of knowledge that can be taught, but rather skills that grow and are exercised throughout your career.

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1.14 Effective SCs/PAs are...

Effective SCs/PAs are...



Flexible to meet people's needs

Creative and think outside the box

Person centered

Respectful

Empathetic

Observant

Resilient when times are tough

Good listeners

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1.15 Effective SCs/PAs do...

Effective SCs/PAs do...



- ✓ Know the rules
- ✓ Communicate effectively in person and in writing
- ✓ Help people navigate complex systems of services
- ✓ See the big picture
- ✓ Plan with a team
- ✓ Facilitate discussions to help resolve conflicts
- ✓ Understand boundaries

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1.16 Not just a paycheck

Although it is a challenging job, being an SC or PA can be a really rewarding experience.

What are the things that made you want to become a SC/PA?

“Helping people to have a voice”

“Making a difference”

“Connecting with people and families”

“Providing supports to enable people to reach their maximum potential”



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1.17 Your responsibility

Your responsibility



Seek to understand what the person wants and/or needs and help make sure the person's voice is heard and listened to.

This is not limited to verbal or written communication.

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1.19 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Good communication

- ✓ “Listen and really *hear*”
- ✓ “Be approachable”
- ✓ “Pick your battles”
- ✓ “Actively listen”



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1.21 Basics of effective communication

Good communication is vital to being a good SC/PA.

- ✓ Be patient
 - Avoid interrupting a person
 - Don't assume you know what he is going to say
- ✓ Pay attention to all aspects of a person's communication
 - Look for non-verbal cues
 - Be aware of your physical presence—are you standing over someone?



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1.22 Basics of effective communication (cont.)

- ✓ Make it easy to understand you.
 - Use words that the person understands.
 - Speak clearly.
 - Show what you mean when applicable.
- ✓ Be honest.
 - Acknowledge when you are wrong.
 - Do not blame others when things don't go the way you planned.



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1.23 Environment and timing matter in effective communication

Environment and timing matter in effective communication



When people are stressed, worried, uncomfortable, or anxious, it can be difficult to have a conversation.

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1.24 Help the person be comfortable

Help the person be comfortable



- ✓ Find a time and place to talk that is comfortable for the person.
- ✓ Consider if the person would feel more comfortable including someone else in the conversation.
- ✓ Turn off your cell phone or other devices that might distract or disrupt the flow of the conversation.

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1.25 Actively listen

Actively listen

Asking the right questions won't get you far if you don't listen to the response.

- Sometimes we formulate the next question without paying attention to the answer to the first.



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1.26 *"She does not communicate."*

"She does not communicate."



There is no such thing as a person "who doesn't communicate."

- Every living creature communicates in some way.
- It may take time to develop the skills to understand the person's communication and for them to understand yours.

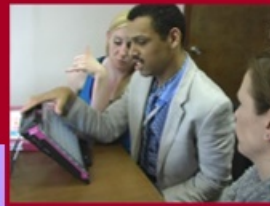
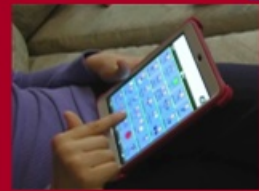
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1.27 Provide information in a manner that can be understood by the person

Provide information in a manner that can be understood by the person

Use the person's preferred method of communication to convey information.

- ✓ Use available technology and tools that work for the person – such as communication devices, visual aids, etc.



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1.28 What you can do if you are unsure

What you can do if you are unsure how to communicate with someone

If you are not sure how to communicate with a person, you can:

- ✓ Ask the person how best to communicate with her.
Often, the person has great insight on what others can do to help understand her.
- ✓ Seek assistance from someone who has a good relationship with the person.



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1.29 Plan ahead for

Plan ahead for more effective communication



Do some research before you go out to meet someone, to get an idea of who the person is and how he communicates.

- ✓ Review the person's file before you go.
- ✓ Find out if an interpreter will be needed, and if so make arrangements ahead of time.

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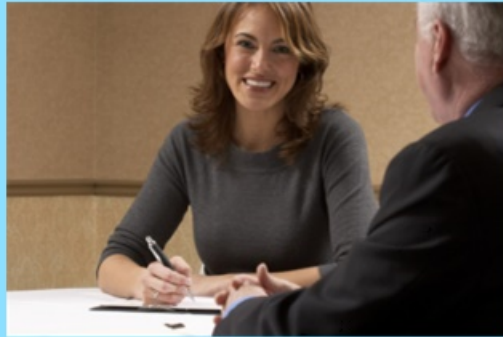
1.30 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Courtesy and professionalism

- ✓ “Respect for the person: it’s her story and will be, long after you’re gone.”
- ✓ “Be able to say, ‘I am not sure, let me get back to you’.”



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1.31 Correct information is more important than a fast answer.

Correct information is more important than a fast answer.



When you don't know
something, it is ok to admit it.

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1.32 Arranging for follow up

Let the person know that you will find out the answer to his question and get back to him.

- ✓ Give the person a timeline when you will get back to him.
- ✓ Follow up.
- ✓ Let him know it's ok to call you if he hasn't heard back from you.
- ✓ If needed, give the person your supervisor's contact info.
- ✓ Let your supervisor know when someone may contact her.



You can't know everything, so be graceful in your ignorance.

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1.34 Demonstrating professionalism –

Show respect and courtesy
in all interactions.

- ✓ Return phone calls in a timely manner.
- ✓ If needed, let the person know that you are not able to talk now but will be able get back to him later.



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1.35 Demonstrating professionalism –

If a person or family member is not pleasant with you, do your best to not take it personally.



- ✓ Consider the person's perspective:
 - The person might be having a bad day.
 - There could be things going on that you don't know about.
 - The person could have had negative experiences in the past and may need to get to know you before he trusts you.
- ✓ Avoid jumping to conclusions or making assumptions about someone's intent.

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1.36 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Building relationships

- ✓ "Build relationships with honesty."
- ✓ "Build trust: if I trust you, I will tell you."
- ✓ "If you have to say 'no' to something, find something to say 'yes' to."
- ✓ "Have empathy."



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1.37 Building professional relationships

Building professional relationships



In your job, you will often need to ask questions and have conversations that are about something private in the person's life.

Build professional relationships, so you can facilitate communication and trust.

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1.39 Build relationships and focus on positives

Facilitate positive communication.

Many of your interactions with a person, providers, organizations, or families will involve problem solving, dealing with issues, or getting something done.

- ✓ Recognize and acknowledge when good things happen.
- ✓ Give positive feedback whenever possible.
- ✓ Celebrate successes: let others know when they have done something that will help the person succeed.



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1.40 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Respecting the person's choices

- ✓ "Don't get overly attached—this is your job, their lives."
- ✓ "When I go into a family's home, they are in charge, not me."
- ✓ "People have a right to complain, and I am happy to present that complaint."



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1.41 Respect each person's way of life

Respect each person's way of life

Each person has her own way of living – show respect to the person and family at all times, especially when you are in someone's home.



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1.42 Your responsibilities in respecting each person's way of life

Your responsibilities in respecting each person's way of life

Your role is to ensure the health and safety of a person.

- ✓ Use your professional judgment to separate:
 - what is a **lifestyle difference** from
 - what might be **dangerous**



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1.43 “Do’s” of visiting a person’s home

“Do’s” of visiting a person’s home

Do...

- ✓ Schedule the visit in advance whenever possible.
- ✓ Be on time.
- ✓ Ask where the person would like to meet.
- ✓ Observe the person’s culture, and take off your shoes if requested.



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1.44 “Do’s” of visiting a person’s home

“Do’s” of visiting a person’s home

Do...

- ✓ Inquire if there is anything you should know about, such as:
 - Pets
 - Where you can park
 - Something going on that your presence might disrupt



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1.45 “Do not’s” of visiting a person’s home

“Do not’s” of visiting a person’s home

Avoid...



- ⊗ Arriving unannounced, unless it is required to do your job
- ⊗ Being late or a “no show” without calling
- ⊗ Taking your own food or drink with you into the person’s home

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1.46 Setting boundaries

Setting boundaries

Setting boundaries with others can go a long way in helping manage expectations for everyone involved.

- ✓ Be able to separate yourself from your work, in order to maintain balance in your job.
- ✓ Define clear boundaries with others in a respectful way.
- ✓ Know and follow your organization's policies regarding:
 - Social media
 - Gifts



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1.47 Why it is important to set boundaries within professional relationships

Why it is important to set boundaries within professional relationships

It can be very difficult for a person when you leave or change jobs, if your friendship with her also ends.



- ✓ Help the person understand that while you may become close, your relationship is professional in nature.
- ✓ Be mindful that it may become a conflict of interest if you develop too close of a friendship with a person, family member, or provider.

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1.48 Stress and burnout

Stress and burnout

Case management is often very stressful and requires a lot of you.

- Take care of yourself.
- Know your own signs of stress and burn-out.
- Talk to your supervisor if you need support.



See the Resource tab for more information on coping with stress.

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1.49 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Collecting and providing resources

- ✓ "Get to know people, so when you come across a resource you will be able to share it."
- ✓ "Keep your own references to use and share with others."
- ✓ "Say 'let me find out for you' instead of 'I don't know'."



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1.50 Providing information and referral

Providing information and referral



A large part of case management is providing information, resources, and referral to people.

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1.51 Familiarize yourself with resources and the person's needs

Familiarize yourself with resources and the person's needs



Get to know resources in the community as well as specific resource needs of the person, so you can help her get connected to what she needs.

- Be aware that some services are complex and can be very difficult for a person to navigate.

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1.52 What resources are in your area?

What resources are in your area?

There are many ways you can become aware of resources in the community that are relevant to the people for whom you provide case management services.



- ✓ Check in with your coworkers and supervisors – find out what resources are available at your organization.
- ✓ Listen to families and others who may know of community resources.
- ✓ Use the internet.

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1.53 Provide resources in a way that

Provide resources in a way that works for the person

Depending on what a person needs, you may need to provide support by:



Linking the person with resources

Explaining resources and programs

Taking the person to access a resource

Researching resources on behalf of the person

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1.54 What you can do to

What you can do to help a person access resources



- ✓ Leave information with the person, so he can:
 - Process the information in his own time.
 - Ask you questions.
 - Be able to use the information later.
- ✓ Make contact information easy to read and highly visible, such as on your business card or brochures.

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SC/PA 103: What It Means to Provide Good Case Management (Part 2)

1. SCPA Introduction to Case Management - Unit 7 Part 2

1.1 Introduction to Case Management – Part 2

**What It Means to Provide
Good Case Management – Part 2**

Tier 1: Must be completed within 30 days of start date
and before working unassisted

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Notes:

1.2 In this course

In this course...

- What it means to provide good case management:
 - Maintaining an impartial point of view
 - Long-term vision and short-term planning
 - The concept of “nothing about me without me”



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1.3 In this course

In this course...

- What it means to provide good case management:
 - Basic team facilitation skills and conflict management
 - Time management and prioritization
 - Your personal safety on the job and role when confronted with illegal activity



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1.4 At your organization



At your organization

Although this course will cover core concepts, we will not go into details about what is expected of you every day in your work.

- Complete all other required training at your organization, as well as get to know the people for whom you are providing case management services.
- Talk with your supervisor to make sure you know what is expected.

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1.6 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Have an open mind.

- ✓ “Be able to put your own values aside.”
- ✓ “Respect a person’s culture.”
- ✓ “Set aside your opinions.”



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1.7 Your role in the person's choices

Your role in the person's choices



Your role is to help the person make informed choices by balancing what is important to her and how to stay healthy and safe.

We will cover more about the dignity of risk in another course.

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1.8 Maintain an impartial point of view

Maintain an impartial point of view



Be aware that your own beliefs may be **influencing** decisions you are assisting the person with.

- If in doubt, talk it over with your supervisor and coworkers, to help you sort out if your own values are interfering with your ability to do your job.

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1.9 Helping a person make informed choices

Helping a person make informed choices

- ✓ Find out what is most important to the person.
- ✓ Learn about her history, as it can help put things into perspective and help you better understand her.
- ✓ Assist the person to understand her options and choices, including possible consequences of her decisions.



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1.10 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Be a team player:

- ✓ “Follow through”
- ✓ “Problem solve”
- ✓ “Be a collaborator, a team player”
- ✓ “Network”
- ✓ “Learn from others – get your feet wet right away and shadow other SC/PA’s”



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1.11 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Learn from others:

- ✓ “Get exposed to scenarios that affect your job, shadow different things/people.”



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1.12 You are Quinn’s SC/PA. He has recently made some decisions in his life that you don’t agree with.

1.13 Funding and services

Funding and services



It is your role to explain services and funding to families, in a way they understand.

Familiarize yourself with assessment tools, services, and guidelines, so you can explain them to others.

There will be more information on funding and services in other modules.

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1.14 Explaining funding and services to help a person make informed choices

Explaining funding and services to help a person make informed choices



Explain what services a person is eligible to receive, based on her assessed needs.

Get to know the person (and family if applicable) so you have a baseline understanding of their knowledge about services.

- This can give you a better idea of how to support them in making informed choices.

Provide written information that may be available from ODDS or your organization, such as brochures, guidelines, and informative flyers.

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1.15 Consider what supports are available

Consider what supports are available

Keep in mind not only the supports the person needs, but the capacity and availability of the supporters as well.

Find out what the person's current support system is, before considering additional supports.



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1.16 Gathering information and asking

Gathering information and asking hard questions



Sometimes, you will need to ask “hard questions.”

- These are personal questions that a person often feels uncomfortable asking or answering.
- It may feel intrusive or unpleasant, but in order to get the information needed, sometimes questions about private matters must be asked—respectfully.

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1.17 Ask deficit-based questions

Ask deficit-based questions with empathy and respect

When gathering required information (such as completing a needs assessment), consider that it can be unpleasant for the person to have a conversation based on all the things he is NOT able to do.



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1.18 How to ask deficit-based questions

How to ask deficit-based questions with empathy and respect



- ✓ Focus on the person's abilities whenever possible.
- ✓ Frame deficit-based questions in terms of what **supports** the person needs, not just what the person is unable to do.
- ✓ Use empathy and sensitivity when asking private questions.
- ✓ Consider what makes **you** uncomfortable, and how you can respectfully ask questions about those things.

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1.19 Asking personal questions

**Always remain respectful –
keep the person's choice
and dignity in the forefront.**

Building relationships with the person, family, and providers can help conversations be more comfortable.

A planned conversation may have to wait if the person or the family has had something more pressing come up.



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1.20 When and where to ask

When and where to ask personal questions



Remember, time and place matter when asking someone questions.

- ✓ Ask when and where the person is most comfortable talking.
- ✓ Be flexible—you may need to get some information in person, and some over the phone.

We will cover gathering person centered information and more in depth about communication skills in another course.

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1.21 Engaging in natural conversations helps

Engaging in natural conversations helps to find out about needs



Ask questions when it feels natural.
You might work assessment-related
questions into conversations.

- For example, when visiting with the person, ask who cooks or what kind of help does the person prefer with laundry.

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1.22 Be aware of the person's level of comfort

When gathering information about someone...

- ✓ Take a break if the person needs one.
- ✓ Phrase questions so they are not dehumanizing.
- ✓ Be aware of your own body language and ensure that you are communicating respect for the person.
- ✓ Remember: this is your job, but it's the person's life – your words and actions have impact.



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1.23 Explaining choices

Explaining choices



Your role is to explain choices in an impartial way.

- Familiarize yourself with how different case management services are set up, so you can assist the person in making informed choices about her services.

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1.24 Provide information to help a person

Provide information to help a person make informed decisions

Help the person make informed choices by providing information accurately and simply.

- ✓ Be familiar with what resources are available, so you are able to explain to the person what her options are.
- ✓ Provide resources from ODDS.
- ✓ Give the person time to make her decision.



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1.25 Explain the rules –

Explain the rules – help avoid Medicaid fraud



Helping people and families understand funding requirements is important.

It can help with better service planning, conscientious use of public funds, and can even help prevent Medicaid fraud.

*We will cover more about funding responsibilities
and CMS in another course.*

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1.26 Explain the rules – help avoid Medicaid fraud

Explain the rules – help avoid Medicaid fraud

Explain funding guidelines so the person knows what is expected, including:



- Allowable expenditures
- What you must monitor and at what frequency
- Documentation requirements

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1.27 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Having a long term vision without loss of focus on immediate needs:

- ✓ “Understand the bigger picture”
- ✓ “Plan for immediate goals without losing sight of long term dreams”
- ✓ “Keep the person in focus, especially when planning involves others”



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1.30 Long term vision

Long term vision



A good SC/PA must have “long term vision,” to help a person reach for her hopes and dreams.

- Long term vision involves the ability to **dig deeper** for meaningful information about what is truly important to someone.

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1.31 Exploring hopes and dreams

Exploring hopes and dreams without limitations

It is important to be able to explore a person's hopes and dreams, **without** thinking of limitations.

This does not mean that barriers in a person's life should be ignored.

- Planning for action will come later.
- If you don't know what a person's hopes and dreams are, you will not be able to facilitate planning to achieve them.



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1.32 When views collide

When views collide

When planning with someone who has others in his life, such as a guardian or support providers, views on what is important may conflict.



- ✓ Avoid taking sides.
- ✓ Facilitate conversations around:
 - What is important to the person?
 - What is important to others?
 - What is possible at this time?
 - What may happen in the future?

There will be more about guardianship, as well seeking the balance between what is important to and for a person in another module.

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1.33 Striving for interdependence

Striving for interdependence



Interdependence [in-ter-di-pen-duh ns]

Noun. The quality or condition of being mutually reliant on each other.

Working towards independence does not mean that a person should or has to make ALL of her decisions on her own.

- Nobody is fully independent, every person needs support in various areas of her life.
- The goal is successful **interdependence**, where a person makes informed choices, has meaningful relationships, and is a productive member of her community.

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1.34 “Nothing about me without me”

“Nothing about me without me”

“No policy should be decided by any representative, without the full and direct participation of members of the group(s) affected by that policy.”



See the Resource tab for more information about “Nothing About Me Without Me.”

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Notes:

http://en.wikipedia.org/wiki/Nothing_About_Us_Without_Us

http://www.disabilityrightsoregon.org/the-dro-blog/weblog_view?b_start:int=44&-C=

1.35 *“Nothing about me without me”*

“Nothing about me without me”



- ✓ Promote the concept of “Nothing about me without me” by assuring that the person has opportunities to exercise her right to be included in decisions made about her, such as...
 - Where to live
 - What to do
 - Who to be with, etc.

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1.36 What you can do to support

What you can do to support “nothing about me without me”

- ✓ Use the person’s communication to ensure her choices and preferences are understood.
- ✓ Ask the person what is important to her.
- ✓ Confirm who the person wants at her ISP meetings.



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1.37 What you can do to support

What you can do to support “nothing about me without me”

- ✓ Ensure that the person remains the focus of planning for short term needs and future goals.
- ✓ Make sure planning reflects the person’s perspective, even if what she wants seems unattainable.
- ✓ Check back in to see what’s working and not working, or to find out what might have changed since the last time you met.



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1.38 Immediate health and safety needs

Immediate health and safety needs



Health and safety needs take priority in planning—however, they don't *replace* the need to plan for what makes the person happy.

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1.39 Striving for balance

Striving for balance

Your role is to help facilitate planning that strives toward a balance between:



- What is important to someone, that makes him **happy**.
- What is important for someone to be **healthy and safe**.

There will be more about this in another course on person centered planning and practices.

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1.40 In a crisis, prioritize

In a crisis, prioritize

If there is a crisis regarding someone's health and safety that needs to be addressed, prioritize what needs to happen **now** and what can be worked on later.

- Find out what the person's preferences are around receiving supports, including at a time of crisis.



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1.41 Short term fixes and long term dreams

Short term fixes and long term dreams

Sometimes the short term fix is not exactly in line with the long term dream.



- ✓ When this happens, acknowledge it.
- ✓ Don't lose sight of long-term vision.
- ✓ Build trust...if you can offer something immediately, then trust can begin to grow.

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1.42 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Effective facilitation:

- ✓ “Be able to clarify several persons’ opinions for consensus building.”
- ✓ “Explain your role in providing case management services in the person’s life.”



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1.45 Your role as facilitator

Your role as facilitator



Throughout your career as a SC/PA, you will be called upon to facilitate various conversations, processes, and help manage conflicts.

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1.46 Facilitation requires flexibility

Facilitation requires flexibility

Depending on the person and the situation, you will need to be able to facilitate conversations:



Privately with the person,
and



With a team comprised of various people, such as the person, family members, providers, organizations, and/or other members of the community.

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1.47 Basic team facilitation and

Basic team facilitation and conflict resolution tips

- ✓ Schedule ahead with people who need to be involved
 - Be aware that you may need to meet with some people separately.
 - Make sure the person is included.



*There will be more on listening and communication
in another course.*

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1.48 Basic team facilitation and

Basic team facilitation and conflict resolution tips

✓ Have a purpose

- Know what needs to be discussed and why.
- Make sure everyone is aware of what needs to be accomplished. Sharing an agenda can be very useful, even if it is not done formally.
- Clarify roles and expectations.



*There will be more on listening and communication
in another course.*

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1.49 Basic team facilitation and

Basic team facilitation and conflict resolution tips



- ✓ Know the rules and have resources handy.
 - Help people understand what is required.
 - Provide resources for people.
- ✓ Use active listening to ensure that people are heard.
 - Restate, paraphrase, and summarize what you heard to make sure you understand what others are communicating.

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1.50 Basic team facilitation and

Basic team facilitation and conflict resolution tips

- ✓ Record notes and capture all perspectives.
 - People feel heard and are able to move on to solutions.
 - Document who will be accountable for what and by when.
- ✓ Be mindful of people's time.
 - Be punctual.
 - Use a time keeper if needed to assure you won't run out of time.



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1.51 Basic team facilitation and

Basic team facilitation and conflict resolution tips



- ✓ Be mindful of people's participation.
 - Try to keep from letting one person's view overpower others.
 - Use rounds if needed to make sure everyone gets a say.
- ✓ Hospitality.
 - Set up the room so that it is comfortable, accessible, and conducive to being productive.

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1.52 It's ok to ask for help

It's ok to ask for help

If needed, you can ask for a supervisor or coworker to attend a meeting with you.

- They can help take notes so you are better able to facilitate the meeting.
- It can also be helpful to have a “second set of eyes,” in case something is contested later on.



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1.53 When it appears that a provider is

When it appears that a provider is not meeting expectations



You may come across a situation when it appears that a provider is not meeting expectations.

When this happens, remain professional and gather information.

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1.54 Start problem solving with

Consider that you may not have all the pieces yet or that you may have made a **mistake**.



- ✓ Gather more information before coming to conclusions.
- ✓ Facilitate conversations to find shared understanding.
- ✓ Focus on the issue and not personalities—it's about finding solutions, not being right or wrong.
- ✓ Aim to build good working relationships and create partnerships—remember that people are trying their best.

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1.55 Facilitate resolution of the issue

If a provider is not meeting expectations, facilitate resolution of the issue.

- ✓ Explain the issue, so the provider understands why something is not meeting an expectation.
 - Respectfully point out what needs to change.
 - You may need to ask for a private conversation with the provider.
- ✓ Let the provider know you are there to help.
- ✓ Share rules and resources with the provider.



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1.56 Don't ignore "red flags"

Don't ignore "red flags"

When something doesn't seem right or you're not sure if something may be wrong—trust your instincts and follow up.

- If you think there may be an issue, ask someone:
 - A licensor
 - Your supervisor
 - A coworker
- Set timelines and follow up.
- Document everything.

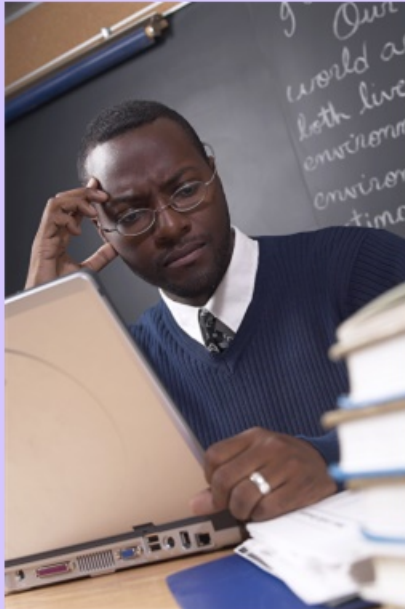


There will be more on reporting serious events in another course.

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1.57 Know the rules that affect your work

Know the rules that affect your work



Have a good working knowledge of the rules, so you understand...

- licensing requirements that affect people for whom you provide case management services.
- what needs protective services notification.
- when and how to report an issue to protective services.

See the Resource tab for a link to Oregon Administrative Rules.

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1.58 Get to know services and providers

Get to know services and providers

Familiarize yourself with the available services and service providers in your area, so you are ready in case a person needs help right away.

Know who to ask and where to look for information.

- Check in with your supervisor.
- Collaborate with your co-workers to be able to bounce things off each other.



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1.59 Local police welfare check

Local police welfare check

If a person is not responding to your contact attempts, you may need to request a welfare check from your local police department.

This is especially relevant if the person...

- Lives alone
- Has been contacting you regularly until now
- Has health concerns, etc.



Know the contact requirements for your organization.

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911



**If someone is in
danger, call 9-1-1.**

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1.61 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Balance.

- ✓ “Learn to set limits”
- ✓ “Spend time with people and families, but also understand the importance of paperwork.”



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1.64 Balancing spending time with people and on paperwork



Balancing meeting people's needs and required paperwork is a big challenge that all SC/PA's are faced with.

- There will be days when you will not be able to get everything done.
- Do your best to not let pressures negatively affect how you interact with people.

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1.66 Organization will “make or break you”

Organization will “make or break you”



Organization is a must—it will “make or break you” as a SC/PA.

- Being organized in a way that works for you is key to being able to stay current on documentation and other requirements.
- Falling behind is not only stressful, but heightens the risk of something important being forgotten or missed.

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1.67 What makes a good SC/PA?

What makes a good SC/PA?

Others have said...

Organization and timeliness:

- ✓ “Have systems that work for you in order to keep track of what things need to get done.
- ✓ “Know deadlines and begin working on time sensitive things as early as possible.”



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1.68 Prioritization is critical

Prioritization is critical

It is critical that you are able to prioritize your work in a way that works for you.

- Health and safety issues and concerns typically take top priority.
- Consider timelines and urgency of the person's need:
 - Does the person need an answer today?
 - Can the situation wait to be addressed next week?

	Urgent	Not Urgent
Important	Urgent and Important	Important but not urgent
Not Important	Urgent but not important	Not urgent and not important

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1.69 Time management in a crisis

Time management in a crisis

Be aware that when a **crisis** happens, it can take up all of your time.



- ✓ Keep communication open—stay in touch with others with whom you have appointments, providers, and families.
- ✓ Know required timelines as well as the expectations at your organization.

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1.70 Organize yourself in a way that

Organize yourself in a way that works for you

- ✓ Talk with your supervisor and coworkers.
 - What works for them?
 - How are they organized?
- ✓ Develop your own organization from the start.
 - Being organized will help you keep track of things and find what you need when things get hectic.
 - Use a system or method that works for you.



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1.71 Practice safe habits

Practice safe habits

Your personal safety is very important. It can be easy to focus so much on helping others that you overlook your own safety.

When going out on visits...

- ✓ Let someone else know where you are going.
- ✓ Consider asking a coworker to go with you if you feel uneasy about going alone.
- ✓ Always take a charged cell phone with you.



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1.72 Trust your instincts

Trust your instincts



Trust your instincts if something doesn't feel right.

- ✓ Be aware of your environment.
- ✓ Know where the exits are and place yourself so you can access an exit if needed.
- ✓ Contact your supervisor if you need to.

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1.73 Know your organization's

Know your organization's personal safety protocols



Know your organization's procedures and protocols for keeping you safe on the job.

- Talk with your supervisor so you know what is expected of you:
 - ✓ Communicating your whereabouts when working in the field
 - ✓ Keeping your contact information current
 - ✓ Relaying any personal emergency needs you have

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1.74 Illegal activity

Illegal activity

In the scope of your work with people, you may be confronted with illegal activity.

Know what your organization's policies and procedures are so you can respond as required.

Know when, where, and how to report illegal activity.

Remember, safety is your top priority.



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1.75 Being in the moment

Being in the moment

Providing case management requires you to make judgment calls, often in the moment, and things might happen that you can't predict or control.



When this happens, don't panic...

- ✓ Do your best.
- ✓ Ask for help.
- ✓ Document your work.

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SC/PA 104: Rights, Complaints, and Being a Proponent

1. 9-19-04 SC PA unit 4 with AA revisions

1.1 Rights, Complaints, and Being a Proponent



**Rights, Complaints, and
Being a Proponent**

Tier 1: Must be completed within 30 days of start date
and before working unassisted

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Notes:

1.2 In This Course


In this course...

- Basic and other rights of people who receive services within Oregon's I/DD system
- Circumstances which may limit a person's rights
- Case management's role as a proponent for people's rights



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1.3 Expected Reading

A person is sitting on a library shelf, reading a book. The background shows rows of books on shelves.

Expected Reading

- Read the current Oregon Administrative Rules (OAR) and all applicable statutes regarding people's rights.
- Know your organization's policies and procedures on complaints and notification of planned actions.

Notes:

OAR on rights: http://www.dhs.state.or.us/policy/spd/rules/411_318.pdf

1.4 Basic Civil and Human Rights

Basic civil and human rights

People for whom you provide case management services have the same civil and human rights that you have.



These rights are automatic for adults, unless guardianship or other court action limits them.

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Notes:

1.5 Rights of people receiving I/DD services

Rights of people receiving I/DD services

People have the right to make choices and change choices, such as:

Health care or other services

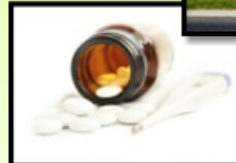
Professional service providers

Where to live

Where to work

Medications and treatments
(including refusing prescribed medications and treatments)

Use of technology and/or devices



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1.6 Rights regarding services

Rights regarding services

People have the right to choose or change services:

- Including what type of service setting
- Service provider (who will provide services)
- What supports to receive
- How the supports will be provided
- What to do if support is not working
- Different PA or SC
- Brokerage or CDDP

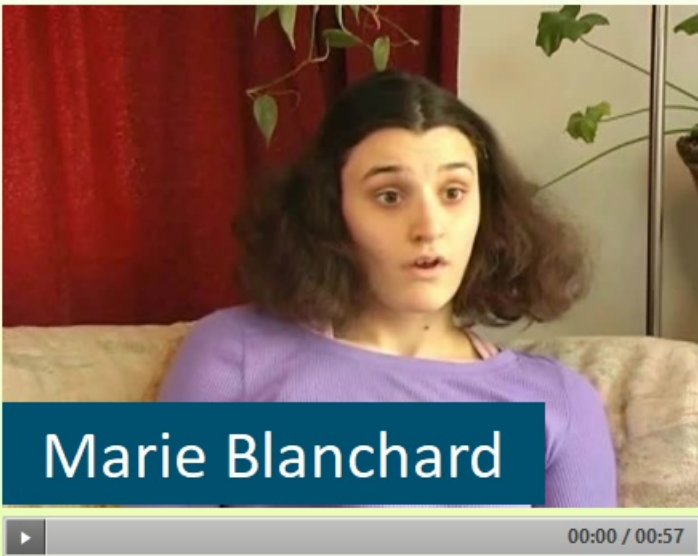


However, a person's options may sometimes be limited by the availability of preferred services, provider denials, and agreement of the team that this is a safe plan.

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Notes:

1.7 VIDEO: Marie



Marie Blanchard

00:00 / 00:57

Marie talks about how she chooses her support providers with help from her PA and mom.

*Select the Resources tab to read Marie's one page profile.
To read a transcription of this video select the Transcript tab.*

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Notes:

MARIE: I hired them through my brokerage.

Mom OFF-CAMERA VOICE: "I hired them through my brokerage" She interviewed a couple; liked one. Then, when she moved, she recommended the second one. And now she's leaving, so she'll have to interview some new ones.

MARIE: Their personality

>>OFF-CAMERA VOICE: They what? Their personality?

MARIE: The first one, they were quiet

OFF-CAMERA VOICE: The first time they were...

OFF-CAMERA VOICE: One was too quiet.

OFF-CAMERA VOICE: And you don't want someone to help you when you don't need help.

MARIE: Yeah.

1.8 VIDEO: Tim hires his own staff



Tim talks about how he participates in hiring his staff with his provider.

*Select the Resources tab to read Tim's one page profile.
To read a transcription of this video select the Transcript tab.*

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Notes:

TIM: They had an interview process, but how Blake and I got together was the PD which is the program director through the agency I have now, who is called Dungarvin. Um, they have an interview process, and then what they do is go through the interview process, and if they like the person, then I get to interview them, and then if I like them, and mom likes them, and 'cause we have a whole entire team of people that we work with. If they are comfortable with the fit and the whole part of the program, then I get to have the final say-so. So, I do go through that hiring process of hiring my own staff.

1.9 VIDEO: Tim trains his staff.



Tim talks about training his staff so they can provide supports in a way he prefers.

Select the Resources tab to read Tim's one page profile.

To read a transcription of this video select the Transcript tab.

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Notes:

TIM: Someone that's dependable. Knows what they are supposed to do on their job. Like with me, I have a whole...I have, um, a lot of meds. And, someone that doesn't know a lot about meds or anything like that, it's very important that they know what they're doing when they are. And, someone that's also very driven to know what they want. And a caregiver, it's important that they know what they want as far as a caregiver's important to them.

1.10 Other examples of rights

Other examples of rights

People have the right to:

- Confidentiality of records and personal information
- Privacy in communication and legal affairs
 - Including visitors, personal mail, and access to a phone or other means of communication
 - Unless limited by a guardian or through a guardianship proceeding.
- Access to free and public education
- Protection from abuse, neglect and exploitation.
- Own personal property



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1.11 Rights related to the Individual Support Plan (ISP)

Rights related to the Individual Support Plan (ISP)

Each person has the right to choose:

- Who is (or is not) part of his ISP team, present at meetings, or contributing
- Who may (or may not) see his ISP
- Goals stated within his ISP
- Method(s) in which supports identified in his ISP are provided
- including services, service settings, and providers



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1.12 Rights limitations

Circumstances that may limit rights

Civil commitment

Parole or probation

Psychiatric Security Review Board (PSRB)



Be aware of any such circumstances affecting anyone for whom you provide case management.

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Notes:

**Animate*

1.13 Addressing critical support needs in the ISP

Addressing critical support needs in the ISP

Critical Health or Safety Support Needs

The ISP may reflect limitations in a person's rights in order to address a critical health or safety need.

Examples of ISP agreements that restrict rights:

- Locking chemicals if the person is at risk of ingesting them
- Securing knives or sharp objects out of reach if a person is at risk of harming himself or others
- Securing areas of a home or other setting that pose a risk

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1.14 Rights limitations in the ISP

Rights limitations in the ISP

A person has a right to receive services in the **least restrictive** setting and method possible.

- Any effort to restrict a person's rights must be justified by a specific assessed safety need and documented in the ISP.
- The ISP team must develop and comply with a plan to reduce rights restrictions.

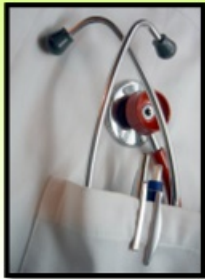


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1.15 Rights limitations in the ISP

Rights restrictions by other entities

The ISP may also include **rights restrictions** imposed by other entities, such as a physician or judge.



Examples:

- Fluid or food intake, as per a doctor's order
- Living in a supervised setting, as per a court order



These types of restrictions remain in place for as long as the orders exist, but the team must review these orders at least annually.

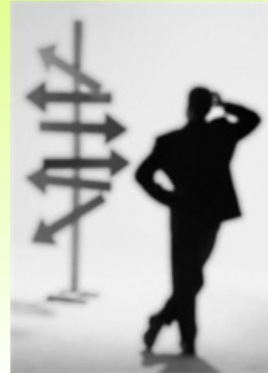
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1.16 Designated representatives

Designated representatives

A person has a right to **designate someone else** to help make decisions on his behalf, such as:

- General decisions
- Medical and legal decisions
- Decisions about funded services
- ISP decisions
- Other decisions for which he has specifically requested representation



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1.17 Designated representatives

Designated representatives

The person always drives the decision-making process.

- The person decides how much authority the designated representative has.
- The person may choose to withdraw the designation at any time.
- A designated representative may not make decisions that limit the person's rights.



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Notes:

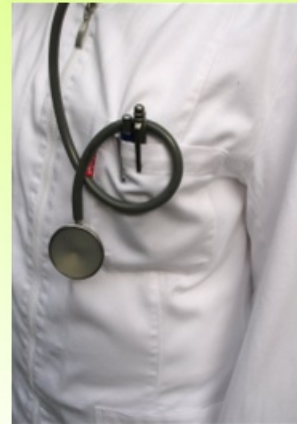
1.18 Designated representatives

Designated representatives

- ✓ *Be aware that there are various types of representatives in different service systems.*
- ✓ *Get to know who is in the lives of people for whom you provide case management services.*

Examples:

- Durable power of attorney
- A self-appointed health care representative



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1.19 Explaining monitoring requirements

Explaining monitoring services

If necessary for effective monitoring, you may need to observe a particular service or a service in a specific setting being provided, such as:



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1.20 Explaining monitoring requirements

Explaining monitoring services

A person receiving supports with cooking in his home.



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1.21 Explaining monitoring requirements

Explaining monitoring services

Someone whose foster home manages his money.



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1.22 Explaining monitoring requirements

Explaining monitoring services

A child who receives behavior support services in his family home.



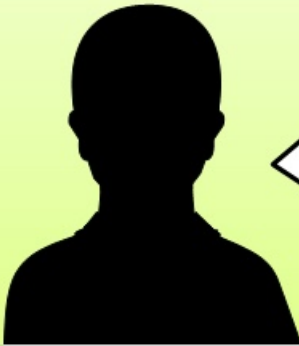
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1.23 Explaining monitoring requirements

Explaining monitoring requirements

Using publicly funded services includes a requirement that the individual/family cooperate with certain monitoring requirements.

Explain the following to the person in a way she can understand:



Monitoring is required and serves to ensure your health and safety, and that services are being provided as outlined in your ISP.

I will occasionally visit with you, either in your home or in another place. I may need to observe the service being provided to you from time to time.

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1.24 Respectful monitoring

Respectful monitoring

Show respect for the person when monitoring services in her home.

- ✓ Schedule a visit with the person and arrive on time.
- ✓ Knock on the door, even if it is a bustling group home.
- ✓ Ask permission before looking in the person's bedroom, cupboards, closet, or other private areas.



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1.25 Funded services and monitoring

Tips for successful monitoring

- ✓ Be flexible - sometimes you will have to reschedule monitoring in order to meet someone's needs.
- ✓ Be proactive - waiting to schedule visits until the end of the month could jeopardize service delivery.
- ✓ Use the person's preferred way of communicating to schedule monitoring



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1.26 Informing of rights

Informing of rights

- ✓ Advise the person of her rights at least annually.

Some people need more frequent reviews of their rights, to ensure understanding.

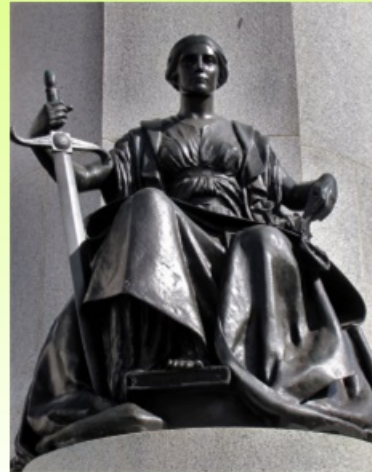
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1.27 Extra support

Extra support

If a person's rights have been violated before, she may need extra support to understand her rights and how to advocate for herself.



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1.28 Informing of rights

Informing of rights

You have basic responsibilities around informing a person of rights.

- ✓ Use the person's preferred method of communication in order to support understanding.
 - *Consider what words to use, visuals, etc.*
 - *Be prepared to repeat or explain things in different ways. Families are often overwhelmed by the day to day responsibilities of supporting loved ones and information about "the system" can be difficult to remember.*
- ✓ Provide the person with a copy of anything she signs.
- ✓ Complete required documentation and ensure that it is filed in the person's file.

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1.29 Informing of rights

Supporting understanding

What can you do if you think that the person doesn't understand her rights?

- ✓ Enlist help from a family member, Direct Support Provider (DSP), or other support provider such as the person's behavior consultant (if applicable) to assist while you explain.
- ✓ Check in with your supervisor about the issue.



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1.30 VIDEO: Pam talks about getting assistance from her PA



Pam shares her story of being mistreated by a previous employer. Her PA (Chris) helped her to realize that her rights were being violated, get the courage to speak out, and get connected with legal counsel.

Select the Resources tab to read Pam and Ted's one page profile.

To read a transcription of this video select the Transcript tab.

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Notes:

PAM: When I was working in a shelter, a shelter for animals, that time when I was still working in shelter, when I, when I knew Chris (points to Chris off screen). And it was a lot of problems. The boss named _____. Um, she did a lot of things to me. Like, how can I say this, she threatened me. If I did not do the things she wanted me to do, she's gonna put all the animals down. Do that. Because see I'm the type person I love animals, and I can't stand to see some animal put down or killed for no reason. And she threatened me. It took me so long, my sister ____ knew, and I told her what was going on. After that, we got ahold of Chris, and talked to Chris about it. Chris said "What we need to do is...we need to take care of this Pam. What she did was wrong with a disabled person. And she said...Chris said "nobody don't have a right to do something like that to a disabled person, and put them down." And, I had nightmares and all that stuff, and it wasn't good nightmares. And we, after that, we talked about...Chris and I talked about it and Chris said I needed to do this, was...um...to get a hold of somebody to find out how we could get this going, do that. And, we um, she helped me, and I got a lawyer, lawyer. His name was _____, he lives in Medford. And we got...her and I got together with him and took care of it. And, he asked me about things, what happened. And, I explained to him what happened is, she put me down, threatened me, not gonna pay me money, my money she owed me, and said if I do not do what she want me to do is, she was gonna put the animals down. He said, "Pam," he said same thing to me what she said (points off screen) "nobody do not have the right to put a disabled person down." He said "Pam you have a case, we're gonna go after her." And I kind of, couple times, wanted to back off because I was so nervous and so scared I didn't want to do it. I didn't want to look at her; I didn't want to face her. Face her for what she did to me, she hurt me so bad inside, my esteem was down, I didn't want to fight back in any way. Chris and my sister said..._____ said "Pam we have to do this, we have to do this. We have to fight back. We can't let her get away with it, what she did." And we fought about...how long did we do it (to the person off screen)?

Chris (from off screen): It seemed like two years.

Pam: Two years. It was two years we had to fight this. And, what happened we were gonna go to court, and she decided to settle it out of court because she knew what she did was wrong. And she gave me a whole bunch of chunk of money to settle it. And this is how Ted and I talk about it; when we were married when all this was happening, and Ted said to me "Pam you know what we could do with that chunk of money?" I said "What?" "What if we get a house?"

1.31 Informing of rights

Pam was assisted in advocating for herself in several ways, including recognizing that her rights were being violated, being informed of her options, as well as getting connected to resources.



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1.32 Informing of rights

If rights are violated

- ✓ Know the current Oregon Administrative Rules (OAR) and all applicable statutes regarding people's rights, complaints, and notification of planned action.
- ✓ Provide the individual with assistance and information about her options regarding her rights, her ability to file a complaint and/or hearing request, and a framework to understand when her rights may have been violated.



1.33 If rights are violated

Complaint processes and procedures

Know and follow the complaint processes and procedures of your own organization, as well as the relevant policies and Oregon Administrative Rules that apply to the complaint procedure.

Each **provider organization** also has its own complaint policies and procedures.

- ✓ Be familiar with the procedures of organizations that are used by people for whom you provide case management.

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1.34 Being a proponent

As a person who provides case management, you are a **proponent** for people's rights.



pro·po·nent : *noun* \prə-'pō-nənt: a person who argues for or supports something

The person may need you to support her in expressing her voice and perspective to others.

- ✓ Use your professional judgment.
- ✓ Ask your supervisor for guidance and help.

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1.35 You are a proponent

You are a proponent

Help people advocate for themselves.

- ✓ Provide options and opportunities for making choices.
- ✓ Help the person understand her options and the risks/benefits and possible outcomes, so he can make informed decisions.
 - *Do not disregard if a person is making unsafe choices.*
 - *Talk with your supervisor if you have questions or concerns about someone.*



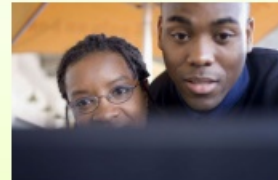
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1.36 Being a proponent

Remain impartial when supporting the person to make choices.

It is *not* your role to convince a person to make a decision you personally feel is most beneficial or right, such as in financial or legal decisions.

Provide a framework based on the person's wishes, goals and desires to support the person in decision-making.



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1.37 Being a proponent

You can assist a person in advocating for herself by:

- Assisting in a complaint process
- Connecting him with resources, such as
 - Including helping the person get connected with others who can help advocate for her
 - Future planning
 - Legal assistance and advocacy



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1.38 VIDEO: Pam and Ted talk about trust



Pam talks about why trust is important to her and how her husband Ted, and Chris, her PA, were a part of helping her learn to stand up for herself.

Select the Resources tab to read Pam and Ted's one page profile.

To read a transcription of this video select the Transcript tab.

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Notes:

PAM: I have to trust that person. If I don't trust that person, I don't want them around me because I used to be a person I could not stand up for myself. Stand up for myself. I always would back up in that corner; like in a shell. When Chris came around, Chris is the one who got me a lot more stronger to fight back on anybody. To fight back if I felt like if somebody doing something to me - being mean - I kinda get in their face. That's why my way to fight back because I'm don't want to be put back down in a spot, in a corner, pushed back in a corner when...when...when somebody puts you in that corner, back you up in a corner, you can't do nothing. You just clamp up. You start getting, like, scared...nervous; you can't fight back. When I met Ted, he was not like...he wasn't like that. He was not, like, a fighter. He learned that...he's learned that from me, now, because learned to stand up for himself.

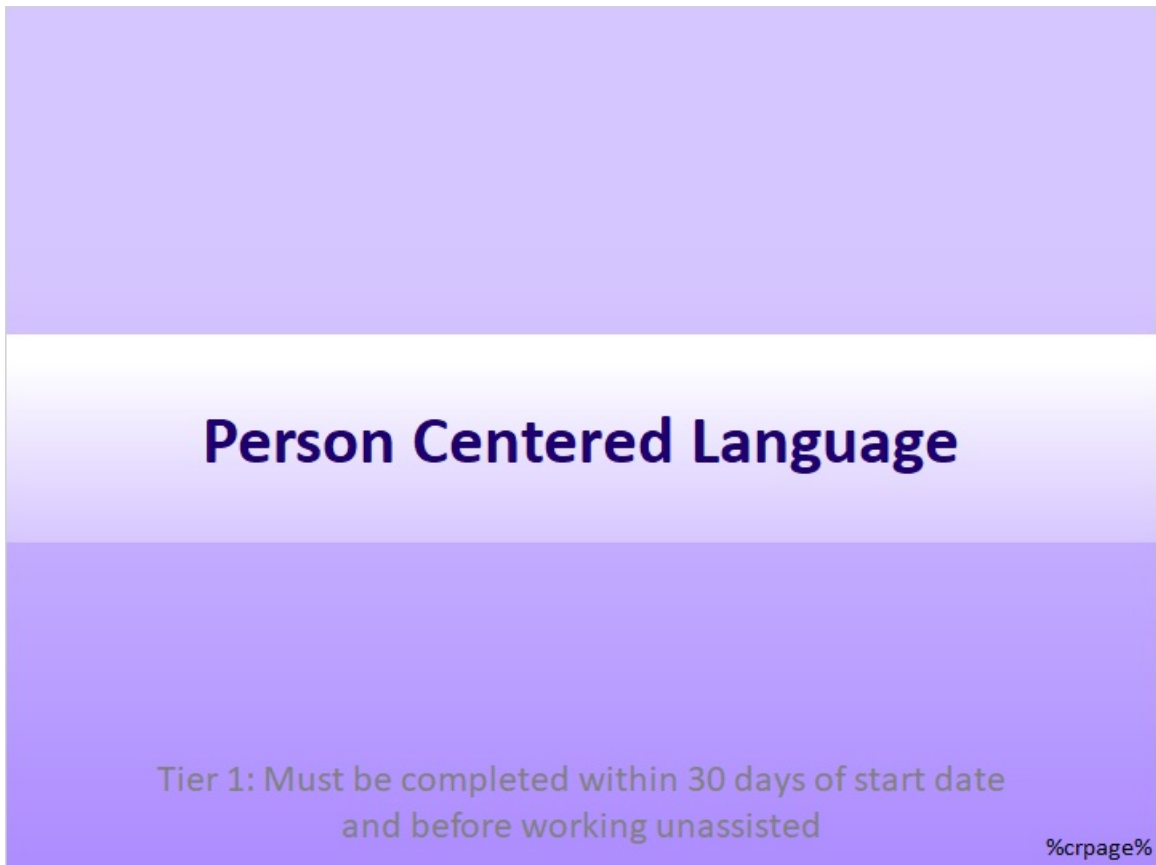
TED: I think I have learned a long time ago, before I met you.

PAM: I don't know! You didn't act like you did before! When somebody does something to me, he kinda stand up for me. He will stand up for me. And if I think somebody's doing something to him, I will stand up for him.

SC/PA 105: Person Centered Language

1. Unit 8-B (2 of 3) SCPA Other Competency 6 Person Centered Language

1.1 Person Centered Language



Notes:

1.2 In this course...

In this course...

- Use person centered language in all interactions.
- Speak of the person first, then the disability.
- Emphasize abilities, not limitations.



%crpage%

1.3 At your organization



At your organization

Talk with your supervisor and/or training team, to ensure you:

- Understand your responsibilities regarding using person centered language in all interactions.
- Know what documentation to complete and who to talk to if you need assistance.

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1.4 The power of words

Power of words

“Words simultaneously reflect and reinforce our attitudes and perceptions; words shape our world.”



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1.5 The power of words

Power of words

“Many disability descriptors evoke feelings and imagery that perpetuate archaic and negative stereotypical perceptions.”

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Notes:

1.6 The power of words

Power of words

“And these perceptions create a powerful attitudinal barrier—the greatest obstacle to the success and inclusion of individuals with disabilities.”

—Kathie Snow, author of *Disability is Natural*



You can find more information about Kathie Snow and *Disability is Natural* in the Resources tab.

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1.7 The words we use

The words we use


Our words can create powerful and lasting impressions of ourselves and other people.

Be conscious of what words you use when communicating with or about people who experience disability.



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1.8 The word “disability” video



Jordan Ackerson

00:00 / 02:45

In this video, Jordan talks about why he chooses other words over “disability.”

Select the Resource tab to read Jordan’s one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

JORDAN: Well, it seems like the word...well, the word disability.... Well, kind of has a little more of a deficit-focus...focus, well, kind of terminology, , which is the reason, well, which is the reason...One, I'd like to use words more like challenge or different-ability, or learning ...learning opportunity, and...well, 'cause that shows that...well, 'cause those kind of words... those kind of words, well, kind of show more like...well, *UNCLEAR*, well, maybe they're...maybe they're honest and inabilities, but I, well, but we can't really say that something is impossible yet, until we really know, although I know that in the real world the word disability, is what qualifies people either for social security or for other kinds of programs or...or for Medicaid...Medicaid or whatever, but...well, but I think it's good to be...it's good to be inventive...inventive and, well...well, and to not always feel like I have to agree on, on every single idea; make it more interesting.

1.9 Person centered language

Person centered language

When we use person centered language, the focus is on the person, first and foremost.

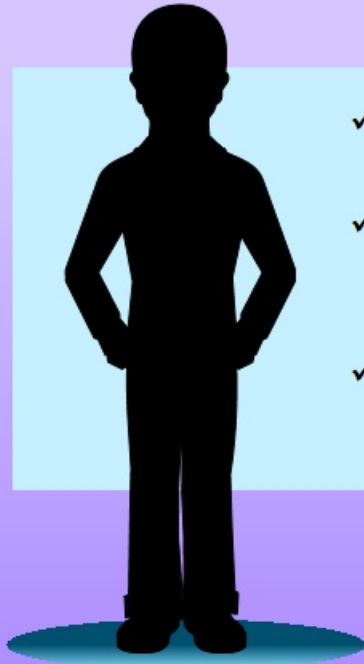
Person centered language demonstrates respect for a person as your equal.



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1.10 Using person centered language to describe someone

Using person centered language to describe someone



- ✓ Refer to a person by his name whenever possible.
- ✓ Describe the person by his interests, achievements, or personality.
- ✓ Discuss the person's disability only when necessary.

%crpage%

1.11 VIDEO: What Adam likes to do



In this video, Adam talks about some things he likes to do for fun.

Select the Resource tab to read Adam's one page profile.

To read a transcription of this video select the Transcripts tab.

%crpage%

Notes:

ADAM: Um, well, I'm more of a...I'm like an outdoors guy. I like anything, really. Um, well, I got a couple of hobbies that I really love. I do archery - which is fun. I also do, um, I play "Magic - The Gathering" - which is good cool and fun if you got someone who knows how to play...that's the problem. But, mostly I like to do archery more 'cause it gets me better, and it helps me sometimes, it'll help with anger. So, works more, either way, it works out.

1.12 Demonstrating person centered language

Demonstrating person centered language

To describe Adam using person centered language, you could say:



- “Adam likes archery and ‘Magic: the Gathering.’”
- “Adam is a charismatic young man with tattoos commemorating his mother and friends.”
- “Adam enjoys lots of outdoor activities and spending time with him doing these activities is a good way to get to know him.”

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1.13 When should you talk about a person's disability?

Sometimes it will be necessary to refer to a person's disability.

For example:

Discussing eligibility

Explaining service options

Completing needs assessments

In the event of an emergency

If the person (or his guardian, if applicable) requests that you share information with someone about his disability



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1.14 Speaking of disability

Speaking of disability



If you need to speak of someone's disability to others, make sure you:

- ✓ Have specific permission to do so.
- ✓ Show respect.
- ✓ Only reveal what is absolutely necessary.
- ✓ Frame what you say in a support-focused way.
- ✓ Avoid using jargon.

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1.15 VIDEO: What Tracy appreciates



In this video, Tracy talks about being shy around new people, and feeling secure with staff who she knows well.

Select the Resource tab to read Tracy's one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

TRACY: Nina was a big influence. She helped me by helping me to explain to me what things were, and getting me all signed in and everything. She's been a real big help in my life; a part of my life. One thing about her, she won't take anybody's static I can tell you that much. Sometimes I wanted to do something I didn't have the money for, and she said, "You don't have the money for that. You already know that," and she let me know the consequences. She's been a really big help for me. I really appreciate her help. And uh, I just feel really safe and really secure with everybody around me. I make new friends. But sometimes when I get to know people, I get kinda shy. But, I'm not shy for long. Then, everyone says I don't shut up after that.

1.16 Describing Tracy

Describing Tracy

To describe Tracy using person centered language, you could say:



- “Tracy is passionate about encouraging people with disabilities to ask for the help they need.”
- “Tracy prefers that you show her the process and steps for a task and then let her try it. She will ask for help if she needs it.”

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1.17 “Labels belong on cans not people”



00:00 / 02:22

Jordan talks about the beauty of diversity and sings a song he used as his speech when he was running for high school class vice president.

Select the Resource tab to read Jordan's one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

JORDAN: Well, and what really mattered...mattered, well, was that...well what really mattered most was that I did it and it very much increased people's awareness on the beauty of diversity in the school community, as well as... as well as..., pretty much in the universe. Well...and since I'd only had about a minute to give this speech, well, I did it to a very familiar tune of, "Chantilly Lace" by the Big Bopper, and it begins with [begins singing] "I thought I'd sing for you today with only one minute to have my say if vote for me for senior VP. I'll work hard just wait and see. Keep Lake O and us in school where differences are seen as cool. I'm a friendly dude, I'll keep it fun...I'm not done, Oh baby, here's another verse. Diversity is the key to a strong school community. Labels should only be used on cans. So, drop the judgment let's make some plans. We can put our heads together and see it through, through planned activities everyone can do. Let's make '07 the class from Heaven. Now I'm through. Oh baby, vote for Ackerson."

1.18 What if we don't use person centered language?

What if we don't use person centered language?

Speaking of a person's disability first can inflict **harm** by generating:

- Labels
- Assumptions
- Divisions instead of appreciation for diversity

This can create barriers for the person to overcome in his attempt to get a job, find a new place to live, meet new people, or try new things.



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1.19 Avoid referring to a person's "level of functioning"

Avoid referring to a person's "level of functioning"



Speaking of someone's "level of functioning" creates:

- False or confusing imagery of a person's age, experiences, and ability
- Limitations for the person because of our inability to imagine his success

We cannot be certain of what someone else understands, knows, or is capable of unless given time and the right opportunities.

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1.20 VIDEO: Talking about the person first



Tim Marberry

00:00 / 00:41

Tim talks about why he feels it is important to talk about the person first.

Select the Resource tab to read Tim's one page profile.

To read a transcription of this video select the Transcripts tab.

%crpage%

Notes:

TIM: "People First Language" is talking to the person or persons first, and talk to them on a real personal level, and don't look at them as part of their disability; talk to them as they would want to be talked to, first.

Interviewer: Do you think it's important for people to know about "People First Language"?

TIM: Yes.

Interviewer: Why is it so important?

TIM: So they know that they're people too, and to not discriminate toward them.

1.21 Using person centered language professionally

Using person centered language professionally

Things to DO

- ✓ Use the person's name, or, to maintain confidentiality, "someone" or "a person."
- ✓ Remember the person is someone you provide services to.

Things to AVOID

- Referring to a person as "client," "consumer," "resident," etc.
- Calling someone *your* "person" or "case."

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1.22 Examples of person centered language

Examples of person centered language



Don't Say:

- Sarah, a Down's girl...
- My handicapped friend John, or John is wheelchair bound
- Andre is challenged; he's special needs.

Do Say:

- Sarah has Down Syndrome.
- John uses a wheelchair.
- Elise needs support understanding her finances.
- Andre needs support to learn to read.

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1.23 Keep it simple

Keep it simple

Sometimes the most effective way to use person centered language is just to keep it simple.

Use everyday words instead of jargon:

Smiling vs. bright affect

Hanging out or chatting vs.
social interactions

Going out vs. community outing

Fun vs. preferred activity

Friends vs. peers



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SC/PA 106: Case Management and Provider Qualifications

1. Unit 3 - SCPA and Provider Qualifications

1.1 Case Management and Provider Qualifications



**Case Management and
Provider Qualifications**

Tier 1: Must be completed within 30 days of start date
and before working unassisted

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Notes:

1.2 In this course we will cover:

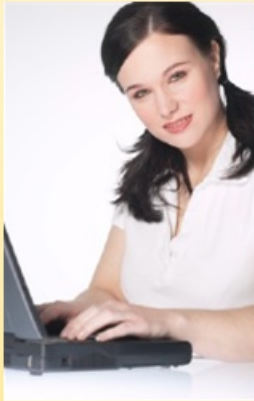
In this course...

- Qualification requirements for providing case management services
- Types of service providers
- Qualifications of service providers
- Rules that govern providers of service



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1.3 At your organization



At your organization

- Talk with your supervisor and/or training team to ensure that you understand your responsibilities regarding ongoing qualification requirements for your role, as well as understanding and assuring provider qualifications.
- Know what documentation you need to complete and who to talk to if you need assistance.

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1.4 Case management qualifications

Case management qualifications

In order to provide case management services in Oregon, one of the following requirements must be met:

A bachelor's degree in a behavioral science, social science, or a closely related field.

A bachelor's degree in any field and one year of human services related experience.



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1.5 Case management qualifications

Case management qualifications

An associate degree in a behavioral science, social science, or a closely related field and two years of human services related experience.

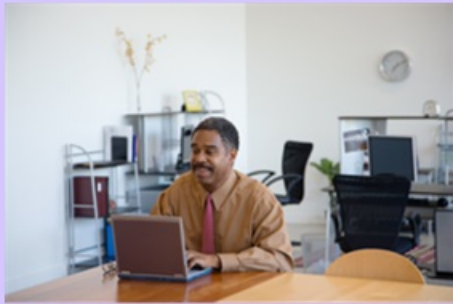
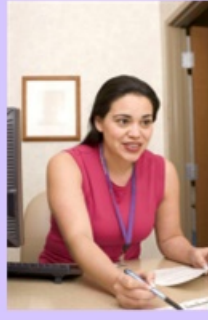
Three years of human services related experience. *This might include providing assistance to people and groups affected by economical disadvantages, employment barriers and shortages, abuse and neglect, substance abuse, aging, disabilities, prevention, health, cultural competencies, or inadequate housing.*



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1.6 You are a qualified professional

You are a qualified professional



- You've been hired to provide case management services because you are a qualified professional in your field.
- It is your responsibility to be aware of ongoing qualification requirements in your role.
- As system changes occur, you will need to keep your skills and knowledge up to date.

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1.7 Background check

Background check

There is an initial background check that you must pass in order to work as a SC/PA.

- **Be aware** even after you pass the required initial background check, there are some disqualifying conditions for employment that effect eligibility to provide case management services.
- Disqualifying conditions for employment can be found in the **Oregon Administrative Rules** as well as your organization's policies and procedures.

The form is titled 'BACKGROUND CHECK REQUEST (301QED)' and is issued by the 'SHARED SERVICES Background Check Unit' of the 'Oregon Department of Human Services' and 'Oregon Health Services'. It states that the form is used to assist in gathering information for the CRBS system. Instructions for the Qualified Entity Designee (QED) are provided, noting that they are available separately in form MHC 301QED-Instructions. The form is divided into 'Section 1 - To be completed by the QED or the Qualified Entity Initiator (QE)'.

Section 1 includes the following fields:

- 1. QED agency name: [Text field]
- QED agency street address: [Text field]
- QED agency City/State/Zip code: [Text field]
- 2. QED name: [Text field]
- QED phone number: [Text field]
- QED fax number: [Text field]
- 3. Application type (select one program area for this position):
 - ☐ AFD ☐ DD ☐ MH ☐ PLA ☐ CW ☐ VR
- If an ADP, is this application for a skilled position in a nursing facility only? ☐ Yes ☐ No
- Is this position:
 - ☐ Paid (for example: employee or contractor)
 - ☐ Non paid (for example: volunteer, household member in AFH, etc.)

For more information select the Resources tab.

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1.8 Ongoing training

Ongoing training



Communicate with your supervisor and/or training department to ensure that you understand your responsibilities regarding completing all required initial and ongoing training.

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1.9 Ongoing training continued...

Ongoing training continued...

Take advantage of learning opportunities whenever possible, including but not limited to:

Statewide training,
Webinars, conferences,
other online training,
and In-services at your
organization.



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1.10 Types of service providers

Types of service providers



There are several types of service providers in Oregon who may be hired to support a person.

- Licensed or certified provider organizations
- Independent providers
- General business providers

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1.11 What is a licensed or certified provider organization?

What is a licensed or certified provider organization?

Licensed or certified provider organizations:

Must be licensed or certified by the state of Oregon to provide supports to people with Intellectual and/or Developmental Disabilities (I/DD).

Are endorsed to provide supports either statewide or in a certain specified area.

Provide supports through employees, contractors or volunteers.

Recruit, hire, train, supervise and pay the person who provides support.

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1.12 Licensed or certified provider organizations must be reviewed

Licensed or certified provider organizations must be reviewed

Licensed or certified provider organizations are periodically reviewed and their license or certificate renewed when they meet all qualifying criteria.

- The Office of Developmental Disabilities, Licensing unit or their designee is responsible for licensing and certification reviews and renewals.
- The Licensing unit is overseen by the Department of Human Services (DHS).



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1.13 Examples of licensed or certified provider organizations

Examples of licensed or certified provider organizations

Examples of provider organizations licensed or certified as Developmental Disability programs include but are not limited to:

24-hour Residential provider organizations.

Employment Service provider organizations.

Community Living Supports Provider.

Supported Living provider organizations.



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1.14 Examples of services provided by licensed

Examples of services provided by licensed or certified provider organizations

Services provided by licensed of
certified provider organizations may
include but are not limited to:

Employment
Attendant care



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1.15 Examples of services provided by licensed

Examples of services provided by licensed or certified provider organizations

Service settings in which these are
provided include but are not limited to:

The person's home
The community
Foster home
24 hour residential home



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1.16 What is an independent provider?

What is an independent provider?

Independent providers are individuals who are hired directly by a person (or as applicable her guardian/designated representative) to provide professional services.

An independent provider can be:

- An Independent Contractor.
- An employee of the person (or her guardian/designated representative if applicable).



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1.17 Personal Support Workers and other examples of independent providers

Personal Support Workers and other examples of independent providers

A Personal Support Workers (PSW) is a type of independent provider.



- A PSW is employed by a Common Law Employer, who may be the individual or someone designated to act as the Common Law Employer. A PSW is typically recruited, hired, trained, and supervised directly by that person.

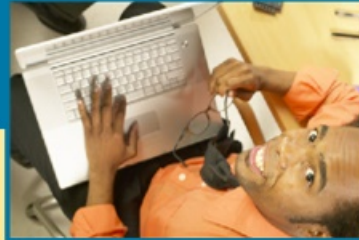
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1.18 Personal Support Workers and independent providers continued...

Personal Support Workers and independent providers continued...

Examples of independent
providers who are not PSWs
include but are not limited to:

Job Developers
Behavior Professional
Nurses



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1.19 Examples of services provided by independent providers

Examples of services provided by independent providers

Services provided by independent providers may include but are not limited to:

Discovery (meeting appropriate DHS requirements)

Professional Behavior Support Services



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1.20 General business providers

General business providers

General business providers provide services and supplies to the general public, not specifically to people who experience I/DD.



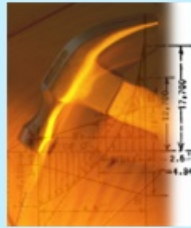
General business providers:

- Deliver supports through employees, contractors or volunteers.
- Recruit, hire, train, supervise, and pay the person who provides support.
- Must hold current, appropriate licenses to operate, as required by state/federal laws and regulations.

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1.21 Examples of general business providers

Examples of general business providers



Examples of general business providers include:

- Taxi or bus service
- Environmental modification contractors
- Building contractors
- Medical supply vendors
- Assistive technology or device vendors

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1.22 Examples of services and supplies

Examples of services and supplies provided by general business providers

Services and supplies provided by general business providers include but are not limited to:

- Chore services
- Transportation
- Home modifications
- Vehicle modifications
- Personal emergency response services
- Specialized medical supplies
- Assistive technology or devices



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1.23 Your role before services are provided

Your role before services are provided

You must assure that all providers are qualified and endorsed to provide services in the person's location (if applicable) before they begin working to support a person.

- Ensure the qualifications of providers according to state regulations as well as your organization's policies and procedures.

Employment Application

We are an equal opportunity employer. Decisions to accept or hire are based on merit and qualifications. We do not discriminate on the basis of race, ethnicity, sex, age, religion, gender, sexual orientation, marital status, or any other characteristic protected by law.

PLEASE PRINT AND COMPLETE THIS FORM IN DETAIL. PLEASE BE SPECIFIC AND FILL IN ALL APPROPRIATE BLANKS. ALL INFORMATION GIVEN WILL BE HELD IN STRICT CONFIDENCE.

Personal Information

Date: 3/21/2016 Email address: terrence@jones.com

Full Name: Terrence Jones First: Terrence Last: Jones

Address: 1234 Main Ave City: Springfield State: IL ZIP Code: 62701

Home/Phone: 217-555-1234 Cell/Phone: 217-555-5678

DO YOU HAVE THE LEGAL RIGHT TO WORK IN THE UNITED STATES? ☐ YES ☐ NO
IF NO, EXPLAIN: _____

HAVE YOU EVER BEEN CONVICTED OF A CRIME? ☐ YES ☐ NO
IF YES, EXPLAIN: _____

HAVE YOU EVER BEEN REPORTED FOR CHILD ABUSE OR A SUBSTANTIATED ABUSE? ☐ YES ☐ NO
IF YES, EXPLAIN: _____

I understand that I must pass a Criminal History Background Check. If the Criminal History check reveals a conviction, my employment will be immediately terminated.

Employment Desired

Position: Therapist Date Available: 4/1/16 Desired Salary: \$ 15.00 / hr

Are you employed now? ☐ YES ☐ NO If so, may we inquire of your present employer? ☐ YES ☐ NO

Have you ever applied to this company before? ☐ YES ☐ NO If yes, when? _____

Education: _____

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1.24 Know the rules

Know the rules

Each type of service has **administrative rules** that outline allowable provider types and their corresponding qualifications.

Some provider qualification requirements apply in all cases, such as:

- Being legally eligible to work in the United States,
- Being at least 18 years of age, and
- Passing a background check.

Other local, state and federal rules may apply to qualifications of independent providers.



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1.25 How to access the rules

How to access the rules

The Oregon DHS I/DD website provides access to Oregon Administrative Rules (OARs) and other guidelines that relate to providers and their qualifications.

The website may be accessed directly or by searching “Oregon DHS DD”.

Some useful links are located the DHS I/DD page:

- Licensing
- Tools and other Resources
- Tools for Providers
- Tools for staff



For more information on OARs select the Resources tab.

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1.26 Qualified providers in your area

Qualified providers in your area

- Familiarize yourself with how your organization keeps track of which licensed or certified providers are qualified in your area.
- There is a registry where a person can get connected with PSWs. Be able to help someone access this resource.
- Know where to find information and who you can ask for help.



For more information select the Resources tab.

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SC/PA 107: Introduction to Person Centered Practices

1. Unit 1-A (1 of 3) SCPA Service Planning 4 - Intro to Person Centered Practices

1.1 Introduction to Person Centered Practices



Notes:

1.2 In this course...

In this course...

- Introduction to person centered practices, thinking, and planning



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1.4 At your organization



At your organization

- Talk with your supervisor and/or training team to ensure that you understand your responsibilities regarding providing services using person centered practices.
- Complete all required and necessary training as directed by your organization.
- Know who to talk to if you need assistance.

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1.5 Dignity and respect

Dignity and respect

Planning involves collecting some very personal and often private information about a person.

- Recognizing the dignity of the person and her family is paramount.
- Demonstrate respect throughout all interactions with the person and family.



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1.6 What are person centered practices?

What are person centered practices?



Person centered practices keep the **person** in the focus of all planning and supports.

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1.7 What are person centered practices?

Person centered practices are evidence based and have been shown to help make significant positive changes in people's:

social networks,

contact with family and friends,

engagement in their local community, and

chances to make decisions about their lives.



Find more information on person centered thinking and planning in practice in the Resource folder.

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1.8 Video – What does “person centered” mean and why is it important?



Michael Smull and Helen Sanderson are leaders in the development and use of person centered practices. In this video, they discuss what “person centered” means, what person centered planning is, and why it is important.

To read a transcription of this video select the Transcripts tab.

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Notes:

HELEN: Michael, why is Person-Centered Planning important?

MICHAEL: If people are to have the lives that they want. If, when we're talking about people who are at risk of losing control - or have lost control - of their lives... if they're to have the lives they want, then they have to have something that says, "Here's what's important to me. Here's how I want to be supported. Here's how I want to live." And, that's what a Person-Centered Plan does. It provides a description of what's important to the person, how they want to live, and describes actions so that they get the life that they want.

1.9 Video – what is the difference between person centered thinking and planning?



Michael Smull and Helen Sanderson explain the differences between person centered approaches, thinking, and planning, as well as how skills are built upon to affect change in a person's life.

To read a transcription of this video select the Transcripts tab.

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Notes:

HELEN: I think people often get confused by all the terms that have "Person-Centered" at the beginning, and it'd be really good if we could just run through a few of those, and get some definitions. So, let's start with "Person-Centered Approaches", "Person-Centered Thinking", and "Person-Centered Planning". How do you define those when people ask you?

MICHAEL: Something...All of them have Person-Centered at the beginning and it truly is just a normal use of language. It means the person's at the center of the effort. It's not the system that's the center of the effort. It's not the program. It's not the agency. It's the person. So, an approach that has people at the center, uh, would be person-centered. And, any approach that would be used might be a strategy; might be a policy; might be a practice. Um, but a person-centered approach is not a plan. Person-Centered Thinking, on the other hand, refers to a set of tools where you've taken approaches, you've taken ways of doing the work, you've taken the planning and you've broken them down into pieces so that you have discrete tools that can be used to support a person.

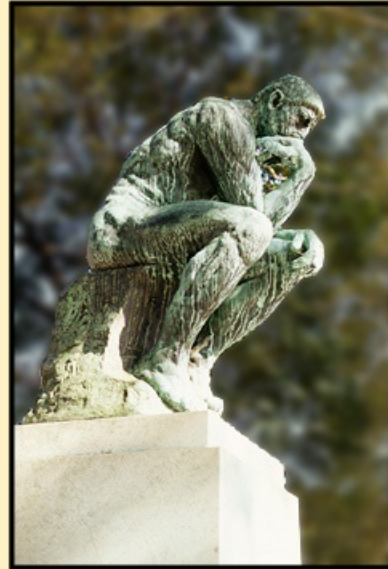
1.10 What is person centered thinking?

What is person centered thinking?

Person centered thinking underlies all person centered practices, including planning.

Person centered thinking is a set of values, skills and tools, used to:

- Gather a deeper understanding of people.
- Organize and use what is gathered to help people live the lives they value.



Person Centered Thinking includes person centered concepts, principles and materials used with permission from The Learning Community for Person Centered Practices. Find out more at www.learningcommunity.us.

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1.11 Where did person centered thinking

Where did person centered thinking come from?



Person centered thinking was developed by a group of people practicing Essential Lifestyle Planning (ELP), now known as *the Learning Community for Person Centered Practices*.

Their goal was to develop skills and tools to drive planning that results in real changes in people's lives.

Find more information about the [Learning Community for Person Centered Practices](#) and person centered thinking skills and tools in the Resource folder.

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1.12 Person centered thinking leads to changes in people's lives

Person centered thinking leads to changes in people's lives

Using person centered thinking skills ultimately results in people with:

- **Positive control** over the life they desire and find satisfying.
- Recognition and a sense of **value for their contributions** (current and potential) to their communities.
- Support from a variety of **relationships from people who are paid and unpaid**, within their community.



Person Centered Skills includes person centered concepts, principles and materials used with permission from The Learning Community for Person Centered Practices. Find out more at www.learningcommunity.us.

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1.13 Person centered thinking skills

Person centered thinking skills reflect values we embrace in Oregon



Person centered skills reflect and reinforce values that:

- Help support a person rather than try to “fix” him.
- Build a culture of learning, partnership, and accountability.
- Affirm the belief that with the right supports, everyone can learn.

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1.14 Using person thinking skills to gather information

Using person centered thinking skills to gather information

Gather meaningful details from the person's perspective about:

What is important to have or not to have in his life, including clues to why something may be important.

How best to support him, including preferences and support needs.

Relationships in his life.

How he communicates.



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1.15 Information

Information from others' perspectives



Information from people who know and care about the person can also be helpful in discovering more about his perspective.

Always respect the person's privacy—if you need to share private information about him, get permission first and document how the permission was given.

There is more information on privacy and preventing breaches of confidentiality in another module.

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1.16 Video – Person centered information leads to planning



Michael Smull and Helen Sanderson describe how person centered descriptions lead to planning.

To read a transcription of this video select the Transcripts tab.

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Notes:

MICHAEL: A person-centered description is a piece of a Person-Centered Plan. And, a great deal of the work that we're doing now, we're helping people get started by saying, "Let's work together," or "Let me show you how to work so that you can describe how you want to live, what's important to you, what does 'best support' look like, what are other people really like and admire about you." And that would be a person-centered description. It's not a plan until it has actions associated with it.

1.17 Different methods to plan using person centered practices

Different methods to plan using person centered practices

There are various methods of person centered planning that trained facilitators can use to develop plans with people.



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1.18 Video – various planning styles



Michael Smull and Helen Sanderson describe several different ways to plan with people using person centered practices.

To read a transcription of this video select the Transcripts tab.

Find more information on various person centered planning methods in the Resource folder.

%crpage%

Notes:

HELEN: And there are different styles of Person-Centered Planning, now, aren't there? Say a bit about the different styles, and where they are useful and powerful.

MICHAEL: Each different style is powerful. Each different style of planning has a different power. And if you look at the main styles that are used, you would start with PATH. PATH is a remarkably powerful way of defining a destination, saying, "Here's how I want to live at some point in the future," and, "Here's how we can mobilize people so that we can take the steps necessary to get there." MAPS, on the other hand, is really about how do I mobilize the circle that's around me? And that circle would be a group of committed people who are willing to walk with me and be with me, and typically are mostly not paid. And MAPS is a way to mobilize that group and keep them mobilized, and keep them committed, and to be able to, again, look at a desirable future. Both of those planning formats assume that there's a committed group of people...that there's a committed group of people who are willing to walk with you; be with you. And part of the process is to mobilize and commit those people, and their work. Essential Lifestyle Planning - which is a third way of doing it - assumes that there are people who are knowledgeable, who know the person, but doesn't assume that there's a committed group of people around the person. It says, "If we can gather the information that tells us what's important to you, and how to best support you, then, we can make it happen." Essential Lifestyle Planning was really designed to be done inside systems, as well as outside. PATH and MAPS were designed to be done on edges of systems where you could find those committed groups of people.

1.19 Using person centered thinking skills in person centered planning

Using person centered thinking skills in person centered planning



Use person centered thinking skills to gather information about the person and what is currently happening in her life.

Then, use that information to identify what should stay the same and what needs to change.

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1.20 Using person centered thinking skills in person centered planning

Using person centered thinking skills in person centered planning



Find out what is working and not working in her life, from the person and others' perspectives.

Facilitate problem solving.

Guide the development of short and long term desired outcomes.

Clarify roles in taking action.

Record learning and document for accountability.

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3. Important to/Important for

3.1 What makes you “tick?”

What makes you “tick?”

Everyone has “things” they like.

- Just because a person likes something, it doesn’t automatically mean that it **defines her**.
- It is up to you, as information gatherer, to dig deeper to find the things that are important to a person—the things that make her “tick”.



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3.2 Core concepts

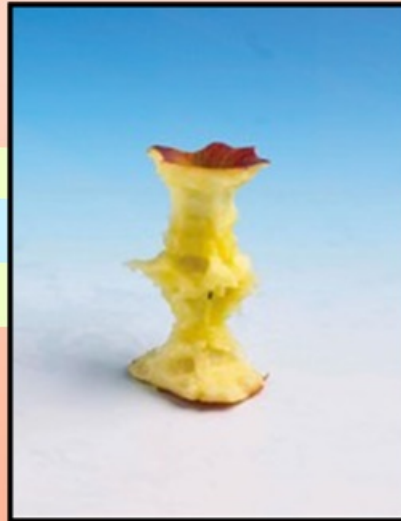
Core concepts in person centered thinking

The core concepts in person centered thinking are:

What is **important to** a person;

What is **important for** a person; and

Seeking the **balance** between them.



This slide includes person centered concepts, principles and materials used with permission from The Learning Community for Person Centered Practices. Find out more at www.learningcommunity.us.

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3.3 What is important *TO* a person

What is important **TO** a person



What is important to a person includes those things in life which help a person be satisfied, content, comforted, fulfilled, and happy.

People to be with/relationships

Status and control

Things to do and places to go

Rituals or routines

Rhythm or pace of life

Things to have

Important To includes person centered concepts, principles and materials used with permission from The Learning Community for Person Centered Practices. Find out more at www.learningcommunity.us.

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3.4 Video – What is important to Adam



Adam talks about what is important to him: his tattoos commemorating his mother, some close friends, and favorite hobbies.

Select the Resources tab to read Adam's one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

ADAM: Um, well, this one was for my mother. Um, she died of this month. Actually, on this date right now. I'd forgot about that. Ha. It's so weird. And, um, I got it for her. So, I know when her Birthday is and when her passing is, now. So, that's why me and my sister are meeting up together, tonight, to celebrate it our way. And this one, an old family friend - fair warning - this man taught me how to eat. You don't mess with a man and his Home Town Buffet, or anything. When I found out he died, man, I was really angry. I went to go see him; to his memorial service was cool. Then, one of my house staff took me to this shop his friend had, and they hooked me up. Not bad. Um, my other one right here is Laura Croft, my favorite video game. And, uh, I got one on my chest that's, uh, it's a cool dragon. Funny thing, though, I got a dragon done by a dude named Dragon. Seriously, his name was Dragon. It's like, uh, I don't know. How was I supposed to know? And this one is gonna be, like, a half angel - well, it's technically halfway there - half angel, half devil, but...needs some more work. She's almost done. Just finish printing, I'll be happy. [laughs]

3.5 What is important FOR a person:

What is important FOR a person: health and safety



- Prevention and treatment of illness or other medical conditions
- Promotion of wellness (e.g.: diet, exercise)
- Physical and emotional health and freedom from fear
- The person's environmental needs for safety
- Protection for the person and others
- Being a valued and contributing member of a community

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3.6 What is important *FOR* a person:

What is important *FOR* a person:

Being valued

What is important for a person also includes things that others see as necessary to help the person:

- Be valued.
- Be a contributing member of their community.



Important For includes person centered concepts, principles and materials used with permission from The Learning Community for Person Centered Practices. Find out more at www.learningcommunity.us.

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3.7 Helping a person be a valued member of her community

Helping a person be a valued member of her community

Imagine that you provide case management services to Jessica, whom you are meeting at a café. She has let you know that she is going to a job interview right after your visit, and she mentions that she is wearing her lucky shirt. You notice that her shirt looks very old and there is a stain on it.



Which would you do? (select one)

Say something to her
about her shirt

Just wish her good luck
on her interview

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Helping a person be a valued member of her community



Even though it is Jessica's choice to make the decision on what to wear, it is important for her to appear clean when she attends her interview.

How you approach her will depend on several factors including her preferences as well as your relationship with her.

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Helping a person be a valued member of her community

Imagine that you provide case management services to Jessica, whom you are meeting at a café. She has let you know that she is going to a job interview right after your visit, and she mentions that she is wearing her lucky shirt. You notice that her shirt looks very old and there is a stain on it.



Which would you do? (select one)

Say something to her
about her shirt

Just wish her good luck
on her interview

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3.8 Untitled Slide

Important to and important
for influence each other



A person doesn't do anything that is important **for** her willingly unless a piece of it is important **to** her.

For example, a person may not want to take a medication, but she will if it helps her feel well enough to go out with her friends.

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3.9 Important TO and FOR are connected

Important TO and FOR are connected

**“I exercise four times a week,
because...”**

I want to keep trim and feel good.

I would like to meet other people who
are getting healthy.

I might be able to avoid having to take
medications I would have to take if I
were less healthy.

I hope to live long enough to see my
grandchildren grow up.



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3.10 Important TO and FOR are connected

Important TO and FOR are connected

"I take my medicine, because..."

I want to stay out of the hospital.

I need to be able to focus on my work.

If I have seizures, I won't be able to drive.

It helps me feel well.



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3.11 Important TO and FOR are connected

Important TO and FOR are connected

**"I take a shower every day,
because..."**

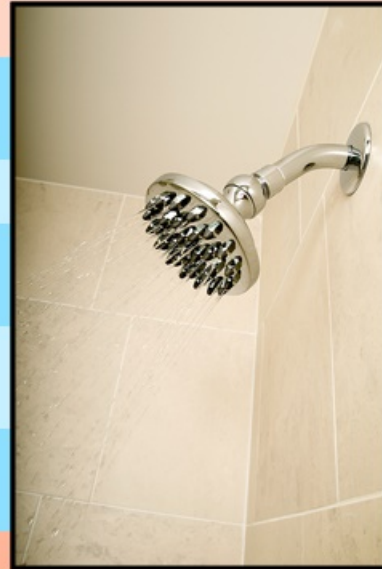
I like looking and smelling nice at work.

I want to feel good about myself.

I don't want other people to avoid me.

I would like to be attractive to my partner.

I don't want my skin condition to flare up.



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3.12 *Life is always changing,*

Life is always changing, striving for balance involves tradeoffs



A primary goal of person centered thinking and planning is to help a person strive toward **balance** between what is important to him and for him.

Balance is dynamic and always involves tradeoffs:

- Among the things that are important **to** a person.
- Between what is important **to** and **for** a person.

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3.16 Making tradeoffs between things that are important to a person

In striving for balance, we make tradeoffs between different things that are important to us.

Click on the examples:



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ork.

Opting to record your favorite show and watch it later while you go to a concert with your friends that night.

Sacrificing the late night snacks to lose weight and look sharp for a friend's wedding.

Packing a lunch instead of buying it while saving for a tattoo.



The collage consists of four rectangular images arranged in a 2x2 grid. The top-left image shows a dense traffic jam on a multi-lane highway. The top-right image shows a man in a white shirt and black vest adjusting a black bow tie. The bottom-left image is a close-up of a black TV remote control with various buttons like 'PLAY', 'STOP', and 'REW'. The bottom-right image shows a person's arm with a large, dark, tribal-style tattoo.

3.17 Video - Ted and Pam



Ted and Pam discuss prioritizing their home improvements, and how they are opting for less nights out in order to afford the repairs and save for vacations.

This shows how their dreams of having a nice home and taking trips (important to) are driving their budgeting (important for) as they make informed choices about how they want to live.

Select the Resources tab to read Pam and Ted's one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

PAM: Ok, how we save up the money is our paycheck. We um, each much money he get, he give me how much money to save up on the house, on our trip, and do what we wanna do. And we put that money away in an envelope; in a saving box. In the saving box, that's not the money to touch on what we want to. The money we make for the house, it's doing every stuff we want to do to the house. The money we make - half of the money - we go on trips what we wanna do. To do that, what we wanna go Hawaii, or go other different places what we wanna do.

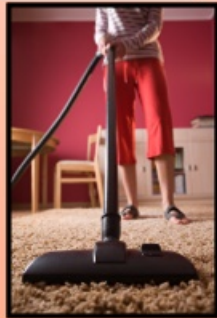
TED: Like this month, we're gonna get the washer fixed. Then, we'll take money out of my paycheck to do it.

3.18 Making tradeoffs between what is important to and for a person

In striving for balance, we also make tradeoffs between what is important **to** us and what is important **for** us. These tradeoffs can be temporary or long term solutions.



Someone may choose to quit smoking (important for) because he doesn't want his children to grow up and smoke (important to).



A person who hates cleaning may decide to do it (important for) if his girlfriend (important to) is coming over.

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3.19 What is important to Connall is connected to what is important for him

What is important to Connall is connected to what is important for him



Connall works in the Timbers' locker room.

- In general, Connall doesn't like to clean.
- This illustrates the connection between what is important to him (his love for the Timbers) and what is important for him (having a job).
- Connall is making a tradeoff as the perks of being around the Timbers outweighs what he doesn't enjoy (cleaning).

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Notes:

3.20 Your role is seeking to understand the person's perspective

Your role is seeking to understand the person's perspective

When a person doesn't want to do something that may be important *for* him, such as taking medicine, saving money, or socializing, your role is to learn why.

Consider:

- What barriers may exist for the person?
- Is this issue really important for his well-being?
- Can other people in his life help you understand his perspective?



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3.21 Video – understanding Cainan’s perspective on changing schools



Cainan no longer wanted to continue going to his school—instead, he wanted to attend the same school as his brother. Here, Cainan talks about why he wanted to change schools, and he and his mom describe what they did to advocate for Cainan to be able to achieve this. Cainan’s mother explains how this was important in both short and long term planning for Cainan’s future.

Select the Resources tab to read Cainan’s one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

CAINAN: It’s a nice school because there’s no bussing, and it’s really close to our house. And, if there’s nice weather, we can go to school early, and we can walk there. We can walk to school.

MOM: So, you used to ride the bus for quite a long time?

CAINAN: Yes. Yes, for three years. Three years. And it was very, very far. It was a long bus ride.

INTERVIEWER: Took a lot of time?

CAINAN: Yes.

BROTHER: Which school?

CAINAN: Kennedy

INTERVIEWER: So, now you like, you like the shorter time?

CAINAN: Yes. Um, it’s actually a lot different from Kennedy. Just a lot...

MOM: We had a talk a couple of years ago.

CAINAN: Yeah, yeah.

MOM: Uh, when he was at Kennedy, he was at a site-based class - self-contained classroom for kids who, um,

receive special education - and I came home with him from Partners in Policy Making after the first weekend and asked him - since he was gonna be transitioning the next year into a class for third through sixth graders - if that was something he wanted to continue to be in a class with other kids third through sixth grade that um experience disabilities, or if he wanted to be in a class with kids his own age only that may or may not have disabilities. And, um, he was very clear - immediately - that he wanted to be in a class with kids his own age, at the same school his brother went to.

CAINAN: Mmhmm.

MOM: And that's when we started advocating for that.

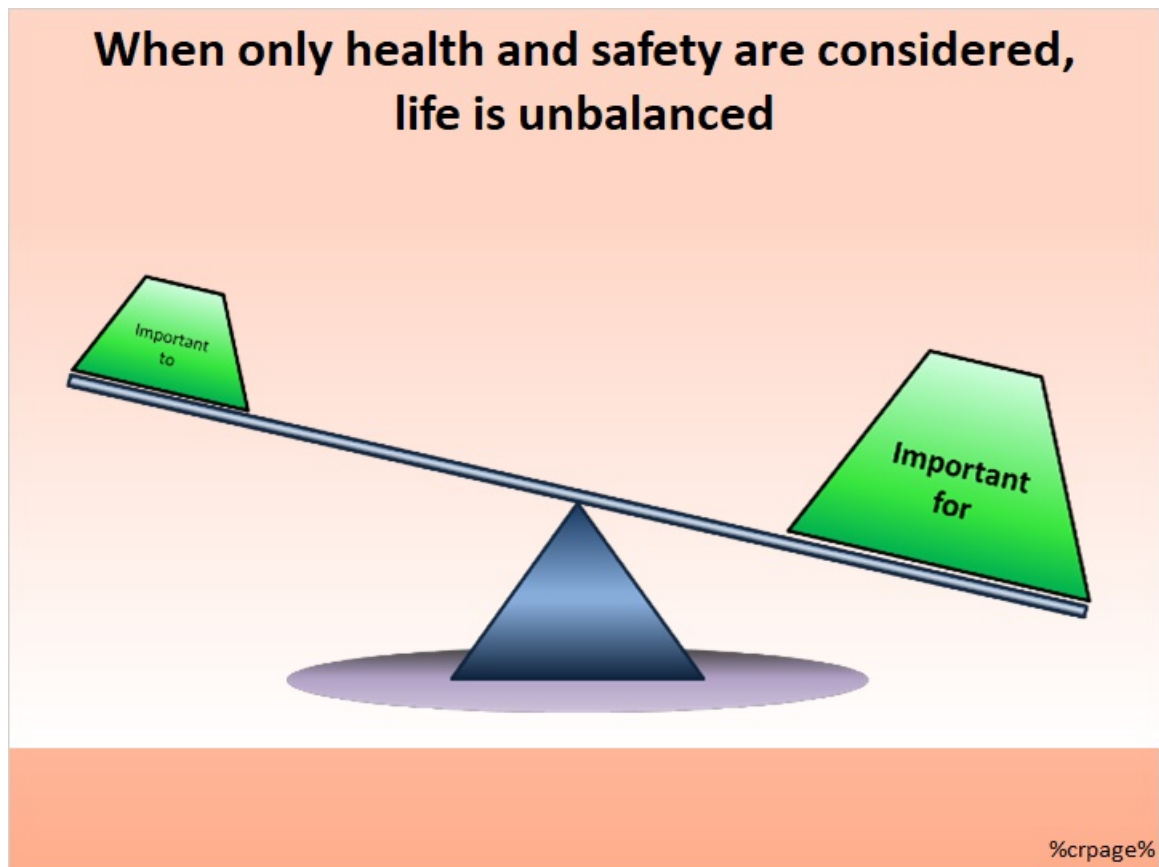
CAINAN: Yeah, yeah.

MOM: And last year was his first year in our home school, in a generalized setting...

CAINAN: Yeah.

INTERVIEWER: That's awesome.

3.22 When only health and safety are considered, life is unbalanced



3.23 Out of balance:

Out of balance: being safe only goes so far



This can be described as
“alive but miserable.”

Regulations typically revolve around assurances of health and safety, or what is important *for* a person.

- While these issues are critical, a person who is healthy and safe but does not have access to what is most important *to* him isn't happy.
- Focusing only on a person's health and safety can result in the person engaging in behaviors that are considered “challenging” – and often unsafe.

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3.24 Videos – What is important to Brett



Brett is a man to whom making his own decisions, being treated like an adult, and living in his own apartment are very important. Brett has diabetes.

Select the Resources tab to read Brett's one page profile.


To read a transcription of this video select the Transcripts tab.

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Notes:

BRETT: Then I would say, "Well, why'd you make that choice for me when you didn't come to me, and tell me about it?" Ya know, that's just...ya know, I don't like...I don't like that, ya know. I have to make my own choices. And, you come to me, and then I'll make that choice.

3.25 Videos – What is important to Brett



Brett Miller

00:00 / 01:02

Brett talks about his health and describes being in the hospital after having a diabetic seizure.

*Select the Resources tab to read Brett's one page profile.
To read a transcription of this video select the Transcripts tab.*

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Notes:

BRETT: Well, I gotta stay healthy by eating vegetables and exercise, and ya gotta stay fit, ya know, don't eat greasy foods. Stuff like that.

INTERVIEWER: Do you have a diet that you're on? Or, is that just something that you...

BRETT: No, I'm not on any diet. I don't stand...I don't like diets *laughing*

INTERVIEWER: So, sometimes we have those things that are not good for us...

BRETT: Yeah, some of the things.

INTERVIEWER: What else about health is it that's important to you?

BRETT: Oh, I take my meds every morning; every afternoon. You know, 'cause I have seizures and stuff. I had one last year. Had to go to the hospital, and everything else, and broke my collar bone. Oh yeah, that was no fun. Ya know, I had to stay in the hospital. The nurse kept buggin' me, "Did ya go to the bathroom yet?" *laughing* "No."

3.26 Consider: If health and safety

Consider: If health and safety dictate Brett's life...

Conflict emerges when Brett's support providers:

- Tell him what to eat (Brett's perspective).
- Make a diet plan for him that he "just doesn't stick to" (others' perspective).



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3.27 Consider: If health and safety

Consider: If health and safety dictate Brett's life...

Focusing only on what is important *for* Brett without regard to what is important *to* him can result in:

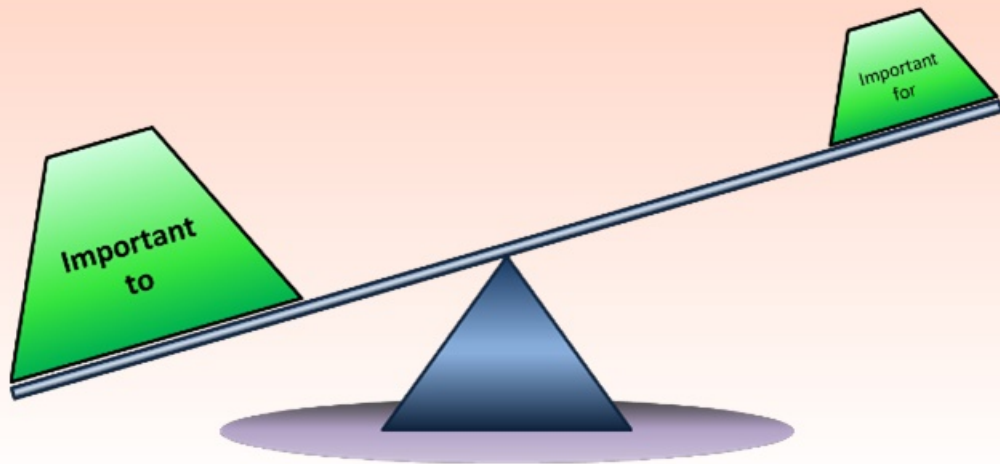
- Brett and supporters' relationship deteriorating, and Brett declining supports he needs.
- The need for additional supports, or Brett no longer being able to live on his own because of his health.



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3.28 When it's all choice, no responsibility,

**When it's all choice, no responsibility,
life is unbalanced**



%crpage%

3.29 Out of balance:

Choice without responsibility poses unreasonable risk.



- Sometimes, person centered practices are mistakenly interpreted as a person choosing whatever she wants without regard for her health and safety.
- Being person centered involves helping a person make informed choices.

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3.30 Consider: If Brett's supports focus on all choice, no responsibility

Consider: If Brett's supports focus on all choice, no responsibility

If the people who support Brett **only** focus on what is important to him, it could ultimately endanger his health and impact him in the long run.

If Brett regularly eats unhealthy foods:

- His diabetes will worsen, and he will need more support for daily activities.
- He could end up in the hospital or even in a nursing care setting, unable to live on his own.



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3.31 Focusing on all choice can

Focusing on all choice can jeopardize Brett's future

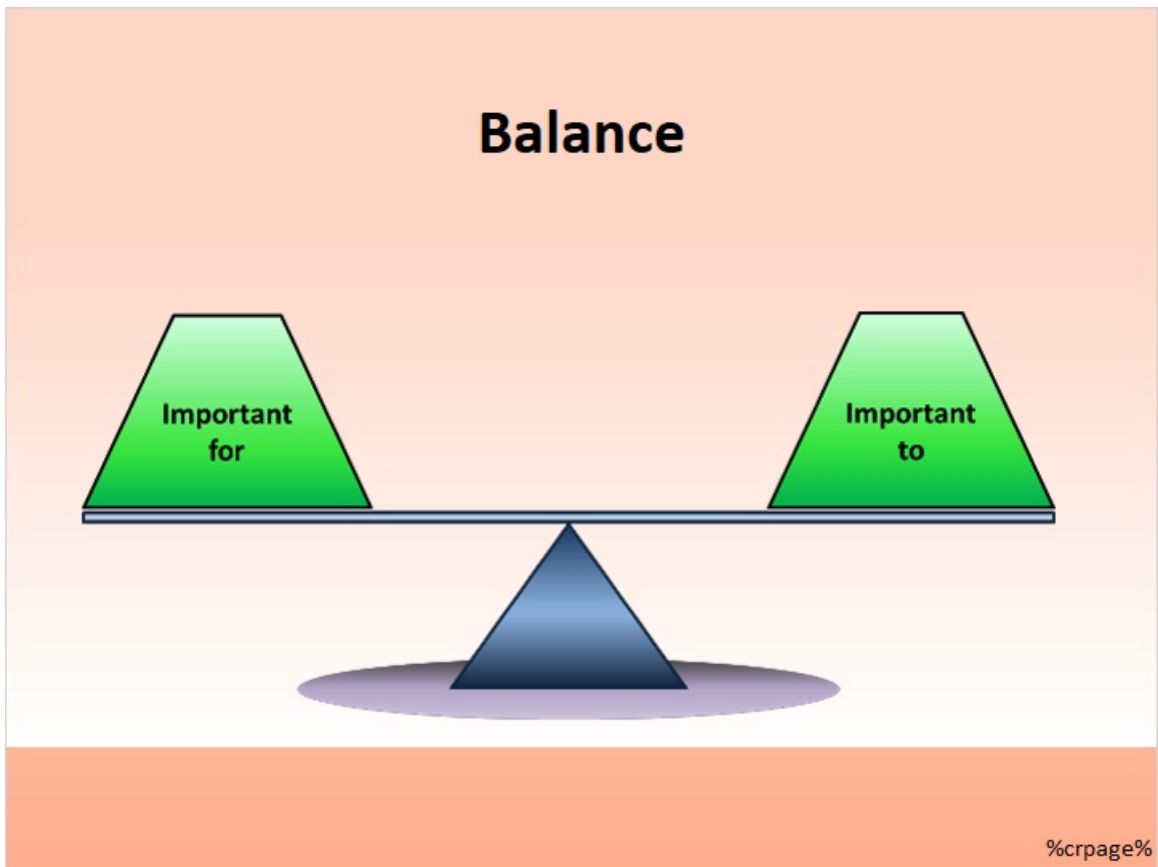


By saying “it’s your choice to eat whatever you want,” supporters may think they are honoring Brett’s choices, but in fact are they are ignoring the larger picture.

This compromises those other things which are also important to him, such as being independent and living on his own.

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3.32 Balance



3.34 Striving for balance within the context of a person's life

Striving for balance within the context of a person's life

All people struggle with how to find the balance between what is important to them and what is important for them.

- Your role is to help the person find the balance that works within the context of his life.
- Consider what is important to the person, and how it can be accomplished while also paying attention to issues of health and safety.



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3.35 Striving for balance

Striving for balance leads to positive control



Striving for balance between what is important **TO** and important **FOR** someone can help the person have more **positive control** over his life.

This can ultimately lead to a better life.

Striving for balance includes person centered concepts, principles and materials used with permission from The Learning Community for Person Centered Practices. Find out more at www.learningcommunity.us.

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3.36 Video – Adam receives support to budget for tattoos that commemorate family



Adam talks about saving his money for additional tattoos, and what is *important* to him in the process. This illustrates how what is *important* to him (want more tattoos, remembering his mother) can be balanced with what is important for him (supports to save money, which is something he doesn't really enjoy but puts up with in order to get what he wants), and how those supports are set up.

Select the Resources tab to read Adam's one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

ADAM: Well, I would wait until I got my paycheck. Then, see how much, well, I'd go in and see how much my tattoos would be, usually, which isn't bad. Um, you pick out which artist you want, too, more in my book...to me. 'Cause like, there's two I already trust at PussyCat tattoo, I trust them. There's another one at Jade Sword I trust, but don't know. The one I wanted to get for this one is out of town right now, she's in Ireland tattooing. Lucky little sucker. I want to be in Ireland! *vocalization* But luckily I was able to get my other artist who did this one, Eric, for this guy which worked out perfect. And um, when I get my check, we go in to see how much the tattoo is. I see how much I need to put aside for it. But it's kinda nice. But, sometimes when you gotta save on your own, that money gets blown easy on other things. My house manager does it. I'll do the I'll do the research more on the pricing. And she'll do the, um, budgeting. Whatever, you know what I want to do also is save some money, like, shoot, \$300 or even \$500 bucks. Go out to a shop where they sell my "Magic: The Gathering" cards, and buy like a whole box of boosters, man. \$400 bucks each. Not bad, but going to sell outta trade stock, but it's, but if I need to, I'll just buy 'em separately - singly - for \$3 bucks, easy.

3.37 Gather information

Gather information to help strive toward balance

Collect quality information about both what is **important to** and **important for** someone.

- It may be easier to gather health and supports information about a person, simply because you may have better access to others who know that type of information best.
- In order to have a good balance, quality information is needed on **both** sides.



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3.38 Finding conflicting information

Finding conflicting information



Sometimes, you will find conflicting information about a person.

This may make it challenging to help the person strive toward balance between what is important to her and what is important for her.

Your role is to exercise judgment in those instances.

Know who you can go to for help if needed.

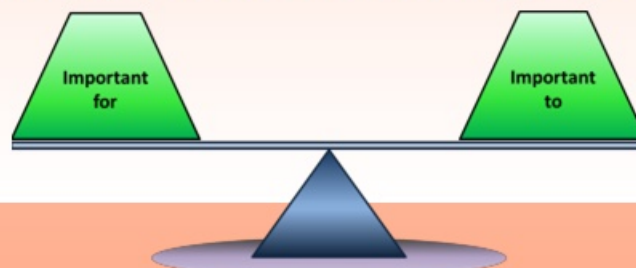
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3.39 Person centered supports are responsive to the person's life

Person centered supports are responsive to the person's life

Person centered supports reflect a balance between what is important to and important for a person, given what is happening in the person's life.

- A person may have great insight into her own needs—make sure you ask her.
- Services and supports should be flexible and responsive to the person's needs and preferences.
- Changes in supports should occur as the person's life dictates.



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SC/PA 108: Seeking the Perspective of the Person

1. Unit 1-B (2 of 3) SCPA Service Planning 2 - The person's perspective

1.1 Seeking the Person's Perspective

Seeking the Person's Perspective

Tier 1: Must be completed within 30 days of start date
and before working unassisted

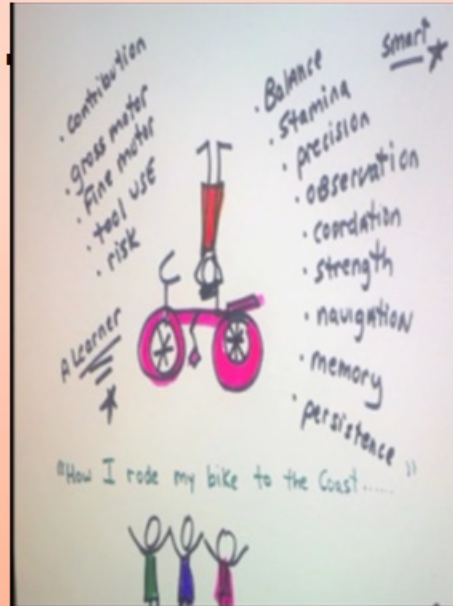
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Notes:

1.2 In this course...

In this course.

- Using person centered practices to gather meaningful information about a person, and identify what's happening in a person's life



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1.3 At your organization



At your organization

- Talk with your supervisor and/or training team to ensure that you understand your responsibilities regarding providing services using person centered practices.
- Complete all required and necessary training as directed by your organization.
- Know who to talk to if you need assistance.

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1.4 Seeking the person's perspective

Seeking the person's perspective

Person centered practices keep the **person** in the focus of all planning and supports.



Seek the person's perspective and ensure that it is used in planning.

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1.5 Gather information and use it in planning with the person

Gather information and use it in planning with the person



- ✓ Gather information about the person's choices and preferences.
- ✓ Ensure that it is recorded and used in the planning for the person's supports.

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1.6 Take the time to get to know the person

Take the time to get to know the person



The first step in **gathering person centered information** is taking the time to get to know the person.

Use your professional judgment. It takes time to get a feel for...

- how and when to ask questions.
- when you should ask things in a different way.

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1.7 Time spent now will help in the future

Time spent now will help in the future



Taking this time to get to know the person will help you be more efficient down the road, so you will be able to provide better services.

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1.8 Getting started in gathering person centered information

Getting started in gathering person centered information

Engaging people in friendly conversation is an easy way to get started gathering person centered information. Like everything else, there is a skill to it.



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1.9 Open-ended questions

Open-ended questions



Ask **open-ended questions**, or questions that require more than one word answers and encourage people to communicate.

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1.10 Open-ended questions

Open-ended questions



Let's say you are getting to know Andrea. If you want to know details from her perspective, ask questions that will encourage her to tell you more, such as:

- “What do you like to do for fun?”
- “What places do you like to go to?”
- “How did you get your job?”

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1.11 Avoid closed-ended questions

Avoid closed-ended questions



Avoid asking questions that are **closed-ended**, or require only one-word replies.

Closed-ended questions usually provide inadequate answers, and can bring a conversation to a screeching halt.

Examples of closed-ended questions include:

- "Do you live with your mom?"
- "Did you go to work today?"
- "Is bowling your favorite activity?"

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1.12 How to encourage a person to open up

How to encourage a person to open up

If the person is reluctant to talk more openly about a topic, one technique you can try is:

- Ask a more narrow question first.
- Then, make the questions broader *after* getting the person engaged in the conversation.



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1.13 Follow up with more questions to get more specific information

Follow up with more questions to get more specific information



Another technique you can use to help you get more specific, in-depth information is to ask a closed-ended question followed up with "Why?" or "How?"

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1.14 Use an open-ended question or request to broaden a conversation

Use an open-ended question or request to broaden a conversation

Here is an example of a strategy for sparking more conversation:

- You: "Do you like where you live?" (starting narrow)
- The person: "Yes."
- You: "Tell me some things you like about where you live."



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1.15 Follow up to get

Follow up to get more specific information

(Click on each image.)

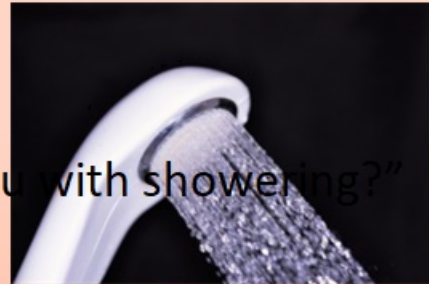
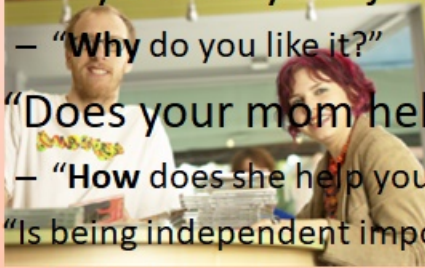


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Follow up to get more specific information

(Click on each image.)

- “Do you like your job?”
 - “**Why** do you like it?”
- “Does your mom help you with showering?”
 - “**How** does she help you?”
- “Is being independent important to you?”
 - “**Why** is it so important?”
- “Is Sue a good housemate?”
 - “**What** does she do that you like?”



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1.16 Video: Asking for detail in conversation



Earlier in conversations, Tim mentioned that being independent was important to him. In this video, he is asked to give some more details about this topic. Tim answers the question “what does being independent mean to you?”

Select the Resources tab to read Tim’s one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

INTERVIEWER: Can you tell me what your definition or what does it mean to you to be independent?

TIM: To have freedom, to have say and to have faith in knowing that I can be my, my own self in my own person and my body.

1.17 Video Reflection

Video Reflection



Asking Tim for his definition of independence gave us some insight on other things that might be important to him, as well as some of his strengths and talents. For example, we know that he is an eloquent speaker.

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1.18 Video Reflection

Video Reflection



There are many ways a person can choose to describe the concept of independence. Consider **why** Tim might choose to define independence as “freedom,” “to have a say,” and “faith in knowing that I can be my own self and my own person in my body.” What else would you ask Tim?

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1.19 Using conversation to identify and record needs, strengths, and interests

Using conversation to identify and record needs, strengths, and interests

Engage in meaningful conversations to find clues about what is truly important to a person rather than what it may appear to be at the surface.



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Notes:

1.20 Using conversation to identify and record needs, strengths, and interests

Using conversation to identify and record needs, strengths, and interests



Discover a person's:

- Interests and strengths
- Needs
- Relationships
- Perspective and preferences on:
 - How supports should be delivered
 - What he wants to do and how he wants to live
 - Any issues or conflicts and how they can be resolved

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1.21 An example – engaging in conversation to find out what is most important

An example – engaging in conversation to find out what is most important

Nell says she likes living with Andrea;
Andrea says she *doesn't* like living with Nell.



When we ask Andrea to **tell us about living with Nell**, we learn:

- Nell smokes; Andrea does not.
- Andrea doesn't want to smell like smoke when she kisses her boyfriend; this is important **to** Andrea.
- Andrea has a respiratory issue; it is important **for** her to live in a smoke-free environment.

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1.22 If a person does not want to share information

If a person does not want to share information

In many cases, when a person does not want to share information about something, her choice to end that conversation should be respected.

- If it's relevant to providing supports, reflect in documentation that she did not want to share any further information about the topic.



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1.23 If a person does not want to share information

If a person does not want to share information

- Consider if the person would like to talk about something else, or if another time would be better.
- Follow up and reschedule with the person as needed.



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1.24 When it may be necessary to keep asking questions

When it may be necessary to keep asking questions



There may be situations where a person has indicated a reluctance to share information, but it may be necessary to keep asking questions.

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1.25 When it may be necessary to keep asking questions

When it may be necessary to keep asking questions



To determine if you should persist in asking the person to share information, consider:

- Is there is reason to be concerned for the person's **health, safety, or quality of her services?**
- Is the **safety of others** in question?
- Is this something you **need** to know about to do your job, or are you *simply curious*?

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1.26 Show respect for the person

Show respect for the person

The person may have deep feelings about the issue, so be cautious in how you approach it.

- Consider your relationship with the person—are you the best person to be asking this?
- Know who you can ask for help or guidance.
- Build trust with the person.



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1.27 Respecting the person

Respecting the person

- Ensure the person's privacy.
- If possible, meet in person so you are able to observe non-verbal cues, appearance, or environment.



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1.28 Environment and timing matter

Environment and timing matter



When people are stressed, worried, uncomfortable, or anxious, it can be difficult to gather good information about what is important.

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1.29 Create a comfortable environment for having a conversation

You will be able to gather better information if the person feels relaxed and you are both able to focus on the conversation.

- ✓ Find a comfortable place to talk in person, and minimize distractions.
- ✓ Consider if there is someone else with whom the person feels more comfortable, who might be able to join the conversation.



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1.30 “Meet people where they are at”

“Meet people where they are at”



You might need to meet with a person or family outside of normal work hours or at the person’s home or another location that is convenient for the person.

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1.31 “Meet people where they are at”

“Meet people where they are at”




Consider the person's perspective:

- The person may not know you well enough to discuss personal things with you.
- There may be something more urgent going on in the person's life than what you need to discuss.

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1.32 Video – Adam



Adam Young

00:00 / 02:00

Adam talks about wanting to be in charge of his ISP but also needing to have a relationship with supporters to feel comfortable.

Select the Resources tab to read Adam's one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

ADAM: Um, honestly, I wanna be the one to ask. Um, That would be the bo...the, um...I, uh...I would be that...oh gosh, what's the word? ...not county, the, um, management. Um, Aaron. And uh... See, me when it comes down to new people, I just hide. I really, honestly, when it comes down to new people, I get shy too easily. I love it. It's like, um... It's like meaning...ay... It's like, we have one staff who quit or something, and they're...when she first started, I didn't know her. So I just stayed, hid, didn't do nothin', didn't say a word. But then one day, I wanted to call my sister. So, I bring her the phone, I'm like, "I wanna...can I call my sister?" She's like, "Who's your sister?" I'm like, "Shannon." She's like, "Oh, I know Shannon!" I'm like, "Wait, how do you know Shannon?" ha. She's like, "We know each other from meetings." I'm like, like "Wait a minute." She just realized I was her younger brother, Adam. So, that's a funny thing. [laughs] It just made me laugh. Didn't think she knew my sister. At first, I'm like, "Oh, okay, she must have bumped into her a couple times. But, it happens." But, it turns out, she really knew her! It's like, cool. It's like when I...and then, like, if somebody was...somebody new was to learn more about me, they would have to read a book. ...Not very fun, ha, trust me. People are like, c...it's like, "havin' fun yet?" Nope.

1.33 Your responsibility

Your responsibility

Your core responsibilities include seeking to understand what the person wants and/or needs as well as helping make sure the person's preferences are heard *and* listened to.

This is not limited to verbal or written communication.



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1.34 Everyone communicates

Everyone communicates



There is no such thing as someone who doesn't communicate.

It's true that you may not *understand* the person's communication at first.

You are responsible to learn and use the person's preferred method of communication and any related devices or tools in order to successfully gain his perspective and plan together.

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1.35 Learn the person's communication

Learn the person's communication

Look for clues such as gestures, behavior, sounds and facial expressions.

Make an effort to learn how a person communicates, to:

- ensure the person's perspective is sought and used in planning together.
- recognize the person's dignity.



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1.36 Video – Jordan



Jordan talks about how singing helps his thoughts become more fluid so he is able to communicate better, and adds clues on how others can best give him information.

Select the Resources tab to read Jordan's one page profile.

To read a transcription of this video select the Transcripts tab.

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Notes:

JORDAN: Well, thank you, and sometimes after singing that can absolutely help smooth out the fluidity a little more.

Well and I think when there's a lot of, well I, well I think, I think when there is a lot of, kind of mind boggling questions at one time and, well and some serious talk that cannot, that cannot always, but often cause the flow to kind of, to kind of hesitate more or to take more uncomfortable brakes in between.

1.37 Ask for help gathering information

Ask for help gathering information



It is ok to engage others who know and care about the person for help gathering meaningful information about the person.

Make sure that you have documented that you have permission from the person (and guardian if applicable) before you ask others.

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1.38 Know who has decision-making authority in the person's life

Know who has decision-making authority in the person's life

Be sure you are aware of who can receive information about the person, as well as who has the authority to make decisions in the person's life.

- Keep in mind that decision-making authority may be limited in scope or broad.



There will be more information about guardianship and rights in another module.

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1.39 Sometimes there are barriers involved with what's important to a person

Sometimes there are barriers involved with what's important to a person



When what a person wants seems impossible...

- ✓ Listen to the message the person is sharing about what is important to him—don't let possible constraints or barriers stop you from gathering that information.

There will be more information on risk and choice in another module.

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1.40 Sometimes there are barriers involved with what's important to a person



- ✓ Show respect when he describes what is important to him, and validate that you heard him say what he wants—regardless of your opinion on the matter.
- ✓ Consider: “Whose barrier is it?” Is the barrier that *others* are having trouble imagining something for the person?

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1.41 Some barriers can be more significant and require additional consideration

Some barriers can be more significant and require additional consideration

Examples include:

When what the person's guardian wants conflicts with what he wants

When what the person wants is unsafe for him or others

When what the person wants involves illegal activity



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1.42 Conflicting perspectives can give additional clues to what is important

Conflicting perspectives can give additional clues to what is important

For example:

Emma wants to live by herself, but her guardian disagrees.

What clues can be gathered about what is important?

(Click on the images)



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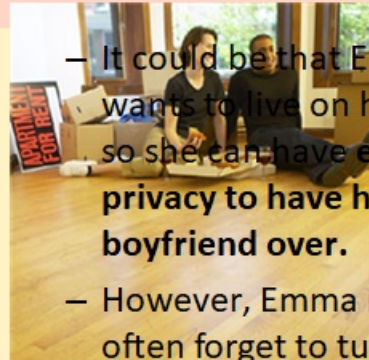
Conflicting perspectives can give additional clues to what is important

For example:

Emma wants to live by herself, but her guardian disagrees.

What clues can be gathered about what is important?

(Click on the images)



– It could be that Emma wants to live on her own so she can have enough privacy to have her boyfriend over.

– However, Emma may often forget to turn the



stove off and her guardian is worried that she will be in danger if she lives alone.

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1.43 Continuing the conversation

Continuing the conversation

By continuing the conversation and recording people's perspectives, we can gather insight into what is important to Emma, as well as begin to problem solve to find better ways to support her.



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1.44 Consider the perspectives of all involved

Consider the perspectives of all involved



When working with children, families, or anyone who has a guardian or legal or designated representative, it is important to listen to and record the perspectives of all involved.

Their input can give a holistic view of what is important in the person's life now and in the future.

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1.45 Record the person's perspective, even if others disagree with it

Record the person's perspective, even if others disagree with it

Record the person's perspective even if there are things present in his life that keep him from getting what is important to him.

Document what is important to the person in his own words whenever possible.



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1.46 Barriers and perspective

Barriers and perspective

Describe barriers that need to be addressed once you have recorded the person's perspective.

Specify others' perspectives when needed.



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1.47 When recording others' perspectives

When recording others' perspectives

Preserve the person's perspective even when others' views conflict.



- Avoid using first person language when you record other people's thoughts about what is important to a person.
- Reflect whose perspective is being recorded.

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1.48 Next, focus on what is positive and possible

Next, focus on what is positive and possible

- ✓ When planning with a person, focus on what is positive and possible about those things that are important to him.
- ✓ Look for small steps that can be taken towards the person's dream.
- ✓ Plan the next step with the person: identify others' role in supporting that action.



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1.49 Use the person's perspective in planning

Use the person's perspective in planning



It is not your role to make decisions for the person or sway anyone to make a decision you personally feel is right.

However, it is your role to use the person's perspective in planning.

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1.50 Use the person's perspective in planning

Use the person's perspective in planning

At times you will need to help the person communicate his choices and perspective to others.



- ✓ Use your professional judgment in determining when and how to speak up.
- ✓ Provide resources to help the person learn to advocate for himself.

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SC/PA 109: Conflict of Interest

1. SCPA - Conflict of Interest

1.1 Service Planning

A presentation slide with an orange background. The title "Conflict of Interest" is centered in a large, bold, dark brown font. Below the title, the text "Tier 1: Must be completed within 30 days of start date and before working unassisted" is displayed in a smaller, grey font. In the bottom right corner, the text "%crpage% of" is visible in a small, grey font.

Conflict of Interest

Tier 1: Must be completed within 30 days of start date
and before working unassisted

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Notes:

1.2 In this course

In this course...

- Conflict of interest as defined by Oregon Developmental Disabilities Services (ODDS).
- Explaining conflict of interest to others.
- Your role in addressing conflict of interest with the Individual Support Plan (ISP) team.



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1.3 At your organization




At your organization

- Talk with your supervisor and/or training team to ensure that you understand and can explain conflict of interest.
- Be able to locate, access, and understand all applicable Oregon Administrative Rules (OARs) and forms related to conflict of interest.

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1.4 Untitled Slide

A person is sitting on a bookshelf, reading a book. The bookshelf is filled with many books, and the person is wearing a light-colored shirt and dark pants. The background is slightly blurred, showing more books and a warm, indoor lighting.

Expected Reading

Read and understand the rules regarding...

- Conflict of interest
- Designated representative appointments
- Common Law Employer (also known as Employer Of Record)

1.5 Presume ability

Presume ability



Adults with intellectual/developmental disabilities (I/DD) are presumed able to direct their own care, supports, and services.

However, sometimes a person will need someone else to make decisions on his behalf.

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1.6 What is a conflict of interest?

What is a conflict of interest?

A conflict of interest exists in a situation where someone who makes decisions or acts on behalf of a person receiving services is in a position to derive **personal benefit** from those decisions or actions.



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1.7 Conflict of interest explained

Conflict of interest explained



If a decision-maker was in a position to gain personal benefit, it could undermine his impartiality, due to a possible clash between self and professional interests.

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1.8 For example

For example

Consider Steve and his mother, who obtained guardianship when he became an adult:

- If Steve's mother becomes a paid provider to him, the money can easily become depended upon.
- His mother may unintentionally diminish opportunities for Steve's independence, in order to maintain her needed monthly paycheck.



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1.9 How does conflict of interest apply to directing someone's services?

How does conflict of interest apply to directing someone's services?



Federal regulations *prohibit* someone who directs services from also being a paid caregiver or financially benefiting from the services provided to a person.

- Directing services means identifying where and by whom the services will be delivered.

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1.10 In a conflict of interest,

In a conflict of interest, a decision must be made

When a conflict of interest exists, a legal guardian of an adult who experiences I/DD must either:

designate someone else to direct the services on the person's behalf,

or

stop receiving payment for providing supports.



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1.11 What is a designated representative?

What is a designated representative?



A designated representative is a parent, family member, advocate or other person authorized by a person, or their legal guardian to determine where funded services will be delivered and by whom the services will be delivered.

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1.12 Designated representative in ISP

Designated representative in the ISP

A designated ISP representative's role is to help the person:

- select services,
- select providers, and
- direct the implementation of the plan.



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1.13 No personal gain

No personal gain



A designated representative shall not select services from which she herself financially benefits.

For example...

- She cannot require that services be provided through an organization or business that she operates.
- She also may not be a paid provider for the person.

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1.14 The ISP team's role in making decisions

The ISP team's role in making decisions

In circumstances where a person is unable to express his opinion or choice using words, behaviors, or other means of communication *and* he does not have a legal or designated representative, the **ISP team** is empowered to make a decision on behalf of the person.



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1.15 The ISP team honors the person

The ISP team honors the person



The person's preferences drive the plan and planning process.

No one member of an ISP team has the authority to make decisions for the ISP team.

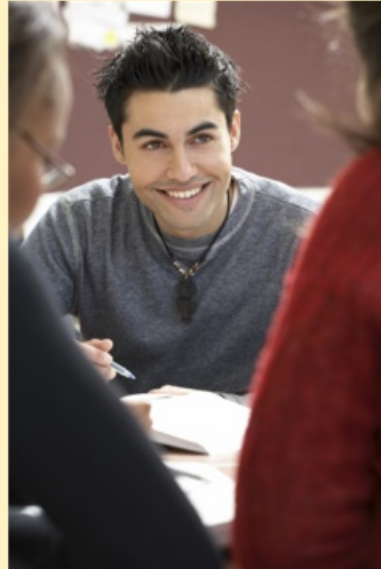
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1.16 The ISP team consensus

The ISP team consensus

When the person has no guardian or designated representative and his choice cannot be determined, consensus among ISP team members is prioritized.

- When consensus may not be reached, majority agreement is used.
- For purposes of reaching a majority agreement, a provider, family member, CDDP, or designated representative are each considered one member of the ISP team.



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1.17 Valuing and supporting families

Valuing and supporting families



Families are an important part of Oregon's service delivery system.



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1.18 Consider the family's perspective

Consider the family's perspective

It may be challenging for families to understand the rules required to follow when caring for their loved one.



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1.19 If a guardian provides services

If a guardian provides services



When a guardian provides, or proposes to provide ODDS funded supports, specific actions must be documented in writing and maintained in the person's record.

- Ask your supervisor for help if you are unsure of what to do or what needs to be documented.

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1.20 If the parent or guardian is unable to direct the planning process

If the parent or guardian is unable to direct the planning process

If the parent or guardian feels they are unable to appropriately direct the planning process, they may choose a designated representative to direct the planning process on their behalf.



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1.21 Provide resources

Provide resources

If you identify a situation in which a conflict exists, you must **provide information** to the person and the legal guardian.



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1.22 Explain the rules

Explain the rules



Help the guardian and the person understand that a conflict of interest exists, while preserving the person's supports, as well as his right to choose the provider who supports his assessed needs.

Explain requirements and provide resources to families, so they understand what they need to do.

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1.23 Assist in identifying a designated representative

Assist in identifying a designated representative

If necessary, support the person and their guardian to identify someone whom they trust has the skills and knowledge to direct the planning process appropriately.

Provide resources to assist with choosing a designated representative for the person's ISP.



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1.24 Keep in mind

Keep in mind



The appointment of a designated representative does not usurp or otherwise change the rights or responsibilities of a guardian.

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1.25 Know the rules –

Know the rules – designated representative appointments

The appointment of a designated representative must be...

In writing whenever possible.

At least for the period of the ISP year
and is revocable at any time.

Renewed annually, but a new
designated representative may be
appointed at any time by the person
or guardian.

Documented in the person's record,
which may be in lieu of a written
agreement when it is not possible to
get one.



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1.26 If an appropriate designated representative is not accessible

If an appropriate designated representative is not accessible



It is required to mitigate conflicts of interest.

Exceptions to this requirement may only be granted with prior approval from ODDS.

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1.27 Requesting an exception to mitigating a conflict of interest

Requesting an exception to mitigating a conflict of interest

A request for an exception should include demonstration of **efforts to resolve** any conflicts of interest through...

- a thorough exploration of service setting options,
- a thorough exploration of available providers,
- and an inability to locate a qualified and willing designated representative.



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1.28 Designated ISP representative's duties

Designated ISP representative's duties



The designated ISP representative will...

- Participate in ISP meetings.
- Represent the person for determination of service options and identifying qualified providers.

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1.29 Designated representative's duties – approving services provided

Common Law Employer

An individual may serve as the Employer for their PSW or they may choose to have someone else fill that role.

The Employer is also referred to as the Common Law Employer and formerly known as the Employer of Record.



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1.30 Know the rules –

Know the rules – Common Law Employer



Familiarize yourself with OARs about the roles and responsibilities of a Common Law Employer, also known as employer of record.

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1.31 Outside the scope of a designated representative's duties

Outside the scope of a designated representative's duties

A designated representative may not...

- Displace the guardian in the legal and appropriate activities of a guardian including the appointment of a designated representative.



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1.32 Guardian's role in the ISP

Guardian's role in the ISP



The guardian may participate fully as an ISP team member.

She can also contribute information for:

- The needs assessment.
- The development of the ISP.

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1.33 Guardian who provides paid supports - role in the ISP meeting

Guardian who provides paid supports - role in the ISP meeting

If the guardian provides paid supports, he or she may not:

- Override team decisions or contributions of the designated representative.
- Determine the hours of service for which he or she will be paid.
- Determine his or her own rate of pay.



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1.34 Ask for help

Ask for help



Conflicts of interest can be confusing and challenging.

Ask your supervisor for help if you are unsure of what to do, or if you have any questions.

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SC/PA 110: Reporting Serious Incidents

1.1 Serious Incidents

Serious Incidents

Tier 1: Must be completed within 30 days of start date
and before working unassisted

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Notes:

1.2 In this course...

In this course...

- Incident reporting
- Review and documentation of incident reports
- Identifying Serious Incidents
- Follow-up and recommended actions for incidents
- Review of abuse reporting



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1.3 In order to maintain our customers' health and safety...


In order to maintain our customers' health and safety please always follow the most recent policy and guidance surrounding incident reporting and Serious Incidents.

Please note that while this course is updated periodically to reflect changes in laws, rules, and policies, it is incumbent upon you to use the current and effective laws, rules, policies and procedures. Where in conflict, the applicable law, rule, policy or procedure takes precedence over information contained in this training.

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Notes:

1.4 Expected Reading

A person is sitting in a library, reading a book. They are wearing a light-colored shirt and khaki pants. The background shows bookshelves filled with books.

Expected Reading

Familiarize yourself with all rules, statutes and policies regarding abuse and reportable incidents, such as:

- Current Oregon Administrative Rules (OARs).
- Applicable Oregon Revised Statutes (ORS).
- Office of Developmental Disabilities Services (ODDS) transmittals and workers guides.

1.5 At your organization



At your organization

Talk with your supervisor and/or training team to:

- Understand your responsibilities in incident management.
- Know any additional requirements your organization may expect of you.
- Be able to locate and complete required documentation within expected timelines.
- Understand when to inform your supervisor or ODDS.

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1.6 Centralized Abuse Management System (CAM)

Centralized Abuse Management (CAM)



- ✓ Oregon uses an online system called the **Centralized Abuse Management (CAM)** system for tracking abuse and serious incidents.
- ✓ Ask your supervisor if you are unsure about your role in facilitating entry of appropriate incidents into CAM.

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1.7 You are a mandatory reporter

You are a mandatory reporter

If you think someone may have been abused or neglected, you are required to **report** it immediately.

As a Services Coordinator, Personal Agent or Case Manager, you must complete Mandatory Reporting Training.



Please see the resources section for more information on Mandatory Reporting and available training.

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Resources:

When you must report: You are a 24/7 mandatory reporter.

To whom you report: [report abuse or neglect to your County Developmental Disability Program](#)., DHS Office of Investigations, or to local law enforcement.

The law that applies: [ORS 430.735 to 430.765](#)

Notes:

1.8 Reporting abuse and neglect

Reporting abuse and neglect

You must report all suspected abuse and neglect.

To report abuse of children or adults call:

1-855-503-SAFE (7233)

Additionally when making a report regarding children you have the option of instead making your report to law enforcement OR a screener at your local child welfare office.

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1.9 What to do if you have questions

What to do if you have questions



- ✓ Talk with investigators in your county. It is up to the screener/investigator to determine if an incident rises to the level of abuse.
- ✓ Ask your supervisor if you are unsure or confused about anything related to reporting any serious incidents.
- ✓ When in doubt, report it.

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1.10 If you observe something you are concerned about...

If you observe something you are concerned about...

Document what you observe, your actions, and all follow up:

- ✓ Ask enough questions to determine if something needs to be reported.
- ✓ Avoid asking too many or leading questions, as they may influence or change the person's story.
- ✓ Use your professional judgment.



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1.11 Know the rules

Agency and Foster providers must submit a written incident report within 5 business days

- **Suspected Abuse**
- **Serious Incidents**
- **Emergency Crisis Strategies** (per TESP)
- Any use of a **Safeguarding Intervention**
- **Fire** requiring the services of a fire department



1.12 Know the rules

Independent Providers must report incidents

- Suspected Abuse
- Serious illness or Injury
- Serious Incidents
- Use of a safeguarding intervention

Independent Providers, including Personal Support Workers, may report incidents by phone, secure email, in writing or in person.



1.13 Know the rules

Incidents you must report

Incidents that you observe (either first-hand, or in documentation other than an incident report.)

Some Community Developmental Disability Programs (CDDPs) and Brokerages may track and report additional incidents. Follow your agency's policies for reporting incidents.



1.14 Your responsibilities

Your responsibilities when an incident is reported

Make sure you understand what is expected of you. Depending on where you work, your responsibilities include:



Receiving and reviewing incident reports from service providers and others.

Determining what action(s) are needed to keep the person healthy and safe and protect her rights.

Documentation of your review if it is a Serious Incident.

Mandatory reporting if abuse is suspected.

CAM entry or submission to CAM user, if it is a Serious Incident.

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1.15 Observing an unusual incident

Observing an incident



You may **observe** something:

- During a visit.
- During a conversation with someone.
- From reviewing documentation.

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1.16 Finding out about unusual incidents

Finding out about serious incidents from others



You may be **informed** of an serious incident from...

- People who receive I/DD services.
- Concerned family members.
- Other people in the community.

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1.17 Finding out about serious incidents

Finding out about serious incidents from service providers

You might find out about serious incidents in a variety of ways.



All **service providers** are required to report incidents to the applicable Brokerage, CDDP, or other organization responsible for case management.

Certified or licensed service providers must report in writing.

Independent providers, including Personal Support Workers, can report by phone, email, in person or in writing.

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1.18 Reports of serious incidents

Reports of serious incidents are legal documents

- Copies of serious incident reports must have any confidential information about other people removed or redacted.
- Be aware that in some circumstances, copies of reports may also be subpoenaed.

Section A	Release from one record holder: (individual, school, employer, agency, medical or other provider)
	(Insert individual - name, address)
	Community Developmental Disability Program
	Children's Residential Services coordinator.
	Children's Intensive In Home Services Coordinator
	OTHERS:
	If the information contains any of the types of re relating to use and disclosure may apply. I unde unless I place my initials in the space next to the
	HIV/AIDS: Mental health:
	Alcohol/drug diagnoses, treatment, referral:
	Release to: (address required if mailed)
	If releasing to a team, list members.
	Oregon Technical Assistance Corporation

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1.19 A person's right to access

A person's right to access incident reports



A person or her legal guardian has a right to request copies of incident reports pertaining to her.

- Be aware that there are situations when copies of incident reports may **not** be provided, such as if the report is part of a protective services investigation.

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1.20 Some Incidents are "Serious Incidents"

Some incidents are “serious incidents”

ODDS has identified some incidents as being more critical than others for evaluating to protect the health and safety of people using services.

Incidents in this subset rise to the level of **“serious incidents.”**

Suspected **abuse** is very serious, but it is tracked separately from the other 10 serious incident types.

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1.21 What are Serious Incidents?

What are Serious Incidents?

The following types of incidents are required to be entered into the Centralized Abuse Management (CAM) system as Serious Incidents:

Act of Physical Aggression resulting in injury
Death
Emergency Medical Care
Emergency Physical Restraint
Medication Error with adverse consequences
Missing Person
Psychiatric Hospitalization
Safeguarding Intervention resulting in injury
Suicide Attempt
Unplanned Hospitalization



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Notes:

1.22 Act of Physical Aggression

Act of Physical Aggression resulting in injury

An action taken by an individual that results in physical injury to themselves or someone else that is not accidental.



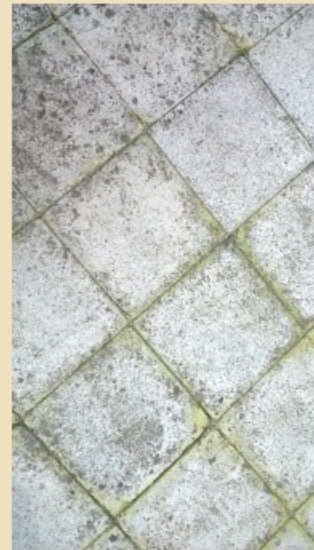
Example: Kira kicked her staff, leaving a bruise on her staff's leg.

1.23 Death

Death

Any death of an adult or child under any circumstance.

- For adults, a Death Review will be conducted by the investigator. For children, Child Welfare determines whether a death review is conducted.
- It is your responsibility to enter a Serious Incident for the death in CAM , or to provide the death information to the appropriate CAM user at your agency.
- Talk with your supervisor if you need help, or you are not sure what to do.



1.24 Emergency Medical Care

Emergency Medical Care



Care from an urgent care center, emergency room, emergency medical technicians, a psychiatric intervention team or care delivered in a physician's office that is typically received in an emergency room or urgent care center.

Does not include medical care by a DD provider or routine physical health care at an urgent care center or emergency room, such as a flu shot or blood pressure check.

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1.25 Emergency Physical Restraint

Emergency Physical Restraint

A manual physical restraint that is:

- Part of an ODDS approved behavior intervention curriculum.
- Delivered by a designated person trained to deliver the intervention.
- Not a safeguarding intervention.
- Not included in a Positive Behavior Support Plan or not agreed to in an individually-based limitation.



1.26 Medication Error with Adverse Consequences

Medication Error with Adverse Consequences

Any error in medication administration that results in actual harm, or jeopardizes health and safety to a degree that requires either emergency medical care or a call to the prescriber.

Example: Lu was given her roommate's pain pills by mistake. Her provider was concerned it would harm her and called her physician .



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1.27 Missing

Missing Person

An individual is missing without support beyond the timeframe identified in the individual's ISP.



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1.28 Psychiatric hospitalization

Psychiatric hospitalization

Admission to a psychiatric treatment facility or psychiatric unit in a hospital.



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1.29 Safeguarding Intervention or Equipment resulting in Injury

Safeguarding intervention/Equipment Resulting in Injury

Any use of a Safeguarding Intervention or Safeguarding Equipment that results in an injury.

Examples: Jay's back was bruised during the hold.
Pat had a blister caused by the arm shields.



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1.30 Suicide Attempt

Suicide Attempt

An actual attempt to end one's life.

Does not include:

- Ideation/threats
- A death resulting from suicide



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1.31 Unplanned hospitalization

Unplanned Hospitalization

Any unplanned admission to a hospital.

This does not include admission for scheduled procedures, such as a planned surgical procedure, unless complications arise that require an unplanned extension to the hospital stay.



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1.32 Abuse reports are entered by an investigator

Abuse reports are entered by an investigator

All allegations of abuse for adults and children in DD kids residential are entered into CAM by the abuse investigator/screener when the abuse will be investigated by the CDDP or by the Office of Training Investigation and Safety (OTIS.)

Child abuse reports screened/investigated by Child Welfare are tracked in the Child Welfare system.



Don't forget if you suspect abuse, report it:

1-855-503-SAFE (7233)

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1.33 Recommended Actions

What are Recommended Actions?

Recommended Actions are follow-up actions identified by a Services Coordinator, Personal Agent or Case Manager in response to a Serious incident; or by an investigator in response to an potential of abuse.



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1.34 Recommended Actions – your responsibility

Your responsibilities regarding Recommended Actions

When you are assigned a Recommended Action by an investigator:

- Complete the Recommended Action and document your actions in a progress note.
- If you have concerns about the Recommended Action, discuss them with the investigator

When you assign a Recommended Action for a Serious Incident:

- Communicate the Recommended Action to the party responsible to complete it.
- Monitor the status of the Recommended Action and document your actions and progress/results of the Recommended Action.
- Enter the Recommended Action in CAM, or inform the staff at your CME who performs the CAM entry.
- Once completed, record the completion and results in CAM, or provide the information to the staff performing CAM entry.

1.35 What does CAM do?

CAM serves multiple purposes...



Centralized,
computer-based
record of the
reporting of serious
incidents and
allegations of abuse.

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1.36 Purpose of CAM

CAM serves multiple purposes...



Reviewing serious incidents and at both state and local levels.

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1.37 Purpose of CAM

CAM serves multiple purposes...



Tracking **follow-up** actions of CDDPs, brokerages, CIIS and ODDS.

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1.38 Purpose of CAM

CAM serves multiple purposes...



Tracking and
analyzing local and
statewide **trends** over
long periods of time.

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1.39 CAM- quality assurance

Connecting the dots – CAM is part of quality assurance

CAM is a component of the ODDS and Department of Human Services (DHS) obligation to the Centers for Medicare and Medicaid Services (CMS) for quality assurance strategies.

- CMS is a federal agency, funding the majority of ODDS home and community-based services.



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Notes:

1.40 How is CAM information used?

How is CAM information used?



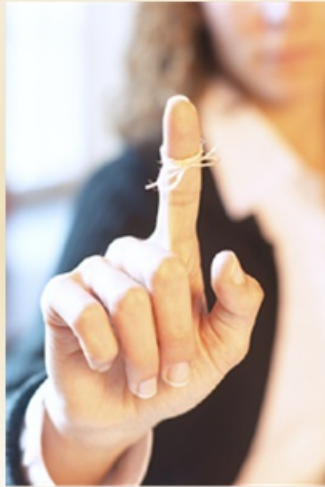
CAM information is used to:

- Improve overall service quality for people.
- Respond to problems.
- Identify issues and training needs for providers.

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1.41 Know what is expected of you

Know what is expected of you



- Depending on your organization, entering the information into the CAM system may or may not be your role.
- If you are unsure of what is your role, talk to your supervisor.

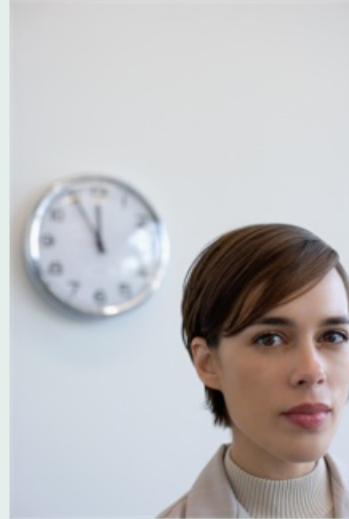
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1.42 Timelines

When an incident is suspected abuse and also another serious incident type

If the incident is one of the 10 Serious Incident types and is also suspected abuse, you are responsible for reporting the potential abuse AND either entering the incident into CAM or getting the information about the serious incident to the CAM user at your agency for entry.

The abuse investigator will enter the abuse case information and link it to your serious incident.



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1.43 Your responsibilities

Your responsibilities regarding the CAM system



- ✓ **Ensure** that serious incidents involving people for whom you provide case management services are entered into the web-based CAM system.
 - Depending on your organization, you or someone else may be the one entering the information into the database.
 - Check with your supervisor to ensure you know what you are expected to do.

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1.44 Things to note

Things to note

You need to be able to identify what is an incident that should be recorded in CAM.

Even if you are not required in your role to enter information into the CAM system directly, you will still need to know what to report and whom to report it to.



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1.45 Helping people be healthy and safe

Helping people be healthy and safe



All licensed or certified service providers are required to have a quality management strategy for assuring people are healthy and safe.

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1.46 Serious events can be very stressful

Serious incidents can be very stressful

When a serious incident occurs, it can be a very complex and stressful situation to everyone involved, including you.



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1.47 Being prepared can help reduce stress

Being prepared can help reduce stress



Prepare yourself by understanding your organization's processes and procedures, so you can best respond when a serious incident occurs.

Don't be afraid to ask your supervisor and coworkers for help.

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1.48 Secondary trauma

Secondary trauma

Something you witness or hear about that happens to another person may trigger you to react with strong emotions.

- This is called secondary trauma.



Notes:

1.49 Talk to your supervisor

Talk to your supervisor



Talk with your supervisor about any concerns, questions, or needs you may have.

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1.50 After serious incidents are reported

After serious incidents are reported..

- ✓ Make sure that serious incidents are **reviewed**, and either:
 - appropriately **resolved**,
or
 - escalated to your management team and ODDS when appropriate.
- ✓ Take direction from the Protective Services Investigator if a serious incident needs to be investigated as suspected abuse.



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1.51 Your responsibilities

Your responsibilities regarding protecting the person



- ✓ Make sure the person is **protected** from harm prior to and while an investigation is conducted; this may include looking for options to ensure the person's safety.

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1.52 Your responsibilities

Your responsibilities regarding follow up of serious incidents

- ✓ Follow up regarding the incident, as well as long term plans to ensure the person's safety and well-being.
- ✓ Document all of your work.
- ✓ "Close the loop" and make sure you understand what is expected of you.



There will be more about professional documentation and closing the loop in other modules.

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1.53 Your responsibilities

Your responsibilities, based on reviews and investigations



Per your organization's procedures, your responsibilities may include **determining** and **documenting** actions taken.

- *Remember, "if you didn't write it down, it didn't happen."*

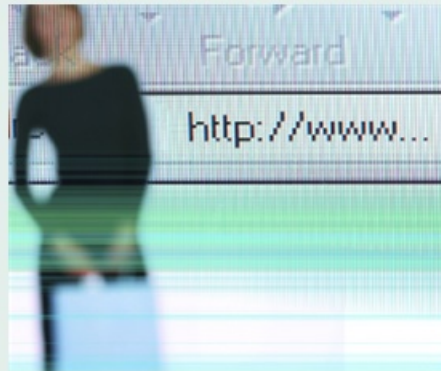
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1.54 Documentation requirements

Documentation requirements

Find what documentation is required for serious Incidents within expected timelines, by accessing:

- DHS Staff Tools.
- ODDS Transmittals.
- Applicable manuals and technical guides.
- Protective services investigators.
- Your organization's policies and procedures.



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1.55 Abuse is tracked separately in CAM

Abuse is tracked separately from Serious Incidents

Any information alleging an instance of abuse of a person with I/DD must be reported immediately.

Abuse allegations include but are not limited to:



- Physical Abuse
- Sexual Abuse
- Verbal or Emotional Abuse
- Financial Exploitation
- Neglect
- Abandonment
- Restraints/Involuntary Seclusion

Please note that the following slides regarding suspected abuse pertain to Adults.

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1.56 What is physical abuse?

Physical Abuse Includes:

Any physical injury by other than accidental means or is at variance with the explanation given.

Willfully inflicting physical pain or injury.

Physical Abuse is presumed to cause physical injury or pain to an adult otherwise incapable of expressing pain.

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Notes:

1.57 What is physical abuse?

Physical abuse may be evidenced by, but not limited to injuries such as...

- bruises
- welts
- broken bones
- bites
- burns
- cuts
- sprains



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1.58 Sexual abuse or exploitation of adults

Sexual abuse of adults includes:

Sexual contact with a **non-consenting** adult or with an adult considered incapable of consenting to a sexual act. Consent, for purposes of this definition, means a voluntary agreement or concurrence of wills. Mere failure to object does not, in and of itself, constitute an expression of consent.

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1.59 Sexual contact with a paid caregiver is abuse

Sexual contact with a paid caregiver is abuse



Any sexual contact between a **paid** caregiver or an employee of a facility or program and a person receiving services is sexual abuse.

Please note this does not include sexual contact between an adult and a paid caregiver who is the spouse or partner of an adult.

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1.60 Examples of sexual abuse of adults

Sexual abuse may also include:

Sexual harassment, sexual exploitation or inappropriate exposure to sexually explicit materials or language including requests for sexual favors.

For Employee, provider or other caregiver, sexual harassment or exploitation means: Any sexual contact or failure to discourage sexual contact

For all other situations, sexual harassment or exploitation means unwelcome sexual contact and other physical conduct directed toward an adult.

Any sexual contact achieved through force, trickery, threat, or coercion.

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1.61 Human trafficking

Human trafficking:

Human trafficking is modern-day slavery and involves the use of force, fraud, or coercion to obtain some type of labor or commercial sex act.

- Traffickers use force, fraud, or coercion to lure their victims and force them into labor or commercial sexual exploitation.
- They look for people who are susceptible for a variety of reasons, including psychological or emotional vulnerability, economic hardship, lack of a social safety net, natural disasters, or political instability.
- The trauma caused by the traffickers can be so great that many may not identify themselves as victims or ask for help, even in highly public settings.

Notes:

1.62 What is verbal abuse?

Verbal or Emotional Abuse

Verbal or emotional abuse includes threatening significant physical harm or threatening or causing significant emotional harm to an adult through the use of:

- Derogatory or inappropriate names, insults, verbal assaults, profanity, or ridicule; or
- Harassment, coercion, threats, intimidation, humiliation; or
- Threat(s) to withhold services or supports, including an implied or direct threat of termination of services

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1.63 Examples of verbal abuse

Verbal or emotional abuse

Examples of verbal abuse include, but are not limited to:

the use of oral, written, or gestured communication that is directed to an adult or within their hearing distance, regardless of their ability to comprehend.



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1.64 Financial exploitation

Financial exploitation



Financial exploitation of an adult includes but is not limited to **wrongfully taking** or using a person's assets, funds, or property or medications.

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1.65 Financial exploitation

Financial exploitation

Financial exploitation of an adult also includes but is not limited to...

- Conveying a threat to take money or property.
- Misappropriating or misusing any money from a person's account.
- Failing to use a person's income or assets for the benefit, support, and maintenance of the individual.



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1.66 What is neglect?

Neglect: Failure to provide the care, supervision, or services necessary to maintain the health and safety of an adult.

- Failure may be active or passive
- Failure could include a caregiver failing to protect an adult from abuse
- Failure could mean withholding services to maintain health and safety
- Failure creating a risk of harm or results in physical harm or significant emotional harm.

Services include but are not limited to: food, clothing, medicine, housing, medical services, assistance with bathing or personal hygiene, etc.

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1.67 Neglect

Neglect: Failure to provide the basic care or services necessary to maintain the health and safety of an adult

The expectation for care may exist as a result of an assumed responsibility or a legal or contractual agreement, including but not limited to, where an individual has a fiduciary responsibility to assure the continuation of necessary care or services.



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1.68 Abandonment

Abandonment includes:

...the willful forsaking of an adult for any period of time by an individual who has assumed responsibility for providing care, when that desertion or forsaking results in harm or places the adult at risk of serious harm.



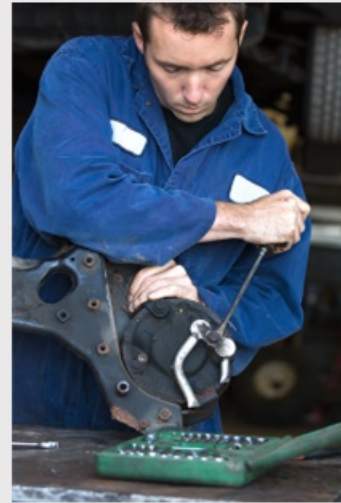
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1.69 Apply your knowledge

What are some things you could do for Julian?

You provide case management services to Julian, a cheerful, outgoing man who receives employment services.

You are visiting him at 2:45pm (you know he works 8am-4pm) and he mentions he is really hungry. You ask what he had for lunch, and he tells you that he hasn't eaten yet, because his Job Coach told him he had to finish his work before he can eat—or else he would be terminated from his services.



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1.70 Some things you can do for Julian

Here are some things you can do for Julian...



- ✓ Inform Julian of his rights, that he has a right to take a lunch break without being threatened with termination.
- ✓ Document this as an incident of verbal abuse.
- ✓ Facilitate communication with the service provider to help resolve this conflict.

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1.71 Involuntary seclusion

Involuntary seclusion: involuntary seclusion of an adult for the convenience of a caregiver or to discipline the adult.



Involuntary seclusion may include but is not limited to:

- Confinement or restriction of an adult to his or her room, specific area, or ordinarily accessible areas of the facility, residence or program.
- Placing restrictions on an adult's ability to associate, interact, or communicate with other individuals.

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Notes:

1.72 Physical or chemical restraints

Physical, chemical and mechanical restraints

An individual has the right to be free from restraint. The wrongful use of restraint may be abuse.

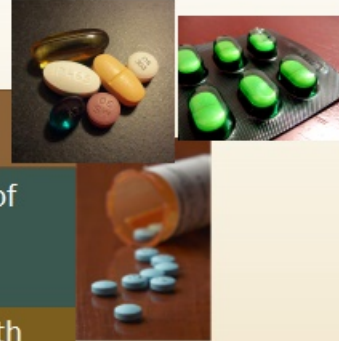
This does **NOT** include:

A meaningful behavior or treatment plan

Medication administered for the clinical needs of the individual as prescribed by a health care provider.

A safeguarding intervention when consistent with OAR

Use of acceptable infant safety products; the use of car safety systems, or safeguarding equipment when ordered by a physician or health care provider and approved by the ISP team.



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1.73 Safeguarding Interventions

Safeguarding Interventions should NOT be used unless

- There is **imminent danger** to individual or others.
- Less restrictive alternatives would be ineffective
- The maneuver is authorized by an ODDS approved behavior intervention curriculum
- The Designated Person has been trained to implement the intervention by a qualified person
- The safeguarding Intervention is in accordance with OAR 411-304-0160
- There is a current Functional Behavior Assessment (FBA) and Positive Behavior Support Plan (PBSP) in place and the individual has authorized an Individually Based Limitations (IBL)

1.74 Safeguarding Interventions

Safeguarding Interventions may NEVER be:

Abusive
Aversive
Coercive
For convenience
Disciplinary
Demeaning
Mechanical Prone or supine restraint
Pain compliance
Punishment Retaliatory

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1.75 Emergency Physical Restraints

Emergency Physical Restraints

A emergency physical restraint may only be used in a true emergency that includes the following conditions:

- There is an imminent risk to the individual or another person and
- Less intrusive measures have been determined to be ineffective,
- It only continues for as long as the imminent risk exists.
- The restraint must be part of an ODDS approved curriculum.
- The person applying the restraint must have been trained.



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1.76 When you notice “red flags”

When you notice “red flags”

Trust your instincts if something doesn't seem right.

- If you suspect **abuse**, stop—determine if protective services are needed, and report.
- If there is any suspected criminal activity, immediately call local police or 9-1-1.



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Notes: