

Quick Use Guide for

Direct Support Staff



September 2009



Prepared by
the ISP/PCP Team at Oregon Technical Assistance Corporation
for the State of Oregon's Office of Seniors and People with Disabilities

QUICK USE GUIDE for DIRECT SUPPORT STAFF

About this guide

This **QUICK USE GUIDE for Direct Support Staff** is designed to quickly assist direct support staff to know and understand his/her roles and responsibilities within the Individual Support Plan (ISP) process for adults and children services established by Seniors and People with Disabilities (SPD). This guide will give valuable information in order to understand the ISP process.



This guide does not replace the Oregon's Individual Support Plan System Instruction Manual. The manual has the detailed information about each piece of the process. In addition, the manual and require forms can be found at www.otac.org. This guide has been prepared by OTAC's ISP/Person Centered Planning (PCP) team as part of its contract with SPD.

Required ISP team members are:

- The person for whom the plan is being developed
- Family, significant others and/or legal guardian
- A representative of Employment/Alternative to Employment provider
- A representative of Residential providers
- County Services Coordinator (for adult services) and ODDS Residential Specialist (for children services), formerly known as case managers

The ISP Process

An Individual Support Plan (ISP) is an agreement made between an individual receiving services and the team of people supporting that individual. An ISP is created by a team of people with information gathered from ISP team members and others that know and care about the person. In order to contribute within the ISP process, staff does not need to be on the ISP team.

In this ISP process, information about the person is gathered from those that know and care about them. The information is then compiled onto the Personal Focus Worksheet during the Pre-meeting. Direct Support Staff may be asked to contribute in a number of ways. The Risk Tracking Record (RTR) identifies serious risks which have Support Documents to assist with minimizing risks.

The ISP team uses the information from the PFW and RTR to create Action Plans during the ISP meeting that help Direct Support Staff know the goals of an individual and the supports to achieve those goals.

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The role of Direct Support Staff within the ISP process will vary from provider to provider. These roles may include:

- Contributing to the **Personal Focus Worksheet (PFW)**
- Collecting information throughout the year
- Assisting the individual in completing his/her section of the PFW
- Providing information about supports
- Participating in the ISP meeting either as a team member or a guest
- Following through with the implementation of the ISP, looking at Action Plans
- Indicate when updates or changes need to occur

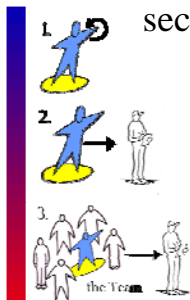


Detail for some Direct Support Staff roles are:

Contribute to the PFW

- Either answer or discuss the 20 focus questions in 5 sections of the PFW, giving detailed information about the person receiving services
 - The optional Supporting Questions may be used to help answer the focus questions
 - Some information may not be able to be answered by Direct Support Staff. For example, if the staff at work have not talked with the person about his/her spiritual preferences, this question may not be answered by Direct Support Staff. This question would be answered by another person.
- When completing PFW information, detailed information is important. The detail assists with the different perspectives that will be gathered on the PFW. A variety of people may contribute information to the PFW.

→ There is a hierarchy for completing the person receiving services sections of the PFW.



1. The person should complete his/her sections when able;
2. The person chooses someone to assist him/her; or
3. The ISP team chooses a person that can be objective to complete/revise the PFW.

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If chosen by the ISP team to assist the individual to complete designated sections, some expectations are but not limited to:

- The words the person writes, speaks or signs should be in quotation marks and when additional information is needed to provide detail, use parenthesis. For example, “I like coffee” (Jim has one cup of black coffee in the morning and goes to Shari’s after work for a cup or two. He likes going without staff.).
- Record those things that you are reasonably sure he/she would express if he/she could.
- Record all the things you have heard the person say are important in his/her life.
- Everything gets written down even if you believe it is wrong, it is not possible, unsafe, unhealthy, or you do not agree.

Provide information about supports

- An individual may have Support Documents.
- Support Documents are written for people providing direct support to follow.
- Providing information to your front line manager of your observations and/or experiences while spending time with the person may assist him/her in creating a protocol or other support documents.
 - Information on a support document should be clear.
 - Direct Support Staff must be trained to understand and follow support documents.



Participate in the ISP meeting

- An individual may want his/her Direct Support Staff to be on his/her ISP team
- An individual may want to invite his/her Direct Support Staff to a meeting to participate in a particular issue; this means the direct support staff would be a guest at the ISP meeting.



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- Direct Support Staff should talk with his/her supervisor about participating on an ISP team.

Following through with the implementation of the ISP, looking at Action Plans

- Action Plans developed during an ISP meeting are measurable and observable
- Share information throughout the year with the necessary people.
 - Use memos to communicate when changes within plan occur
 - Call or talk with people in a timely fashion; other action may be needed when Action Plans are completed or need modification
- Always remember to ask for help or clarification when needed.
- Follow-through with the ISP is an agreement made at the ISP meeting by all team members.

Indicate when updates or changes need to occur

- Staff must be trained on the ISP and Support Documents before the “start date” of the ISP
- Know the person within the agency who can assist to make changes
- Support Documents must be current at all times
- Changes must be record

Throughout the year, updates can be made.

- Develop and keep good communication with others
- Assure Action Plans occur; ask for help when not understanding the commitment agreed upon
- Know and have access to a copy of the ISP
- Know and have access to copies of Support Document (related to specific position)
- If change (additions, subtractions, modifications) needs to occur, know and go to the appropriate person to make the change(s) with ISP team approval as per Signature page of the ISP.
- Ask questions when necessary!

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Information Direct Support Staff should know:

Important TO information: This is what the person “says” either by words or behavior. This information can include, but is not limited to, activities, people, places or things the person says he/she likes.

Important FOR information: This is information that needs to be kept in mind regarding issues of health and safety and/or what others see as important to help the person become a valued member of his/her community and provide an opportunity for the person to be a valued member of his/her community.

Balance between Important to and Important for: A balance needs to exist. When a person has all choice and no responsibility, this could lead to be unsafe or unhealthy. However, if a person has health and safety dictating his/her life, the person has limited control over his/her life and may lead to restrictions of things important to the person.

People who know and care: These people can include, but are not limited to, family, friends, nurse, doctor, teacher, former staff, or behavior specialist.

Risk Tracking Record (RTR): This is a document that identifies serious and significant risks. Identified risks have support documents to minimize the serious and significant nature of the risk. For example, if someone has a possibility of aspirating because someone feeds him/her, an Aspiration/Choking protocol exists and addresses preventions for the risk of aspiration, which generally means when food and/or liquids get into the breathing tubes and lungs.

Support Documents: Examples are protocols; plans such as financial plan, behavior support plan; and other identified supports. Protocols address prevention, signs and symptoms, what to do if signs and symptoms are observed, and emergency procedures.

ISP process: The whole process includes gathering person centered information onto a PFW; having a Pre-Meeting; completing meeting preparations; having an ISP meeting; as well as training and implementing the ISP and Support Documents.

Pre-Meeting: This includes compiling the PFW from all providers; writing word-for-word PFW question number 5 onto the What’s Most Important

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Page of the ISP; completing/reviewing the RTR; identifying Support Documents; writing the bold/italics words from the RTR onto the Risks page of the ISP; and drafting the ISP Meeting Agenda. The Pre-Meeting has required people who attend this face-to-face meeting.

ISP: An Individual Support Plan is the written details of the supports, activities and resources required for an individual to achieve personal goals over a twelve month period. The ISP is developed to articulate decisions and agreements made during a person-centered process of planning and information gathering. The ISP is the individual's Plan of Care for Medicaid purposes.

