



Self Determination Informational
Gathering Series
Part 1



**Getting to Know Local Independent
Facilitators, Person Centered
Planners and Financial Management
Agencies**

Brought to you by The Valley Mountain Self Determination Team
and the
VMRC Self Determination Advisory Committee



Schedule for the Day

- Introductions
- Presentation by Local Independent Facilitators and Person Centered Planners
- Presentation by Local Financial Management Service Agencies
- Questions

Traducción en español es disponible llamando al 1-866-299-7945 e ingresar el Código del Participante 7793177#



Local Independent Facilitators and Person Centered Planners



Milestone Facilitation Services, LLC

Independent Facilitators: Carlos and Stella Hernandez



Who We Are.....



- ❖ Multicultural Family of 4
- ❖ Owner/Operators of a Step Down Behavioral Home for Adults
- ❖ Active Community/Board Members working with various interdisciplinary teams in various counties
- ❖ Over 16 years of combined experience working with DD population
- ❖ Experience working in Residential Homes children-adults
- ❖ Experience working for Valley Mountain Regional Center- Roles included Service Coordinators both children/adults; Special Projects; and Cultural Specialist
- ❖ Active Mental Health Board President
- ❖ Active Community Advocates
- ❖ Interpreters
- ❖ Familiar with all 5 Counties San Joaquin, Stanislaus, Tuolumne, Calaveras, Amador

Education

- BA in Liberal Studies with Child Development Concentration
- BS in Business Management
- Adult Administrator Credentials
- CPI Trainers
- CPR/First Aid Trainers
- Independent Facilitator Certifications
- Mental Health Board President, Stanislaus County
- Board Members Christian Berets

How Can We Serve You?

- Person Centered plan
- Independent Facilitator

Person Centered Planning

Our approach to planning centers on the needs and wishes of the person who is central to the action plan.

- Sources of family & community support
- Appropriate services and supports
- Short & long term goals
- Measurable outcomes and timelines
- Useful “About Me” and “My Goals” summaries

Independent Facilitation

You want to maximize your services? ... You already have a Service Coordinator?

Milestone facilitators begin by putting your dreams, needs, and goals at the forefront.

- Develop your comprehensive Person-Centered Plan
- Assist you in making informed decisions regarding your program budget and IEP meetings
- Identify natural supports & coordinate services
- Lead, support and/or advocate on your behalf in the IPP and/or IEP process
- Assure that you receive the services and supports you need



Milestone Facilitation Services, LLC

Independent Facilitator for Self Determination

Our purpose is to ensure that participants and their families understand the Self Determination Program and to support the development of a *Person Centered* approach to a well thought out comprehensive plan ready to implement!

Meet Your Team



As your Independent Facilitators (IF) in the Self Determination Program (SDP)

- We bring our years of experience both working for Valley Mountain Regional Center and working in various capabilities serving individuals with developmental disabilities, both children and adult.
- We are active in our community serving on various boards
- We currently are owner/operators of an Adult Behavioral Step Down Facility in Stanislaus County.
- We serve Amador, Calaveras, San Joaquin, Stanislaus & Tuolumne Counties.
- We re culturally diverse, bilingual in Spanish and Assyrian.

Facilitator Roles

- Assist budget making decisions
- Coordinate services in the IPP
- Educate on the IPP
- Facilitate IEP planning
- Provide Person Centered Planning assistance Plan

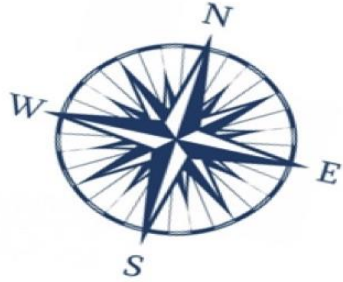
**CONTACT US For A
FREE INTAKE**

Carlos & Stella Hernandez

209-502-0231

Facilitator.ch@gmail.com

Ready to get started?



INTEGRATED COMMUNITY COLLABORATIVE

c o m m u n i t y i n t e g r a t o r s

Self-Determination Informational Gathering Series

THE SELF-DETERMINATION EXPERIENCE

Presented By

Elizabeth Barrios Gomez



The Self-Determination Experience

- ❖ It is beyond creating a plan
- ❖ It is implementing the plan and making sure it is working
- ❖ It is revising the plan and making appropriate adjustments
- ❖ It is centered on the person and assuring all elements are working
- ❖ It is making sure it captures the essence of the individual and the needs
- ❖ It is about having a circle of support

Support: Parents Helping Parents

- ❖ The Integrated Community Collaborative was launched due to the need of engaging the voice and unique perspective of the Family, especially the Individual served by the system.
- ❖ We meet Families where they are at and help walk them through the process step by step.
- ❖ As Family members we understand the needs and challenges from a unique perspective.
- ❖ Our help and support is diverse and continuous.
- ❖ We do not charge Families for our services.



Resources: Partnerships Matter

- ❖ The ICC has received for the 3rd year in a row, a grant from the Department of Developmental Services (DDS) for community outreach and engaging families impacted by disparities within the regional center system
- ❖ The ICC collaborates and works in Partnership with key organizations to assure the needs of Families are kept up to date and informed.
- ❖ We are connected to keep you connected



Momentum: Integradoras help move into SDP with the following services:

- ❖ Train families about both systems to make an educated decision about which program (traditional system or the Self-Determination Program) to use;
- ❖ Train families in their preferred language (English or Spanish)
- ❖ Pre-plan for Self-Determination Program;
- ❖ Identify unmet needs, changes in circumstance and improve the lives of participants through collaboration;
- ❖ Draft a spending plan;
- ❖ Zoom video-conference to support families: person-centered planning session with the participant and his/her circle of support;
- ❖ Create job descriptions to find the most appropriate providers to serve the participant's needs; and
- ❖ Continue the participant and their family's circle of support with the integradora.

Steps to Success:

- ❖ Get to know the participant and their circle of support
- ❖ Train families and participant about supports and rights
- ❖ Help families meet their needs by collaborating with the RC
- ❖ Hold information sessions about traditional system and the Self-Determination Program
- ❖ Support families with Person-centered Planning for either system to reduce disparity
- ❖ Include ICC as part of the participant's circle of support until the participants choose to remove us.





- Informed
- Join us every Thursday at 6:00 PM for a ZOOM Cyber Café and discuss everything you want to know about the Self-Determination Program in a relaxed and informal setting.



Integradoras



INTEGRATED COMMUNITY COLLABORATIVE

c o m m u n i t y i n t e g r a t o r s

Making self-determination a way of life

Services provided by ICC

- Pre-planning to understand and move into the Self Determination Program
- Identifying unmet needs and improving the initial SDP budget
- Drafting a spending plan
- Zoom video-conferencing: person-centered planning session with the client and his/her circle of support
- Creating job descriptions to find the most appropriate providers to serve the client's needs
- On-going communication with client and family.

Servicios proveldos por el ICC

- Formar el pre-plan y enseñarle al cliente y a su familia lo que es el Programa de Autodeterminación
- Identificar las necesidades insatisfechas para informar y aumentar el presupuesto del cliente
- Escribir un plan de gastos para y con el cliente
- Hacer una conferencia: sesión de hacer el plan centrado en la persona con el cliente con su círculo de apoyo.
- Escribir descripciones de los trabajos en el plan de gastos para localizer proveedores adecuados para las necesidades del cliente.
- Comunicación continua con el cliente y la familia

ICC

Pre-planning session

Primer paso: Conocer a la persona

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COMUNIDAD INTEGRATIVA

persona: _____ fecha: _____

lista de intereses, esperanzas y necesidades

_____	_____
_____	_____
_____	_____

ideas acerca de las metas que se puede hacer con los intereses, las esperanzas y las metas nombrado

Interes 1	Interes 2
_____	_____
_____	_____
necesidad 1	necesidad 2
_____	_____
_____	_____
esperanza 1	esperanza 2
_____	_____
_____	_____

agregue más copias de este papel si los necesita
www.integratedcommunitycollaborative.org

Segundo paso: Identificar metas enfocadas en la persona

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COMUNIDAD INTEGRATIVA

meta: _____

meta: _____

meta: _____

meta: _____

meta: _____

meta: _____

notas: _____

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Segundo paso: Identificar metas enfocadas en la persona

INTEGRATED COMMUNITY COLLABORATIVE
COMUNIDAD INTEGRATIVA

Language suggested for writing the goals:
Español: _____ será parte de la comunidad.
English: _____ will be part of the community.

Español: _____ vivirá un vida de opciones y posibilidades.
English: _____ will live a life of choice and possibility.

Español: _____ alcanzará la meta de ser _____.
English: _____ will reach his/her goal of being _____.

Español: _____ dará vida al sueño de _____.
English: _____ will make his/her dreams of _____ come true.

Español: _____ mejorará la salud.
English: _____ will improve his/her health.

Español: _____ aprenderá _____.
English: _____ will learn to _____.

Español: _____ fortalecerá sus destrezas adaptativas para poder _____.
English: _____ will improve his/her adaptive skills in order to _____ and _____.

Español: La familia de _____ continuará aprender y apoyar a _____ para mejorar la calidad de la vida.
English: _____ family will continue to learn and support _____ to improve his/her quality of life.

notas: _____

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Tercer paso: Formar metas enfocadas en la persona

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COMUNIDAD INTEGRATIVA

persona: _____ fecha: _____

meta: _____

como yo alcanzaré la meta: _____

servicios posibles para alcanzar la meta: _____

notas: _____

Haga un círculo alrededor de la categoría principal de la meta

ORGANIZACIÓN DE LA VIDA	EMPLEO Y PARTICIPACIÓN EN LA COMUNIDAD	SAÚDE Y SEGURIDAD
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Ultimo paso del pre-plan: Poner lo en el Google Form

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COMUNIDAD INTEGRATIVA

Usando todo que ha aprendido del cliente, llene el Google Form.

<https://forms.gle/#HXsBocGk4zfVvK8>

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www.integratedcommunitycollaborative.org

ICC Spending Plan Tool

Includes: Participant Goals, Services, Service Categories and Codes, Wages, and Service Costs

The image shows a 3D-rendered tablet displaying a spreadsheet interface. The spreadsheet has a grid with columns and rows of data. At the top, there is a blue header bar with several dropdown menus and buttons. The data in the spreadsheet includes various categories and codes, such as 'Employment and Community Participation', 'Perceptual Support', 'Family-Centered Individual', 'Community Involvement', 'Health and Safety', and 'Crisis Intervention and Support'. The numbers in the cells are mostly zeros, with some non-zero values like 2000, 1000, 1200, 1800, and 3000. The tablet is shown at an angle, giving it a three-dimensional appearance.

What Will You Receive

- ❖ A comprehensive and culturally relevant Person-Centered-Plan
- ❖ Attend with you regional center and relevant meetings.
- ❖ Ongoing support to implement the plan
- ❖ Adjustments and revisions to the plan as needed prior to submitting it.
- ❖ Help in managing and understanding the plan and your options.
- ❖ Staying informed and connected to information, resources and changes as needed.





INTEGRATED COMMUNITY COLLABORATIVE
c o m m u n i t y i n t e g r a t o r s

• Muchas Gracias

- WWW.INTEGRATEDCOMMUNITYCOLLABORATIVE.ORG
 - Elizabeth Barrios Gomez 310.871.5080
 - elizabeth@integratedcommunitycollaborative.org





Will Sanford

Person-Centered Planner

- Person-Centered Planning is supporting individuals in taking control of the life they want to live.
- My Background:
 - Over 40 years of experience supporting individuals to live full and included lives in their community.
 - Deep understanding of the “Traditional Service” system
 - Active supporter and Advocate on the Department of Developmental Services internal Self-Determination Workgroup, which helped moved Self-Determination from theory to practice in California
 - Believer that Self-Determination can make a difference in people’s lives.
 - Vendored by VMRC (PV1916) so no cost to participants.

Services Provided

- Development of individual Person-Centered Plans
- Support thru the “Traditional Service” Budget Certification process.
- Support thru the development of the Self-Determination Spending Plan, so that Self-Determination can be implemented.
- Ability to provide support in English and Spanish.
- Goal to ensure that Self-Determination is clearly understood by all.

- Currently, have 14 completed California PCPs with 6 additional in process.



Contact information

Will Sanford

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(925)963-4950



Local Financial Management Agencies





Aveanna Healthcare Services

Tran Tran





Acumen Fiscal Agent

Financial Management Services (FMS) Self Determination Program

Presented by Yvette Torres

What is Financial Management Services (FMS)?

FMS is the only **required** Regional Center vendor and is responsible for:

- Managing the SDP participant's budget
- Processing payroll for employees and paying service providers
- Ensuring the participant doesn't go over budget and has enough funds to pay for services listed in their IPP
- Preparing and distributing a monthly statement of participant's individual budget (similar to a bank statement)
- Withholding employee taxes
- Tax Return Forms: W2's and 1099's

FMS Models Acumen Offers

Bill Payer

Sole Employer

***Acumen has been providing Financial Management Services to self-directed participants/employers across the country since 1995**

Bill Payer

Bill Payer: The participant will not be hiring direct employees. In this case, the FMS will only pay bills/process checks for goods and services included in the participant's IPP.

Example: The participant will be going to summer camp; the camp submits an invoice (signed by the participant/representative) to the FMS requesting payment. FMS processes a check and pays for this service.

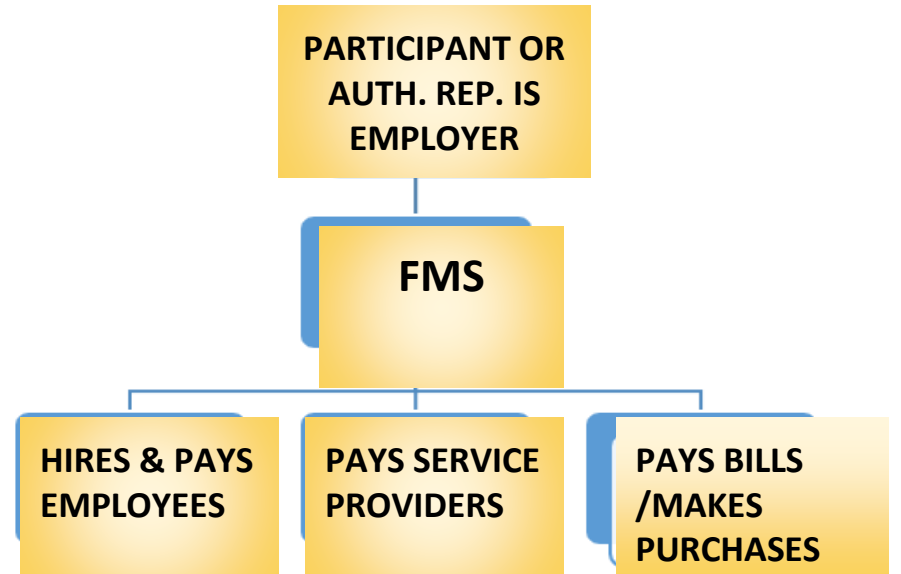


Sole Employer

Participant (or Representative) **IS** the employer.

Example: Participant would like to hire a community coach; candidate goes through SDP hiring protocols (background checks, livescan, etc). In this case FMS ensures candidate is eligible to work based on these protocols (ensures background checks are cleared by DDS & hires applicant on participant's behalf).

FMS processes payroll & makes purchases.



Other services in which we will assist our clients under our Sole Employer model:

1. Worker's compensation:

- By providing Workers Compensation by charging separately at a very low rate (included in the employer-related-costs).

2. FEIN:

- As a **Sole Employer** you are required to obtain a Federal Employer Identification Number which we will help you obtain by submitting all required paperwork to the IRS on your behalf.

3. Tax Return Forms:

- We provide W2 forms to your employees at the end of the year as well as 1099s to vendors who provide services to you/participant.

4. A complimentary application (for employees to clock in/out) which is compatible with most smartphones, tablet or desktop:

<https://www.dcisoftware.com/>

- EVV (Electronic Visit Verification) compliant
- Your employees will have access to this application and can clock in/out in real time and (you/employer) can approve hours worked!
- View your budget without having to wait for the monthly statement

5. Monthly Budget Statements

- We provide monthly budget statements (which will include information on what was paid and budget balance)

Benefits of being a Sole Employer:

- You're the boss
- More control on who you choose to hire
- Live-In Exemptions for employees who live with you
- Lower monthly FMS rates
- FMS works for YOU

**Self-Determination Program
Maximum Financial Management Services (FMS) Rates**

FMS Model	Number of Services	Max Rate Per Month
FMS as Bill Payer	1-3	\$50
	4-6	\$75
	7+	\$100
Participant as Sole Employer	1-2	\$110
	3-4	\$125
	5+	\$150
Participant & FMS as Co-Employers	1-2	\$125
	3-4	\$140
	5+	\$165

Note: If the FMS provides payments through more than one of the models above for a participant, then the maximum rate for that participant cannot exceed the highest cost model for the total number of services. For example, if a participant is using five services, and the FMS is a "bill payer" for two services and a "co-employer" for three services, the maximum rate charged to the participant cannot exceed \$165 per month. **In all cases, the participant and FMS can agree to rates lower than the maximum rates above.**



Yvette Torres

Email: yvettet@acumen2.net

Direct Line: 424-210-8810

www.acumenfiscalagent.com



**KEEP
CALM
PORQUE YO
SI HABLO
ESPAÑOL**

GT Independence

Terrasel Jones

With GT Independence You Also Get....

- CARF Accreditation
- Person Centered Enrollment
- National FMS Provider
- Live Dedicated Customer Service Team
- Electronic Employee Payment Availability
- Online portal

Family Owned & Family Operated

GT Independence is a leader in providing financial management services to home and community based programs and has over 15 years of experience serving participants.

We have received the highest industry accreditation from CARF for exemplary service to our customers.

INTEGRITY - COMMUNITY - PROFESSIONALISM - RESPECT - EXCELLENCE - **SELF-DETERMINATION**

P: 1.213.200.3641 F: 1.888.972.3861 www.gtindependence.com



Choosing Your FMS Employer Model

	GT Independence (Sole Employer)	Other FMS Providers (Co-Employer)
Full Control and transparency of budgeted dollars	✓	
Highest possible wages for employees	✓	
Participant Controls Training Requirements	✓	
Full Employer authority to Hire, Manage and Fire Employees	✓	
Participant selects benefit options to employees (PTO, Health Insurance, 401K)	✓	
Industry specific Continuing Education provided to Agencies Free of Charge	✓	
Scheduling your Employees	✓	?
Real time budget reporting access	✓	?
Electronic Time Submission	✓	✓
Purchase workers compensation Insurance	✓	✓
FMS is responsible for State and Federal Tax Filings	✓	✓
Employee Background Screenings	✓	✓
Authority to Fire your employees	NO	YES

INTEGRITY - COMMUNITY - PROFESSIONALISM - RESPECT - EXCELLENCE - **SELF-DETERMINATION**

P: 1.213.200.3641 F: 1.888.972.3861 www.gtindependence.com





Public Partnership, LLC

Mark Altieri



You = We =  =

Mission:

Transform more lives by making
Self-Determination easier for all.



Self-Determination - A Growing Trend

Forbes

**DOES SELF-DIRECTED LONG-
TERM HOME CARE MAKE SENSE
FOR YOU?**

The idea of choosing your mode of long-term care is an evolving trend. There are now more than 1 million people in over 200 self-directed Medicaid and Veteran Directed programs across the country. Enrollment in these services has grown more than 40% since 2011.

— AUGUST 2018

OUR 5 VALUES

1

CARE

We understand who we serve and the importance of our role in the Circle of Support.

3

SPEAK UP

We are always listening and looking for ways to better serve Participants.

2

TEAM PLAY

We understand we all need to work together to make sure the Participant reaches their goals.

4

LOOK AFTER THE PENNIES

We want Participants to know where their budget stands at all times and have the tools to control the budget.

5

OWN IT

Participants are owning their budget and services – we are owning our service delivery. If we are not A+ we want to know.

OUR FINANCIAL MANAGEMENT SERVICES

BILL PAYER



FMS RATES

Number of Services	Rate Per Month
1-3	\$50
4-6	\$75
7+	\$100

What does the Participant Really Need to Know?

1. Bill Payer is for those that only want to self-direct Agency Provided services.
2. Bill Payer is NOT for those that want to hire their own worker for services like Community Living Supports.

OUR FINANCIAL MANAGEMENT SERVICES

Sole-Employer



FMS RATES

Number of Services	Rate Per Month
1-3	\$110
4-6	\$125
7+	\$150

What does the Participant Really Need to Know?

1. Sole Employer is for those that want the most control over services like Community Living Supports.
2. Participants will actually be the Employer of the worker.

OUR FINANCIAL MANAGEMENT SERVICES

So...what exactly are you doing every month and...why do I need to pay your company...and why the different rates?

BILL PAYER

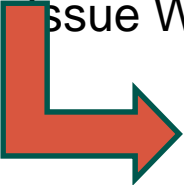
1. Enroll the Participant and collect Agency Provider documentation
2. Process Provider Invoices **
3. Advance payments to the Provider (s) **
4. Bill the Regional Center **
5. Provide a Web Based system to manage the budget
6. Provide Customer Service for the Participant and their Providers
7. Interact with the Regional Center staff, Independent Facilitator, etc.

** These activities are why the rates are different based on the number of services

OUR FINANCIAL MANAGEMENT SERVICES

SOLE-EMPLOYER

1. Enroll the Participant as an Employer of Record and complete hiring paperwork for their worker (s)
2. Process timesheets and possibly Invoices from their Provider (s)
3. Advance payments to the workers (s) and possibly their Provider (s)
4. Withhold, file and pay all Employer taxes and worker taxes
5. Issue W-2s to workers, and

- 
1. Bill the Regional Center
 2. Provide a Web Based system to manage the budget
 3. Provide Customer Service for the Participant and their workers
 4. Interact with the Regional Center staff, Independent Facilitator, etc.

Find us @ www.publicpartnerships.com

The screenshot displays the website's interface. At the top, there are two notification banners: a green one for COVID-19 and a blue one for California DDS SDP visitors. Below these is a navigation bar with the 'public partnerships PPL' logo, a home icon, and links for 'Home', 'Select Language', 'Accessibility', 'Sitemap', and 'Search'. A secondary navigation bar contains links for 'Self-Directed Home Care', 'Programs', 'Tools', 'Blog', 'About Us', 'Careers', and 'BetterOnline™ Login | Register'. The main content area features a banner for 'Self-Directed Home Care Explained' with a teal house icon and a list of benefits. A small accessibility icon is visible in the bottom left corner of the banner area.

COVID-19 Nursing Home/Institutional Residential Care Crisis ×
Are you looking for an alternative care option? [Learn more about the safest home care option available.](#)

Welcome California DDS SDP Visitors! ×
Learn about our new [California Self-Determination Program \(SDP\)](#), and how PPL can guide you on your self-determination (self-direction) journey. [CALIFORNIA SDP](#)

public partnerships PPL Home Select Language Accessibility Sitemap Search

Self-Directed Home Care Programs Tools Blog About Us Careers BetterOnline™ Login | Register

Self-Directed Home Care Explained

- Stay in **your** home
- Hire **your** own care/support workers
- Hire **your** friends, potentially family

Find us @ www.publicpartnerships.com



COVID-19 Nursing Home/Institutional Residential Care Crisis



Are you looking for an alternative care option? [Learn more about the safest home care option available.](#)



Welcome California DDS SDP Visitors!

CALIFORNIA SDP



Learn about our new [California Self-Determination Program \(SDP\)](#), and how PPL can guide you on your self-determination (self-direction) journey.

public partnerships

Home

Select Language

Accessibility

Sitemap

Search

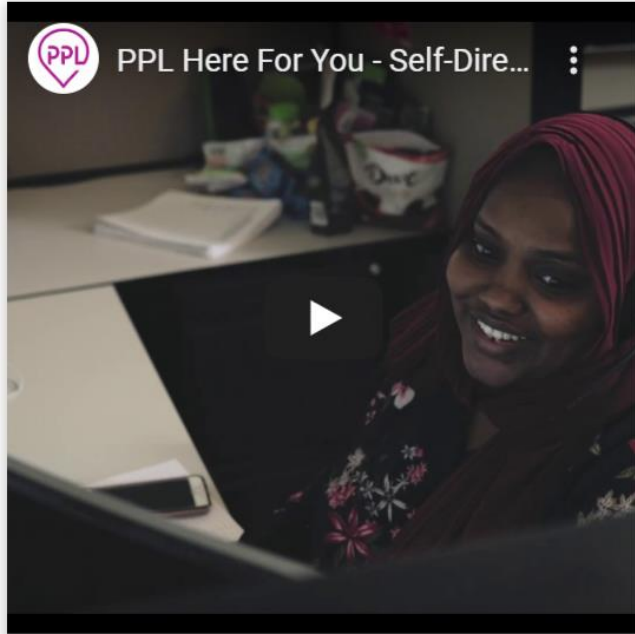
› Select Language	Bulgarian	Esperanto	Haitian Creole	Italian	Latin	Mongolian	Russian	Spanish	Ukrainian
Afrikaans	Catalan	Estonian	Hausa	Japanese	Latvian	Myanmar (Burmese)	Samoan	Sundanese	Urdu
Albanian	Cebuano	Filipino	Hawaiian	Javanese	Lithuanian	Nepali	Scots Gaelic	Swahili	Uyghur
Amharic	Chichewa	Finnish	Hebrew	Kannada	Luxembourgish	Norwegian	Serbian	Swedish	Uzbek
Arabic	Chinese (Simplified)	French	Hindi	Kazakh	Macedonian	Odia (Oriya)	Sesotho	Tajik	Vietnamese
Armenian	Chinese (Traditional)	Frisian	Hmong	Khmer	Malagasy	Pashto	Shona	Tamil	Welsh
Azerbaijani	Corsican	Galician	Hungarian	Kinyarwanda	Malay	Persian	Sindhi	Tatar	Xhosa
Basque	Croatian	Georgian	Icelandic	Korean	Malayalam	Polish	Sinhala	Telugu	Yiddish
Belarusian	Czech	German	Igbo	Kurdish (Kurmanji)	Maltese	Portuguese	Slovak	Thai	Yoruba
Bengali	Danish	Greek	Indonesian	Kyrgyz	Maori	Punjabi	Slovenian	Turkish	Zulu
Bosnian	Dutch	Gujarati	Irish	Lao	Marathi	Romanian	Somali	Turkmen	

Login | Register

Home

support

Email me directly @ maltieri@pcgus.com



Based Services conference.

Call to learn about SDP,
and if it's the right choice
for you.



You can call us at [888-419-7469](tel:888-419-7469) or
contact [Mark Altieri](#), our SDP
Manager!

Mark has been in the area of self-determination for 13 years, working across the country and has been a repeat presenter on Self-Determination at the National Home and Community



www.publicpartnerships.com






VMRC Self Determination Advisory Committee

Everyone is welcome

Meetings 3rd Thursday of the month
watch the website VMRC.net for details

Next Meeting
August 20, 2020
3:30 PM – 5 PM



Part 2: Monday August 24, 2020 1:00 PM- 3:00 PM

<https://zoom.us/j/99840286318?pwd=T1A3ZzJSbTRHSzdLeVNVSmJtRVVEUT09> Password: 603333

Get to know some local Service Providers for Self Determination Participants

Part 3: Tuesday September 8, 2020 10:00 AM – 12:00 PM

<https://zoom.us/j/91079898885?pwd=eHlQN2JqbU1Nd0RUUExRRTJ3R29hQT09> Password: 800817

Reviewing of the VMRC Self Determination Budget tool and its implementation in the Self Determination Program

Part 4: Wednesday October 14, 2020 10:00 AM – 12:00 PM

<https://zoom.us/j/96127663909?pwd=ZVpGeWJ5eDRibVJiN0xCWEhFMEEFrDz09>

Password: 380639

Meet some Self Determination Participants and their families for their perspective of how the program works for them

The Self Determination Advisory Committee and VMRC Self Determination Team Elizabeth Diaz, Tania Candelaria, David Narbona, Michele Poaster and Angelique Shear welcome you.

