

D.C. IDS TELECONFERENCE

June 20, 2014

Quarterly Report

- Quarters are determined by Person's ISP year, not length of time in IDS service
- Reports are due within 7 business days of the end of each quarter
- Reports should be sent via email to Service Coordinators by the due date

Quarterly Report Template

- Always attach most recent Community Integration Plan and Positive Personal Profile
- 8 key areas to address – look back over past three months
- Narrative – qualitative information, not quantitative data

Quarterly Report Template

Part 1: Schedule and Attendance

- Hours authorized; weekly schedule
- Describe Person's participation in IDS
- If not consistent and regular, explain why and steps you took during quarter to try to address the reasons
- Share any recommendations for modifying/increasing hours or weekly schedule; explain reasons for recommendations; say whether Person is in favor of changes or not.

Quarterly Report Template

Part 2: Person's Relationship with DSPs

- How long have primary and back-up DSPs been paired with Person?
- If less than three (3) months, explain why
- If reason is staff turnover, explain reason(s) for turnover and what steps you have taken to prevent on-going turnover for the Person.
- Describe the relationship between the primary DSP and the Person. What are the key strengths of the relationship? In what specific ways could the relationship be improved? What is your plan to address the areas for improvement?

Quarterly Report Template

Part 3: Person's Relationship with Others Paired with Person to Receive IDS Service

- What approximate percentage of service delivery time was the Person paired with another person receiving IDS during the quarter?
- If pairing did occur, describe the relationship between the Person and any other IDS participants that the Person was paired with for service delivery. Which people have proven to be good matches and why? Which people have proven not to be ideal matches and why?
- What is your plan to address the matches that have not proven to be ideal?

Quarterly Report Template

Part 4: Opportunities for Community Membership

- Describe the types of IDS opportunities the Person had in the last quarter that offered a chance to belong to a club, group, community association or similar informal opportunity. If no opportunities like this were offered through IDS, please explain why.
- Describe the Person's involvement in, and reaction to, these opportunities, both initially and over time.
- How did the DSP assist the person to maintain involvement and have a positive experience?
- What next steps and goals are planned to help the Person build on the experiences of the last quarter?

Quarterly Report Template

Part 5: Opportunities to Meet and Interact with Ordinary Community Members

- What approximate percentage of service delivery time was the person involved in an activity with someone other than the DSP (and another IDS service participant paired with the Person, if applicable)?
- Describe the types of IDS opportunities the Person had in the last quarter that offered a chance to meet, interact with, and participate in an activity with another (non-staff) community member(s). If no opportunities like this were offered through IDS, please explain why.
- Describe the Person's reaction to these opportunities, both initially and over time.
- How did the DSP assist the person to interact with other community members during IDS service delivery time?
- What next steps and goals are planned to help the Person continue to connect with the same community members? What next steps and goals are planned to help the Person meet, interact with and participate alongside of new community members that the Person has not yet encountered or met?

Quarterly Report Template

Part 6. Opportunities Based on Person's Interests and Goals

- Describe how the IDS service offered the Person unique opportunities during the quarter which were matched to the person's unique interests and goals.
- For each opportunity listed, describe how the Person reacted, both initially and over time, if applicable.
- What additional opportunities are going to be sought for the Person and why?

Quarterly Report Template

Part 7. Skill Development Opportunities

- How have IDS services given the Person opportunities to develop **social skills**?
- What particular gains in social skills has the Person demonstrated during the quarter?
- What next steps and goals are planned to help the Person continue to develop and use social skills which are relevant to the community opportunities the Person is participating in through IDS?

Quarterly Report Template

Part 7. Skill Development Opportunities (Continued)

- How have IDS services given the Person opportunities to develop **choice-making skills**?
- What particular gains in choice-making skills has the Person demonstrated during the quarter?
- What next steps and goals are planned to help the Person continue to develop and use choice-making skills which are relevant to the community opportunities the Person is participating in through IDS?

Quarterly Report Template

Part 7. Skill Development Opportunities (Continued)

- How have IDS services given the Person opportunities to develop **travel and mobility skills**, particularly related to use of public transportation?
- What particular gains in social skills has the Person demonstrated during the quarter?
- What next steps and goals are planned to help the Person continue to develop and use travel and mobility skills relevant for the community opportunities the Person is participating in through IDS?

Quarterly Report Template

Part 8. Career and Vocational Exploration for Working-Age IDS Participants

Note: Skip this section if the Person is not working age (18-60).

- Describe how the IDS service offered the Person opportunities for career and vocational exploration.
- For each opportunity listed, describe how the Person reacted, both initially and over time, if applicable.

Quarterly Report Template

Part 8. Career and Vocational Exploration for Working-Age IDS Participants (Continued)

- Has the Person decided that s/he wishes to pursue community employment? YES NO
- If yes, has an application to RSA been submitted? If not, when is it likely to be submitted and who will assist the Person with this?
- If no, what additional opportunities for career and vocational exploration are going to be sought for the Person and why?

Quarterly Report Template

Part 9. Other Issues or Other Recommendations and Ideas Not Addressed Elsewhere in Quarterly Report

- Please note any other issues, recommendations or suggestions related to the Person's on-going receipt of the IDS service.
- This section is another opportunity to make recommendations regarding an increase in IDS service authorization for those who have very low authorizations.

Key to Good Quarterly Reports

- Good Progress Notes – descriptive writing
- Active Treatment Goal Sheets should not be used unless person is living in ICF
- Progress Note Examples

I traveled to Bonnie's apartment to meet her this morning. I arrived at 9:30am as planned. Bonnie was ready to go. She had lunch and her Metro fare card with her. We first talked about the day ahead of us. We then proceeded to the near-by Metro station where she used her pre-purchased fare card to enter the station independently but needed support to find the proper platform to travel to Metro Center. She did not recognize the stop that we had discussed as the destination and needed assistance exiting the train station. From the Metro station she proceeded to the downtown YMCA with for the water aerobics class she had chosen as an activity she would like to explore. She required some support navigating the way to there but acknowledged and adhered to all crosswalk notifications and looked each way before crossing busy downtown streets.

We arrived at the YMCA at 10:00 am. Upon arrival Bonnie asked the staff at the front desk where the class was being held. She also asked about a dressing room. She was very courteous and friendly in the exchange. The staff were very warm in return. They assigned her a locker and accompanied her to the locker room to orient her to it. Bonnie then proceeded to dress for her class and store her clothing and lunch in her locker. She changed into her swim wear with no assistance. She did require some support putting her bathing cap on but it was a difficult task. We talked about getting a lock for her locker if she decided that this class was something she would like to do routinely in the future. She like the idea of having her own locker and lock and key. She talked about how she would take care of the key if she had one. After dressing, Bonnie proceeded to the pool area to wait for her water aerobics class which was to begin at 10:30am.

Bonnie participated in the class but was a bit shy at first. She was able to follow all directions with the coaching and support of the instructor and her peers, most of whom were around her age of 65. After a short time her peers began calling her by name and engaging her in conversation. The instructor was very supportive of Bonnie and positively engaged her throughout the hour long session.

After the session which concluded at 11:30, Bonnie showered, dressed independently, packed up her swimsuit and combed her hair before leaving the YMCA. Upon leaving I asked her how she liked the class. She said she liked it and would like to come back and try it again. She stated that she wasn't ready to commit to coming there each week just yet and would like to try some additional activities. She later came back to the subject of the YMCA classes and talked about the women there and how nice they were to her. I asked if they were people she may like as friends and she responded, "I think so".

After the YMCA class we had lunch outside on the plaza and spent time getting to know each other better while eating. At 12:30 we met up with DW, an individual that Bonnie may pair with for some activities if she and DW choose to do so. They walked a short distance together to Bread for the City, a non-profit agency where they both have chosen to explore volunteerism. Bonnie has stated that at her age she considers herself retired from paid work but would like to volunteer in order to keep busy. They were both oriented to the volunteer work and asked to talk a little about why they were interested in Bread for the City. Bonnie shared her interest in keeping busy and in her words, "helping the people". Bonnie again was not ready to commit to volunteering at Bread for the City and asked about the other places that we had discussed her visiting.

At 1:30pm we began traveling back to the place where DW met us previously, which was on Bonnie's route home, and met her staff who traveled home with her. While traveling back to Bonnie's home we talked about our day. Bonnie kept going back to her experience at the Y. She said she looked forward to going back and seeing her "friends" again. I assured her that we would do that. I asked how she enjoyed being with DW. She said it was, "ok", but said nothing more. I asked if she wanted to spend more time with DW to get to know her more and she agreed. We reviewed our plan for our next meeting and then arrived at Bonnie's subway stop, exited and walked back to her home where we arrived at 2:30pm and said goodbye for the day.

John met me and his friend DW at Union Station at 9:30am. We proceeded to the bus stop where he independently used his pre-purchased fare card to board the bus and pay his fare. He recognized the stop at his destination and exited the bus without assistance. He proceeded by foot to the Washington Humane Society (WHS), acknowledging and adhering to all crosswalk notifications and looking each way before crossing busy streets.

We arrived at the WHS at 10:00 am. John greeted the staff at the front desk and they returned the greeting, calling him by name and “chatting” for a few minutes. John went to the staff locker room where he recognized his locker and independently opened it with his key. He changed into his smock with no assistance. He required some support putting shoe covers on. After dressing, John proceeded to the volunteer office to wait for his assignment for the morning. John was assigned to the cat room. Several other volunteers were in the cat room. John engaged in conversation with the volunteers he had previously met and appropriately introduced himself to the new volunteers. John’s task was to water and feed the cats which he was able to do with some support and coaching from familiar peers. The volunteer coordinator also positively engaged him throughout the two hour time period he was at the WHS.

After completing his volunteer tasks at 12:00, John independently removed his smock and placed it in the wash bin. He removed his shoe covers and placed them in the trash. His friend DW, who had been volunteering with the cats but in a room adjacent to John’s was picked up at noon to go to another activity. Upon leaving we noticed volunteers from the WHS entering a nearby coffee shop. Seeing an opportunity to further develop relationship with the volunteers, we decided to go to the shop as well. They invited John to sit with them which clearly delighted him. I assisted him to purchase a cup of coffee as he needed some support to manage the payment. He was independently able to eat his lunch while talking with the others. I faded back from the group while remaining in the shop to allow John time with his friends. I heard John asking the other volunteers about animals and sharing his hope of one day working with them. The volunteers encouraged him and talked about their own experiences working with animals. This appears to be a routine for the volunteers. John stated that he hopes he will be welcome to join the group. I told him I would assist him to do that.

At 1:00pm I had to remind John that it was time to leave for his appointment at City Paws, a veterinary clinic, where he had an appointment to tour and conduct an informational interview. City Paws is one of the clinics closest to John’s home. We will continue to work on telling time so that John is able to better manage his own time and schedule.

We traveled by bus to the next destination. John did not recognize the bus stop as it was not one he had been to before but was able to manage all other aspects of travel independently. Upon arriving at City Paws John was able to ask the receptionist for the person he was to meet for the tour. He greeted the person providing the tour very appropriately and was able to state what his interest was. I accompanied them on the tour but hung back in order to allow John to be as independent as possible. He did a great job of asking appropriate questions about the types of jobs at the clinic of the person conducting the tour and the workers he encountered. Afterwards he sat in the office with the tour guide and asked additional questions including the qualifications for different positions. He needed some prompts to recall all of the questions he had previously said he wanted to ask. He thanked the staff for their time and wished them well.

We went to the bus stop and proceeded back to Union Station for John to be picked up by staff. On the ride we talked about the day. We discussed what he had learned, whether he had enjoyed the day and some skills he would like to focus on like time telling and learning to ride the bus independently. He stated that it was a “great day”. He especially liked the lunch with the volunteers and the tour at City Paws. He also talked about DW and how he liked going to WHS with him. We talked about the schedule for the next time we meet and said goodbye at 3:00pm when he was picked up by staff.

Travel Training for DSPs

- Last call, this was identified as universal training need
- What suggestions or ideas do you have about expert trainers or curriculums that could be used in DC?
- Does anyone feel they do a very good job with training their DSPs in this area?

Issues Raised on Last Call

Individuals Not Attending:

Are residential or home-based support people still sending person to day program rather than IDS?

Are other appointments still being scheduled during IDS time?

Are individuals still saying I don't want to participate in IDS activities?

Issues Raised on Last Call

Referrals/Authorizations:

Are referrals and authorizations still for very few hours (e.g. one day a week or month)?

Is this still causing challenges with hiring and keeping DSPs?

Issues Raised on Last Call

Pairing of IDS Participants:

Are referrals and authorizations still typically for 1:2 staffing ratio?

Is it still very challenging to pair up IDS participants so 1:2 staffing can be done?

Are Service Coordinators and DDA beginning to refer people who are already matched?

Issues Raised on Last Call

MTM Requiring 60 Minute Pick-Up Window:

If MTM is being used to transport a Person to an IDS service delivery site, IDS staff should not be meeting the Person at home.

IDS staff should meet Person at the IDS service delivery site if transportation being provide by MTM.

If the IDS service is being used to help a Person learn to use public transportation, the IDS staff person can meet the Person at home and start the service there.

Issues Raised on Last Call

Submitting Initial Community Integration Plans

- Have Service Coordinators stopped asking for the ICIP prior to service authorization/start?
- What happens when you submit your Plans?
 - Do you get feedback from Service Coordinators?
 - Is the policy to go ahead and implement the plan unless you hear something back from the Service Coordinator?

Issues Raised on Last Call

- Do most Service Coordinators/Teams have a clear understanding of what the IDS service is for?
- Is the IDS service being used to help working-age people move toward employment or to help older people have positive retirement experiences?
 - If not, what reasons are people being referred for IDS?

Use of Discovery

- How can Discovery techniques be useful during the first thirty (30) days of service?
 - How can Discovery help in the development of an On-Going Community Integration Plan?
- To what extent can the IDS service implement Discovery for working-age participants?

Next Monthly Call

- July 18, 2014 10am-12pm
- We will be asking some of the IDS providers to present/share information or lead parts of the call
- Agenda suggestions?