



Are you interested in pursuing a Participant Directed Program Model for your adult child? In this handout, you will find the common steps to follow to create your own program. ****Disclaimer: this checklist is specific to Massachusetts, if you live outside of MA, your processes and agencies will differ. Please reach out to your specific state agencies for more information. ****

Step 1: Program Eligibility

Before you can get into the details of planning, you first need to have your adult child apply for adult services. As a reminder, post school services are no longer an entitlement, but are based on eligibility and yearly budget allocations.

- 688 Referral: At least 2 years prior to graduation/aging out, make sure that your school has submitted the 688 Referral to start the adult service agency process. In order to participate in the Self-Directed Programming model, your child must be found eligible for adult services via DDS, so confirm that this is the agency that the primary referral is being made to. Remember, the 688 Referral does not determine eligibility in the program, it is just identifying which adult programming your adult child will apply for. See the Resource page for more information.
- Apply for Adult Services via DDS: Once DDS has been identified as the primary agency via the 688 Referral, your child will now need to go through the application process for DDS Adult Eligibility. Regardless of whether or not your child was found DDS eligible as a minor, they must re-apply to DDS for adult services.
- Do your homework: while undergoing the application process, start doing your homework on self direction programming. See the Resources page to find more information on the different programming models and what each will entail. This will allow you to get a better idea on which self-directed programming model will work better for your adult child and family. While doing your homework, make sure you:
 - Create a person-centered plan: this person-centered plan will be a critical piece in completing the Vision Plan and Individual Support Plan. See the resource page for more information on person-centered planning.
 - Have all formal and informal transition assessments completed and update the transition planning form in the IEP: during the annual IEP meeting, the school district should be completing the transition planning form in the IEP and conducting both formal and informal assessments to help determine what your child should be working on while still enrolled in school and post school.
- Work with your DDS Transition Coordinator to determine eligibility for the Self-Directed Programming Model: Once your child has been found eligible for DDS Adult Services, your child will be assigned a DDS Transition Coordinator which will support them and their team until they transfer into adult services. At this

time, you will start discussing which programming model your child would like to pursue once they age out of school.

- Invite your DDS Transition Coordinator to attend all upcoming IEP meetings: this will allow the Coordinator to learn more about your child and gather information from them and their team on future goal setting which will be helpful when planning for self-directed services.
- Create the Individualized Transition Plan with your team: this form will be completed by the team and submitted to DDS, indicating which service delivery model the child would like to pursue once they enter adult service programming.
- Network with other families participating in Self-Directed Programming and attend webinars and trainings related to this topic. See the Resource page for additional information.

Step 2: Setting up your Participant Directed Program Model

Once you have obtained eligibility for DDS Adult Services and have decided to pursue the Participant Directed Program (PDP) model under self-direction, you will move into setting up the program model. **If you chose to use Agency With Choice, the agency will be supporting you with creating this piece and will be the responsible party for all staffing needs.**

- Create the Vision for the PDP model, using the person center plan and transition assessments: this is your “business plan” which will list out your child’s vision for their self-directed program and their current and long term goals. This document should also list the staffing anticipated to assist your adult child in carrying out the plan, the resources needed to support the plan and an estimated budget request to support the vision plan. See the Resource page for more information
- Schedule the PDP orientation with your DDS Transition Coordinator and DDS Support Broker to further develop your vision plan and the budget for the upcoming year: during this meeting, you will go into more detail on what needs to be set up to get the PCP up and running. After this meeting, you will now be transitioned to your DDS Support Broker
- Detailed program planning once you have been allocated your budget: Once you are allocated your final budget, you will create the program (including staff, programming, supplies and resources)
- Set up the Employer of Record: The Employer of Record is the person that will be responsible for the administration of the budget, including hiring and onboarding staff, payroll and vendor invoices.
- Write Job Descriptions: all staff members must have a signed job description on file with DDS. The job description should match the roles and responsibilities of the staff
- Find, hire and train your staff: if doing PDP, the Employer of Record and adult client are responsible for writing the job description, advertising for staff, interviewing of staff, hiring (onboarding) of staff, and training of staff. Please see the Resource page for more information.
- Develop the ISP (Individual Support Plan) and Safety Plan during annual ISP meeting with your DDS Support Broker: Within 30 days of being found eligible for PDP, the adult client, employer of record, DDS Support Broker and other members of the team will meet to create the Initial Individual Support Plan and Safety Plan. The ISP will outline the goals that the adult client will be working on for that year period. The team will meet annually to update the ISP, Safety Plan and submit progress notes from the previous year.

- Continue Networking with other families participating in Self-Directed Programming and attend webinars and trainings related to this topic.

Step 3: Ongoing Programming Needs

- The Employer of Record will be working with the program fiscal intermediary and DDS for:
 - Bi weekly payroll
 - Submit invoices
 - Budget monitoring
 - Fiscal Fraud and fiscal abuse monitoring
- Continued Professional Development of Staff
- Monthly to Quarterly check ins with your DDS Support Broker
- Yearly update of ISP, Program Progress Notes and Safety plan
- Continue Network with other families participating in Self-Directed Programming and attend webinars and trainings related to this topic

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