A Guide To Using The Person Centered Description

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Introduction

What follows is a guide to using a Person Centered Description (PCD). It is called a description rather than a plan because it lacks action planning. The PCD should be used to develop the actions and then the person centered description and actions together make up a person centered plan. This guide is designed to be used by those who will support people who are leaving a congregate setting such as a public ICF. The PCD provides a snapshot of a person's life based on what is known at the time it is written.

A PCD that is written months before someone moves may be out of date, and a PCD that is not updated after someone moves is certainly out of date. It is developed from information provided by the person, and those that know and care about him/her. It is not a complete description; it is just a "good enough" description so that Service Providers can answer a critical set of questions to determine whether or not they can support someone before, during and after he/she moves. The structure of the PCD is outlined in the next section.

The PCD gives you a way to answer important questions and to add to what is known about the person. Some of the questions it can help answer are:

1. **Can we support this person?**
    a. Who is this person?
    b. What do you need to do to help this person be happy?
    c. Are there issues of health or safety that we have to take into account?
    d. What has to be in place to be successful?
    e. How much are services that work for the person likely to cost?

2. **What is the best way to develop supports and services for this person?**
    a. Where should the person live?
    b. What needs to be in place before he/she moves?
        i. Are there specialized supports (e.g. a psychiatrist) that need to be arranged before the person moves?
    c. Who can he/she live with?
    d. What are the characteristics of those who will best support the person?
    e. What should we look for the person to do at home and during the day?

3. **What should staff know before they start supporting this person?**
    a. What, if any, are the critical issues to be aware of?
    b. What helps the person have a good day and avoid bad days?
    c. What things need to remain the same where the person will be living?
    d. How should supports be provided for him/her?
    e. How does the person communicate so others know how to best support him/her?

4. **When we start learning new things about the person (the day he/she moves in), how do we record and share learning?**
   a. What are the big changes in what is important to the person or in support that have happened since moving?
   b. What are we learning as he/she settles into his/her new life? (Learning and trying new things once a person is beginning to settle in to the new home by using the Learning Log, Communication Chart and 4+1 Questions)
   c. How can we help the person get a meaningful, productive life with community connections?
   d. How do we keep learning alive?

The PCD should be viewed as a tool to help others learn things that are important to the person, important for the person and how to provide supports that work well for the person. The PCD will not be useful if it sits in a file somewhere. It must be seen as something that is used on a daily basis by those that directly support the person.

As a tool, the PCD can be used in a variety of ways to make life easier for all parties involved. From a Provider standpoint, it will help identify ways to develop successful supports and services; Direct Care Professionals will not have to "guess" how to support a person when they first meet; and People Supported will not have to "retrain" support professionals and will be able to keep their lives moving forward.

The structure of the Person Centered Description

All of the PCDs that we develop have the same structure. The content varies dramatically from person to person but the structure remains the same. Once you learn how it is structured it is easy to use when you are looking for a specific piece of information or have a particular question that you want answered. If you need to hire new staff you turn to the section that describes "the characteristics of those who do the best in supporting the person." If you want to explain how someone communicates with his/her behavior you can simply hand the person you are training the "communication chart." What follows describes what the reader can learn from each section:

Cover page

The reader learns:
- Whose plan
- When it was done
- The purpose of the plan
- Who contributed

People or relationship map

This shows who is in the person's life:
- It shows who is paid and who is not and
- How close the person feels to each individual listed

Introduction – great things about the person

This section describes what people like and admire about the person, it is your introduction to the person.

Important to the person
This section describes what we believe the person wants and needs in order to be happy, content, and comforted. It includes what we have learned about what the person sees as important in:
- Relationships
- Rituals and routines
- Things to do
- Places to be
- Rhythm or pace of life and
- Preferred approaches, methods of transitioning from one activity to another, etc.

Characteristics of people who support the person best

In this section the reader learns:
- The personality characteristics that those who provide support should have if they are to be successful
- The core skills needed
- Anything else that you would look for in a person if you were using this list to screen potential candidates to work with the person

What others need to know or do to support the person

In this section the reader learns:
- The general "rules" for support
- The specific things to do or ways to approach issues so the person has what is important to him or her; and
- How the person responsible for providing support can adequately know what is expected of him/her in terms of how support is delivered.

What others need to know and do to help the person stay healthy and safe

This section is where issues of health are described. This may include:
- Any relevant medical conditions
- Complicated medications
- Allergies or positioning issues
- Dietary needs or swallowing or food allergies
- Other items related to physical health and/or mental health

This section also describes what the reader should know about helping the person stay safe. This may include, but not be limited to, issues around:
- The person spending time by themselves
- The person's understanding of strangers, and others who may or may not be helpful in emergencies
- Understanding of dangerous or threatening situations
- Other items related to the person's safety, and what they need from others in order to have an acceptable balance between being happy and safe.

Things to figure out

In this section the questions people have as they develop the PCD are recorded. The questions can relate to understanding the person or in how to implement the PCD. Some examples could be:
- Lucy says she is afraid of dogs because she was bitten as a child. Is this true?
- Does Lucy really like to get up early or is it just the routine of her current residence?

Communication

This is used with everyone who does not use words to communicate and anyone else where it is helpful to know how the person communicates with their behavior. In general be sure that:

- The first column indicates what is happening around the person, either within the setting, or what other people are doing, time of day (ex. after school or early morning), recent activity or occurrences
- The second column describes what the person does, what he or she says, or what he or she appears to be doing or saying
- The third column indicates what those who know the person best believe he or she is trying to communicate to others by what was observed
- The fourth column should provide specific, yet brief, instructions for those who are providing support. These instructions should indicate what to do in response to what is recorded in column two

What is happening in the person's life right now **– the upside and downside (What is working and what is not working)**

In this section the reader learns what is working and not working in the person's life at the time the PCD was done. It is done with separate sections for the perspective of the person and for the perspective of those who support the person. It may include issues around:

- Where the person lives
- Who the person lives with
- What the person does for fun
- What the person does with his/her days
- The amount of control he/she has and wants

A Picture Of A Life for…

In this section there is a description of the circumstances and supports needed for the person to have a good life in the community. The first page of this section has 2 parts – a graphic on the left, and on the right a heading that says **(person's name) would live.** The graphic has the person at the center and then around the person there are the key characteristics of a good life for that person. On the left is the same information but in text rather than a picture.

Community would… Day would…

On this page are descriptions of what needs to be present in the person's community and in his/her day time activities.

Activities, supports, and costs

In this table the routines, proposed activities, and the supports needed are detailed together with the costs. *This is where critical information about lifestyle and support issues can be found.* The Other section starts off with a description of what professional services are needed to support the person successfully. The section also includes information related to equipment needs, therapies, mental health, behavioral supports, and transitional supports (if necessary).

Activities	Supports Needed	Associated Costs
Morning		
School/Work		
Evening		
Weekends		
Other Needs		

Can We Support The Person?: Using The PCD To Determine Provider Capacity

Who is this person?

The PCD should be viewed as a "résumé" that offers a first glimpse of the person. It provides enough information to help you determine whether or not supporting this person makes sense for you and if it would be beneficial to learn more about the person. Much like a good résumé, the PCD provides enough information for you to know whether or not your organization wants to follow up and what other information you would need. When you first get the PCD read through it, from start to finish. After reading once, then go back and look at what questions you would need to ask to make a decision to support the person.

What would you need to do to help this person be happy? Are there issues of health or safety that we have to take into account?

Go back and read the sections on "what is important to" and "what other people need to know or do". Ask whether or not your organization could put together the supports needed for there to be a good balance between important to and important for. Do you already have a good track record of supporting people with similar issues? Will you need to develop new services or methods of support?

What has to be in place to be successful and how much are services that work for the person likely to cost?

If you carefully read the Picture Of A Life section you will find what you need to know about where and how the person wants to live. You can see what you must have in place to be successful, including specialized supports. You should be able to use this information to construct a reasonable estimate of costs.

As you read through the PCD you should be asking yourself what else you need to know. Most of the information you need to get started is present, but you are likely to have questions the PCD doesn't fully answer. Where that is the case, make a list of questions. Once you have the list of questions, look at them and think about whether they can best be answered by looking at the records or by talking to people who know the person. If you look at who contributed and who is in the person's life, you will get a good idea of whom or what can answer your questions. Think about whether you need to know this information in order to develop a proposal or whether this is information that can wait until you actually need to develop services. If your services are selected, the development process can begin.

Developing Services and Supports Using the PCD

The PCD provides enough information to give a clear perspective of what supports will be necessary to help the person have a successful life. This does not mean that supports won't need to be modified or won't change over time, but does indicate what is currently working well and provides a good starting point for you to begin services. It also provides a training tool for direct support professionals to quickly learn about the person. It is a useful positive summary of the information available but it is still only a summary of what is known and should not replace reviewing files, or meeting and talking with people to obtain more information.

Where should the person live?

The Picture Of A Life identifies a good living situation for someone and includes such information as the type of physical home, needed home accommodations, and some information on the kind of neighborhood. It can help you learn what the person is looking for and determine if you have available what is being sought. If it is not readily available, it helps you determine if you want to develop the type of living situation requested. Along with the physical requirements, you can learn how close a person wants to live to friends or family. The Picture Of A Life creates an opportunity to discuss with the person what you are able to offer.

What needs to be in place before the person moves?

Many times when a person moves, there are supports that must be in place beforehand to make sure the move is successful. For example, if a person is on psychotropic medication, it is necessary to have a psychiatrist in place to make sure medications continue without a lapse in the prescription. It also allows for medical professionals from the current program to talk to community clinicians beforehand to make sure successful medication regimens continue. This information can be found in the "What's Working" section of the PCD. Additional information on needed supports will be found on the "Supports Needed For Success" page (the final section of the Picture Of A Life). Adaptive equipment needs are another area that should be in place prior to someone moving. Again, these can be found in the Supports Needed section of the Picture Of A Life.

Who can the person live with?

Within the PCD, the "Relationship Map" identifies who the person feels close to and some of these may be people the person you are planning with would like to have as housemates. You can also explore what people the person feels close to have in common and develop a picture of who might do well living together. The "Important To" section of the description illustrates the key things the person must have in his/her life to be happy and content. Often, this will provide you with information on the types of

things that others should/should not do for life to go well for the person and will identify things that can be used to determine common interests for housemates. Be sure to look for things that need to be absent in the person's life as well as what needs to be present.

Who should provide support: What are their characteristics?

The section titled "What Are the Characteristics Of People Who Support Best" provides a snapshot of what personality characteristics should or should not be present in staff to best support the person within your organization. It should be used to determine who will be assigned to provide support and as a tool to recruit and hire direct support professionals.

What should we look for the person to do at home and during the day?

The PCD provides many details on what a person can do at home and during the day. The Picture Of A Life offers a quick description of what should be available in the community and during the day. For a more detailed description of what should be present, the "Important To" section provides interests, places and activities the person likes to do, while the "What Others Should Know Or Do To Support" section provides information on how to accomplish the identified interests.

The "Communication Chart" provides you with information on how the person will respond to certain situations that will help you support him/her while he/she is involved in different activities.

Preparing For The Move: What Staff Should Know Before Starting To Support The Person

Often, direct care professionals are at a disadvantage when working with someone new to them. They have only the critical information (generally around health and safety issues) on how to support the person and have to guess about what needs to be present for the day to go smoothly. This results in frustration and uncertainty for the person supported, and confusion for the staff. Prior to the person moving to their new home, the PCD should be provided to direct support staff as a training tool to give them a background on who they will be supporting and what needs to be in place for the person to feel comfortable.

What, if any, are the critical issues to be aware of?

Sometimes, there are issues that impact the person's health or safety, or the safety of others. This information is included in the PCD and should be presented in a clear, respectful manner so you know what to do to keep people safe and in good health. These issues are too critical to be glossed over or to require you to "read between the lines" to determine if there are concerns related to supporting the person. This information will be found in the two sections that detail what others need to know or do to support the person. The information may not provide all the details you will need to develop supports, but it will let you know to request additional documentation to learn about issues that are too sensitive for a public referring document. Additionally, you will know what supports need to be in place, and potential costs, by reviewing the Supports Needed section in the Picture Of A Life. Such support needs may be related to medical equipment, behavioral and mental health supports, or criminal justice involvement.

What helps the person have a good day and avoid bad days?

These are the things generally not found written in a file anywhere, yet are essential in contributing to the well being of the person. Good days, something we all have, generally are dependent on the simple things in our lives – things such as that morning cup of coffee, being able to watch that favorite TV show, changing clothes after work, or listening to music as you fall asleep at night. These things are different for all of us. Just think of what life would be like if suddenly they were no longer present because you moved to a new home with a new support system. These things are found in the "Important To" section of the PCD and illustrate what is currently known about the person's routines, rhythms of life, who he/she likes to spend time with, what he/she likes to be involved in and how he/she likes to spend his/her day. This is balanced with what others need to know to support the person and provide the balance we all need to be successful in our day. For example, you may like to eat pizza, but shouldn't eat it every day. As a Provider, it is helpful to work with the person to determine what makes a good balance of eating the pizza while maintaining a healthy diet. (ex. once a week could be a good compromise).   The "Characteristics" page identifies what should be present or absent for those that support the person and can contribute to a good day, especially when it is someone the person likes to be around.

These sections also help identify what should be avoided. If the things identified were present, you can expect the person to have a bad day. This is helpful information to have, since sometimes these things are beyond our control. However, knowing this beforehand helps you prepare to support the person and help them through the difficult times.

What things need to stay the same where the person will be living?

To help provide continuity for the person, the What's Working section of the PCD provides information from the perspectives of both the individual and those that know the person well on what makes sense at this moment in time. It provides you with a good starting point when you first begin to support the person in his/her new life. The information provided in "What's Not Working" gives you an opportunity to design services in a way that will make more sense for the person from the very beginning.

How should supports be provided for the person?

The PCD captures information from people who have supported the person and provides that information so you don't have to spend time guessing on what to do. You can find what successful supports, and what supports do not work, in the "What Others Need To Know And Do To Support" sections of the PCD. This basically provides you with instructions on how to best support the person, based on what is currently known, and avoids you having to reinvent the wheel when working with the person. These sections must be provided to the direct support professionals who will be working with the individual to assist with a smooth transition.

How does the person communicate so others know how to best support them?

Much like the "What Others Need To Know And Do" sections, the "Communication Chart" also provides crucial information on how to support a person best. Supporters can quickly learn what a person who does not use words is saying through his/her sounds, expressions or actions and not feel at a loss because they are unfamiliar with the person. Additionally, for those people who do use words to communicate, there may be times or situations where their words and actions are in conflict. The Communication Chart will help supporters identify these inconsistencies and provide tips on how to help the person through the situation.

How To Record And Share Learning: Using The PCD For Ongoing Support

The PCD is purposefully designed to capture new learning as people are supported on a daily basis. As you look at the pages in the PCD that describe what is important to the person and the pages that follow you see that the right hand side of the pages is blank and has the heading "new things we have learned…" This is so that any new learning can be handwritten and then incorporated into the body of the PCD later. What was important to the person before he/she moved may no longer be important. Things that are not on the important to list may need to be added. How to best support the person may have changed.   New experiences and opportunities will have different results and must be recorded so that everyone knows how to keep the person's life

moving forward. New learning is critical and without recording it, we lose precious opportunities to ensure we don't forget what has been learned.

What are the changes that are happening since moving?

When the person first moves in and over the first 30 days, you should expect significant changes. The person you are supporting is in a new environment with new people and what was correct in the old setting may not be correct in the new setting. The PCD provides a starting point to help everyone look for significant changes in what is important to the person and how he/she can best be supported. If the person has a history of challenging behavior, look for indicators that he/she is struggling but also see if the old issues have gone away in the new setting. As you learn about the person in their new environment, what part of the PCD still makes sense and what parts will need to change.

One way to look at a typical pattern is to think about it in the framework found in the following table:

Phase	Activities
The person just arrived **Within 30 days...**	Time of major discovery Look for big issues/changes/implementation issues What parts of the PCD make sense? What parts need to change Does direct support staff know what it says; are they doing what it says? What are they learning? How is the learning being shared/recorded? What are they doing about what they learn?
Settling in **Within 30-90+ days...**	Lots of learning/trying new things What are direct support staff trying that is different? What are they learning? Are they listening? How does the PCD and associated actions need to change?
Getting a good "paid" life **Within 90+ days to1 to 2 years**	The learning wheel - How do you: 1. Encourage ongoing learning 2. Record the learning 3. Act on the learning 4. Continue to learn, etc

Community Connecting **From then on…**	➢ Continuing to use the learning wheel approach ➢ Building on a "good paid life" ➢ Understanding the person's current & potential contributions ➢ Looking for/building connections

Remember this is just a way to think – it will not work for everyone.

Living descriptions and building a learning culture: Encouraging learning; recording learning; acting on learning

The challenge in ongoing support is to create a culture of active learning, where learning is expected, recorded and acted on. Without structures that support these practices learning is noted by the exceptional manager but lost when that manager moves on. With this in mind we have developed and teach several "mindful learning tools". To record day to day learning there is a "learning log". To look at where we are and how to move forward there are 2 tools; the working/not working sort and the 4 + 1 questions. While the nature and use of these tools is beyond the scope of this guide, the reader can contact the authors or go to the Learning Community website (www.learningcommunity.us) for more information.

Regardless of how the learning is gathered it needs to be organized, synthesized, and acted on. The PCD provides a framework for this. By putting the new learning into the PCD as it occurs, the service provider creates a living document that can then be used to drive the action planning for the person.