

PDP Orientation Checklist

Support Brokers should use PDP Orientation Checklist Talking Points as this document is being reviewed and discussed.

The following topics should be reviewed by the Support Broker with the participant prior to starting the Participant Directed Program:

1. The general concept and practice of self-directed supports
2. Review of all service delivery models and the option to change them
3. Translating a participant's vision into an Individual Support Plan and budget
4. The role of the participant, family, Support Broker, other DDS staff, and the Financial Management Service
5. Review of natural and existing supports and services
6. Development of an individual budget with an explanation for all paid services
7. Review of how and why to make changes to supports and budget
8. Limitations, allowable and disallowable expenses
9. Selecting an Employer of Record or Authorized Representative, and if they are needed
10. Participant and Employer of Record responsibilities including schedule, job description, time sheet review and submission, supervision, performance review, etc.
11. Hiring providers including how to establish pay rates and service hours
12. Review "Wages Cost to You" and "Payment Schedule" documents.
13. Option to talk with other PDP participants to hear about their experience
14. Opportunity to participate in information sessions for others considering self-direction
15. Review of the Participant Toolbox
16. Review "Preventing Financial Abuse and Exploitation"
17. Review and sign the "PDP Acknowledgement of Responsibilities"
18. Review other program responsibilities and considerations, as needed

By signing below, I acknowledge that my Support Broker reviewed each topic with me during the PDP enrollment process.

Signature: _____ Date: _____

Participant (or their legal guardian)

Signature: _____ Date: _____

Support Broker

This document should be reviewed and signed before starting the Participant Directed Program. Please store this in the Area Office Shared Drive.

