

## Person-Centered Plan Report Scoring Criteria & Checklist

Adapted from the Kansas Institute for Positive Behavior Support Person-Centered Positive Behavior Support Plan (PC-PBS) Report Scoring Criteria & Checklist (Rev. 3-5-07)

Person's Name: \_\_\_\_\_ Rater's Name: \_\_\_\_\_

Date of Person's Plan: \_\_\_\_\_ Date Completed Rating: \_\_\_\_\_

### SUMMARY OF CRITICAL FEATURES

Please review the entire plan and then rate the following questions by circling  
Y (yes) or N (no)

<b>CF1</b>	<b>Person-Centered Planning goals attempt to increase quality of life, not simply maintain it</b>	<b>Y</b>	<b>N</b>
<b>CF2</b>	<b>The plan is designed to make a meaningful positive difference in the life of the person</b>	<b>Y</b>	<b>N</b>
<b>CF3</b>	<b>The plan clearly reflects the values and beliefs (philosophy &amp; foundation) of Person-Centered Planning</b>	<b>Y</b>	<b>N</b>
<b>CF4</b>	<b>The plan has sufficient detail to answer what is important to the person</b>	<b>Y</b>	<b>N</b>
<b>CF5</b>	<b>The plan describes what is important for the person in the context of what is important to them</b>	<b>Y</b>	<b>N</b>
<b>CF6</b>	<b>The plan addresses what needs to stay the same, to be maintained, or enhanced</b>	<b>Y</b>	<b>N</b>
<b>CF7</b>	<b>The plan addresses what needs to change</b>	<b>Y</b>	<b>N</b>

### GENERAL CRITICAL FEATURES

Total Number of Y = \_\_\_\_\_ PERCENT = [ \_\_\_\_\_ / 7 ] X 100 = \_\_\_\_\_ %  
(Total Number of Y)

**Instructions** - Please rate each of the following questions by circling either **0**, **1**, or **2** according to each question's criteria. Items with a \* are critical elements that must be scored.

### PART 1 – DISCOVERY AND LEARNING INFORMATION

#### Identifying Information

<b>1.*</b>	<b>Identifying information is complete (facilitator name, person's name, other people involved in the planning process, DOB/age, current living environment)</b> 2 = All identifying information is provided including name of person writing the plan, person's name, other people involved in the planning process, DOB/age, current living environment 1 = Some of the above identifying information is included but not all 0 = With the exception of the person's name, there is no identifying information included that is relevant to the plan	<b>2</b>	<b>1</b>	<b>0</b>
<b>2.*</b>	<b>Planning participants, including the person, are listed and are people important to the person (including family, friends, and/or person's preferred spokesperson)</b> 2 = Planning participants' names and their functions/roles are listed and were chosen by the person 1 = There is a description of who participated in the planning, but it is incomplete (either not all participants are listed or their function/role is unknown, or planning participants were not chosen by the person) 0 = There is no mention about who participated in the planning	<b>2</b>	<b>1</b>	<b>0</b>

#### Information on how the person currently lives

<b>3.</b>	<b>A brief story or history of the person's life is provided</b> 2 = There is a description of the person's life story or history, which includes health issues, behavioral issues, diagnoses, living situations, moves, and community involvement. If particular events do not apply, it is so stated 1 = Some events are described but the information is limited 0 = There is no information provided regarding the person's history	<b>2</b>	<b>1</b>	<b>0</b>
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<b>4.*</b>	<p><b>Important places for the person at home, at school/work/retirement, and in the community are described</b></p> <p>2 = Important places for the person at home, at school/work/retirement, and in the community are described            1 = Some places are listed, but the information is limited (e.g. does not address each setting listed above)            0 = There is no information provided regarding important places for the person</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>5.*</b>	<p><b>Opportunities for the person to interact with friends and/or family are described</b></p> <p>2 = Quality and frequency of friendships (non-paid and paid supports) and/or family interactions are discussed and described            1 = Friendships and/or family relationships are mentioned in general but there is no description regarding the quality or frequency of the relationships            0 = There is no information provided regarding the person's opportunities to interact with friends or family members</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>6.*</b>	<p><b>The person's strengths are described</b></p> <p>2 = Several specific skills, gifts, strengths, and positive behaviors are described            1 = Some skills, gifts, strengths, or positive behaviors are described but the information is limited            0 = There is no information provided regarding the person's, skills, gifts, strengths, or positive behaviors</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>7.</b>	<p><b>The person's preferred method of communication is described (receptive/expressive communication)</b></p> <p>2 = The person's method of communication (both expressive and receptive) is described as well as any possible issues related to communication            1 = Incomplete information is provided regarding the person's method of communication or only one form of communication is addressed, expressive or receptive            0 = There is no information provided regarding the person's method of communication or strategies related to communication</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>8.*</b>	<p><b>Opportunities for choice in the person's current environment are described</b></p> <p>2 = There is a specific description of the person's opportunities to make meaningful choices in their daily life. If there are areas in which opportunities for choice are limited, these are listed. (Need to mention "choice" or a similar word)            1 = Opportunities to make choices are identified, but not described. (Need to mention "choice" or a similar word)            0 = The issue of opportunities to make choices is not addressed (there is not mention of "choice")</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>9.*</b>	<p><b>Current physical and/or mental health issues are described</b></p> <p>2 = Current physical and/or mental health status, including chronic and/or acute medical issues, medication, and necessary adaptive equipment, is described. If the person is in good health, it is so stated            1 = Incomplete information is provided regarding current health status issues            0 = There is no information regarding current health status</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>10.</b>	<p><b>Mobility issues are described</b></p> <p>2 = The person's abilities to mobilize themselves physically from one place to another are described            1 = Some information is provided regarding the person's mobility, but they are not completely addressed            0 = There is no information provided regarding the person's mobility skills</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>11.</b>	<p><b>Transportation issues are described</b></p> <p>2 = The person's ability to access or use transportation to different activities (e.g., work, school, church, community) are described            1 = Some information is provided regarding the person's ability to access or use transportation, but they are not completely addressed            0 = There is no information provided regarding the person's ability to access or use transportation</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>12.*</b>	<p><b>Current rituals and routines are described (quality, predictability, preferences)</b></p> <p>2 = There is a general description of the person's daily rituals and routines, which includes quality, choice, preferences, and predictability, in general            1 = There is some information provided regarding regularly scheduled activities but there is no mention of how predictable they are or how enjoyable they are or if they relate to a person's preference            0 = There is no information provided regarding the person's daily activities, rituals or routines</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>Understanding how the person <i>wants</i> to live their life</b>				
<b>13.*</b>	<p><b>The purpose of the planning process/plan is clearly stated and related to the person's desires and preferences</b></p> <p>2 = There is a clear purpose statement about why the plan is created and it is related to the person's desires and preferences            1 = There is a statement about the purpose, but it is not very clear or detailed or it is not related to the person's preferences            0 = There is no mention about the purpose of the plan</p>	<b>2</b>	<b>1</b>	<b>0</b>

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<b>14.*</b>	<p><b>A global statement of the person’s dreams is made</b></p> <p>2 = There is a global statement about what the person’s dreams are for the future with enough detail to create action steps</p> <p>1 = There is a statement about what the person’s dreams are for the future, but it is not very clear</p> <p>0 = There is no mention about what the person’s dreams are for the future</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>15.*</b>	<p><b>Type of preferred living setting for the person is described</b></p> <p>2 = The person’s preferred living setting is clearly described, and there is a statement regarding how this information was gathered.</p> <p>1 = The person’s preferred living setting is mentioned but is not described in enough detail and/or there is no information about how the proffered living setting was gathered</p> <p>0 = The person’s preferred living setting is not identified</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>16.*</b>	<p><b>With whom, if anyone, the person wants to live is clearly described</b></p> <p>2 = Specific people or type of people the person wants to live with are clearly described. and there is a statement regarding how this information was gathered</p> <p>1 = With whom the person wants to live is mentioned but is not described in enough detail and/or there is no information about how the details were gathered</p> <p>0 = With whom the person wants to live is not identified</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>17.*</b>	<p><b>With whom the person wants to socialize is clearly described</b></p> <p>2 = Specific people the person wants to socialize with are clearly described and there is a statement regarding how this information was gathered</p> <p>1 = With whom the person wants to socialize is mentioned but is not described in enough detail and/or there are no details about how this was gathered</p> <p>0 = With whom the person wants to socialize is not identified</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>18.*</b>	<p><b>Work/school/retirement activities the person wants to engaged in are described</b></p> <p>2 = Specific work, school or retirement activities the person wants to engage in are clearly described and there is a statement regarding how this information was gathered</p> <p>1 = Work, school or retirement activities the person wants to engage in are mentioned but is not described in enough detail and/or there is no information about how the details were gathered</p> <p>0 = work, school or retirement activities the person wants to engage in are not identified</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>19.*</b>	<p><b>Social, leisure, or religious activities the person wants to participate in are described</b></p> <p>2 = Specific social, leisure, or religious activities the person wants to participate in are clearly described and there is a statement regarding how this information was gathered</p> <p>1 = The social, leisure, or religious activities the person wants to participate in are mentioned but not described in enough detail and/or there is no information about how the activities were gathered</p> <p>0 = The social, leisure, or religious activities the person wants to participate in are not identified</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>20.</b>	<p><b>What skills or leisure activities a person wants to learn are described</b></p> <p>2 = Specific skills or leisure activities the person wants to learn are clearly described and there is a statement regarding how this information was gathered</p> <p>1 = What skills or leisure activities the person wants to learn are identified but not described in enough detail and/or there is no information about how the details were gathered</p> <p>0 = What skills or leisure activities the person wants to learn are not identified</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>21.*</b>	<p><b>Barriers to achieving the life a person want to live are described</b></p> <p>2 = Possible barriers for the person to achieve the way they want to live their life are identified, there is a statement regarding why it is thought that this may be a barrier and what area of life may be adversely impacted</p> <p>1 = Possible barriers for the person to achieve the way they want to live their life are mentioned , but there are no details included as to why it is thought that this may be a barrier or what area of life may be adversely impacted</p> <p>0 = Possible barriers for the person to achieve the way they want to live their life are not identified</p>	<b>2</b>	<b>1</b>	<b>0</b>

### PART 1 – DISCOVERY AND LEARNING INFORMATION

**Total Points Earned** (Items 1-21) = \_\_\_\_\_      **PERCENT** = [ \_\_\_\_\_ / 42 ] X 100 = \_\_\_\_\_ %  
(Total Points Earned)

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<b>PART 2 – SUPPORTS AND ACTION PLANNING</b>				
<b>Person-Centered Supports</b>				
<b>22.*</b>	<p><b>Goals or skills to be achieved are described and are related to the person’s preferences and how the person wants to live their life</b></p> <p>2 = The goals or skills to be achieved are clearly described and are related to the person’s preferences            1 = The goals or skills to be achieved are listed but are not clearly described and/or not related to the person’s preferences            0 = There is no mention about the goals or skills to be achieved</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>23.*</b>	<p><b>Action steps describing what needs to be done to assist the person to achieve the goals or skills are documented</b></p> <p>2 = Actions steps documenting what needs to be done to assist the person achieve his/her or goals are clearly identified and described with dates for completion and people responsible for assisting the person in completing each step            1 = Action steps describing what needs to be done to assist the person achieve his/her goals are identified but not described (simply listed), the description of the actions are unclear, and/or no dates for completion and people responsible for completing step are documented            0 = Action steps of what needs to be done to assist the person achieve his/her action steps or goals are not addressed</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>24</b>	<p><b>Supporter training needed to assist the person to achieve goals is described</b></p> <p>2 = The training needed to assist the person in achieving his/her goals is clearly identified and described. If no training is needed, it is so stated.            1 = The training needed to assist the person achieve his/her goals is identified but not described (simply listed) in enough detail, and/or is described but the description of the training is not clear            0 = The training needed to assist the person achieve his/her goals is not addressed</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>25.</b>	<p><b>Materials, equipment, assistive technology needed to assist the person to achieve his or her goals are described</b></p> <p>2 = The materials, equipment, and/or assistive technology needed to assist the person achieve his/her goals are clearly identified and described. If nothing is needed, it is so stated.            1 = The materials, equipment, and/or assistive technology needed to assist the person achieve his/her goals are mentioned but not described (simply listed) in enough detail, and/or is described but the description provided is unclear            0 = The materials, equipment, and/or assistive technology needed to assist the person achieve his/her goals are not addressed</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>26.</b>	<p><b>Extra services and supports needed to assist the person to achieve goals are described</b></p> <p>2 = Additional services and supports needed to assist the person achieve his/her goals are clearly identified and described. If nothing is needed, it is so stated.            1 = Additional services and supports needed to assist the person achieve his/her goals are mentioned but not described (simply listed) in enough detail, or is described but the description provided is not clear            0 = Additional services and supports needed to assist the person achieve his/her goals are not addressed</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>27.*</b>	<p><b>Plan outlines how achievement of goals or skills will be evaluated</b></p> <p>2 = The achievements of each goal is evaluated by the person and his or her team and information describing how this information will be reviewed regularly is described            1 = It is unclear how goals are evaluated and/or how the goals are reviewed regularly            0 = There is no mention of data collection of any kind to assess goal achievement</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>28*</b>	<p><b>Plan outlines how changes in the way the person wants to live their life will be evaluated</b></p> <p>2 = Information is collected to document the changes that are occurring in the person’s life and whether the quality of the person’s life is improving over time            1 = It is unclear how changes in the way the person wants to live their life will be evaluated            0 = There is no mention of how changes in the way the person wants to life their live will be assessed</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>29.*</b>	<p><b>Process for monitoring the Person Centered Plan is described:</b></p> <p><input type="checkbox"/> <b>Timeline for meetings</b>    <input type="checkbox"/> <b>What needs to be done</b>    <input type="checkbox"/> <b>When</b>    <input type="checkbox"/> <b>By whom</b>  <b>(responsibilities)</b></p> <p>2 = There is a specific process described for the team to meet regularly and for specific individuals to monitor the plan            1 = It is noted that the plan will be monitored regularly, but there are no specific details regarding how this process will be completed            0 = There is no indication that the plan will be monitored at all</p>	<b>2</b>	<b>1</b>	<b>0</b>

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<b>30.</b>	<p><b>Evidence that values/expectations of the person and team members are considered</b></p> <p>2 = There is some description provided of those issues that are important to the person and his or her supporters regarding the plan, supports, or data collection and the plan is modified or written to address these concerns</p> <p>1 = Issues may be noted regarding values or expectations of the person and his or her supporters but there is no indication of how they are addressed in the plan</p> <p>0 = The values/expectations of the person and his or her supporters are not discussed</p>	<b>2</b>	<b>1</b>	<b>0</b>
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### PART 2 – SUPPORTS AND ACTION PLANNING

**Total Points Earned** (Items 22-30) = \_\_\_\_\_      **PERCENT** = [ \_\_\_\_\_ / 18] X 100 = \_\_\_\_\_ %  
(Total Points Earned)

### PART 3 – FOLLOW-UP

#### Person Centered Planning Follow-up

<b>31.*</b>	<p><b>Evaluation of goals and achievements over time</b></p> <p>2 = For each goal, there is a measure of some sort provided regarding the status of the goal</p> <p>1 = Goal status is discussed, but there is not specific measure provided, or not all goals are addressed</p> <p>0 = There is no mention of goal status</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>32.*</b>	<p><b>Evaluation of changes in the person’s Person-Centered Plan includes a statement regarding the status of each of the following:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Type of preferred living setting</li> <li><input type="checkbox"/> With whom the person wants to live</li> <li><input type="checkbox"/> With whom the person wants to socialize</li> <li><input type="checkbox"/> The school, work or other valued activity the person wants to do</li> <li><input type="checkbox"/> The social, leisure, religious or other activities the person wants to participate in regularly</li> </ul> <p>2 = For each issue listed, there is a statement regarding its current status</p> <p>1 = There is a statement regarding current status of some of the issues listed, but not all</p> <p>0 = Current status of issues listed is not addressed</p>	<b>2</b>	<b>1</b>	<b>0</b>
<b>33.</b>	<p><b>If there is evidence of changes that impact the Person-Centered Plan or, the stated goals, and/or current levels of support are not resulting in positive outcomes, there is a plan for revising the plan to reflect these changes</b></p> <p>2 = Changes in the plan are documented and/or have already been made to address issues encountered and to achieve positive outcomes. If changes in the areas listed have not occurred, it is so stated</p> <p>1 = It is noted that changes have occurred in the listed areas, but there are no plans for making revisions</p> <p>0 = There is no mention regarding changes in the listed areas</p>	<b>2</b>	<b>1</b>	<b>0</b>

### PART 3 – FOLLOW-UP

**Total Points Earned** (Items 31-33) = \_\_\_\_\_      **PERCENT** = [ \_\_\_\_\_ / 6] X 100 = \_\_\_\_\_ %  
(Total Points Earned)

### ENTIRE REVIEW

**Including scores from PART 1 – DISCOVERY AND LEARNING, PART 2 – SUPPORTS AND ACTION PLANNING, and PART 3 – FOLLOW-UP. (Do not include score from SUMMARY OF CRITICAL FEATURES on page 1)**

**Total Points Earned** (Items 1-33) = \_\_\_\_\_      **PERCENT** = [ \_\_\_\_\_ / 66] X 100 = \_\_\_\_\_ %  
(Total Points Earned)