

## Person Centered Planning Checklist Provider Version

Prior to, during, and after your planning meetings, try to keep in mind the following questions. It is NOT assumed that you will be able to follow all practices in all circumstances, but simply being more aware of what you are striving for will enhance your ability to offer person-centered care and planning. Check all that you were able to apply.

Consumer Name: \_\_\_\_\_ MPI#: \_\_\_\_\_

Person completing Checklist: \_\_\_\_\_ Date: \_\_\_\_\_

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1. \_\_\_\_ Did you remind the individual that s/he could invite supportive others to the planning meeting and that you would make reasonable attempts to accommodate their schedules?
2. \_\_\_\_ Did you offer the individual a copy of his or her recovery plan?
3. \_\_\_\_ Did you include the individual's own words in writing the plan?
4. \_\_\_\_ Was the language of the plan understandable to all participants? Where professional terminology was necessary, was this explained to all participants in the planning process?
5. \_\_\_\_ Was the individual engaged in rehabilitation services (e.g., in the housing, social, or employment areas)? If so, and if it was the person's preference, were these individuals invited to the meeting or was there feedback incorporated in some way?
6. \_\_\_\_ Were the person's strengths and resources clearly documented in the plan?
7. \_\_\_\_ Did the plan identify concrete next steps, along with specific time-lines, that would help the person to move toward recovery and his or her vision for the future?
8. \_\_\_\_ Did the plan document areas such as physical health, social relationships, employment/education, spiritual life, housing satisfaction, community connections, etc., where these areas are identified by the person as being high priorities?
9. \_\_\_\_ Did you review, and incorporate into the plan, preventative and self-care measures and daily wellness strategies that can be used to manage triggering situations or early warning signs?
10. \_\_\_\_ Did you educate the consumer re: his option to complete an advance directive or a similar self-directed crisis plan?

## **Person Centered Planning Checklist Consumer (Person in Recovery) Version**

The Southwest Connecticut Mental Health System is committed to offering planning services to you that respect your right to be in charge of your treatment and life decisions. In addition, we want to offer you a wide range of supports that can help you in your recovery and help you to enjoy a more fulfilling life in the community. You can help us to do this by answering the questions below. Check all that you were able to apply.

1. \_\_\_ Did you invite the people that you wanted to your meeting? This could be anyone that you think is supportive of your recovery, e.g., a family member, a friend, a fellow parishioner, or a sponsor.
2. \_\_\_ Were you offered a copy of your plan by your service provider?
3. \_\_\_ Did the plan mention the things that you said were most important to you and did it have your own words in it?
4. \_\_\_ Did you understand the language of the plan when you read it, or did it have lots of professional and confusing terms in it?
5. \_\_\_ If you have a rehabilitation provider, like a job coach that helps you find employment, did you get to invite that person to the meeting or did they give you their ideas in some other way?
6. \_\_\_ Did you talk about what you are good at and what kinds of strengths and resources you have? And did these things get included in your written plan?
7. \_\_\_ Did you come out of your meeting with a plan that has specific action steps that you, and others who help you, can move on in the near future?
8. \_\_\_ Did you talk about ideas to help you be a part of your community, things like how to find a job, get involved in church, make friends, pursue hobbies, get your medical needs met, etc.?
9. \_\_\_ In your meeting, did you learn about things that YOU can do on a day-to-day basis to feel good and move ahead in your recovery, e.g., things like calling a friend, going for a walk, painting a picture, praying, etc.?
10. \_\_\_ Did you talk about psychiatric advance directives or have a chance to learn about preparing advance crisis-plans that could help you in the future event that you might need to go to the hospital?