



# New Service Coordinator Training Standards



This document addresses orientation and first year training for new Service Coordinators hired by the Regional Center. Tracking and enrollment for each RC Service Coordinator will be carried out through ARCA LMS. The delivery method for all topic areas includes E-learning and/or instructor led training. Information originally suggested by ARCA is below; Additional recommendations from RCPM workgroup members are highlighted in **GREEN Font**.

BUILDING RELATIONSHIPS: GETTING TO KNOW THE PEOPLE YOU SUPPORT		
Topic Area	Objective:	Duration/Hours
1. Cultural Awareness, Cultural Identity and Equity • Cultural Humility	<p>This session provides an overview of cultural diversity and awareness. The training will emphasize the importance of linguistic and cultural sensitivity and illustrate approaches that should be considered when working with a diverse population. Upon completion of this course staff will be able to:</p> <ul style="list-style-type: none"> <li>• Use culturally and linguistically responsive communication strategies.</li> <li>• Use equity-focused approaches to improve access to services for culturally diverse individuals and families.</li> <li>• Discuss how cultural dimensions (e.g., values, beliefs, communication styles) impact client expectations and engagement.</li> </ul>	1 hour
2. Introduction to Person Centered Service Planning (PCP)	<p>This Training uses the PCT principles of choice, "Important to" and "Important for" and covers the steps in the PCP process and how to facilitate the development of the Person Centered Plan. Upon completion of this training staff will have skills in:</p> <ul style="list-style-type: none"> <li>• Identifying Preferences</li> <li>• Balancing health and safety</li> <li>• Establishing desired outcomes</li> <li>• Identifying supports and services</li> <li>• Identifying what is "important to" and "important for" the person to guide planning decisions.</li> <li>• Facilitating the development of meaningful, person-centered outcomes based on individual goals and values.</li> <li>• Balancing individual choice with health and safety considerations in a respectful and collaborative way.</li> <li>• Identifying appropriate supports and services that align with the person's desired outcomes.</li> <li>• Supporting individuals in choosing providers that best meet their needs and preferences.</li> </ul>	1 hour

**BUILDING RELATIONSHIPS: GETTING TO KNOW THE PEOPLE YOU SUPPORT**

Topic Area	Objective:	Duration/ Hours
<p>3. <b>Person Centered Standardized IPP</b></p>	<p>This topic includes five training sections with information on the implementation of the statutorily required standardized IPP Template effective January 1, 2025. Also included are resources for Regional Centers and links to Guides for individuals and their families. Upon completion of this topic, staff will be able to:</p> <ul style="list-style-type: none"> <li>• Describe the purpose and structure of the new standardized IPP template and how it supports person-centered planning.</li> <li>• Identify and explain the key components of the IPP template, including:                             <ul style="list-style-type: none"> <li>○ Introduction and Individual Information</li> <li>○ How the Plan Was Developed</li> <li>○ Vision for the Future</li> <li>○ Communication and Decision-Making</li> <li>○ Life Areas and Emergency Planning</li> <li>○ IPP Agreement and Signature Form</li> </ul> </li> <li>• Use person-centered principles throughout the IPP process, including honoring culture, self-direction, and individual preferences.</li> <li>• Recognize how to incorporate HCBS Waiver requirements and exceptions to setting requirements into the IPP.</li> <li>• Use the client records system to document, update, and submit IPPs, including addendums and progress reports.</li> <li>• Facilitate person-centered planning team meetings, ensuring the individual's hopes, dreams and preferences are honored in their plan.</li> </ul>	<p>2 hours 45 minutes</p>

**GETTING TO KNOW THE DEVELOPMENTAL SERVICES SYSTEM**

Topic Area	Objective:	Duration/ Hours
<p>4. <b>Lanterman Act</b></p> <ul style="list-style-type: none"> <li>• History</li> <li>• Guiding Principles (Philosophy)</li> </ul>	<p>This training provides a historical overview of the enactment of the Lanterman Act, its importance, and purpose. Upon completion of this training, all participants will be able to:</p> <ul style="list-style-type: none"> <li>• Describe the historical context and purpose of the Lanterman Act.</li> <li>• Explain the legal rights guaranteed under the Lanterman Act, including the right to individualized services and supports.</li> </ul>	<p>1 hour 30 minutes</p>

**GETTING TO KNOW THE DEVELOPMENTAL SERVICES SYSTEM**

Topic Area	Objective:	Duration/ Hours
	<ul style="list-style-type: none"> <li>• Identify the current key areas addressed by the Lanterman Act, such as service coordination, access to regional center services, and person-centered planning.</li> <li>• Utilize the key principles of the Lanterman Act in service coordination (i.e.: dignity, choice, and inclusion).</li> <li>• Recognize how the Lanterman Act shapes the responsibilities of Regional Centers and the role of Service Coordinators.</li> </ul>	
<p>5. Community Inclusion/ Integration</p> <ul style="list-style-type: none"> <li>• Home and Community Based Services</li> </ul>	<p>The Home and Community Based Services (HCBS) Final Rule is designed to ensure that Medicaid-funded HCBS programs provide people with intellectual and developmental disabilities full access to the benefits of community living and offer them long term services and supports in the most integrated setting of their choosing. Upon completion of this training staff will be able to:</p> <ul style="list-style-type: none"> <li>• Explain the purpose and impact of the HCBS Final Rule on service delivery for individuals with developmental disabilities.</li> <li>• Identify and describe the 10 federal requirements of the HCBS Final Rule.</li> <li>• Assess service settings for compliance with HCBS standards using person-centered tools and strategies.</li> <li>• Use person-centered planning principles to promote full community integration and individual choice.</li> <li>• Support individuals in accessing inclusive services that reflect their preferences and goals.</li> </ul>	1 hour
<p>6. <b>Employment First</b></p>	<p>This course explains California's Employment First Policy, the role of regional center in supporting, promoting, and informing individuals served about the various pathways to employment. Upon completion of this training, staff will be able to:</p> <ul style="list-style-type: none"> <li>• Explain the core principles of California's Employment First Policy and its emphasis on Competitive Integrated Employment (CIE).</li> <li>• Accurately describe what constitutes Competitive Integrated Employment and how Paid Internship Program (PIP) incentives support employment goals.</li> <li>• Identify the role of the Regional Center and Service Coordinators in promoting employment pathways and making appropriate referrals.</li> </ul>	30 minutes

**GETTING TO KNOW THE DEVELOPMENTAL SERVICES SYSTEM**

Topic Area	Objective:	Duration/ Hours
7. Eligibility under the Lanterman Act	<p>This session discusses developmental disabilities and qualifying conditions for individuals over the age of three years. Upon the completion of this training, staff will:</p> <ul style="list-style-type: none"> <li>• Describe the history and purpose of California's Developmental Disabilities Services system and the Lanterman Act.</li> <li>• Identify the five qualifying conditions for Lanterman Act eligibility and explain the criteria for a "substantial disability."</li> <li>• Describe the intake and assessment process, and the roles of the special services and clinical teams in determining eligibility.</li> </ul>	1 hour
8. Individual Rights	<p>This training provides information regarding clients' rights and ways to assist clients and others to advocate for these fundamental rights. Upon completion of this course staff will be able to:</p> <ul style="list-style-type: none"> <li>• Identify the fundamental rights of individuals receiving Regional Center services.</li> <li>• Recognize situations where a right may be limited or denied and describe the appropriate procedures and justifications.</li> <li>• Support individuals and their families in advocating for their rights and accessing appropriate resources.</li> <li>• Describe the Service Coordinator's responsibilities when a right is denied, including documentation, follow-up, and referral to advocacy services.</li> <li>• Direct individuals and families to appropriate resources (ie: Clients' Rights Advocates, Disability Rights California - OCRA) when rights are at risk or violated.</li> </ul>	3 hours
9. Generic Community Services	<p>This course will provide an overview of generic resources. It will also define the legal mandate to pursue natural support and generic resources before Regional Center funding is used. Upon completion of this training staff will be able to:</p> <ul style="list-style-type: none"> <li>• Identify key generic resources available to individuals with developmental disabilities (i.e.: Medi-Cal, IHSS, SSI/SSA, CCS, DOR, SNAP, CalAble, housing supports, private insurance).</li> <li>• Understand eligibility criteria and application/ referral processes for major generic resources.</li> <li>• Explain the legal mandate to pursue natural supports and generic resources before Regional Center funding is used.</li> <li>• Locate information, make referrals, and follow up on access to generic services.</li> </ul>	1 hour

**GETTING TO KNOW THE DEVELOPMENTAL SERVICES SYSTEM**

Topic Area	Objective:	Duration/ Hours
	<ul style="list-style-type: none"> <li>• Identify common barriers (including language access, physical accessibility, and bias) to access generic services and apply strategies to help individuals navigate them.</li> </ul>	
<p>10. Common Regional Center Funded Services</p>	<p>This training will cover regional center services across the individual's lifespan. It will provide a basic understanding of various transitions. Upon completion of this training staff will:</p> <ul style="list-style-type: none"> <li>• Identify common Regional Center-funded services across the lifespan (Early Start, school-age, transition-age, and adult).</li> <li>• Assess individual needs to determine what Regional Center can support and based on statute and regulation.</li> <li>• Explain the importance of planning for future life phases and transitions (i.e.: from school to work, from family home to independent living).</li> <li>• Describe the criteria Regional Centers use to justify funding, including the requirement to exhaust eligible generic resources first.</li> <li>• Support individuals and families in navigating service options and making informed choices about available supports.</li> </ul>	<p>1 hour</p>
<p>11. Lanterman Service Delivery Model</p> <ul style="list-style-type: none"> <li>• Traditional</li> </ul>	<p>This session will provide a basic overview of the regional center's traditional services. Upon completion of this session staff will be able to:</p> <ul style="list-style-type: none"> <li>• Use person-centered planning principles to support individuals in developing meaningful outcomes/goals and selecting services that align with their values.</li> <li>• Understand Purchase of Services (POS) Policies when identifying services.</li> <li>• Explain the authorization process when securing services.</li> </ul>	<p>1 hour</p>
<p>12. Lanterman Service Delivery Model</p> <ul style="list-style-type: none"> <li>• Self-Determination Program</li> </ul>	<p>This session will provide an overview of the regional center Self-Determination Program (SDP). Upon completion of this session staff will be able to:</p> <ul style="list-style-type: none"> <li>• Use person-centered planning principles to support individuals in developing meaningful outcomes/goals and selecting services that align with their values.</li> <li>• Explain the key differences between traditional Regional Center service delivery and the Self-Determination Program.</li> <li>• Support individuals in taking next steps toward enrollment in the SDP, including orientation, planning, and budgeting.</li> </ul>	<p>1 hour</p>

**GETTING TO KNOW THE DEVELOPMENTAL SERVICES SYSTEM**

Topic Area	Objective:	Duration/ Hours
	<ul style="list-style-type: none"> <li>• Describe the core components of the Self-Determination Program, including the Individual Budget, Spending Plan, and Financial Management Services (FMS).</li> <li>• Define the roles and responsibilities of participants, Independent Facilitators, Service Coordinators, and FMS providers in the SDP.</li> <li>• Identify safety considerations, HCBS qualification, and oversight responsibilities within the Self-Determination Program.</li> </ul>	
13. Complaints and Appeals	<p>This training is an introduction to Due Process and Appeals for regional center staff. Upon completion of this training staff will be able to:</p> <ul style="list-style-type: none"> <li>• Describe the difference between the Consumer Complaint Process and the Appeal Process under the Lanterman Act.</li> <li>• Explain the steps involved in filing a complaint or appeal, including timelines, documentation, and escalation procedures.</li> <li>• Identify the Service Coordinator's role and responsibilities when a client's rights are denied or when a Notice of Action (NOA) is issued.</li> <li>• Support individuals and families in accessing advocacy resources (i.e.: Clients' Rights Advocates, Disability Rights California – OCRA, State Council on Developmental Disabilities (SCDD), Ombudsman) when navigating complaints or appeals.</li> <li>• Use person-centered planning principles when addressing disagreements or rights concerns in the IPP process.</li> </ul>	1 hour
14. Confidentiality and HIPAA Requirements	<p>This training provides an overview of privacy and security. The main focus is on confidentiality and proper disclosure of individual records to safeguard their rights. Upon completion of this course staff will be able to:</p> <ul style="list-style-type: none"> <li>• Define the Health Insurance Portability and Accountability Act (HIPAA) and explain the purpose of the HIPAA Privacy Rule.</li> <li>• Identify what constitutes Protected Health Information (PHI) and the types of data covered under HIPAA.</li> <li>• List the rights of individuals under HIPAA, including access to records, request for amendments, and privacy protections.</li> <li>• Describe your role and responsibility in protecting confidential client information.</li> </ul>	1 hour 15 minutes

**GETTING TO KNOW THE DEVELOPMENTAL SERVICES SYSTEM**

Topic Area	Objective:	Duration/ Hours
	<ul style="list-style-type: none"> <li>• Explain the limited circumstances of how and when PHI can be used or disclosed, including required authorizations and exceptions.</li> </ul>	
<p>15. <b>Mandated Reporting and Special Incident Reporting</b></p>	<p>This training will provide an overview of the legal responsibility of mandated reporters, define what is a Special Incident Report (SIR) and review the process for completing and submitting an SIR. Upon completion of this training staff will be able to:</p> <ul style="list-style-type: none"> <li>• Define what constitutes a “Special incident” under Title 17 and identify the categories that require reporting.</li> <li>• Describe the steps for completing, submitting, following up on and closing a Special Incident Report (SIR), including verbal and written reporting timelines.</li> <li>• Gather and document accurate, relevant information to support effective incident reporting and follow-up.</li> <li>• Describe the Service Coordinator's role in responding to incidents, including follow-up actions, coordination with other agencies, and ensuring client safety.</li> <li>• Explain the legal responsibilities of mandated reporters, including timelines, documentation, and procedures for reporting suspected abuse or neglect.</li> </ul>	<p>1 hour 30 minutes</p>
<p>16. <b>Understanding Regulations</b></p> <ul style="list-style-type: none"> <li>• <b>Introduction to Title 17 and Title 22</b></li> </ul>	<p>This training will cover Title 17 and Title 22 regulations and provide an understanding of resource development, the vendorization process, and quality assurance. Upon completion of this training staff will be able to:</p> <ul style="list-style-type: none"> <li>• Describe the purpose and scope of Title 17 and Title 22 regulations as they relate to Regional Center operations and community care licensing.</li> <li>• Explain the structure and functions of the Community Services Department at Regional Center, including resource development, vendorization, provider relations, and quality assurance.</li> <li>• Define the role of Community Services Specialists and how assignments are organized to support service delivery.</li> <li>• Use the knowledge of regulatory requirements to support ethical, person-centered service planning and provider engagement.</li> </ul>	<p>1 hour</p>

**GETTING TO KNOW THE DEVELOPMENTAL SERVICES SYSTEM**

Topic Area	Objective:	Duration/ Hours
<p>17. Understanding Regulations</p> <ul style="list-style-type: none"> <li>• Introduction to Title 19</li> </ul>	<p>This course will explain what Title 19 Notes are, why they are so important, and how to complete them. It will also cover the steps to document Title 19 notes properly. Upon completion of this course staff will be able to:</p> <ul style="list-style-type: none"> <li>• Learn the purpose and benefit of the federal Targeted Case Management program.</li> <li>• Identify case management activities that are billable targeted case management units as well as those activities that are not billable targeted case management units.</li> <li>• Identify case management activities that are not billable targeted case management units.</li> <li>• Correctly classify unit time and type.</li> <li>• Document a Title 19 Note that clearly describes the case management activity and includes five components (who, what, when where and why) required by Title 19.</li> </ul>	<p>1 hour</p>
<p>18. Supporting People in Crisis</p> <ul style="list-style-type: none"> <li>• Risk Management †</li> </ul>	<p>This training will provide an overview of Title 17 requirements for risk management, assessment &amp; planning, how to develop incident prevention strategies, and how to integrate individual risk assessment/mitigation into the IPP/IFSP process. Upon completing this training, staff will be able to:</p> <ul style="list-style-type: none"> <li>• Identify indicators of risk and emerging trends that may affect the safety and well-being of individuals supported by Regional Center.</li> <li>• Conduct basic risk assessments and develop appropriate intervention and prevention plans.</li> <li>• Explain the role of risk management and mortality review committees in reducing and preventing significant risks.</li> </ul>	<p>1 hour 30 minutes</p>
<p>19. Introduction to Intellectual and Developmental Disabilities</p>	<p>This training will increase awareness, understanding and empathy and cover topics including but not limited to: types of disabilities, communication strategies, inclusion practices, ways to support individuals in various settings, etc. By the end of the training, staff will be able to:</p> <ul style="list-style-type: none"> <li>• Identify common types of intellectual and developmental disabilities and their characteristics, especially within the five eligibility categories for regional centers under the Lanterman Act.</li> <li>• Use effective communication strategies tailored to individuals with varying communication abilities.</li> <li>• Describe common treatment modalities and support used in the care of individuals with I/DD.</li> <li>• Utilize inclusive practices that promote participation and belonging in decision making, community, educational, and service settings.</li> </ul>	<p>1 hour</p>

**GETTING TO KNOW THE DEVELOPMENTAL SERVICES SYSTEM**

Topic Area	Objective:	Duration/ Hours
	<ul style="list-style-type: none"> <li>Support individuals with developmental disabilities across various settings (i.e. home, school, work, community).</li> </ul>	
20. Basic Rights and Advocacy	<p>This session will provide staff with basic information on the constitutional rights of people with developmental disabilities in California. Staff will also learn about Supported Decision-Making (SDM), conservatorships, guardianships and advocacy agencies. Upon completion of this training staff will be familiar with:</p> <ul style="list-style-type: none"> <li>The constitutional rights of people with intellectual and developmental disabilities</li> <li>The steps involved in the conservatorship and guardianship process</li> <li>Supported decision-making process</li> <li>Supporting individuals and families in accessing advocacy resources</li> </ul>	1 hour

**TRAINING TOPICS IN DEVELOPMENT (FUTURE RELEASE)**

Topic Area	Objective:	Duration/ Hours
21. Eligibility under Provisional Eligibility	<p>This session will provide an overview of the legislation introduced in 2021 for provisional eligibility. It will also cover qualifying conditions. Upon completion of this training, staff will be able to:</p> <ul style="list-style-type: none"> <li>Explain the criteria for provisional eligibility, including functional limitations and the distinction from Early Start.</li> <li>Describe the intake and assessment process, and the roles of the special services and clinical teams in determining eligibility.</li> </ul>	30 minutes
22. Communicating with People with Intellectual and Developmental Disabilities: Building Trust and Respect	<p>This training will provide an overview of communication methods that are respectful and inclusive reflecting the unique preference of individuals and families served. After completion of this training staff will be able to:</p> <ul style="list-style-type: none"> <li>Identify common communication methods used by individuals with diverse needs, including electronic devices, picture boards, gestures, and sign language.</li> <li>Use respectful and inclusive communication by addressing people directly and using appropriate methods based on their communication preferences.</li> <li>Use active listening skills to build trust and rapport with customers, especially adults and individuals with communication support needs.</li> </ul>	1 hour
23. Supporting People in Crisis	<p>This training provides an overview of different roles and responsibilities of crisis services. Upon completion of this training, staff will be able to:</p>	1 hour

**TRAINING TOPICS IN DEVELOPMENT (FUTURE RELEASE)**

Topic Area	Objective:	Duration/ Hours
<ul style="list-style-type: none"> <li>Crisis Intervention</li> </ul>	<ul style="list-style-type: none"> <li>Describe the roles and responsibilities of crisis services, including the Psychiatric Emergency Team (PET), and the procedures for on-call response and incident reporting.</li> <li>Identify who qualifies as a dependent adult.</li> </ul>	
24. Standardized Respite Assessment	This training will familiarize participants with the new standardized respite assessment tool.	TBD
25. Eligibility under Early Start	This session discusses developmental disabilities and qualifying conditions for children under the age of three years for California's Early Start system.	TBD