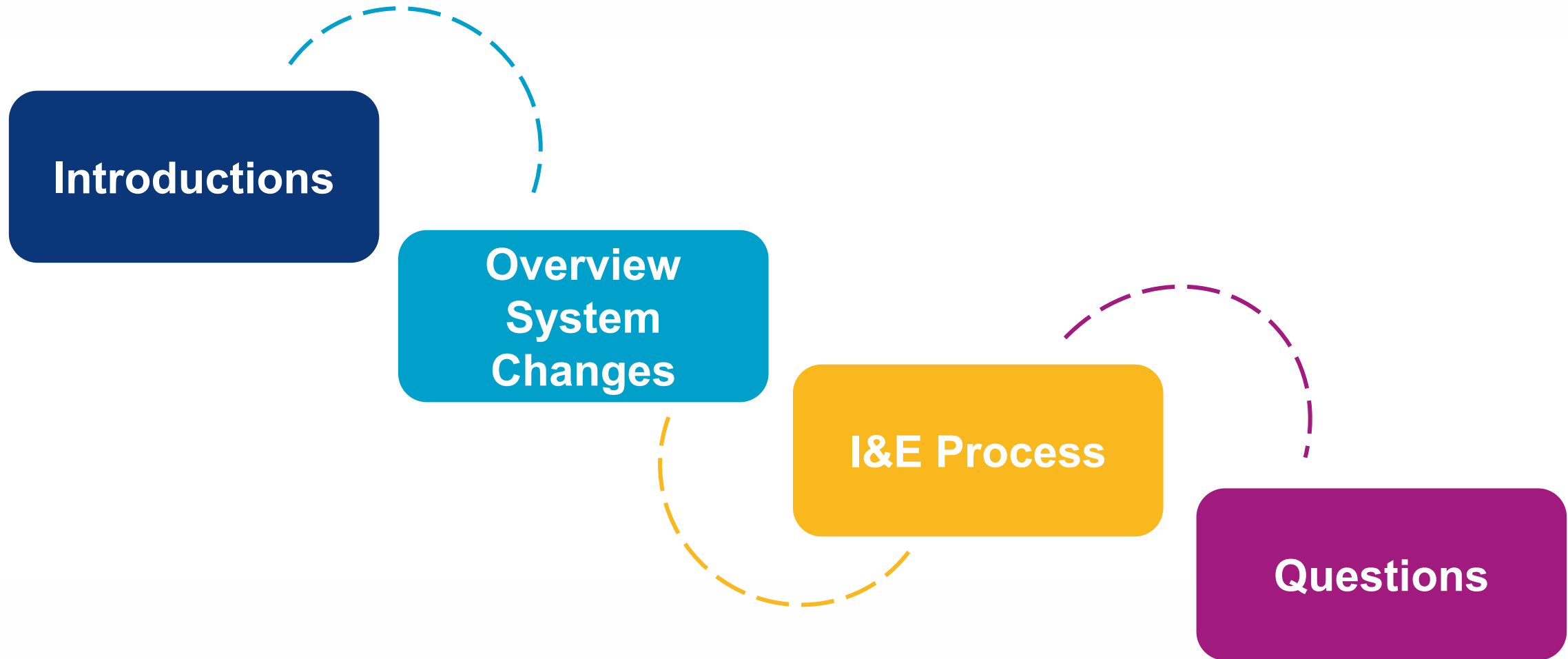


# Developmental Service Changes: Intake & Eligibility Process

Meet Public Consulting Group (PCG)

*October 7, 2025*

# Today's Conversation

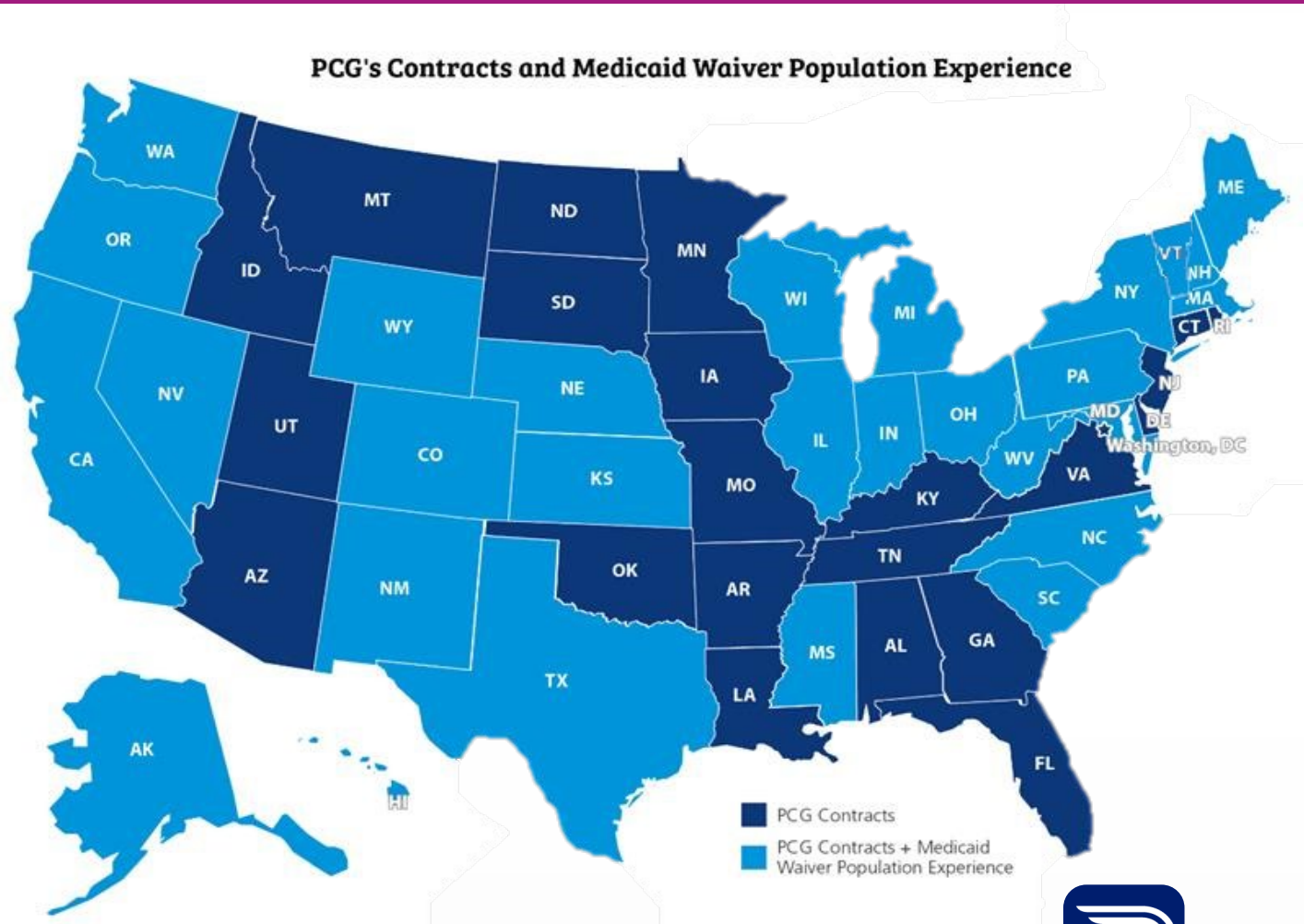


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**Meet PCG**

# Public Consulting Group: Overview

- Founded in 1986 and headquartered in Boston, MA
- Operates across all 50 U.S. states, as well as in Canada and Europe
- Provides management consulting services to help public sector agencies better serve their communities
- National experience with HCBS and IDD program operational consulting, assessments, eligibility, and oversight.



# Meet Our Team

## PCG Project Management Team



**Hannah Trate**  
*Senior Consultant*



**Kate Miller**  
*Operations Manager*



**Mary Elizabeth Lipscak**  
*Director of Operations*

## Intake and Eligibility Specialists



**Drew Celeste**  
*Waterbury, VT*



**Cheryl Frazier**  
*Brookfield, VT*



**Gabi King**  
*Burlington, VT*



**Danielle Sachs**  
*Fairfax, VT*



**Sandy McIntyre**  
*Rutland, VT*

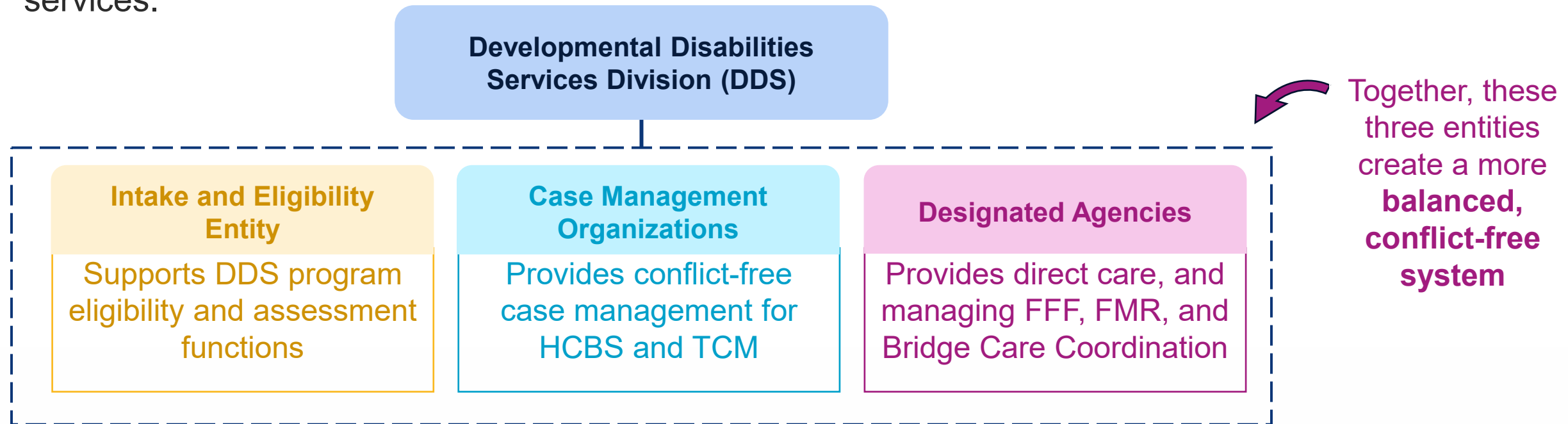


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# **Developmental Disabilities Services (DDS) System Changes**

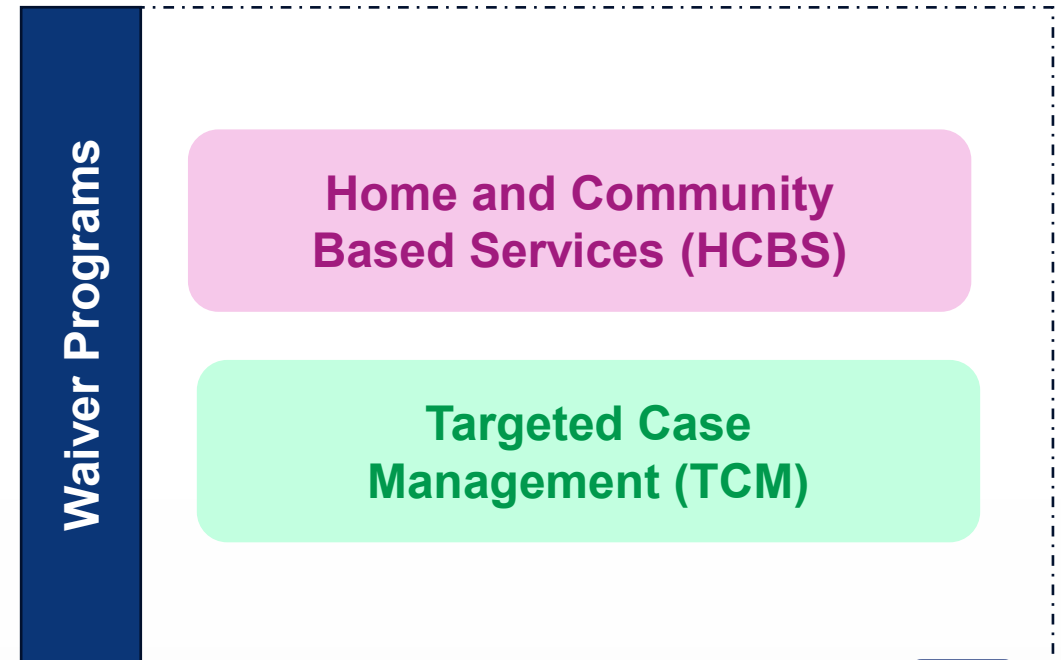
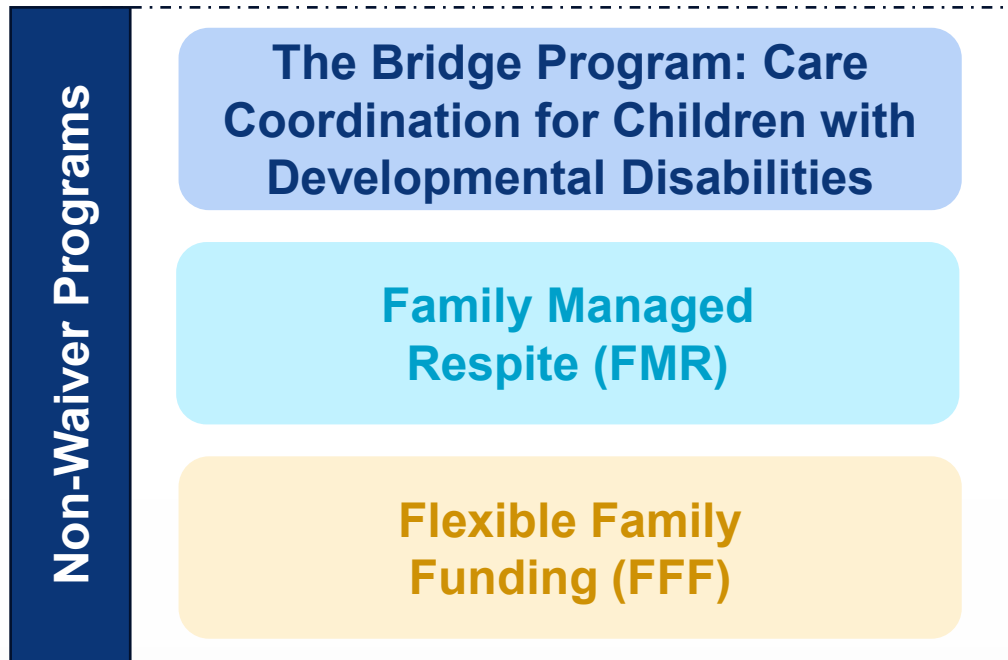
# Conflict-Free DDS Program

To comply with federal requirements and ensure fairness, Vermont has created a **conflict-free structure** for the Developmental Disabilities Services (DDS) program. Each entity now performs a distinct role to maintain independence between eligibility, case management, and direct services.



# Intake and Eligibility Entity

On August 11<sup>th</sup>, PCG assumed responsibility for intake and eligibility for DDS programs requiring a clinical eligibility determination. This change ensures eligibility decisions are made independently of service delivery.





# Impact of Changes on Intake and Eligibility

These changes focus on **how** intake and eligibility are managed, not **who** is eligible for services. While the handoff point has shifted to PCG's centralized team, the core values and collaborative roles of schools, DAs, and partner agencies remain the same.

## What's Changing



Single statewide I&E team



Standardized eligibility and enrollment process



Program funding process

## What's Not



Program eligibility requirements



Schools and partner agencies' role in identifying and supporting students and families



Need for collaboration across systems

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# **Intake & Eligibility Process Overview**

# PCG Intake and Eligibility Process



PCG's Intake & Eligibility Team partnered with the Vermont Developmental Disabilities Services Division (DDSD) to implement a centralized, statewide conflict-free intake and eligibility operation. **Our goals include:**

## 1 Service Consistency

Implement standardized intake and eligibility processes to support a consistent experience statewide.

## 2 Timely and Informed Decisions

Promote informed decision-making and timely and equitable access to needed supports.

## 3 Operational Excellence

Leverage data, feedback, and quality assurance strategies to drive continuous improvement and high-quality service delivery.

# Intake and Eligibility Process



Schools, DAs, and other agencies help identify and refer individuals who may need DDS services to PCG for information and next steps. Common referral reasons include:

**Newly  
diagnosed**

**Change in  
support needs**

**Transitioning to  
adult services**

**Aging out of  
DCF Custody**

**Moving from  
out of state**

***Individuals currently enrolled in DDS programs looking to increase services or access FFF or FMR do not need to be referred to PCG for intake and eligibility determinations.***

# Intake and Eligibility Process



During the inquiry stage, PCG gathers basic information about the individual, confirms their Medicaid enrollment status, and answers initial questions about available DDS programs and eligibility requirements. This is the first step in helping families understand the process and confirm program fit.



*If an applicant is not enrolled in Medicaid, they are referred to a Certified Application Assister and invited to reach back out once enrolled.*

# Intake and Eligibility Process



## How you can support

- When possible, refer individuals aging out of children's services or transitioning from schools at least 6 months before key dates (such as graduation or 18th birthday).
- Encourage families to review online resources about DDS program eligibility criteria, including financial eligibility criteria.
- Help families compile recent educational and clinical records — such as IEPs, evaluations, or diagnostic reports — before referral.

# Intake and Eligibility Process



During the intake stage, PCG meets with the applicant and their authorized representative to begin the electronic application and learn more about the applicant's circumstances and unmet needs. During this meeting, I&E Specialists:

**Collect  
releases and  
required  
documentation**

**Discuss current  
supports and  
identify unmet  
needs**

**Review other  
resources/  
programs  
explored**

**Screen for  
program  
access criteria**

**Confirm next  
steps and  
timeline**

***All intake information is recorded in a standardized screening tool and provided to DAIL for review as part of the official eligibility determination.***

# Intake and Eligibility Process



## How you can support

Share with families and care teams that the individual who will receive services is expected to be involved in the intake meeting.

Support individuals and families with limited technology access by offering to help facilitate the virtual intake meeting, if appropriate.

Encourage individuals and families to complete consent forms and respond promptly to documentation requests.



# Intake and Eligibility Process



PCG and contracted evaluators review all submitted clinical and educational documentation to determine whether the individual meets Vermont's clinical eligibility criteria. If documentation is incomplete or outdated, PCG can coordinate facilitating updated assessments. Types of clinical documentation that may be collected include:

**Diagnostic  
assessments**

**IQ test**

**Adaptive  
assessment <3  
years**

**IEPs and  
school docs**

**Medical  
records**

**After review, PCG meets with the applicant or guardian to finalize and submit the application. DDSD will issue a clinical eligibility determination and funding letter within 45 days. .**

# Intake and Eligibility Process



## How you can support

Support families in collecting or updating clinical and educational records needed for the clinical eligibility review.

With consent, provide PCG with relevant records already in your possession (e.g., psychological evaluations, case notes, or school assessments) to avoid duplication or delays.

Share feedback with PCG on barriers families experience during this stage.

# Intake and Eligibility Process



Applicants found eligible for HCBS Waiver or Targeted Case Management receive neutral, conflict free choice counseling to help them make an informed decision between Benchmark Human Services or The Columbus Organization for Case Management.



***Individuals found eligible for Bridge, FFF, or FMR are referred to contact their Designated Agency for program enrollment.***

# Intake and Eligibility Process



Following Choice Counseling, PCG's Intake Team schedules an expedited SIS-A Assessment to determine program funding. The SIS-A score is used to determine program funding and is used by the case manager to inform the service planning process.

# Key Takeaways

This process works best when we all work together. As referral partners, you play a vital part in helping individuals and families move through each step of the Intake and Eligibility process with confidence and accesses needed supports, especially during periods of transition.



## Identify and Refer

When someone may need DDS services, direct them to PCG's front door.



## Support

Explain that this process helps ensure fairness and independence.



## Share

With consent, help the individual gather records needed to confirm clinical or financial eligibility.



## Collaborate

Once eligibility is confirmed, coordinate with the assigned CMO or DA for services.

# How to Contact Us

Our team is available Monday – Friday from 8:00 am – 4:30 PM. Messages and emails received after business hours will be responded to the next business day.



(833) 426-5668



[VTDDSDIntake@pcgus.com](mailto:VTDDSDIntake@pcgus.com)



<https://ddsd.vermont.gov/apply-dd-services> and [PCG's website](#)



Insights ▾

Focus Areas ▾

Industry Solutions ▾

Home → Industry Solutions → Health → State Health and Medicaid Agency Services → Assessments with Public Consulting Group (PCG) → Vermont Intake & Eligibility

## Vermont Intake & Eligibility for Developmental Services

Public Consulting Group (PCG) is proud to support the Vermont Department of Disabilities, Aging and Independent Living (DAIL) to operate a standardized and conflict-free intake and eligibility process for individuals across Vermont.

Interested in applying for Developmental Services (DS) programs? Reach out to PCG's centralized Intake and Eligibility Team. The PCG team can answer questions about program and eligibility criteria and help individuals and their families complete their application through a virtual intake meeting.

These programs include:

- Home and Community-Based Services
- Bridge Program: Care Coordination for Children
- Family Managed Respite
- Flexible Family Funding
- Targeted Case Management

How is eligibility determined?



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**Questions?**



**Solutions that Matter**