



## Chapter Three: Understanding Coaching Services and Requirements

The first two chapters discussed the service delivery system, and knowing what types of home and living situations are preferred when considering supported living. Supported living offers an array of options; however, the ability to live successfully in supported living depends greatly on the individual's coach and other needed supports. The individual and her family should have a clear understanding of the coach's commitment to service implementation, as well as the requirements associated with the position.

### Commitment

In order to be an effective supported living coach, it is desirable to have a basic belief system, consistent with best practices in the field of developmental disabilities. Supported living, along with supported employment, is often considered the foundation of supports for persons seeking self-determination.

*"What if you never got to make a mistake...  
What if you were never given a chance to do well at something.  
What if you were always treated like a child.  
What if your only chance to be with people different from you was  
with your own family...  
What if you never got to make a decision.  
What if the only risky thing you could do was act out...  
What if you had no privacy...  
What if you grew old and never knew adulthood.  
What if you never got a chance."*

*-excerpted from "The Dignity of Risk," which appeared in Changing Expectations/Planning for the Future: A Parent Advocate Manual by Dorothy Sauber, published by Association for Retarded Citizens, Minnesota.*

As the individual directs supported living services, the values associated with supported living coaching should guide service delivery. Ultimately, the belief system should be used as the framework around which all decisions are made. Values and beliefs should embrace the needs and desires of persons using

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supported living services. Services and supports are most successful when these needs are addressed.

In order to be consistent with the values set forth and the overall needs identified by persons receiving supported living services, it will be important to commit to a consistent approach to service delivery. Habilitative Services of North Florida, a supported living coaching provider, identified their approach to service delivery around "The Top Ten Commitments of a Supported Living Coach:"

### The Top Ten Commitments of a Supported Living Coach

#### A supported living coach should:

1. ... fully believe that people should have homes of their own, in which they **"control their own front door."**
2. ... support people to exercise **choice and control** in what services and supports they receive and from whom {rather than "taking what they can get"}.
3. ... support people to **define the lifestyles they want**, and should provide opportunities and assistance in developing and expressing preferences for their desired lifestyle.
4. ... define themselves as an ally in helping people **achieve** as much of what they want out of life as possible {rather than deciding what's "best" for the person}.
5. ... accommodate and support the **personal preferences and desired lifestyles** of persons with developmental disabilities {rather than trying to "fix" them}.
6. ... **really listen** to the opinions of those they support {rather than manipulating people into acquiescence and calling it "choice"}.
7. ... learn how to **be less intrusive** in the ways they bring services and supports into people's homes.

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8. ... **be sensitive to and respectful** of people's homes and the rights and courtesies associated with them, and provide services that are delivered in different ways to different people in different places (**flexible!**), instead of offering a "one-size-fits-all" approach to supports.
9. ... **do what they promise** and keep the commitments they make to those they serve . . . making each individual feel as if they are the **only person** they support.
10. . . . allow people to think for themselves, dream their own dreams, and **write their own stories.**

### **Becoming A Certified Medicaid Waiver Provider**

Persons providing supported living services must be certified as a Medicaid Waiver provider. Agencies or individuals who wish to be certified as providers of supported living coaching services must submit a completed Developmental Disabilities Medicaid Waiver Application, including all required attachments and assurances, to the Department of Children and Families (DCF) Developmental Disabilities Program in the District/Region where they wish to provide services. On accepting an application, the District/Region Developmental Disabilities Program will issue a certification to provide services.

Supported living coaching certification is valid statewide. Providers who wish to expand services to a new district shall notify the District/Region of their desire to become a provider in that district.

#### **Provider Qualifications, Education, Experience, and Training**

The supported living coach is a trained professional with experience in the field of human services. Supported living in the state of Florida has become a profession for many people. Supported living coaches may either work for an agency or operate their own supported living coaching business. All coaches, whether they are business owners or employed by a supported living agency, must meet the qualification requirements as outlined by the Department of Children and Families, Developmental Disabilities Program.

In order to determine if an individual is qualified to become a supported living coach, the Developmental Disabilities Office follows the guidance offered by the Developmental Services Waiver Services Medicaid Coverage and

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Limitations handbook, and the requirements found in the “Core Assurances” identified in the Medicaid Waiver Services Agreement.

The DS Waiver handbook explains qualifications, experience, and training requirements, and the Core Assurances comprise administrative and programmatic requirements that must be signed by all Medicaid Waiver providers, regardless of the service. Proof the requirements identified in the DS Waiver handbook have been met, and the Core Assurances have been accomplished, must be provided for a supported living coach to become certified as a Medicaid Waiver provider.

The DS Waiver handbook includes the following as requirements for Medicaid Waiver supported living coaching certification:

### SUPPORTED LIVING COACHING REQUIREMENTS

1. **Qualifications**
2. **Pre-Service Training and Ongoing Requirements**
3. **Core Assurances**

#### **Qualifications:**

- A **bachelor’s degree** from an accredited college or university with a major in nursing, education, or social, behavioral or rehabilitative science. In lieu of a bachelor’s degree, a person rendering these services has **an associate’s degree from an accredited college or university with a major in nursing, education or social, behavioral or rehabilitative science and two years of experience**. Experience in one of the previously mentioned fields can substitute on a year-for-year basis for the required college education.
- **Level II background screening** must be completed for all supported living coaches. This process includes:
  - **Affidavit** of good moral character;
  - **Local background check**;
  - **Finger prints** submitted to FDLE (Florida Department of Law Enforcement) for screening;
  - 3 verified **personal references** and;
  - **Re-screening** performed every 5 years.

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### **Pre-service Training and Additional Requirements**

In addition to qualifications, the Department provides requirements for pre-service and on-going training as a framework for organizing supported living services. Pre-service training may be obtained through a certified provider or District/Region trainers. The following are the minimum training requirements of supported living coaching services:

At least **18 hours of pre-service training prior to assuming job responsibilities.**

At a minimum, training consists of:

#### **Pre-service:**

- A detailed review of all components of the 2003 publication, *A Guide to Supported Living in Florida*.
- Overview of Rule 65B-11, Florida Administrative Code (FAC)
- Overview of home modification
- Overview of affordable housing

#### **Additional requirements include:**

- **Training:**
  - Complete training covering those identified in the DS Waiver handbook and the Core Assurances such as HIV/AIDS training once every two years.
  - Maintaining current cardiopulmonary resuscitation (CPR) certification.
  - Eight (8) hours of ongoing annual in-service training including maintenance of certification (e.g. CPR, etc.)
- **An on-call system** that allows individuals' access to services for emergency response 24 hours-per-day, 7 days a week, including having a certified backup supported living coach to provide supports in the event the person's regular supported living coach is unavailable.

**Core Assurances** provide the terms and conditions by which the provider of Waiver Services agrees to be bound. Verification the provider agrees to meet these requirements may be denoted by his signature on the Medicaid Waiver Services Agreement. This agreement is signed when the individual completes the requirements for certification. Specific information for implementing most

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of the components of the training and documentation requirements are addressed in **Chapters Five and Six**.

The Core Assurances, outlined in the DS Waiver handbook, include some of the following topics:

- The emphasis on individual choice and right.
- Responsibilities and procedures for maintaining health, safety, and well-being of individuals for whom services and supports are provided.
- Required documentation for supported living coaching services.
- Specific additional responsibilities under the Core Assurances and the Developmental Services Waiver Services Florida Medicaid Coverage and Limitations handbook.
- Due process procedures.
- Specific needs or characteristics of the individual(s) served as required to successfully provide services and supports.
- Mandatory meetings and training scheduled by the District/Region and/or Department.
- A written policy and procedure that identifies the rights and responsibilities of individuals receiving services.
- Written policies and procedures to address choice for individuals, including those with family involvement, guardians, or for those who have been adjudicated incompetent.
- A written policy and procedure to address the immediate reporting of any suspected incidents of abuse or neglect.
- A written policy and procedure to educate the individual and/or family/guardian about how to report abuse, neglect or exploitation.
- A written policy and procedure to use the personal outcome process to design person-centered supports and services, and to enhance service delivery in order to assist individuals in achieving personal outcomes.

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- A written policy and procedure that prohibits solicitation of individuals through the use of fraud, intimidation, undue influence, including offering discounts or special offers that include prizes, free services or other incentives.
- A written policy and procedure that prohibits solicitation of an individual currently receiving services from another vendor for the purpose of inducing the individual to switch vendors through the use of fraud, intimidation, or exertion of undue influence on an individual.
- Written grievance procedures that are used to resolve conflicts that may arise between the individual, family, and/or guardian and the provider. The procedure contains all of the required and relevant information.
- Maintain a log of grievances filed.
- Written policies and procedures on a person-centered approach to service delivery.
- Written policies and procedures on promoting health and safety.
- Written policies and procedures on the safe administration and handling of medication, that includes staff training.
- Written policies and procedures on transitioning of individuals.
- Written policies and procedures on staff training, orientation, and in-service.
- Written policies and procedures on self-assessment.

### **Responsibilities of the Supported Living Coach**

The supported living coach assumes the main role in providing the ongoing life management support an individual needs to live in and maintain his own household as defined in the individual's support plan. This can include teaching new skills and providing assistance in the areas of support listed earlier in this chapter. In addition, the coach assumes primary responsibility for assisting an individual in developing relationships with other members of the community if the person so desires.

As mentioned, meeting qualifications, understanding the service delivery system, and embracing the beliefs established in the field provides the

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backdrop for the supported living coach's daily responsibilities. In order to receive payment for the supported living coaching services provided, the coach must provide verification that services are being provided. Specific billable job responsibilities are on pages 3-9 through 3-13 of the Guide. Additional information on rates and billable services can be found in the "Home and Community Based Waiver Final Published Rates – November 1, 2003" which can be accessed at the following Web site <http://apd.myflorida.com>. Billing Guidelines for Supported Living may also be obtained through your local Developmental Disabilities office.

### Billable Support Services

- **Facilitating One to One Relationships:**  
Assisting in the development and maintenance of ongoing relationships between individuals served and other persons including social etiquette, self-protection, appropriate social behavior, etc.
- **Meetings**  
Time spent in person-centered meetings at which the person served is present including personal futures planning meetings, support plan meetings, quarterly progress review meetings, informal meetings, etc.
- **Time Spent working to coordinate services with other providers**
- **Direct Services** based on the implementation plan, and the requirements and responsibilities outlined in the DS Waiver Handbook. (list can be found on pages 3-9 through 3-13).
- **Assessments and Planning:** Also included is time spent completing and updating functional community assessments, financial profiles, implementation or transition plans, and relationship maps.

**The Supported Living Coach is reimbursed through the "Program Related" component of the rate for the following. These activities may not be separately billed to the waiver as they are covered in the rate built for the service.**

- **Documentation:** Time spent completing documentation of services through progress notes, completion of time intervention logs, progress reports, completion of billing statements, filing, setting up consumer records/ files, review and completion of release all release forms, grievance procedures, authorization forms, annual summaries, etc.
- **Supervision of Support Services:** Time spent in oversight activities geared to coordination and monitoring the quality of support services being provided and ascertaining whether all support services are being met. (e.g., determining whether the services and supports provided by an in-home or PCA provider are meeting an individual's needs.)
- **Quality Assurance Activities:** Time spent with monitoring activities including visits from Delmarva, responding to satisfaction survey reports, writing quality improvement plans and conducting self- assessments, reviewing data from projected service outcomes.

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While there may be rare instances when the coach conducts activities on the person's behalf without him being present, it is essential he be actively involved in all activities whenever possible. Below are some examples of direct services a coach may provide:

### **Examples of Direct Service Provision May Include:**

- Housing Procurement
- Household Maintenance/Management
- Safety/Emergency Procedures
- Meal Planning/Preparation
- Shopping/Consumer Skills
- Clothing Care
- Personal Grooming
- Money Management/Banking
- Third Party Benefits
- Time Management
- Support Counseling
- Community Connections
- Mobility/Travel Skills
- Civic Responsibilities
- Legal Assistance/Advocacy
- Interpersonal Communication
- Self-Medication/Health Management
- 24 Hour Emergency Assistance

**Activities that may occur under each direct service provision may include, but are not limited to:**

#### **Housing Procurement:**

- Reviewing classified ads
- Contacting realtors
- Looking at prospective apartments or houses
- Completing housing applications
- Filling out change of address forms
- Collecting boxes
- Making arrangements with a mover
- Signing the lease
- Paying utilities, Cable deposits
- Having keys made
- Having ID cards made, etc.

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### **Household**

#### **Maintenance/Management:**

- Cleaning and care of floors, carpeting, walls, windows, and bathrooms
- Care and use of equipment and appliances
- Arranging and caring for furniture
- Dishwashing and clean-up after meals
- Bed making
- Making simple repairs or replacements
- Lining shelves, etc.
- Operating a television, VCR, DVD, or cassette player

#### **Safety/Emergency Procedures:**

- Locating, calling, and giving needed information over the phone in case of an emergency
- Answering doors and telephone cautiously
- Fire suppression/evacuation
- Preparedness for hurricanes and other natural disasters
- Basic first aid
- Self-protection

#### **Meal Planning/Preparation:**

- Principles of nutrition
- Meal planning
- Menu planning
- Food and utensil identification
- Use and care of kitchen utensils and appliances (dishwasher, toaster, etc.)
- Meal preparation
- Following recipes
- Setting the table
- Serving meals
- Storing leftovers, etc.

#### **Shopping/Consumer Skills:**

- Coupon clipping
- Shopping etiquette
- Storage of purchased items
- Tips and techniques for buying groceries, personal hygiene items, clothing, and household items
- Preparing a grocery shopping list
- Assistance in making and keeping appointments for services (haircuts, repairs, etc.) in person and by telephone
- Paying for services
- Interacting with salespeople or service providers
- Using the post office

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## **Personal Grooming:**

- Bathing
- Showering
- Washing hands and face
- Hair care and appearance including haircuts
- Care of teeth and mouth
- Shaving
- Feminine hygiene
- Selecting appropriate clothing for weather and type of activity
- Using deodorant
- Nail care

## **Clothing Care:**

- Storage of clothing
- Sorting, Washing, and drying clothing and linens
- Operating washers and dryers (personal or coin operated machines)
- Ironing

## **Money Management/Banking:**

- Developing/updating the financial profile
- Personal budgeting
- Opening, maintaining, and closing checking/savings accounts
- Using checkbook
- Communicating with the bank
- Using an Automatic Teller Machine (ATM)
- Paying bills
- Filing income tax returns

## **Third Party Benefits:**

- Assistance with SSI/SSA/VA benefits, food stamps, Medicare, etc. (including reporting changes in income)
- Applying for rental assistance programs

## **Time Management:**

- Telling time and using face of digital clock/watch
- Using alarm devices
- Taking wake up calls
- Reading and using a calendar
- Developing and using a schedule

## **Support Counseling:**

- Discussing disappointments
- Developing and maintaining friendships
- Discussing intimate relationships
- Addressing roommate conflicts
- Addressing grief
- Addressing stress management
- Addressing anger
- Participating in community support meetings, such as Weight Watchers™, Alcoholics Anonymous™, etc.

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### **Community Connections:**

- Churches
- Planning parties/social functions
- Adult education classes
- Swimming lessons
- Joining civic organizations/social clubs
- Bowling leagues
- Planning trips
- Being a good neighbor
- Membership in neighborhood associations
- Arts/crafts classes
- Athletic/recreational leagues

### **Mobility/Travel Skills:**

- Mobility training
- Pedestrian safety
- Obtaining a driver's license
- Using taxi services
- Using public transportation
- Bicycle safety

### **Civic Responsibilities:**

- Registering to vote
- Voting
- Volunteering
- Obeying laws
- Jury duty
- Citizenship (helping others, not littering, etc.)

### **Legal Assistance/Advocacy:**

- Assistance in retaining attorney or advocacy services
- Acting as an advocate
- Assistance in self-advocacy
- Accompaniment to court appearances

### **Interpersonal Communication:**

- Operating home/pay telephones and voice digital pagers
- Making and self-managing the placement of long distance calls
- Making/using lists of telephone numbers
- Telephone etiquette
- Conversational skills and manners
- Making needs known and conveying information
- Use of hearing aids
- Telecommunication devices for the deaf (TDD)
- Writing cards and letters
- Reading functional words
- Reading and using the newspaper
- Recognizing appropriate times for telephone calls and visits
- Understanding the difference between social calls and emergency calls, etc.

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### **Self-Medication/Health**

#### **Management:**

- Using pharmacy services
- Taking over-the-counter medications
- Self-administration of medication/treatments
- Use of tracking charts
- Storage of medications
- Learning contraindications for various medications, etc.
- Assistance in making and keeping medical appointments
- Conveying information to health care professionals
- Assurances in actions promoting wellness (e.g. exercise, following diets, etc.)

#### **24-Hour Emergency Assistance:**

- Assistance in resolving health or interpersonal crises
- Accompaniment to hospital emergency room
- Managing stress/communicating anger/needs
- Keeping track of on-call support personnel
- Assistance in dealing with law enforcement officers
- Support in time of fire, weather or other disasters
- Hospital stays, illness at home, etc.

## **Other Supports and Services**

All Medicaid Waiver services have minimum provider qualification requirements. Supported living coaches who desire to expand their service network may make application to provide other services. Each provider must meet the requirements for certification as outlined for that service. Providers must make application for each service through the District/Region Developmental Disabilities Program.

## **Termination of Supported Living Coaching Certification**

The District/Region Developmental Disabilities Program will terminate a provider's certification when there is good faith reason to believe that the provider has engaged in any of the following:

- Submitted false information on the application for certification;
- Submitted a fraudulent invoice for services;
- Abused, neglected or exploited a person as defined by Chapter 415, Florida Statutes, or committed any action that violates the minimum standards for good moral character set forth in s.393.0655, F.S.; or,

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if an agency provider, failed to terminate or reassign a direct service staff person who has engaged in these actions;

- Lost a required professional certification, license, or registration;
- Financially benefited by borrowing or otherwise using an individual's personal funds; or
- Engaged in conduct that adversely affects the provider's ability to deliver services, including any action that renders the provider ineffective under the terms of the certification or affects the provider's ability for acceptance or trust by the department, citizens of the state or consumers.

Further, the Developmental Disabilities Program may terminate a provider's certification when there is good faith reason to believe that the provider has engaged in "actions of non-compliance" which are in conflict with:

- the Definitions and Core Assurances found in the "Developmental Services Waiver Services Medicaid Coverage and Limitations" Handbook, Final Filed Version;
- the Medicaid Waiver Services Agreement;
- standards identified in the Developmental Disabilities Supported Living Coaching Services, Monitoring Checklist/Protocol established by the Florida Statewide Quality Assurance Program (FSQAP);
- Chapter 415, Florida Statutes, regarding abuse, neglect or exploitation; and,
- Chapter 393, Florida Statutes, regarding the minimum standards for good moral character.

The District/Region Developmental Disabilities Program will notify a provider of termination in writing by certified mail. The notice will include the reasons for the termination and a statement that the provider has a right to respond within 20 calendar days. If a provider responds in a timely manner and the response provides the District/Region Developmental Disabilities Program Office with evidence that the reasons for termination were not valid, the termination will be lifted.

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### **Termination of Provider Certification**

Consistent with the DS Waiver handbook, Medicaid Waiver Services Agreement (Section IV), a provider's certification may be terminated as follows:

- A. This Agreement may be terminated by either party without cause, upon no less than thirty (30) calendar days notice in writing to the other party unless a lesser time is mutually agreed upon in writing by both parties. Said notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery.
  
- B. This Agreement may be terminated for the provider's non-performance or misconduct upon no less than twenty-four (24) hours notice in writing to the provider. Waiver by either party of any breach of any term or condition of this Agreement shall not be construed as a waiver of any subsequent breach of any term or condition of this Agreement. If the Department determines that the provider is not performing in accordance with any term or condition in this agreement, the Department may, at its exclusive option, allow the provider a period of time to achieve compliance. The provisions herein do not limit the Department's right to any other remedies at law or in equity.

Providers who voluntarily wish to terminate certification must notify the District/Region Developmental Disabilities Program in writing at least 30 calendar days prior to the date they wish the termination to be effective.

### **Notification to Individuals Receiving Services**

The District/Region Developmental Disabilities Program is responsible for notifying the support coordinator when a provider of supported living is terminated or voluntarily resigns from being a provider. The support coordinator will advise the individual of her right to continue receiving supported living coaching services and assist her in locating a new provider. For this reason, the District/Region Developmental Disabilities Program will maintain a list of supported living providers who are willing to temporarily provide services until individuals can locate permanent providers.

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For additional information regarding the requirements for each specific authority reference, it is suggested the provider contact their local district or regional office. Copies may also be obtained through the Department's website [www.MyFlorida.com](http://www.MyFlorida.com) and the FSQAP at [www.dfmc\\_florida.org](http://www.dfmc_florida.org). (1-866-254-2075).

### **Chapter Summary**

Once requirements and qualifications are met, the supported living coach is prepared to provide services to individuals. That service begins with the WSC informing the individual regarding supported living coaching options, to ensure informed decisions can be made. Chapter Four addresses the series of actions which occur before the person moves.