

# Special Processes

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## Supplemental Resources

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This document contains the forms, tables, lists, and websites that were either displayed or referred to in the Special Processes for services training module. This document also contains additional resources to aide new WSCs in gaining the skills necessary to effectively coordinate the supports and services for individuals on their caseload.

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## ***Supported Living***

APD describes a supported living setting as a client's own home where they live and receive supported living coaching services and/or personal supports. The term "own home" is defined in the iBudget Handbook as, "[a] house, apartment, or comparable living space meeting community housing standards, which the recipient chooses, owns or rents, controls, and occupies as a primary place of residence."

Supported living is an opportunity for adults with developmental disabilities to choose where, how, and with whom they want to live. Through supported living arrangements many individuals, even those with severe disabilities can live in their own homes, gain control of their lives, and become part of the community. People are not expected to demonstrate complete independence to participate in supported living. People receive the personalized supports needed to maintain their own private home.

In a person-centered approach to supported living, each support or service is tailored to the client's needs, abilities, and preferences. An emphasis is placed on the development of non-paid, natural supports. The client is encouraged to engage in reciprocal relationships within the community, where they participate and contribute based on their unique interests, strengths, abilities.

When clients are interested in moving into their own homes with supported living services, WSCs can help clients by providing information about:

- the types of supports and services that are available to meet the client's needs
- the role of the Supported Living Coach and other support providers who may be needed
- types of living arrangements
- what to expect during the planning and moving process

### ***Choosing a Supported Living Coach***

Choosing a Supported Living Coach who matches the needs and personality of the client is important. To select the appropriate coach, the client and legal representative, along with others the client chooses, can interview potential Supported Living Coaching providers. The WSC can facilitate the interview and provide a list of available Supported Living Coaches who the client may wish to interview. Although a set of interview questions is not required, it is one tool a WSC can provide to clients to help with this process. The following page includes sample interview questions for a Supported Living Coach. In addition to an interview, clients can request a copy of the Supported Living Coach's references and resume if they desire more background information.

**Sample**

**Supported Living Provider Interview Format**

**Agency:** \_\_\_\_\_ **Interviewee:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. How much experience do you have working with people in supported living? \_\_\_\_\_

\_\_\_\_\_

2. How many people do you currently assist? \_\_\_\_\_

\_\_\_\_\_

3. What is your background/experience?

\_\_\_\_\_

\_\_\_\_\_

4. Where is your office located? \_\_\_\_\_

\_\_\_\_\_

5. Do you provide the coaching service, or do you have staff that work for you? Please check one: Provide Service  Staff provide service

6. How many people does each person support? \_\_\_\_\_

7. How do I get in touch with you if I need you?

Phone No.: \_\_\_\_\_

8. How can I reach you in an emergency?

Emergency Phone No. \_\_\_\_\_

9. How long will it typically take you to respond?

\_\_\_\_\_

10. What happens if you or the person working for you cannot make it? What is your back up system? \_\_\_\_\_

*Sample Supported Living Coach Interview Page 1 of 2*

**Supported Living Provider Interview Format (continued)**

11. How will you respect my choices?

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12. How do you train your staff? \_\_\_\_\_

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13. If I am not happy with your services or the services of your staff, what do I do?

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14. How will you assist me in selecting my home? \_\_\_\_\_

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15. What types of things will you help me with?

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16. What are your connections in this community? \_\_\_\_\_

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17. How will you help me to get to know my neighbors? \_\_\_\_\_

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18. Can you provide at least 3 references of people you are currently serving who I may contact. Yes \_\_\_\_\_ No \_\_\_\_\_

*Sample Supported Living Provider Interview Form Page 2 of 2*

## *Roles and Responsibilities in Supported Living*

The WSC is responsible for helping the client identify services and supports necessary to ensure health and safety, and for coordinating those supports. This is particularly critical for clients in supported living since they may be moving from a family home where there were natural supports readily available, or from a licensed facility with around the clock supervision. Unless there are supports and services in place to address the client's specific identified need, clients in supported living settings are responsible for managing their own time, maintaining their own safety in the home and community, and completing the routine tasks of daily living.

The WSC is also responsible for identifying responsibilities for waiver service providers who will assist the client in the supported living setting. If the client has a Supported Living Coach and a Personal Supports provider, the WSC must clearly define their responsibilities to prevent the overlap or duplication of services. The WSC can facilitate a meeting, or a series of meetings, to assign supported living tasks. The WSC may use the *Assignment of Duties and Responsibilities for Serving Clients in Supported Living* best practice checklist to divide tasks.

### **Working Together**

#### **Tips for Collaboration Between WSCs and Supported Living Coaches**

**Be Partners:** Work together to support the client in achieving his or her goals.

**Be Flexible and Creative:** Preferences and needs will vary from person to person as will the roles of providers. Together, search for non-traditional resolutions to problems and creative ways to establish and maintain support arrangements. Maintain as much flexibility as possible within the parameters of state and federal requirements.

**Work it Out:** Address and discuss areas of uncertainty. Identify possible areas of duplication and how they will be handled. Example: The WSC and Supported Living Coach work collaboratively to help clients maintain eligibility for benefits (such as Social Security, Medicaid, etc.). The roles of all parties should be clear so that efforts are not duplicated, or necessary activities overlooked.

**Write it Down:** The Support Plan is the guiding document for services. The expectations of the Supported Living Coach, WSC, and other provider should be clearly specified in the Support Plan. The Support Plan changes and is revised over the course of the year as the needs and desires of the individual change. It is a fluid document reflecting the person's desired outcomes, scope of service, and current situation.

**Communicate:** Be sure the client knows who to contact for assistance in certain situations and with certain tasks (i.e., Medicaid problems, emergency assistance, etc.).

The *Assignment of Duties and Responsibilities for Serving Clients in Supported Living* is a tool that the WSC can use to help ensure that the details of supports and services are carefully considered and that each support team member acknowledges and accepts responsibility for ensuring the client's health and safety needs are met.

The *Assignment of Duties and Responsibilities for Serving Clients in Supported Living* is included as an attachment to this document.

### *Choosing Housing for Supported Living*

Before assisting a client with a home search, the following questions should be answered:

- What is the client's budget for living expenses?
- Are there any debts or credit issues that would prevent the client from qualifying for a rental unit or establishing utilities in their name?
- Would the client consider living with roommates? If so, are there any preferences (gender, shared interest, hobbies, abilities, etc.)?
- What environmental adaptations or modifications will be needed (e.g., ramps, wheelchair access, etc.)?
- What forms of transportation does the client use to get around in the community? (public transportation, taxi, walking, etc.)
- Which locations would be most convenient (considering factors such as the client's job, recreation, entertainment, shopping, church / community activities, public transportation, and/or distance from family and friends)?

The Supported Living Coach should accompany the client to view housing options that meet the client's predetermined criteria for housing. The Supported Living Coach helps the client ensure that the prospective home is safe to inhabit, and that the home meets the housing quality standards that are described in the [Housing Survey form](#). If a client is considering a housing unit to rent, the Supported Living Coach must complete a housing survey of the unit prior to the client signing the lease or rental agreement. The Supported Living Coach must forward the completed Housing Survey to the WSC within 10 days of completion. The WSC must also tour the housing unit, and review and sign the Housing Survey prior to the client's lease being signed.

The requirements outlined in the [Supported Living Rule 65G-5, Florida Administrative Code](#), are as follows:

1. The housing unit must be available for sale or lease to any member of the community.
2. The housing unit must be the client's own choice and within the client's personal financial resources.

3. The client's name must appear on the lease or mortgage either singularly, with a roommate, or with a guarantor. Adding a client's name to a lease agreement of a provider does not constitute a supported living arrangement.
4. Neither the Supported Living Provider nor the immediate family of the Supported Living Provider shall serve as a landlord or have any interest in the ownership of the housing unit.
5. The housing unit must meet Housing and Urban Development (HUD) housing quality standards to ensure the client's safety and wellbeing. (HUD housing quality standards are described in the Housing Survey form.)

The survey must be reviewed quarterly by the Supported Living Coach and made available for review by the WSC at the time of quarterly home visit. This quarterly update must include a review of the individual's current health, safety, and well-being. It is the WSC's responsibility to review the survey on a quarterly basis in the absence of a Supported Living Coach.

The *Housing Survey* form is included as an attachment to this document.

### *Financial Planning and Supported Living*

An important aspect of transitioning into supported living is financial planning. A Supported Living Coach will work with the client to complete the [Individual Financial Profile](#) form. The *Individual Financial Profile* issued to analyze the individual's expenses and income for several purposes, which include:

- Determining the client's budget for housing and household expenses
- Identifying the need for a one time, monthly, or start-up in-home subsidy from APD
- Assisting the client with money management and with maintaining a balanced monthly budget

The Supported Living provider helps the individual complete the *Individual Financial Profile* and submits it to the WSC for review within ten (10) days of housing selection.

Subject to the availability of funds and other criteria, APD can approve an in-home subsidy, which provides financial assistance to help someone to live in their own home. If a client will need an in-home subsidy from APD, the *Individual Financial Profile* is required for submission and approval **before** the person signs the lease agreement.

The *Individual Financial Profile* form is included as an attachment to this document.



## *Health and Safety Checklist*

The Supported Living provider completes the *Health and Safety Checklist* on a quarterly basis, prior to the WSC's quarterly home visit/meeting. The *Health and Safety Checklist* is intended to assess potential health and safety concerns, including home safety concerns. It is important to note that the *Health and Safety Checklist* includes items that are similar or identical to the items on the *Housing Survey*. Completing the *Health and Safety Checklist* helps to ensure that the housing unit is maintained and continues to meet HUD housing quality standards.

During the required quarterly meeting for supported living clients, the WSC will review the *Health and Safety Checklist* with the *Housing Survey* to determine if there is a need for follow-up with unresolved issues or if changes are needed to ensure the client's health, safety, and well-being.

The *Health and Safety Checklist* is included as an attachment to this document.

## *Supported Living Quarterly Meeting*

Arranging the Supported Living Quarterly meeting is one of the required contacts for WSCs when serving clients in supported living settings. The WSC must attend the Supported Living Quarterly meeting with the client and the meeting must be at the client's home. Unless the client declines, the WSC is required to invite the Supported Living Coach and Personal Supports providers.

### **Required Activities During the Supported Living Quarterly Meeting**

WSC reviews client's progress towards achieving the supported living related goals in the client's person-centered support plan and determine if services are provided in accordance with the client's wishes and in a satisfactory manner.

WSC reviews the *Health and Safety Checklist* and the *Housing Survey* to determine if there is a need for follow up on any unresolved issues or if changes are needed.

If the client is receiving assistance with financial management from the Supported Living Coach, the WSC will review client's the bank statements, checkbook, and other public benefits, such as Social Security benefits and health care coverage, including Florida Medicaid, to determine continued waiver eligibility.

If the client is NOT receiving assistance with financial management from the Supported Living Coach, the WSC will review the client's financial status and benefits with the responsible party to ensure that the client's benefits are correct and protected.

If the client receives an in-home subsidy, the WSC will review the *Individual Financial Profile* form to verify that the client's sources of income and monthly expenses are accurate.

If a direct service provider (who is not otherwise licensed) is responsible for administering the client's medication, the Supported Living Coach must ensure that the direct service provider has a current medication administration validation certificate. The WSC assumes this responsibility if the client in supported living does not have a Supported Living Coach.

The WSC must document the meeting in the client's daily progress notes.

If there are any issues that cannot be resolved during the meeting and that may impact the client's stability in the community, the WSC must notify the APD Regional Office within five (5) business days.

The *Supported Living Quarterly Checklist* is a tool that can assist a WSC in conducting a thorough quarterly visit to ensure continued health and safety standards are being met. The *Supported Living Quarterly Checklist* can be found as an attachment to this document.

## Medications

WSCs are required to maintain current information about the medications taken by clients in the support plan. WSCs need to know which medications a client takes and how the medication is administered.

Some clients have their medications administered by service providers. Medication Administration for APD clients is governed by the Medication Administration Rule found in [Rule Chapter 65G-7, F.A.C.](#) A copy of this rule is provided for reference as an attachment to this document. WSCs must know this rule, its requirements, forms associated with the rule, and how it impacts medication administration. The provisions and requirements of the Medication Administration rule can affect how and where services are provided to clients.

The Medication Administration rule allows direct service providers who do not have a professional license (are not nurses, doctors, etc.) to administer medications and enteral formula (tube feeding). However, those individuals must complete required training and validation of their skills.

When selecting Personal Supports, choosing a licensed facility, or selecting other providers, consider whether the individual requires assistance or supervision with medication administration. If so, the provider must be trained and validated to administer medications in accordance with the Medication Administration Rule. The provider must have a validation certificate that is updated in accordance with the rule. If the WSC is unable to locate providers who meet the requirements to administer medications, they may contact the APD Regional Office.

Please note, that when family members and friends assist a client with medications without compensation, they do not have to meet the rule requirements. Also, if a client resides in an Assisted Living Facility, the Medication Administration Rule is not applicable while the client is at the Assisted Living Facility. However, it may be applicable when the client is receiving other waiver services in the community.

### *Informed Consent for Medication Administration*

WSCs may be involved in helping the client and legal representative understand the *Informed Consent for Medication Administration* form. Providers must a signed copy of the *Informed Consent for Medication Administration* form from the client and the client's legal representative before assisting him or her with medications. When signing this form, the client acknowledges that they will receive medication assistance from an unlicensed direct services provider. The WSC may need to help obtain this form as it must be updated annually or when there is any change in facility provider or other provider agency.

## *Authorization for Medication Administration*

All clients must have an *Authorization for Medication Administration* form signed by the client's physician, physician assistance, or advanced registered nurse practitioner on file. This form documents a client's level of ability and need for assistance with medication.

This document must be updated annually and upon any change in the client's need for assistance. The WSC is responsible for assuring that all providers that assist a client with medications have an up-to-date copy of the authorization. This form documents the client's need for assistance with medication administration or ability to self-administer medication without supervision.

The WSC must maintain this form in the client's central record. The *Authorization for Medication Administration* form must also be maintained at the client's residence. When conducting visits in the client's home, check that an up-to-date copy of the Authorization for Medication Administration form is available.

The *Authorization for Medication Administration* form must be updated annually. However, sometimes a physician or other medical professional treating the client needs to update the form before the annual update. If a medical professional makes changes to the *Authorization for Medication Administration* form when a WSC is not present, providers must notify the WSC so that they can update the client's record. WSCs should be mindful to see if changes occurred with the form when contacting clients after medical appointments.

### **Why is the Authorization so important to the WSC?**

- It tells the WSC about the client's ability with medication administration. This information allows the WSC to ensure that chosen providers can meet the needs of the client.
- If the client needs medication assistance around the clock, the client's residential providers must have validated Medication Assistance Providers working around the clock.
- If the client has a medication during daytime activities and requires assistance, the chosen day activity must have a Medication Assistance Provider available.
- If a client needs medication assistance and is fed through a Gastrostomy Tube (GT, aka PEG, JG tube or Mickey button), the WSC must make sure that unlicensed service providers working with the client are Medication Assistance Providers who have had further training and validation in Prescribed Enteral Formula Administration (PEFA).

## Supported Employment

APD is committed to increasing opportunities for clients to work in competitive integrated employment at or above minimum wage. WSCs are critical in helping clients understand the choice to work and how to achieve employment goals by creating a pathway to competitive employment. WSCs can help all clients, even those with the most challenging issues, to have a job.

The term, *competitive integrated employment* is defined in federal regulations. It means that the individual holds a job and is paid at least minimum wage or a salary that is customary for others who hold the same job and have similar experience. The individual can access the same benefits as other employees. The job is at a location where they interact with others who do not have disabilities in the community. As appropriate, the individual has the same opportunities for career advancement as other individuals without disabilities with similar jobs.

### *Person-Centered Conversations About Working*

Person-centered conversations about working are more than just asking a client if he or she wants a job. It is about finding out what is important to the client. The WSC should find out where the client sees themselves in the future and help them develop a plan to get there. A WSC can also learn about past experiences, fears, or barriers that the client has experienced related to working and help identify ways to overcome obstacles.

Some clients may not be ready to go to work immediately, and the WSC can help plan a path for readiness through post-secondary education, pre-vocational training, or vocational training. The plan is about identifying an employment goal and creating opportunities.

Asking a client if they want to work is more than just referring the client for services through Vocational Rehabilitation or helping the client locate a job coach. The WSC, and the client's circle of supports should help the client plan for all aspects of working. This includes transportation, back up plans, and ensuring that the individual is safe when they are working.

Additionally, it is important for WSCs to help APD clients plan for and understand how working impacts Medicaid and other governmental benefits. Understanding Social Security Work Incentives is one way that a WSC can assist clients in this area. WSCs can gain information on Social Security Work Incentives by completing required training on this topic.

When clients have a job, WSCs are responsible for checking in with client to see how the job is going. Find out if the person likes the job. Have they had a promotion, pay increase, or benefits changes? Do they need more training?

There is no right, wrong, or one-size fits all conversation about employment. However, it is critical for WSCs to help clients and their families realize that competitive integrated employment at or above minimum wage is a possibility.

### *Vocational Rehabilitation Referral*

The Division of Vocational Rehabilitation (VR) is the state agency responsible for helping individuals find competitive integrated employment. Since the waiver is the payer of last resort, the client must try to access employment services from VR before receiving waiver-funded supported employment services.

For clients who are ready to work, the WSC should first initiate a referral to VR. Once VR services have ended or if the client is denied services through VR, the WSC can help the individual access Supported Employment services through the waiver.

#### **Helping Clients with VR Referrals**

Clients may be interested in learning more about how VR can meet their needs. WSCs can assist clients in viewing the VR orientation video that is posted on the VR website. Here is a link to the video:

<https://www.youtube.com/watch?v=qxjYH1xYgrs&feature=youtu.be>

Clients will need to sign an attestation of watching the orientation video. WSCs can help clients access the VR Attestation Form at this link:

<http://www.rehabworks.org/docs/OrientationVideoAttestationForm.pdf>

VR has offices around the state that service as points of contacts for individuals seeking VR services. WSCs can help clients connect with these offices at this link:

[http://www.rehabworks.org/office\\_directory.shtml](http://www.rehabworks.org/office_directory.shtml)

Clients interested in obtaining competitive integrated employment as part of their goals on their Person-Centered Support Plan must have their WSC complete a referral packet for VR services. The referral must include a complete referral form with the client's demographic information and contact information of the person filling out the referral, recent pertinent assessments, a copy of the Person-Centered Support Plan with the client's employment goals, and any other information related to employment exploration.

The Referral to Vocational Rehabilitation form may be found on VR's website at this link: <https://www.flrules.org/gateway/reference.asp?No=Ref-10893> (English) and <https://www.flrules.org/gateway/reference.asp?No=Ref-10894> (Spanish)

## **Consumer Directed Care Plus (CDC+)**

WSCs must first be certified to provide CDC+ Consultant services before serving a client in the CDC+ program. More information about the process and training requirements to become a CDC+ Consultant can be found online at the following link:

<https://apd.myflorida.com/cdcplus/consultants/>



## **Attachments List:**

Housing Survey

Individual Financial Profile

Supported Living Quarterly Checklist

Assignment of Duties and Responsibilities for Serving Clients in Supported Living

Medication Administration Rule