

Developmental Services  
**Supported Living Coaching Services**  
 Monitoring Checklist

Provider Number: \_\_\_\_\_

Provider Name: \_\_\_\_\_

Review Date: \_\_\_\_\_

Provider Address: \_\_\_\_\_

Reviewer Name: \_\_\_\_\_


\_\_\_\_\_



District: \_\_\_\_\_

\_\_\_\_\_

Location: \_\_\_\_\_

- Agency Provider     Solo Provider     Onsite Review     Desk

Cite		Met	Not Met	N/A
<b>Explanation of Monitoring Tool Symbols/Codes</b>  Alert: Denotes a critical standard or cite relating to health, safety and rights. A deficiency requires a more intense corrective action and follow-up cycle. <b>“W”</b> Weighted Element: A “W” followed by 2.0 or 4.0 in the Cite column denotes elements that have a greater impact on the monitoring score. <b>“R”</b> Recoupment: An “R” in the Cite column denotes an element that is subject to recoupment of funds by the State if the element is “Not Met.”				
<b>Standard: The provider successfully supports the individual to live in his or her own home.</b>				
1 W2.0	The provider develops an individualized implementation plan (IP) for all consumers.			
2 W2.0	An individualized implementation plan (IP) is developed under the direction of the consumer.			
3	The IP identifies goal(s) and needs from the individual’s support plan and other pertinent sources appropriate to the individual.			
4	The IP identifies strategies and methods to assist the individual in meeting goal(s) as well as the data collection system to be used to assess success and achievement.			
5 W2.0	The IP is reviewed periodically to determine whether progress is being made and is updated to reflect new interest, goals, needs, or strategies to promote meaningful progress.			
6	The provider is tracking and acting on an individual’s progress or lack of progress.			
7	The provider has taken action on the results reported through the Person- Centered Review process.			

Cite		Met	Not Met	N/A
8	The provider assists individuals in completing a functional community assessment prior to his or her move to a supported living arrangement.			
9	The provider assists individuals in updating the functional community assessment annually.			
10	The provider forwards a copy of the completed initial Housing Survey to the individual's support coordinator within 10 working days of the selection.			
11 W2.0	The provider updates the Housing Survey quarterly and has it available for review by the waiver support coordinator at the time of the coordinator's quarterly home visit.			
12 W2.0	The provider's quarterly updates to the support coordinator include a review of the individual's overall status of health, safety and well-being.			
13	The provider assists individuals in completing the Financial Profile and submitting it to the waiver support coordinator no more than 10 days following the selection of housing by the individual.			
14	Providers acting as fiscal agents for the individual must provide bank statements and other financial to the support coordinator for review at the time of the quarterly meeting.			
15 W2.0	Provider assists individuals to be fiscally responsible in their decision making and to assure that affordable choices are made.			
16	As appropriate to the individual's goals, needs, and interests, services are provided in the individual's place of residence or in the community.			
17 W2.0	As appropriate to the individuals' goals, needs, and interests, the supported living coach works with other providers and an individual's waiver support coordinator to avoid activity duplication.			
<b>Standard: The provider and all employees of the provider are qualified to provide Supported Living services.</b>				
18  W4.0	Level two background screenings are complete for all direct service employees.			
19  W4.0	All employees undergo background re-screening every 5 years.			
20	Independent providers and employees of agencies who render services have a bachelor's degree from an accredited college or university with a major in nursing, education, or social, behavioral or rehabilitative science.			

Cite		Met	Not Met	N/A
<b>Standard: The provider and the provider's staff meet training requirements for delivery of Supported Living services.</b>				
21	Agency employees and independent providers are required to attend at least 18 hours of pre-service training prior to assuming job responsibilities			
22 W2.0	Agency employees and independent providers have eight (8) hours of annual in-service training.			
23	Agency employee and independent provider training consists of, at a minimum, a detailed review of the most current (now using the 1997 publication), <i>A Guide to Supported Living in Florida</i> , an overview of affordable housing options and home modifications, and Rule 65B-11, Florida Administrative Code.			
24	Proof of current training and certification in Cardiopulmonary Resuscitation (CPR) is available for all independent providers or agency staff.			
25	Proof of current training in AIDS and infection control is available for all independent providers and agency staff.			
26	The provider attends mandatory meetings and training scheduled by the Area Office and/or Agency.			
27 W2.0	Independent providers and agency staff receive training on responsibilities and procedures for maintaining health, safety and well-being of individuals served.			
28 W2.0	Independent providers and agency staff receive training on medication administration and on supervising individuals in the self-administration of medication.			
29	Independent providers and agency staff receive training on required documentation for service(s) rendered.			
30	Independent providers and agency staff receive training on responsibilities under the Core Assurances.			
31	Independent providers and agency staff receive training on responsibilities under the requirements of specific services offered.			
32	Independent providers and agency staff receive training on use of personal outcomes to establish a person-centered approach to service delivery.			
33 W2.0	Independent providers and agency staff receive other training specific to the needs or characteristics of the individual as required to successfully provide services and supports.			
34	Proof of required training in recognition of abuse and neglect to include domestic violence and sexual assault, and the required reporting procedures is available for all independent vendors and agency staff.			

Cite		Met	Not Met	N/A
<b>Standard: Services are provided at an intensity and duration necessary for successful support of the individuals served.</b>				
35 NEW	Each supported living coach shall maintain a caseload of no more than ten individuals who are receiving supported living coaching services.			
36	Services are rendered at a time and place mutually agreed to by the individual and the provider.			
37 NEW	Services are provided on a one on one basis.			
38 W2.0	Providers have an on-call system that allows individuals' access to services for emergency assistance 24 hours-per-day, 7 days a week.			
39	Independent providers must specify a backup person to provide supports in the event he or she is unavailable.			
40	Supported living coaching services are provided only to adults (age 18 or over) who rent or own their own homes or apartments in the community.			
41 W2.0	Individuals receiving supported living coaching services live where and with whom they choose.			
42 W2.0	Individuals receiving supported living services have control over the household and its daily routines.			
43	Services are made available to individuals within 90 days prior to moving or to individuals who are in the process of looking for a place of their own.			
44	Supported living coaching services are not provided to individuals who live in family homes, foster homes, or group homes, except for the 90 days prior to the individual moving into their own homes or apartments.			
45	Waiver program providers and employees of waiver providers who provide incidental transportation comply with all program requirements.			
<b>Standard: The provider maintains sufficient reimbursement and monitoring documentation to verify service delivery and to evaluate each individual's services and supports.</b>				
<i>Note: Score based on the presence or absence of required documentation.</i>				
46 R	Provider has at a minimum, a copy of the service log or time intervention log for the period being reviewed.			
47 R	Provider has at a minimum, an individual implementation plan, and/or transition plan (if applicable).			

Cite		Met	Not Met	N/A
48 R	The IP is developed, at a minimum, within 30 days of new service initiation (implementation plan complete and copy sent to support coordinator at time of first billing), or within 30 calendar days of service authorization effective date when services are being continued.			
49 W2.0	Provider has at a minimum, an annual written report summarizing the individual's progress toward achieving the goal(s) from the support plan.			
50	Provider has at a minimum a copy of the annual satisfaction survey maintained in the individual's record.			
51	The provider forwards a copy of the annual satisfaction survey to the waiver support coordinator.			
52 W2.0	Provider has at a minimum, documentation of a quarterly meeting in which the individual, the waiver support coordinator and the supported living coach review supported living services.			
53	When the provider is acting as fiscal agent for the individual, provider has at a minimum, progress notes in the service log indicating that the supported living coach and waiver support coordinator review bank statements and financial records quarterly.			
54 R	Provider has at a minimum, an initial Housing Survey containing quarterly updates of the individual's health and safety status.			
55	Provider makes available an initial Housing Survey with quarterly updates to the waiver support coordinator.			
56	Provider has at a minimum, up-to-date information regarding the demographic, health, medical and emergency information, and a complete copy of the current support plan, if approved by the individual/guardian, for each individual served.			
<b>Standard: Provider bills for services as authorized.</b>				
57 R	Supported living coaching services are limited to the amount, duration and scope of the services described in the individual's support plan and current approved cost plan.			
58 R	Provider does not bill separately for transportation that is required during a supported living activity.			
59 R	The provider bills for supported living coaching as defined and specified in the DS Waiver Services Medicaid Coverage handbook.			

Cite		Met	Not Met	N/A
<b>Standard: The provider meets Projected Service Outcomes established for service delivery.</b>				
60	The provider has established a systematic method of data collection for outcome data.			
61	There is evidence that the data is reviewed periodically and that corrective measures are put in place if the data indicators that the goal is not being achieved.			
62 W2.0	Individuals in supported living are the lessee or owner of the home in which they reside.			
63 W2.0	All Individuals served who have responded to the annual satisfaction survey are satisfied with the services based on the results, or the provider has addressed any concerns raised during the survey.			
64 W2.0	Individuals in supported living live in homes occupied by no more than two other beneficiaries with developmental disabilities and in areas in which persons with disabilities account for no more than 10% of the houses or 10% of the units in an apartment complex, unless otherwise waived by the Agency.			
65 W2.0	Individual are supported to live in their own Home.			
66 W2.0	Individuals who use the supports increase their level of participation or independence in the community.			
67 W2.0	Individuals demonstrate freedom of choice in all areas of their lives as evidenced by setting personal goals, being fully informed about service options and making all possible decisions with regard to the conduct of their lives.			
<b>Standard: Personal funds are appropriately maintained and are accounted for accurately.</b>				
<i>Note: Determine if the provider acts as a fiscal agent, manages, stores an/or retains funds belonging to an individual. If no, score cites 66-71 'Not Applicable'. If yes, determine if the conditions outlined in cites 66-71 are being met.</i>				
69 W2.0	Separate checking or savings accounts are maintained for individual's personal funds.			
70 W2.0	If a single trust account is maintained for personal funds of all individuals, there is separate accounting for each individual.			
71 W2.0	Account(s) is reconciled monthly to the account total as noted on the bank statement.			

Cite		Met	Not Met	N/A
72	Account statements and reconciliation records are retained for review.			
73 W2.0	Individual and provider funds are not commingled.			
74 W2.0	The provider has written consent to manage funds or act as fiscal agent.			
<p><b>If the provider is not rendering services to individuals that have problems with behavior such as those that follow, score the elements in this section Not Applicable.</b></p> <p><u>Types of Problems with Behavior:</u></p> <p>Actions of the individual which, without behavioral, physical, or chemical intervention</p> <ol style="list-style-type: none"> <li>1. Have resulted in self-inflicted, detectable, external or internal damage requiring medical attention or are expected to increase in frequency, duration, or intensity resulting in self-inflicted, external or internal damage requiring medical attention.</li> <li>2. Have occurred or are expected to occur with sufficient frequency, duration or magnitude that a life-threatening situation might result, including excessive eating or drinking, vomiting, ruminating, eating non-nutritive substances, refusing to eat, holding one's breath, or swallowing excessive amounts of air.</li> <li>3. Have resulted in external or internal damage to other people that require medical attention or are expected to increase in frequency, duration or intensity resulting in external or internal damage to other persons that requires medical attention.</li> <li>4. Have resulted or are expected to result in major property damage or destruction.</li> <li>5. Have resulted or are expected to result in arrest and confinement by law enforcement personnel</li> </ol>				
<p><b>Standard: Behavioral Services result in objective and measurable improvements in behavior that are consistent with the individual's outcomes.</b></p>				
75	When rendering services and supports to individuals identified as having problems with behavior, the provider is assisted by a qualified professional or professionals who meet the requirements in the Medicaid Handbook for the type of service the professional is providing.			
76	Behavior Service goal(s) are consistent with and relate directly to the individual's personal outcomes/goals.			
77	The individual has a written, individual plan developed by a certified or licensed professional that clearly identifies what will change as a result of intervention, the intervention(s) to be used and how progress will be measured.			
78 W2.0	Written consent to use the plan was obtained from the individual or guardian.			
79	Implementers (provider staff) of the plan are able to carry out the plan as written.			
80 W2.0	A system is in place to assure that procedures are carried out as designed.			

Cite		Met	Not Met	N/A
81 W2.0	There is evidence of progress or lack thereof in reducing the problem with behavior.			
82	Emergency procedures (e.g., reactive strategies, crisis management procedures) used by the provider for problems with behavior are developed and implemented under the guidance of certified or licensed behavioral services professionals.			
83	Staff are able to use the procedure when and as designed			
84	Records are kept on the use of the emergency procedure and occurrences of the problem behavior.			

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 REV 10-29-01; 11-01-01; 11-13-01; 09.27.02; 01.03; 02.04.03; 02-10-03; 11-27-05