



# Individual Quality Review

## Section 7. Overall Summary

Class Member	On-Site Date	Region	Reviewer	Case Judge

[Health Assessments](#)  
[Adequacy of Planning/Services](#)  
[Expectations for Growth](#)

[Quality of Life Satisfaction](#)  
[Team Process](#)  
[Supported Employment](#)

[Behavior AE/AT/Communication](#)  
[Individual Service Planning](#)

### SCORING SUMMARY

#### Ratings Guide:

A rating of "0" = No Compliance (No)

A rating of "1" = Needs Improvement; few of the indicators are met, many are inconsistently met

A rating of "2" = Many Indicators Met, but not all

A rating of "3" = Full Compliance (Yes)

A rating of "NA" = Not Applicable, and represents an item that does not apply to the individual being reviewed

A rating of "CND" = Can Not Determine

In some cases, the Reviewer will simply not have enough information to make an informed decision to appropriately score some questions. The option of "CND" (Can Not Determine) is available as a response in these instances. However, "CND" and N/A (not applicable) can only be selected when it is among the choices provided as answers.

### You must provide an answer for every question

For each question your possible responses are limited to the optional responses listed. For instance, if a question does not list NA as a possible response, you may not use it.

Reviewers: **In your justifications use a (+) to indicate examples of compliance; Use a (-) to indicate examples of non-compliance.**

### HEALTH

52.	<p>Overall, were the team members interviewed able to describe the person's health-related needs?</p> <p><i>Note: Before answering this question, you must review your answers to questions #28 [CM], #36 [Day], #46 [Res]. Enter those scores below. If these three scores are all "3", the answer to this question is a "3". If the answers are mixed (one is scored a "1", one a "2" and another a "3"), this must be scored as an average. No additional justifications are necessary</i></p>	<p><b>Choose</b></p>
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	<p> <input type="text"/> is the score for Question #28    <input type="text"/> is the score for Question #36    <input type="text"/> is the score for Question #46  <i>(You must manually enter these scores, they will not populate from the other protocol sections)</i> </p> <p><b>Justification:</b> <input type="text"/></p> <p><b>Case Judge Comments:</b> <input type="text"/></p>	
53.	<p>Is there evidence that the IDT discussed the person's health related issues?  <i>Note: In addition to information gathered during interviews, consider the health and safety section of the ISP, CM progress notes, provider and therapy reports and progress notes. This cannot be a "3" if the documentation and what was expressed by the team members interviewed were not consistent, or if team members interviewed did not note the person's significant health issues (seizure disorder, aspiration, diabetes, etc.)</i></p> <p><b>Justification:</b> <input type="text"/></p> <p><b>Case Judge Comments:</b> <input type="text"/></p>	<b>Choose</b>
54.	<p>Was the eChat updated timely?</p> <p><b>Justification:</b> <input type="text"/></p> <p><b>Case Judge Comments:</b> <input type="text"/></p>	<b>Choose</b>
55.	<p>Are all of the individual's needed medical treatments timely received?</p> <p><b>Justification:</b> <input type="text"/></p> <p><b>Case Judge Comments:</b> <input type="text"/></p>	<b>Choose</b>
56.	<p>Does the individual receive routine/scheduled medical treatment?  <i>Note: This includes consistent attention to chronic conditions.</i></p> <p><b>Justification:</b> <input type="text"/></p> <p><b>Case Judge Comments:</b> <input type="text"/></p>	<b>Choose</b>
57.	<p>Does the individual receive medication as prescribed?</p> <p><b>Justification:</b> <input type="text"/></p> <p><b>Case Judge Comments:</b> <input type="text"/></p>	<b>Choose</b>
58.	<p>Does my nurse provide oversight of health needs (i.e. weight records, vitals, lab reports, PRN medication use, seizure records) in order to ensure accuracy, identify and respond to new issues?</p> <p><b>Justification:</b> <input type="text"/></p> <p><b>Case Judge Comments:</b> <input type="text"/></p>	<b>Choose</b>
59.	<p>Are nursing services provided as needed by the individual?</p> <p><b>Justification:</b> <input type="text"/></p> <p><b>Case Judge Comments:</b> <input type="text"/></p>	<b>Choose</b>

60.	<p>Is the CARMP is accurate?  <i>Note: if this person does not have a CARMP, this would be “N/A”. It is critical that you have observed either snack time and/ or a meal if at all possible.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
61.	<p>Is the CARMP consistently implemented as intended?  <i>Note: if this person does not have a CARMP, this would be “N/A”. It is critical that you have observed either snack time and/ or a meal if at all possible.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
62.	<p>Are the person's health supports/needs being adequately addressed?  <i>Note: Needed assessments must be secured/scheduled; recommendations must be followed up on in a timely way. New DME and Augmentative Communication Devices are required to be delivered within 150 days from the date requested. Repairs or modifications to DME are required to be completed 60 days from the date requested. Therapy assessments should begin within 30 days of receipt of the Freedom of Choice and no later than 90 days of being identified as a need by the IDT team. Medical specialists' appointments should be scheduled within 14 calendar days. Symptoms should be noted and pursued; dangers should be identified and eliminated/reduced; etc. This cannot be a “3” if there are outstanding assessments/evaluations, no evidence of follow-up of expressed symptoms, or no follow-through on health care recommendations, (e.g. the doctor ordered the person to have a C-Pap machine for use when sleeping at night, and there is no C-Pap machine at the person's home or the C-Pap machine is there but does not work), or lack of timely attention to/resolution of issues.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>

### ASSESSMENTS

*Examples of assessments “types”: physical health; dental; psychological; behavioral; psychiatric; physical therapy; occupational therapy; daily living skills; vision; hearing; communication/speech; social/recreational; vocational/employment; other: i.e., neurological; self-administration of medications; nutritional; etc. Written/paper assessments that are not dated and/or not signed by the evaluator cannot be considered; however, assessments automatically dated and given “electronic signature” through the Therap system for E-CHAT, MAAT and Aspiration Risk Screening Tool are acceptable. An assessment cannot be considered adequate if it does not include clear information that can be used for planning. The mere presence of a piece of paper titled an assessment does not automatically warrant a “2” rating if the contents do not approach the Professional Judgment Standard as defined in the Reviewer's Guide.*

*Note: Assessments provide information to guide planning. Assessments should identify the individual's preferences, desires and interests (this can be used to develop and/or enhance vision statements for individuals who cannot communicate directly with the IDT): strengths and skills (to identify what is currently in place to support the vision); challenges to adaptations/assistive technology); and learning style and culture (to identify the Action Plans, needed strategies and supports that are the least restrictive and most likely to be effective in assisting the individual to attain his or her vision). Assessments should be ongoing, as IDT members learn new information about the person through the provision of ongoing supports and services. Relevant information should be included in quarterly/semi-annual reports, as it is discovered. Assessment information should be formally updated and summarized annually, and sent out to team members two weeks prior to the ISP meeting. The team should be sure:*

- *All assessments the individual needs, in order for planning to be relevant, were considered.*

	<ul style="list-style-type: none"> <li>○ Relevant input from all team members was obtained prior to the annual meeting.</li> <li>○ Assessments identify needs, strengths, learning style, and preferences of the individual.</li> <li>○ Assessments identify presenting disabilities and if possible, causes and proposed solutions.</li> <li>○ Assessments include clearly stated recommendations. If the IDT determines one or more recommendations are not appropriate, team consensus on why not is documented in the Decision Consultation Form (for medically related recommendations); for non-medically related recommendations team consensus may be documented in IDT minutes or in a Decision Justification Form.</li> <li>○ Does the assessment describe where the individual started (baseline) in each area?</li> <li>○ Does the assessment describe how the individual is currently doing in each area?</li> <li>○ Are goals developed in a systemic and naturally progressive manner?</li> </ul> <p>If the team identifies need for a new service/assessment at the annual meeting, this should be completed in a timely manner and the team must convene to review implications for planning and recommendations based on the new assessment and the ISP must be revised to incorporate the new information.</p>	
63.	<p>Did the team consider what assessments the person needs and would be relevant to the team's planning efforts?</p> <p><i>Note: Assessments should be sent out to Team members two weeks in advance of the ISP meeting. Consider recommendations for assessments made as a part of other evaluations, as well as other information found in the CM primary record. This cannot be a "3" if any of the required assessments were not considered. Required assessments include but are not limited to: History &amp; Physical Exam, e-CHAT, Nurses semi-annual reports for people at moderate or high on the e-CHAT, Medication Administration Assessment Tool (MAAT) if the person takes medication. Other assessments that may be considered based on the person's needs include: Behavior Support Consultation (BSC), Occupational Therapy (OT), Physical Therapy (PT), Speech Therapy (SLP), Vision Exam, Dental Exam, Neurological Exam, Psychiatric Exam, Vocational Assessment, Aspiration Screens (required annually if they do not already have a CARMP), TEASC, SAFE clinic, and other clinic exams/assessments.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	Choose
64.	<p>Has the individual received all age and gender appropriate health screenings, in accordance with national best practice and/or as recommended by his/her PCP or other health care professionals?</p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	Choose
65.	<p>Did the team arrange for and obtain the needed, relevant assessments?</p> <p><i>Note: The Action Plan section of the ISP should address only those assessments that are still needed. Routine assessments that have been completed will not be listed in the action plan section. Case Managers are to track assessments provided and assessments needed – reviewers should review the tracking sheet being used by the CM. The information you have gathered regarding this person's needs including assessments found in the CM primary record should guide your answer to this question. This cannot be a "3" if any of the required assessments were not obtained. Nurses are required to provide semi-annual reports for people at e-CHAT acuity of moderate or high. OT, PT and SLP provide reports every 6 months unless the ISP states differently. BSCs are to send their Quarterly/Semi-annual Reports to both OBS and Case Manager. Health related assessments which are recommended are also included here.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	Choose

66.	<p>Are the assessments adequate for planning?  <i>Note: Determine if the assessments provide information that will guide the Team to support the individual and develop a comprehensive plan to help the person learn or develop a skill, achieve an outcome, address a medical or behavioral issue, etc. For some individuals, maintaining current skills and level of health may be appropriate depending on where the individual is in their life (i.e., hospice). This cannot be a “3” if provider assessments (e.g. BT, OT, PT, SLP, e-CHAT, etc.) do not have information and recommendations which can be used in developing the ISP, outcomes, and Action Plans. If a Provider assessment recommendation simply states to continue the service, this cannot be a “3”.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	Choose
67.	<p>Were the recommendations from assessments used in planning?  <i>Note: Determine if information and recommendations from the assessments were used throughout the ISP, such as in narrative section, outcome criteria, Action Plans and strategies, or other areas of the plan. This cannot be a “3” if #57 was a “2”, “1” or “0” or if the recommendations from any of the assessments were not found in the ISP.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	Choose
68.	<p>For medical, clinical or health related recommendations, has a Decision Consultation Form been completed if the individual and/or their guardian/health care decision maker have decided not to follow all or part of an order, recommendation or suggestion?  <i>Note: If no Consultation Form is necessary, the answer is N/A. If recommendations were not followed and no Consultation Form was provided the answer is “0”.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	Choose
<b>ADEQUACY OF PLANNING AND ADEQUACY OF SERVICES</b>		
69.	<p>Is there a document called an Individual Service Plan (ISP) that was developed within the past year?</p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	Choose
<b>If there is not a current ISP (“No” on #69) then #70- #92 are scored “0” or “No”</b>		
70.	<p>Was the ISP developed by an appropriately constituted IDT?  <i>Note: The IDT shall consist of the following members: person served; case manager; guardian (if applicable); direct service staff from each provider agency; ancillary service providers (if applicable) such as therapists; nurses; vocational specialists; physicians; psychiatrists; psychologists; these professions rarely attend team meeting, but may have submitted written assessments or evaluations for team consideration. The team may also include a friend advocate, family member and/or legal representative. “Applicable” depends on the preferences and needs of the individual. Check the ISP signature page, as well as interviewees’ responses, to determine if there was an appropriately constituted Team. If the individual scores a moderate or high on the e-CHAT and there is no evidence that a nurse participated in the meeting, this cannot be a “3”. If the individual is behaviorally involved, and there is no evidence a Behavior Support Consultant participated in the meeting, this cannot be a “3”. If</i></p>	Choose

	<i>there was no evidence the person attended their own meeting, and no explanation as to why the person did not attend their own meeting, this cannot be a "3".</i>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
71.	<p>For any team members not physically present at the IDT meeting, is there evidence of their participation in the development of the ISP?  <i>Note: Participation of ancillary service providers does not require the provider's physical presence at the IDT meeting. Their participation can be accomplished through conference call, or through meeting with another team member prior to the meeting to discuss issues/concerns/recommendations. This applies to therapists and nurses. If the e-CHAT acuity is moderate or high the nurse MUST participate in the ISP, must do quarterly/semi-annual reports on the person's health care plan, must have a health care plans for which the e-CHAT summary indicates an "R" for required. Healthcare plans may be combined as determined by the class member's nurse and a separate Aspiration Health Care Plan is not required in addition to the CARMP since the CARMP is considered a type of healthcare plan that combines several health related issues.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
72.	Does my ISP contain current and accurate information?	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
73.	<p>Overall, does the long term vision show expectations for growth and skill building?  <i>Note: An individual's vision (i.e. dream for the future) should state what the individual wants to achieve over the next 1 to 3 years. Most people value and want: family and friends; a place to live that is comfortable, safe and meets preferences for design and furnishings; people with whom they live to be compatible; work that is interesting and that promotes success and accomplishment; to be a part of and valued by the community; enough money to feel secure and support life's desires; good health, etc. It is the job of the team to find out from the individual (through assessment, questions, observations, etc.) what he/she wants to focus on for the next few years. As a general rule, vision statements should not be repeated verbatim from one plan to the next. They should change and grow as the person does. Exception to this rule, however, would be if none of the vision has been accomplished – in spite of documented clear and consistent work towards the vision – and/or the vision statement is still the desired dream of the individual.</i>  <i>Note: The only allowable way for an individual not to have a vision in Live, Work/Learn and Relationships/Fun is if two criteria are met: 1) the person is not receiving any paid supports in that area AND 2) the team documents why the individual does not require the team's supports in that area (e.g. natural supports are sufficient, the individual is independent in that area...)</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
74.	<p>Overall, does the ISP give adequate guidance to achieving the person's long-term vision?  <i>Note: The Vision section of the ISP includes questions to prompt the analysis that compares life today and the desired life stated in the vision. It is the team's review and discussion of the assessment information (strengths, preferences, interests, non-negotiables, supports, etc.) to identify what</i></p>	<b>Choose</b>

	<p><i>is in place and what needs to be included in planning to support the individual's transition from his/her present status to successful accomplishment of the stated vision for the future. The team should analyze each life area separately. This Section is to address, for each vision statement: the person's strengths, abilities, challenges, skills to be developed to achieve the vision, and what needs to occur including services and supports the person's needs. This cannot be a "3" if any of the Narrative or Vision Sections are not completed and overall does not relate to the achievement of the specified LTV in each life area.</i></p>	
	<p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	
75.	<p>Is measurable data kept which verifies the consistent implementation of each of the action steps?</p>	<b>Choose</b>
	<p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	
76.	<p>Does the data kept identify what the person does so a determination regarding progress/lack of progress?</p>	<b>Choose</b>
	<p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	
77.	<p>Is each action step in the ISP implemented at a frequency that enables the person to learn new skills?</p>	<b>Choose</b>
	<p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	
78.	<p>If the person is not successful in achieving actions steps, has the team tried to determine why, and change their approach if needed?</p>	<b>Choose</b>
	<p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	
79.	<p>If the person achieves action steps, does the team move to the next in the progression of steps or develops a new one?</p>	<b>Choose</b>
	<p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	
80.	<p>Has the person made measurable progress on actions steps during this past year?  <i>Note: Your evidence is measurable and consistently kept data and progress reports (if they provide measurable data)</i></p>	<b>Choose</b>
	<p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	
81.	<p>Overall, do the outcomes in the ISP include criteria by which the team can determine when the outcome(s) have been achieved?  <i>Note: Outcomes are the formal steps (learning a new skill or completing an action/responsibility) necessary to achieve the person's desired vision. Each outcome relates to a relevant component of the vision; vision statements that have many components will require multiple outcomes for that</i></p>	<b>Choose</b>

	<p>specific life area. Outcomes are discussed, agreed upon and written at the IDT meeting; primary responsibilities for the accomplishment of each outcome are assigned. The IDT must meet when outcomes are accomplished in order to identify the next logical step in the process; the ISP is revised based on this discussion. Outcomes are written for the individual; skill maintenance or actions provided by the staff are included in the Vision Section of the ISP, steps of the Action Plans Teaching &amp; Support Strategies and, when necessary, detailed in medical or therapy support plans (i.e. positioning, communication plans, CARMP etc.). In order for this to be a “3” <u>each</u> outcome that is developed must be measurable and state what the person is to do to accomplish it (that is, anyone reading it can tell when the outcome has been accomplished, e.g. the person will lose 50 pounds in the next year; or the person will develop a resume, practice job interview skills, make application and acquire a job in the next year).</p>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
82.	<p>Overall, are the ISP outcomes related to achieving the person’s long-term vision?  <i>Note: For this to be a “3” each outcome that is developed must relate to the person’s Long Term Vision for that life area. Review the LTV and the outcomes to show if there is a direct connection or not. This score is “0” if no outcomes were developed. Consult with your Case Judge if you find vision statements with no outcome. Outcomes may be re-statements of the vision, as long as the steps are identified in the Action Plans.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
83.	<p>Overall, do the ISP outcomes address the person’s major needs?  <i>Note: The ISP is centered on achieving what the person wants, and the outcomes are developed to assist the person in achieving their desires. If there are barriers to the accomplishment of the person’s LTV these should be addressed in the person’s ISP. The Personal Challenges and Obstacles That Need to be Addressed In Order to Achieve the Desired Outcomes section of the ISP (at the top of each action plan) should address these barriers. These challenges in turn should be addressed in the action steps, strategy(s) and/or support plans. There should be at least one related outcome for each vision statement. Consult with your Case Judge if you find a vision statement with no outcome.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
84.	<p>Overall, are the Teaching and Support Strategies sufficient to ensure consistent implementation of the services planned?  <i>Note: Teaching and Support Strategies are detailed directions written to guide the staff in consistent implementation and documentation of the Action Step. These strategies must be directly related to accomplishing the Action Step in the most effective manner for the individual (learning style, specialized equipment, positioning, etc.). Strategies would address conditions for success (type/level of staff support and special equipment/materials necessary to successfully perform the action. The strategies must specify who will assist the individual, what staff will do (preparation, type/level of staff support, how to provide the support, etc.), when and where the Action Step will be implemented, how often the person will do the activity, when and how data will be collected, and when progress will be reviewed. Therapists may provide direct support to develop the provider strategies, or review and insert recommendations before submission for inclusion in the ISP. For those under the new DD Waiver, the therapist provides Written Direct Support Instructions to be attached to relevant Teaching and Support Strategies. For ongoing strategies these are due two weeks prior to the expiration of the previous ISP. For new strategies, these instructions will be added once the therapist has completed trials with the individual to determine the effectiveness prior to submitting and training DSP</i></p>	<b>Choose</b>



	<p>on Written Direct Support Instructions. This score is “0” if strategies are needed but not developed/present. For this to be a “3” each strategy must give clear directions so that anyone can read the strategy and know what to do. These directions should note who will assist the person, what type of support is needed, what materials are needed, when and where to do the action step, how often or for how long to do the action step and how and when data will be collected. If the strategy simply states what the staff will do or if the accomplishment of the Action Step is related to the activity of the staff, this cannot be a “3”. (e.g., The strategy states: “go on a van ride everyday”, this would be a “0”, as it is dependent on a staff activity and does not state what the person will do.)</p>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
85.	<p>Overall, are the recommendations and/or objectives/strategies of ancillary providers integrated into the ISP?  <i>Note: This could include any component of the ISP such as outcomes, action plans, Teaching and Support Strategies (T&amp;SS), etc. Does the ISP incorporate information from ancillary providers (from plans, assessments, recommendations, etc.) dealing with how to reinforce skill building/maintenance, personal traits and abilities appropriately? Relevant Desired Outcomes and associated Teaching and Support Strategies, as needed, contain information from the ancillary providers that supports attainment of the individual’s related vision areas. A mere reference to ancillary providers or specific plans/documents is not considered to have sufficient detail to be understood and consistently implemented, unless Written Direct Support Instructions are attached to the Teaching and Support Strategies from the therapist(s). This cannot be a “3” if the person receives therapies and there is no information from the therapists’ plans in any of the ISP outcomes/action plans, or strategies. For this to be a “3” there must be relevant information from the therapist in the ISP outcomes, action plans and/or strategies such as information from the BSC on how to approach the person to ask them to do a task; or information from the PT on how to have the person sit or stand to do a task; or information from the SLP on how to communicate a request to the person.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
86.	<p>Has the person made measurable progress in therapy this year?  <i>Note: Consider changes made from interviews, measurable data and all other sources. However, to answer this “3” you must have evidence of measurable progress as identified by the therapist progress notes/annual report. Notes such as, “doing better” and “has made progress” are not measurable. Notes such as, “last quarter could (in supine position) bend knee 10 °, can now bend to 20 ° or during the last 60 days has gone from SIB (chewing wrist) 3 x every 60 seconds for 2 seconds to 1 x every 5 minutes for 2 seconds are measurable and would warrant a “3”.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
87.	<p>If needed, does the ISP contain a specific Medical Emergency Response Plan (MERP)?  <i>Note: Has it been made clear in terms of what to do, where to go and who to call in the event of a medical crisis as appropriate to this person? If a person has a chronic condition with the potential to result in a life threatening situation (some types of seizures, asthma, some types of diabetes, etc.) they should have a MERP. Not all healthcare plans require an associated MERP. The e-CHAT summary report will indicate an “R” for health issues that require creation of a MERP. For this to be a “3” all MERPs that are developed must specify: what a crisis looks like specifically for this person; how to prevent the crisis; when the situation becomes a crisis: what the staff need to do to provide appropriate intervention; and describe what that intervention is to be.</i></p>	<b>Choose</b>

	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
88.	Does the ISP contain information regarding primary health (medical) care? <i>Note: The name and contact information for the Primary Care Physician (PCP) should be on the face sheet of the ISP. The ISP should identify the healthcare coordinator responsible for supporting the individual to make such arrangements. The Health Action Plan page of the ISP should address new/changes to health care that needs to be arranged/followed up on. Note: If #79a or #79b are "0", "1" or "2", this cannot be a "3".</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
88a.	Does the ISP face sheet contain contact information for the PCP?	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
88b.	Is the Healthcare coordinator's name and contact information listed in the ISP? <i>Note: This should be on the Additional Healthcare Information page of the ISP.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
89.	Does the ISP reflect how the person will obtain prescribed medications? <i>Note: For this to be a "3" the name and phone number of the pharmacy (face sheet), and the person responsible for getting medications refilled and obtaining new medications (Medication Delivery section of Additional Healthcare Information page) must be noted.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
90.	Does the ISP reflect how the person will get to work/day activities, shopping, and social activities? <i>Note: For this to be a "3" the ISP must note not just that the person needs transportation, but who [either agency, person by name or title, type of public transportation, etc.] will provide that transportation. This information is expected to be in the Action Plan of the ISP, but if it is found in other sections (i.e. Strategy, Vision) that is acceptable.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
91.	Does the ISP contain a list of adaptive equipment needed and who will provide it? <i>Note: For this to be a "3" the ISP and/or Equipment Inventory must note ALL of the adaptive equipment the person is to have available for use, and who is responsible for obtaining it. This question pertains to adaptive equipment. Examples of Adaptive Equipment includes: Durable Medical Equipment such as wheelchairs of any type, walkers, shower chairs, shower trolleys, hospital beds, eating and drinking equipment. Also personal items such as glasses, dentures, hearing aids.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	

<b>Case Judge Comments:</b> [REDACTED]		
<b>92.</b>	<p>Overall, is the ISP adequate to meet the person's needs?  <i>Note: This question focuses on the adequacy of the ISP... the written plan. Based on the rating you have given Questions #63 through #80, does the ISP adequately address the person's living, working/learning, social/leisure and health needs/supports? The ISP does not have to be "perfect" and all of the scores for #61 to #91 do not have to be "3s" in order for you to find the ISP adequate and rate this as a "3". However, the individual's ISP should be based on the person's assessed needs and strengths and include relevant interventions designed to enable and move the person closer to his/her vision. The ISP should be directed towards the acquisition skills and behaviors necessary for the individual to function with as much self-determination as possible, should prevent or decelerate regression and attempt to keep the person safe and free from harm. The reviewer is to consider all the scores and rationales from questions #63-80, using those rationales here to substantiate the score. As you review the ISP in total, you are being asked to apply professional judgment to determine the overall adequacy of this person's ISP. (See guidance on Professional Judgment in the Reviewer's Guide.)</i></p>	<b>Choose</b>
<b>Justification:</b> [REDACTED]		
<b>Case Judge Comments:</b> [REDACTED]		
<i>The scores for questions #70 through #91 should pre-populate below; if they are not all visible, use "print preview" to prompt loading.</i>		
#70: Choose	#73: Choose	#76: Choose
#71: Choose	#74: Choose	#77: Choose
#72: Choose	#75: Choose	#78: Choose
#79: Choose	#80: Choose	#81: Choose
#82: Choose	#83: Choose	#84: Choose
#85: Choose	#86: Choose	#87: Choose
#88: Choose	#89: Choose	#90: Choose
#91: Choose		
<b>If you answered question #92 as "0", "1", "2" or "NA", then answer question #93 as "N/A".</b>		
<b>If you answered question #92 as "3" then proceed to select an appropriate answer for question #93.</b>		
<b>93.</b>	<p>Is the ISP being implemented?  <i>Note: Determine if the ISP is being implemented by looking at outcome and action plan data collection, provider and therapist monthly, quarterly or bi-annual reports noting progress made or the reason for lack of progress, and information obtained from interviewees. Score this question accordingly, noting the corresponding rationale, then proceed to question #81. This can only be a "3" if the data collection and provider and therapist reports note progress or the reason for lack of progress –and if all IDT members interviewed indicated progress has been made or stated why they thought progress was not made and how it is being addressed.</i></p>	<b>Choose</b>
<b>Justification:</b> [REDACTED]		
<b>Case Judge Comments:</b> [REDACTED]		
<b>If you answered question #92 as "0", "1", "2" or "NA", then answer questions #94a and #94b as appropriate.</b>		
<b>If you answered question #92 as "3", then answer questions #94a and #94b as "N/A".</b>		
<b>94a.</b>	<p>Is the ISP being implemented?  <i>Note: Answer this question if this person's ISP was NOT rated as a 3. The Note in #84 applies here as well.</i></p>	<b>Choose</b>
<b>Justification:</b> [REDACTED]		
<b>Case Judge Comments:</b> [REDACTED]		
<b>94b.</b>	Are current services adequate to meet the person's needs?	<b>Choose</b>

	<p><i>Note: Consider all of the services the individual receives, including Case Management, Community Living, Nursing, Nutrition, Day, Employment, and all Therapies. The reviewer is to note what is determined as adequate, and for those that are considered to be inadequate note the reason for that determination. This cannot be a “3” if the person is to receive a particular therapy but there was no progress report from the therapist, and no evidence the therapist had seen the person at home or during the day program. This cannot be a “3” if the person is to receive a specific staffing support during specific times, and the documentation (or your observations) indicates that the support has not been there on a regular basis for a substantial amount of time.</i></p>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
95.	<p>Overall, was the direct service staff trained on the implementation of this person’s ISP?  <i>Note: This should be scored “0” if #60 was answered “No”. Also refer to scored questions #35 (Employment/Day) and #44 (Residential)</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
96.	<p>Overall, were the direct service staff able to describe their responsibilities in providing daily care/supports to the person?  <i>Note: Refer to scored questions #37 (Employment/Day) and #47 (Residential).</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
97.	<p>Overall, do the progress notes or other documentation in the record reflect the status of the outcomes and services of the key life areas stated in the ISP?  <i>Note: This should be scored “0” if #60 was answered as “No” – there is no ISP. Consider documents such as: progress notes and semi- annual reports from each provider; semi-annual reports from each therapist; and all reports from the Case Manager. This can be a “3” if all reports specify if outcomes/action plans have been met (not just worked on) and if not met what the plan is (e.g. continue for six more months or have an IDT meeting to revise the outcome, action steps or strategies). This cannot be a “3” if any reports just state the outcome has been worked on with no supporting detail.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
<b>EXPECTATIONS FOR GROWTH</b>		
98.	<p>Based on all of the evidence, has the person achieved progress in the past year?  <i>Note: Reviewers will base this score on documentation reviewed and interviews. For this to be a “3” outcome, action plans or action steps would have to have been met, or evidence of other positive growth would need to be evident.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
99.	<p>Overall, does the IDT have an appropriate expectation of growth for this person?  <i>Note: Before answering this question, you must review your answers to questions #29 [CM], #40 [Day], #50 [Res]. Enter those scores below. If these three scores are all “3”, the answer to this question is a “3”. If the answers are mixed (one is scored a “1”, one a “2” and another a “3”), this must be scored as an average. No additional justifications are necessary.</i></p>	<b>Choose</b>

	(You must manually enter these scores, they will not populate from the other protocol sections)	
	is the score for #29    is the score for #40    is the score for #50	
	<b>Justification:</b>	
	<b>Case Judge Comments:</b>	
<b>QUALITY OF LIFE</b>		
100.	<p>Was the person provided the assistance and support needed to participate meaningfully in the planning process?  <i>Note: Use the signature sheet and Section IV of the ISP to determine if the person attended their own meeting. Also refer to case management interview question to also if the person attended the meeting; if the case manager met with the person prior to the meeting to discuss things with the person; if the person gave their input during the meeting; or if the guardian or other members of the team spoke for the person. If there is no indication they attended the meeting and no explanation as to why, either in the ISP, the IDT meeting minutes, or the Case Manager notes, then this is to be scored "0".</i></p>	<b>Choose</b>
	<b>Justification:</b>	
	<b>Case Judge Comments:</b>	
101.	<p>Is the person offered a range of opportunities for participation in each life area?  <i>Note: Scoring is determined by evidence of a variety of opportunities being offered to the person in each life area daily/weekly/monthly. If the person is to choose between two objects/activities, determine if those things vary regularly. If not, then this cannot be a "3".</i></p>	<b>Choose</b>
	<b>Justification:</b>	
	<b>Case Judge Comments:</b>	
102.	<p>Does the person have the opportunity to make informed choices?  <i>Note: Questions #102a-#102c should be scored first. If any are scored "0", "1", or "2" this cannot be a "3".</i></p>	<b>Choose</b>
	<b>Justification:</b>	
	<b>Case Judge Comments:</b>	
102a.	<p>About where and with whom to live?</p>	<b>Choose</b>
	<b>Justification:</b>	
	<b>Case Judge Comments:</b>	
102b.	<p>About where and with whom to work/spend his/her day?</p>	<b>Choose</b>
	<b>Justification:</b>	
	<b>Case Judge Comments:</b>	
102c.	<p>About where and with whom to socialize/spend leisure time?</p>	<b>Choose</b>
	<b>Justification:</b>	
	<b>Case Judge Comments:</b>	

103.	<p>Does the evidence support that providers do not prevent the person from pursuing relationships and are respecting the rights of this person?  <i>Note: This determination will be made based on interviews and documentation reviewed.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
104.	<p>Overall, were the direct service staff interviewed trained on the provider's complaint process?  <i>Note: Before answering this question, you must review your answers to the scored questions from Employment/Day (#39a) and Residential (#49a).</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
105.	<p>Overall, were all team members interviewed trained or knowledgeable on how to report abuse, neglect and exploitation?  <i>Note: Before scoring this question, you must review the answers to the interview questions. Review the following:  Nurse #15; PT #19; OT #19; SLP #20; BSC #23; CM #41; Employment #24, Day #23, Residential #23, Guardian #37</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
106.	<p>Does this person and/or guardian have access to the complaint processes/procedures?  <i>Note: Reviewers will score this item based on interviews.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
107.	<p>Does the individual have restrictions that should be reviewed by a human rights committee?</p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
108.	<p>If there are restrictions that should be reviewed by HRC, have the restrictions been reviewed (quarterly) and approved (annually) by the HRC? If no, describe why.  <i>Note: This is only N/A if there are no restrictions on the individual that need review by HRC.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
109.	<p>If there are restrictions that should be reviewed by HRC, is a plan to enable the individual to regain his/her rights and reduce or eliminate these restrictions?  <i>Note: This is only N/A if there are no restrictions on the individual that need review by HRC.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<b>Choose</b>
110.	<p>Is the person protected from abuse, neglect and exploitation?</p>	<b>Choose</b>

	<i>Note: The tables in Section 1 which summarize any IR's, GERS, Out of Home Placements, etc. can be referenced in this section as can the number of incidents overall/those substantiated.</i>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
111.	Have all incidents of suspected abuse, neglect and exploitation been reported and investigated? <i>Note: This is N/A only if there have been no incidents of ANE in the past 12 months.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
112.	Is the individual safe? <i>Note: Reviewers should consider if the person feels safe in his/her home and neighborhood. Are the places where this person lives and works free of hazards and conducive to work/activities? Are needed environmental modifications, if any, made as needed and timely?</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
113.	What is the level of participation of the legal guardian in this person's life and service planning? <i>Note: Based on the information you recorded during all interviews, you should know how often the guardian calls and/or visits the individual-- daily, weekly, monthly, holidays only, on an as needed basis only, not at all. Consider if documents sent/provided to guardians are returned promptly. Consider any problems because needed documents are not signed and returned, such as permission for medical treatment and medical releases; or if the guardian is unable to continue in the role of guardian and there is no one else acting as co-guardian, Power of Attorney, or ready to step into the role of guardian, and therefore documents are not getting signed; or if there is no explanation to the case manager from the guardian as to why things are not being done.</i> None: Currently has NO legal guardian, but a guardian is needed Limited: Less than 12 times per year. Moderate: 1 or more times per month. Active: 3 or more times a month N/A: The individual is Competent and a Guardian is not needed.	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
114.	If the person is retired, does he/she have opportunities to engage in activities of interest during the day? <i>Note: The reviewer needs to consider the person's age in relation to the retirement age of the general population. A 45-year-old person who has never worked cannot be considered "retired". The usual retirement age in the general population begins at about age 62 years. If the person does not meet the criteria, this should be "N/A".</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
115.	Does the person have daily choices/appropriate autonomy over his/her life?	<b>Choose</b>

	<i>Note: This score should be based on documentation verifying regular and integrated-into-daily-life opportunities to make choices, observation of examples, and information gained during interviews.</i>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
116.	Have the person's cultural preferences been accommodated? <i>Note: Scoring will be based on documentation, observation and interviews. Evidence includes foods provided regularly that the person likes, preferred music available and being played, schedules verifying attendance at cultural events of the persons choice; support staff who speak the person's language, etc. Culture is not only ethnic, but may be other things, such as age or lifestyle.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
117.	Is the person treated with dignity and respect? <i>Note: Scoring will be based on documentation, observation and interviews, including things like how the person is addressed and talked about; whether the person has personally chosen possessions and privacy; and whether the person's preferences and support/service needs are planned for/met in a timely manner.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
<b>SATISFACTION</b>		
118.	Does the person have food and drink available according to their specific nutritional needs and recommendations?	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
119.	Does the person have sufficient personal money? <i>Note: What is to be considered is if lack of money prevents the person from doing and going places they want. This information will be gathered information from interviews and documentation.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
120.	Does the person get along with their day program/employment provider staff?	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
121.	Does the person get along with their residential provider staff?	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	



**TEAM PROCESS**

*Successful planning requires the greatest possible involvement of the individual, his/her family, guardian, friends, case manager, support staff and specialists specific to the needs of the person. Each participant is expected to work together, to demonstrate a continuing commitment to learn about the individual and his/her current vision, outcomes, and circumstances, and to consistently carry out the roles and responsibilities necessary to support the individual to realize those aspirations.*

<p><b>122.</b> Are the individual members of the IDT following up on their responsibilities?  <i>Note: This score is based on interviewee responses, as well as documentation indicating if a service or support has been carried out or not, and if follow-up has been done. Consider if the therapists are providing therapy according to their plan, that the assigned persons are getting the individual to medical and other appointments, that the providers are implementing ISP or outcomes/action plans. If interviewees stated everyone is following up, yet the record indicated no follow up on getting a service into place, this cannot be scored a "3".</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<p><b>Choose</b></p>
<p><b>123.</b> If there is evidence of situations in which the team failed to reach a consensus on the person's service and support needs, has the team made efforts to build consensus?  <i>Note: This item is scored "NA" if there is no evidence of team conflict.</i></p> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<p><b>Choose</b></p>
<p><b>124.</b> Do records or facts exist to indicate that the team convened meetings as needed due to changed circumstances and/or needs?  <i>Note: Consider things such as whether or not outcomes are being met timely, or if there has been no progress on outcomes they are changed timely, job status change, housing situation change, loss of someone close to the person, loss of skill or physical ability, change of housemate, or other significant events in the person's life that would require the IDT to meet. In the case of any unusual circumstances mentioned during interviews, determine if the IDT met and discussed the situation, if appropriate medical care was received, if measures were put in place to prevent a recurrence of the situation.</i></p> <p><i>The ISP regulations require IDTs to meet for the following:</i></p> <ol style="list-style-type: none"> <li>1. significant life change, including change in medication that affects behavior or emotional state</li> <li>2. risk of significant harm (this includes a trend of 3 reportable, substantiated incidents in a 3 month period of time)</li> <li>3. changes in desired outcomes or loss of a job</li> <li>4. loss or death of significant person in the individual's life</li> <li>5. serious accident, illness, injury or hospitalization that disrupts the implementation of the ISP</li> <li>6. individual, guardian or provider request a program change or relocation, or when termination of services is proposed</li> <li>7. If the person is the victim of abuse, neglect or exploitation</li> <li>8. Criminal justice involvement</li> <li>9. when proposed services are denied by DDS or New Mexico Medicaid Utilization Review</li> <li>10. reasonable request of any IDT member</li> </ol> <p><b>Justification:</b> [REDACTED]</p> <p><b>Case Judge Comments:</b> [REDACTED]</p>	<p><b>Choose</b></p>

125.	Is there adequate communication among team members between meetings to ensure the person's program can be/is being implemented? <i>Justification:</i> [REDACTED] <i>Case Judge Comments:</i> [REDACTED]	Choose
126.	Do you recommend Dispute Resolution for this IDT? <i>Note: If the reviewer observes things such as unresolved team conflict, team members who appear to not know or understand their responsibilities the reviewer may answer this yes. If the reviewer believes a different type of intervention would be more helpful to the team, answer this "no" and make recommendations in the Summary of Findings and Recommendations Section.</i> <i>Justification:</i> [REDACTED] <i>Case Judge Comments:</i> [REDACTED]	Choose
127.	Is there evidence or documentation of physical regression in the last year? <i>Note: Consider changes identified during interviews as well as documented evidence and all other information provided during the review.</i> <i>Justification:</i> [REDACTED] <i>Case Judge Comments:</i> [REDACTED]	Choose
128.	Is there evidence or documentation of behavioral or functional regression in the last year? <i>Note: Consider changes identified during interviews as well as documented evidence and all other information provided during the review.</i> <i>Justification:</i> [REDACTED] <i>Case Judge Comments:</i> [REDACTED]	Choose
129.	If #127 OR #128 is scored "Yes", is the IDT adequately addressing the regression? <i>Note: This response would be "N/A" only if BOTH #127 and #128 are scored "No".</i> <i>Justification:</i> [REDACTED] <i>Case Judge Comments:</i> [REDACTED]	Choose
130.	Has the person changed residential/day services in the last year? <i>Note: This includes a change(s) in provider(s) or change in services within the same provider agency.</i> <i>Justification:</i> [REDACTED] <i>Case Judge Comments:</i> [REDACTED]	Choose
131.	If #130 is Yes, was the change Planned by the IDT? <i>Note: "Planned" means the team met and a transition plan was developed. If #130 is No, this will be N/A</i> <i>Justification:</i> [REDACTED] <i>Case Judge Comments:</i> [REDACTED]	Choose
132.	If #130 is Yes, did the change meet the person's needs and/or preferences? <i>Note: If #130 is No, this will be N/A</i> <i>Justification:</i> [REDACTED]	Choose

	<b>Case Judge Comments:</b> [REDACTED]	
133.	<p>Has the IDT process been adequate for assessing, planning, implementing and monitoring of services for this person?  <i>Note: This looks at the <u>complete</u> process and the effect it had on the provision of services to the person. Not every item needs to be a "+" to make this a "3". For example, if the dental exam was not completed, yet all other assessments were obtained and used in developing the plan; the plan was scored as adequate; evidence indicated the plan was being implemented; and the CM, providers and therapists were monitoring service delivery, then this can be scored "3".</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
<b>SUPPORTED EMPLOYMENT</b>		
134.	<p>Does (Name)'s have a current Person Centered Assessment?  <i>Note: A person-centered assessment should contain, at a minimum:</i>  <i>a. Information about the person's background and status;</i>  <i>b. The person's strengths and interests;</i>  <i>c. Conditions for success to integrate into the community, including conditions for job success (for those who are working or wish to work); and</i>  <i>d. Support needs for the individual.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
135.	<p>Did this assessment address vocational interests, abilities and needs? <i>CPR #126, #127</i>  <i>Note: The first component of "Informed Choice" criteria is that the individual has an assessment which addresses their vocational interests, strengths and abilities. This assessment was provided by individuals experienced in situational assessments and familiar with the range of employment options available. This can only be scored as an "N/A" if the person is aged 62 or above AND considers themselves retired.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
136.	<p>Did the individual participate personally in the Person Centered Assessment?  <i>Note: This probes whether or not the individual class member had hands on experience such as actual age appropriate experience which take place in the community 'real' environments related to a variety of experiences and exploration of jobs.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
137.	<p>Did the Guardian participate in the Person Centered Assessment?  <i>Note: This probes whether or not the Guardian was offered information regarding the many employment options; whether the guardian was provided information regarding the type of support that could be offered to the individual to ensure the safety, health, satisfaction and success in employment; and whether the Guardian concerns were specifically addressed.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
138.	Is the individual engaged in the Informed Choice Project?	

	<p><i>Note: This probes: #1. Are they in the Informed Choice Project based on interviews and file review (the answer to this questions) and #2. What has happened as a result of being in this project (this will be addressed in the findings and recommendations?)</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
139.	<p>Has the individual been offered the opportunity to participate in work or job exploration including volunteer work and/or trial work opportunities?  <i>Note: This probes whether or not the individual has been given a recent opportunity to explore work or volunteer options. "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
140.	<p><i>If #139 is Yes, are these new experiences clearly documented in the ISP Work, Education and/or Volunteer History section?  Note: If #139 is "No" or "N/A", this is "N/A"</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
141.	<p><i>If #139 is No, is the individual trying new discovery experiences in the community to determine interests, abilities, skills and needs?  Note: If #139 is "N/A", this is "N/A"</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
142.	<p>Has the Guardian had the opportunity to gain information on how the individual responded during job exploration activities such as volunteering and/or trial work experiences?  <i>Note: Look for documentation in the file/ISP about the detail of the information provided and by whom (experienced employment specialists or people knowledgeable about SE strategies for job development and employment support). "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
143.	<p>Has the individual received information regarding the range of employment options available to him/her?  <i>Note: Look for documentation in the file/ISP about the detail of the information provided and by whom (experienced employment specialists or people knowledgeable about SE strategies for job development and employment support). "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
144.	<p>Has the Guardian received information regarding the range of employment options available for the individual?  <i>Note: Look for documentation in the file/ISP about the detail of the information provided and by whom (experienced employment specialists or people knowledgeable about SE strategies for job development and employment support). "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i></p>	<b>Choose</b>

	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
145.	If there are barriers to employment, has the Team, including the individual, addressed how to overcome those barriers to employment and integrating clinical information, assistive technology and therapy supports as necessary for the person to be successful in employment? <i>Note: This is N/A if the person is aged 62 or above AND considers themselves retired.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
146.	If there are barriers to employment, has the Team addressed with the Guardian how to overcome those barriers to employment and integrating clinical information, assistive technology and therapy supports as necessary for the person to be successful in employment? <i>Note: This is N/A if the person is currently working at criteria for Supported Employment or if the person is aged 62 or above AND considers themselves retired.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
147.	Has the individual participated in work or volunteer activities during the past year? <i>Note: "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
148.	Has the individual identified what type of work or volunteer activities he/she would like to do? <i>Note: "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
149.	Does the Guardian support him/her working? <i>Note: Look for documentation in the file/ISP about the detail of the feedback from the Guardian and what his/her thinking is. "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
150.	Is (Name) is involved in the DVR Outreach Project? <i>Note: This probes: #1. Are they in the DVR Outreach Project based on interviews and file review (the answer to this questions) and #2. What has happened as a result of being in this project (this will be addressed in the findings and recommendations). This is a fact-finding question, not a "scored" question.</i>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
151.	Is the individual engaged in Supported Employment? <i>CPR #129</i>	<b>Choose</b>

	<i>Note: This refers to people who are working in competitive integrated employment or short term services leading to competitive, integrated employment. Note: "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
152.	<p>Is the individual Working in accordance with the following: <i>CPR #130</i></p> <p>a. At least a 10-hour work week;</p> <p>b. Person earns at least minimum wage (DD Waiver Standards say, "Get paid competitive wages to work in an inclusive setting, Appendix C, HCBS Consumer Rights and Freedoms).</p> <p>c. Work setting is at integrated environment.</p> <p><i>Note: Jobs that take place in an I/DD agency, in workshops or work crews are not community, integrated jobs. If the person has different jobs, and one is integrated and one isn't, score based on the job worked the most.</i></p> <p><i>Note: "N/A" is a scoring option only available if the person is aged 62 or above AND considers themselves retired.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
153.	<p>Does the person have a Career Development Plan? <i>CPR #128</i></p> <p><i>Note: This is N/A if #136 is "No" or if the person is aged 62 or above AND considers themselves retired.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
<b>BEHAVIOR</b>		
154.	<p>Is the person considered by the IDT to need behavior services now? <i>CPR #131</i></p> <p><i>Note: There is evidence in the person's record that the IDT determined that the person needs behavioral services.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
155.	<p>Does the person need behavior services now? <i>CPR #132</i></p> <p><i>Note: Behavioral services are broad ranging set of possibilities, not limited exclusively to behavioral therapy. Behavioral services may include other forms of intervention designed to address the underlying issue(s) identified. If the things outlined above are happening (the person has restricted access to the community, no or few relationships, limited vision for potential in growth) because of the person's behavior and the team has not addressed these issues, then the person needs behavioral services.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
156.	<p>Have behavioral assessments been completed? <i>CPR #133</i></p> <p><i>Note: In addition to frequency, intensity and duration, determine if the assessments add to the team's knowledge of what motivates, sustains or changes the behavior. Are the assessments anecdotal, data based or both? Does the assessment identify the factors that contribute to the occurrence of challenging behavior? Those factors may be environmental, personal, and psychological, past abuse, interpersonal or other internal or external stimuli.</i></p>	<b>Choose</b>

	<i>This is "N/A" if #154 AND #155 are both "No"</i>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
157.	<p>Does the person have a positive behavior support plan developed out of the behavior assessments that meets the person's needs? <i>CPR #134</i></p> <p><i>Note: In addition to seeing the relationship between the assessment and the positive behavior support plan prevention, long-term change, and, when needed, crisis intervention components should be included. The intervention/s should seek to enhance the individual's quality of life rather than simply reduce the behavior. Do the strategies emerge consistently from the assessment? Do they make sense? The person only needs a crisis plan if the intensity, severity, or duration exceeds the usual strategies of the PBSP. A Crisis Plan is not universally required.</i></p> <p><i>This is "N/A" if #154 AND #155 are both "No"</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
158.	<p>Has the staff been trained on the Positive Behavior Support Plan? <i>CPR #135</i></p> <p><i>Note: If staff can reasonably indicate how the PBSP and/or BSC guides and informs their support of the individual, then you can assume this person has been trained. If you have observed interventions in line with the PBSP/BSC this is confirmation that the staff have been trained. If, however, the staff articulate what to do correctly but your observation of interventions are not in line with the PBSP/BSC, this cannot be a "3".</i></p> <p><i>This is "N/A" if #154 AND #155 are both "No"</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
159.	<p>If needed, does the person have a Behavior Crisis Intervention Plan that meets the person's needs?</p> <p><i>Note: Has it been made clear in terms of what to do, where to go and who to call in the event of a behavioral crisis as appropriate to this person? Not all PBSPs require a Crisis Plan. For this to be a "3" all Crisis Intervention Plans that are developed must specify: how to prevent the crisis; when the situation becomes a crisis: what the staff need to do to provide appropriate intervention; and describe what that intervention is to be.</i></p> <p><i>This is "N/A" if #154 AND #155 are both "No"</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
160.	<p>Does the person receive behavioral services consistent with his/her needs? <i>CPR #136</i></p> <p><i>Note: Reviewers will look to see if the IDT has successfully enabled this person to experience a broad range of preferred environments, activities, relationships regardless of behavioral change and/or whether or not the person's competency is increasing and staff is more effective at preventing and or addressing challenging behavior.</i></p> <p><i>This is "N/A" if #154 AND #155 are both "No"</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
161.	Are behavior support services integrated into the ISP? <i>CPR #137</i>	

	<p><i>Note: Does the ISP incorporate information from the PBSP in important personal traits, skills and abilities and refer to behavioral challenges appropriately? Progress towards the Vision, action plan (challenges) and/or strategies for all vision areas should contain information from the PBSP that supports attainment of the individual's vision/outcomes for that area. A mere reference to the behavior plan (i.e. "behavior services" or "see behavior plan") is not considered to have sufficient detail to be understood and consistently implemented; neither is word for word repetition of the plan required.</i></p> <p><i>This is "N/A" if #154 AND #155 are both "No"</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
<b>ADAPTIVE EQUIPMENT/AUGMENTATIVE COMMUNICATION</b>		
162.	<p>Has the person received all adaptive equipment needed? <i>CPR #138</i></p> <p><i>Note: Equipment identified as being needed for this person is expected to be available and used by the person in all relevant environments; it works as intended and continues to be appropriate to the person. Devices designed specifically for use to support work tasks only; need not be used at home, and vice versa. Equipment is defined in Section #1. Environmental Modification issues would be referenced in this question. Examples of equipment include: durable medical equipment such as wheelchairs of any type, walkers, shower chairs, shower trolleys, hospital beds, eating and drinking equipment; also personal items such as glasses, dentures, hearing aids. Adaptive equipment should be included e.g.; communication systems, switches, electronic devices (anything with an on/off switch) and/or simple non-electric items such as picture devices communication systems including communications rings.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
163.	<p>Has the person received all assistive technology needed? <i>CPR #139</i></p> <p><i>Note: Assistive technology identified as being needed is available and used by the person in all relevant environments; it works as intended; and continues to be appropriate to the person. If the person refuses to use the devices identified, there is evidence that the appropriate specialist has been consulted and alternative devices/interventions assessed, sought and tried. Examples of technology includes: any type of device, including but not limited to communication systems, switches, electronic devices (anything with an on/off switch) and/or simple non-electric items such as picture devices communication systems including communication rings.</i></p> <p><i>NOTE: Environmental Modifications should not be referenced in this question.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
164.	<p>Do direct care staff know how to appropriately help the person use his/her equipment?</p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
165.	<p>Is the person's equipment and technology in good repair?</p> <p><i>Note: you will have to identify what is not, specifically, since equipment and technology are combined here.</i></p>	<b>Choose</b>



	Justification: [REDACTED]	
	Case Judge Comments: [REDACTED]	
166.	Is the person's equipment/technology available in all appropriate environments? <i>Note: you will have to identify what is not, specifically, since equipment and technology are combined here.</i>	Choose
	Justification: [REDACTED]	
	Case Judge Comments: [REDACTED]	
167.	Has the person received all communication assessments and services? <i>CPR #140</i> <i>Note: People with limited ability to engage in communication and be understood will have reviewers paying particular attention to the efforts on the part of the IDT's to expand the person's ability to communicate and be understood (not just by staff). Recommendations made by Speech Therapist will be reviewed and the expectation will be that those recommendations are followed timely or alternatives noted. The Reviewer will take into consideration cultural preferences of the individual.</i>	Choose
	Justification: [REDACTED]	
	Case Judge Comments: [REDACTED]	
<b>INDIVIDUAL SERVICE PLANNING</b>		
168.	Does the person have an ISP that addresses live, work/learn, fun/relationships and health/other that correlates with the person's desires and capabilities, in accordance with DOH Regulations? <i>CPR #141</i> <i>Note: This item does not evaluate the adequacy of any one component, but the existence of the ISP document with the required elements in it. If the person does not have a current ISP, rate this as a "0".</i>	Choose
	Justification: [REDACTED]	
	Case Judge Comments: [REDACTED]	
169.	Does the person have an ISP that contains a complete Vision Section that is based on a long-term view? <i>CPR #142</i> <i>Note: This item evaluates whether the ISP contains progress information reflective of the person's long-term vision. Does the ISP contain a thorough analysis of the individual's progress toward each of their vision statements, including existing skills that can contribute to success as well as skills they need to learn and supports they will need? This information can be found in the Vision section of the ISP Narrative if the prompts in the ISP form have been answered consistent with the class member's likes, preferences, experiences, etc. If the person does not have a current ISP, rate this as a "0".</i>	Choose
	Justification: [REDACTED]	
	Case Judge Comments: [REDACTED]	
170.	Does the person receive services and supports recommended in the ISP? <i>CPR #143</i> <i>Note: This item does not evaluate the adequacy of the ISP. It only measures those services stated in the ISP and whether or not those services are being provided to the person. If the person does not have a current ISP, rate this as a "0".</i>	Choose
	Justification: [REDACTED]	
	Case Judge Comments: [REDACTED]	
171.	Does the person have adequate access to and use of generic services and natural supports? <i>CPR #144</i>	Choose

	<p><i>Note: "Natural supports" are people (e.g., family, friends, co-workers, neighbors) or supports (e.g., environmental, equipment, technology) used to enable people to do what they want to do. "Generic services" are community services and activities available to the general public (banks, local community senior centers, restaurants).</i></p>	
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
172.	<p>Is the person integrated into the community? <i>CPR #145</i></p> <p><i>Note: Evidence of "integration" includes things like: the person has friends who are not paid to be in his/her life and who are not all disabled; the person regularly participates in activities in the community and engages with non-disabled people; the person has memberships, hobbies and/or interests in which he/she participates and engages with people not paid to be in his/her life; the person is recognized by members of his/her community. Consider if the person works, volunteers, and contributes to his/her community in some way. Is he/she seen as a 'regular', known by name and missed when absent? Consider how often the person does these things. Also take into consideration cultural preferences of the individual and/or guardian.</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
173.	<p>Overall is the ISP adequate to meet the person's needs? <i>CPR #146</i></p> <p><i>Note: To ensure consistency, this rating and rationale must be the same as #60. If the person does not have a current ISP, this is a "0".</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	
174.	<p>Is the total program of the level of intensity adequate to meet this person's needs? <i>CPR #147</i></p> <p><i>Note: Only consider the services and supports provided, not the ISP document. This can be a "3" if the person has all the staffing supports as required by the ISP, if all adaptive equipment is in place and being used, if all medical plans are being implemented, if there is evidence that outcomes and action plans are being implemented, if all assessments have been completed and followed up on, and if all therapies are occurring per the ISP and therapy plans. As you review this person's total program, you are being asked to apply professional judgment to determine the overall level of intensity and if it is adequate to meet this person's needs. (See guidance on Professional Judgment in the Reviewer's Guide.)</i></p>	<b>Choose</b>
	<b>Justification:</b> [REDACTED]	
	<b>Case Judge Comments:</b> [REDACTED]	

#	Question	Score
<b>HEALTH</b>		
52.	Overall, were the team members interviewed able to describe the person's health-related needs?	Choose
53.	Is there evidence that the IDT discussed the person's health related issues?	Choose
54.	Was the eChat updated timely?	Choose
55.	Are all of the individual's needed medical treatments timely received?	Choose
56.	Does the individual receive routine/scheduled medical treatment?	Choose
57.	Does the individual receive medication as prescribed?	Choose
58.	Does my nurse provide oversight of health needs (i.e. weight records, vitals, lab reports, PRN medication use, seizure records) in order to ensure accuracy, identify and respond to new issues?	Choose
59.	Are nursing services provided as needed by the individual?	Choose
60.	Is the CARMP is accurate?	Choose
61.	Is the CARMP consistently implemented as intended?	Choose
62.	Are the person's health supports/needs being adequately addressed?	Choose
<b>ASSESSMENTS</b>		
63.	Did the team consider what assessments the person needs and would be relevant to the team's planning efforts?	Choose
64.	Has the individual received all age and gender appropriate health screenings, in accordance with national best practice and/or as recommended by his/her PCP or other health care professionals?	Choose
65.	Did the team arrange for and obtain the needed, relevant assessments?	Choose
66.	Are the assessments adequate for planning?	Choose
67.	Were the recommendations from assessments used in planning?	Choose
68.	For medical, clinical or health related recommendations, has a Decision Consultation Form been completed if the individual and/or their guardian/health care decision maker have decided not to follow all or part of an order, recommendation or suggestion?	Choose
<b>ADEQUACY OF PLANNING AND ADEQUACY OF SERVICES</b>		
69.	Is there a document called an Individual Service Plan (ISP) that was developed within the past year?	Choose
70.	Was the ISP developed by an appropriately constituted IDT?	Choose
71.	For any team members not physically present at the IDT meeting, is there evidence of their participation in the development of the ISP?	Choose
72.	Does my ISP contain current and accurate information?	Choose
73.	Overall, does the long term vision show expectations for growth and skill building?	Choose
74.	Overall, does the ISP give adequate guidance to achieving the person's long-term vision?	Choose
75.	Is measurable data kept which verifies the consistent implementation of each of the action steps?	Choose
76.	Does the data kept identify what the person does so a determination regarding progress/lack of progress?	Choose
77.	Is each action step in the ISP implemented at a frequency that enables the person to learn new skills?	Choose
78.	If the person is not successful in achieving actions steps, has the team tried to determine why, and change their approach if needed?	Choose
79.	If the person achieves action steps, does the team move to the next in the progression of steps or develops a new one?	Choose

#	Question	Score
80.	Has the person made measurable progress on actions steps during this past year?	Choose
81.	Overall, do the outcomes in the ISP include criteria by which the team can determine when the outcome(s) have been achieved?	Choose
82.	Overall, are the ISP outcomes related to achieving the person's long-term vision?	Choose
83.	Overall, do the ISP outcomes address the person's major needs?	Choose
84.	Overall, are the Teaching and Support Strategies sufficient to ensure consistent implementation of the services planned?	Choose
85	Overall, are the recommendations and/or objectives/strategies of ancillary providers integrated into the ISP?	ChooseChoose
86.	Has the person made measurable progress in therapy this year?	Choose
87.	If needed, does the ISP contain a specific Medical Emergency Response Plan (MERP)?	Choose
88.	Does the ISP contain information regarding primary health (medical) care?	Choose
88a.	Does the ISP face sheet contain contact information for the PCP?	Choose
88b.	Is the Healthcare coordinator's name and contact information listed in the ISP?	Choose
89.	Does the ISP reflect how the person will obtain prescribed medications?	Choose
90.	Does the ISP reflect how the person will get to work/day activities, shopping, and social activities?	Choose
91.	Does the ISP contain a list of adaptive equipment needed and who will provide it?	Choose
92.	Overall, is the ISP adequate to meet the person's needs?	Choose
93.	Is the ISP being implemented? (If 92 is "3")	Choose
94a	Is the ISP being implemented? (If 92 is "0", "1", or "2")	Choose
94b.	Are current services adequate to meet the person's needs?	Choose
95.	Overall, was the direct service staff trained on the implementation of this person's ISP?	Choose
96.	Overall, were the direct service staff able to describe their responsibilities in providing daily care/supports to the person?	Choose
97.	Overall, do the progress notes or other documentation in the record reflect the status of the outcomes and services of the key life areas stated in the ISP?	Choose
<b>EXPECTATIONS FOR GROWTH</b>		
98.	Based on all of the evidence, has the person achieved progress in the past year?	Choose
99.	Overall, does the IDT have an appropriate expectation of growth for this person?	Choose
<b>QUALITY OF LIFE</b>		
100.	Was the person provided the assistance and support needed to participate meaningfully in the planning process?	Choose
101.	Is the person offered a range of opportunities for participation in each life area?	Choose
102.	Does the person have the opportunity to make informed choices?	Choose
102a.	About where and with whom to live?	Choose
102b.	About where and with whom to work/spend his/her day?	Choose
102c.	About where and with whom to socialize/spend leisure time?	Choose
103.	Does the evidence support that providers do not prevent the person from pursuing relationships and are respecting the rights of this person?	Choose

#	Question	Score
104.	Overall, were the direct service staff interviewed trained on the provider's complaint process?	Choose
105.	Overall, were all team members interviewed trained or knowledgeable on how to report abuse, neglect and exploitation?	Choose
106.	Does this person and/or guardian have access to the complaint processes/procedures?	Choose
107.	Does the individual have restrictions that should be reviewed by a human rights committee?	Choose
108.	If there are restrictions that should be reviewed by HRC, have the restrictions been reviewed (quarterly) and approved (annually) by the HRC? If no, describe why.	Choose
109.	If there are restrictions that should be reviewed by HRC, is a plan to enable the individual to regain his/her rights and reduce or eliminate these restrictions?	Choose
110.	Is the person protected from abuse, neglect and exploitation?	Choose
111.	Have all incidents of suspected abuse, neglect and exploitation been reported and investigated?	Choose
112.	Is the individual safe?	Choose
113.	What is the level of participation of the legal guardian in this person's life and service planning?	Choose
114.	If the person is retired, does he/she have opportunities to engage in activities of interest during the day?	Choose
115.	Does the person have daily choices/appropriate autonomy over his/her life?	Choose
116.	Have the person's cultural preferences been accommodated?	Choose
117.	Is the person treated with dignity and respect?	Choose
<b>SATISFACTION</b>		
118.	Does the person have food and drink available according to their specific nutritional needs and recommendations?	Choose
119.	Does the person have sufficient personal money?	Choose
120.	Does the person get along with their day program/employment provider staff?	Choose
121.	Does the person get along with their residential provider staff?	Choose
<b>TEAM PROCESS</b>		
122.	Are the individual members of the IDT following up on their responsibilities?	Choose
123.	If there is evidence of situations in which the team failed to reach a consensus on the person's service and support needs, has the team made efforts to build consensus?	Choose
124.	Do records or facts exist to indicate that the team convened meetings as needed due to changed circumstances and/or needs?	Choose
125.	Is there adequate communication among team members between meetings to ensure the person's program can be/is being implemented?	Choose
126.	Do you recommend Dispute Resolution for this IDT?	Choose
127.	Is there evidence or documentation of physical regression in the last year?	Choose
128.	Is there evidence or documentation of behavioral or functional regression in the last year?	Choose
129.	If #127 OR #128 is scored "Yes", is the IDT adequately addressing the regression?	Choose
130.	Has the person changed residential/day services in the last year?	Choose
131.	If #130 is Yes, was the change Planned by the IDT?	Choose
132.	If #130 is Yes, did the change meet the person's needs and/or preferences?	Choose

#	Question	Score
133.	Has the IDT process been adequate for assessing, planning, implementing and monitoring of services for this person?	Choose
<b>SUPPORTED EMPLOYMENT</b>		
134.	Does (Name)'s have a current Person Centered Assessment?	Choose
135.	Did this assessment address vocational interests, abilities and needs?	Choose
136.	Did the individual participate personally in the Person Centered Assessment?	Choose
137.	Did the Guardian participate in the Person Centered Assessment?	Choose
138.	Is the individual engaged in the Informed Choice Project?	Choose
139.	Has the individual been offered the opportunity to participate in work or job exploration including volunteer work and/or trial work opportunities?	Choose
140.	<i>If #139 is Yes, are these new experiences clearly documented in the ISP Work, Education and/or Volunteer History section?</i>	Choose
141.	<i>If #139 is No, is the individual trying new discovery experiences in the community to determine interests, abilities, skills and needs?</i>	Choose
142.	Has the Guardian had the opportunity to gain information on how the individual responded during job exploration activities such as volunteering and/or trial work experiences?	Choose
143.	Has the individual received information regarding the range of employment options available to him/her?	Choose
144.	Has the Guardian received information regarding the range of employment options available for the individual?	Choose
145.	If there are barriers to employment, has the Team, including the individual, addressed how to overcome those barriers to employment and integrating clinical information, assistive technology and therapy supports as necessary for the person to be successful in employment?	Choose
146.	If there are barriers to employment, has the Team addressed <u>with the Guardian</u> how to overcome those barriers to employment and integrating clinical information, assistive technology and therapy supports as necessary for the person to be successful in employment?	Choose
147.	Has the individual participated in work or volunteer activities during the past year?	Choose
148.	Has the individual identified what type of work or volunteer activities he/she would like to do?	Choose
149.	Does the Guardian support him/her working?	Choose
150.	Is (Name) is involved in the DVR Outreach Project?	Choose
151.	Is the individual engaged in Supported Employment?	Choose
152.	Is the individual Working in accordance with the following:	Choose
153.	Does the person have a Career Development Plan?	Choose
<b>BEHAVIOR</b>		
154.	Is the person considered by the IDT to need behavior services now?	Choose
155.	Does the person need behavior services now?	Choose
156.	Have behavioral assessments been completed?	Choose
157.	Does the person have a positive behavior support plan developed out of the behavior assessments that meets the person's needs?	Choose
158.	Has the staff been trained on the Positive Behavior Support Plan?	Choose
159.	If needed, does the person have a Behavior Crisis Intervention Plan that meets the person's needs?	Choose
160.	Does the person receive behavioral services consistent with his/her needs?	Choose

#	Question	Score
161.	Are behavior support services integrated into the ISP?	Choose
<b>ADAPTIVE EQUIPMENT/AUGMENTATIVE COMMUNICATION</b>		
162.	Has the person received all adaptive equipment needed?	Choose
163.	Has the person received all assistive technology needed?	Choose
164.	Do direct care staff know how to appropriately help the person use his/her equipment?	Choose
165.	Is the person's equipment and technology in good repair?	Choose
166.	Is the person's equipment/technology available in all appropriate environments?	Choose
167.	Has the person received all communication assessments and services?	Choose
<b>INDIVIDUAL SERVICE PLANNING</b>		
168.	Does the person have an ISP that addresses live, work/learn, fun/relationships and health/other that correlates with the person's desires and capabilities, in accordance with DOH Regulations?	Choose
169.	Does the person have an ISP that contains a complete Vision Section that is based on a long-term view?	Choose
170.	Does the person receive services and supports recommended in the ISP?	Choose
171.	Does the person have adequate access to and use of generic services and natural supports?	Choose
172.	Is the person integrated into the community?	Choose
173.	Overall is the ISP adequate to meet the person's needs?	Choose
174.	Is the total program of the level of intensity adequate to meet this person's needs?	Choose