

A Questionnaire to Assess Individuals' Ability to Self-Direct Services

In Medicaid self-direction programs, individuals direct many or all of their home- and community-based services, including selecting and managing direct service workers and/or managing a budget (which may also be referred to as a service cost maximum) for needed services. However, choosing this service delivery model requires individuals to carry out a variety of activities. This questionnaire guides case managers and individual in determining whether an individual has the ability to self-direct services or if a representative may be needed.

Background

Individuals who choose to self-direct are responsible for overseeing the day-to-day activities associated with their own services, such as selecting and managing direct service workers and/or managing a budget (or service cost maximum) for needed services.¹ It is important that individuals participating in self-direction possess the commitment and abilities to do so. For example, the individual should be able to make choices, set goals, understand what is or is not adequate care, and make changes to improve his or her services. Individuals must be able to monitor and evaluate services and determine if changes are required when things are not going as intended, or work with a representative to do so. This questionnaire is designed to help determine if the individual understands the nature of the program responsibilities, and indicate whether the individual has the ability to self-direct his or her own services or should consider working with a representative.

Directions

A case manager should ask the following questions during a face-to-face home visit. Inability of the individual to answer one or two of these questions may not necessarily indicate the inability to direct his or her own care, but could suggest that the individual needs more training, education, or support on the topic in question. It could also mean that the individual would benefit from selecting a representative for support. Case managers should fairly assess if the individual is able to self-direct his or her own services based on observations of the individual and how questions are answered.

Questions for Individuals

This program allows you to decide how your service needs, as specified in the person-centered service plan, will be met by allowing you to choose how you are assisted to meet your needs, by whom, and when the assistance is provided to you.

1. What services do you want?

¹ Most programs allow individuals to designate a representative to oversee self-direction activities and many programs have fiscal intermediaries that can help to manage budgets (or service cost maximums).

2. What services do you feel you need?
3. What other things would assist you to be more independent (i.e., equipment, other services) that you can't get now?

You decide who will assist you and what things to buy to help you live in the community.

1. How will you find and select people to assist you in your home?
2. How do you plan to make the purchases you need?
3. How do you plan to train and supervise the people who work in your home?
4. How will you tell your workers about what you like and don't like about their work?
5. If you are not happy with the work done by your worker, how will you handle the situation?
6. If your regularly scheduled worker cannot assist you (for example, he/she calls in sick, doesn't show up, etc.) what back-up plan would you have in place to meet your needs?
7. What would you do if you were home alone and there was an emergency?

A Case Manager will be available for you with information and guidance to help you learn how to: (1) find workers; (2) hire, train and manage workers; (3) determine how much to pay your workers; and (4) manage your Medicaid and Medicare resources. Case Managers will also check in with you periodically to see how you are doing and answer any questions you may have. [STATE INSERTS NAME OF ENTITY (E.G., CASE MANAGER, I&A PROVIDER) THAT WILL BE AVAILABLE TO PROVIDE INFORMATION.]

Are you willing to accept this assistance from the Case Manager on a regular basis, and ask for any additional assistance as you need it?

_____ Yes _____ No

A Representative is someone who can help you in making decisions, reviewing and approving timesheets, and doing other tasks with which you would like assistance. A Representative can be a family member or friend who is willing to check in on you regularly and also meet with program staff when staff meet with you. You might also refer to the "Representative Responsibilities" handout for more information.

1. Do you want to appoint someone as your Representative?

_____ Yes _____ No

(If yes, complete the Questionnaire to Assess Potential Representatives in Self-Direction Programs.)

2. Who do you want to appoint as your Representative?

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