



# SELF-DIRECTION MODULE

<b>Key</b>
<b>Green:</b> Skip Patterns
<b>Red:</b> Additional instructions
<b>Purple:</b> Script for staff
<b>Blue:</b> Directions for automation

## 1. Determination of individual is interested in self-direction

Have brief conversation that addresses the following:

- You may have the option to self-direct your supports.
  - Briefly explain the option for traditional agency-based supports.
- Self-direction allows you to find, hire, manage, and fire workers.
  - Support is available for doing these functions.
  - Support can include taking care of paychecks, taxes, and other requirements.
  - You can have an authorized representative help you.
- You may have the option to determine how much workers get paid. However, because you are given an overall budget, the higher the hourly rate you pay, the fewer hours you get.
- Workers, who can be family members, fill out a timesheet.
- If you aren't interested in self-direction, you can have an agency select, hire, schedule, and manage workers.
- You don't have to decide now, just tell us if you are potentially interested – if so, we wanted to have a discussion to help us decide if this is the best option for you.

### Is individual interested in self-direction?

- Yes       No [Skip to end of module]

## 2. Cognitive Information- These items will auto-populate from the Cognition section of broader tool. Review and verify the information below that was collected in the Cognition section of the broader tool to help inform the individual's ability to self-direct.

### 2.A Does the participant have any difficulty with memory (e.g., retain relevant functional information), attention (e.g., ability to stay focused on task), problem solving, planning, organizing or judgment?

- Yes       No [Skip to 3]       Unknown [Skip to 3]

If Yes, please describe the participant's difficulty with items in 2.B-H:

### 2.B Memory

- No impairment
- Mildly impaired: Demonstrates some difficulty.
- Moderately impaired: Demonstrates marked difficulty.
- Severely impaired: Demonstrates extreme difficulty.
- Unable to answer

### 2.C Attention

- No impairment
- Mildly impaired: Demonstrates some difficulty.
- Moderately impaired: Demonstrates marked difficulty.
- Severely impaired: Demonstrates extreme difficulty.
- Unable to answer

**2.D Problem Solving**

- No impairment
- Mildly impaired: Demonstrates some difficulty.
- Moderately impaired: Demonstrates marked difficulty.
- Severely impaired: Demonstrates extreme difficulty.
- Unable to answer

**2.E Planning**

- No impairment
- Mildly impaired: Demonstrates some difficulty.
- Moderately impaired: Demonstrates marked difficulty.
- Severely impaired: Demonstrates extreme difficulty.
- Unable to answer

**2.F Organizing**

- No impairment
- Mildly impaired: Demonstrates some difficulty.
- Moderately impaired: Demonstrates marked difficulty.
- Severely impaired: Demonstrates extreme difficulty.
- Unable to answer

**3. Are there any other observations that the assessor has made during the assessment process that may impact the ability of the individual to self-direct?** [Note any cognitive, behavioral, social, familial or other factors that may present challenges]

- Yes
- No [Skip to 4]

If Yes, describe: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**4. Has the participant and/or representative identified someone who will likely act as the designated representative if self-direction is?** [Do not ask this item directly – use the item to code if the information is volunteered]

- Yes
- Yes, but participant would like to answer the rest of the items directly
- No

If Yes, Name of individual: \_\_\_\_\_ Relationship: \_\_\_\_\_

**5. If you had the opportunity to supervise people who are paid to help you, describe how you would do the following:** [Ask representative if one has been identified. Record brief summary in the boxes below. Emphasize that it is okay to be uncertain about how to address these tasks – they will receive training on how to do these tasks.]

**5.A Find workers to hire**

Commented [SL1]: Review language.



Assessor's interpretation of the response:

- Has clear plan/approach that is likely to be effective
- Likely able to perform task with training
- May need support and/or an authorized representative
- Not interested in performing this task

**5.B** Train workers

Assessor's interpretation of the response:

- Has clear plan/approach that is likely to be effective
- Likely able to perform task with training
- May need support and/or an authorized representative
- Not interested in performing this task

**5.C** Giving workers directions

Assessor's interpretation of the response:

- Has clear plan/approach that is likely to be effective
- Likely able to perform task with training
- May need support and/or an authorized representative
- Not interested in performing this task

**5.D** Deal with a worker who is not doing her/his job well

Assessor's interpretation of the response:

- Has clear plan/approach that is likely to be effective
- Likely able to perform task with training
- May need support and/or an authorized representative
- Not interested in performing this task



**5.E** Fire a worker who is not meeting your needs

Assessor's interpretation of the response:

- Has clear plan/approach that is likely to be effective
- Likely able to perform task with training
- May need support and/or an authorized representative
- Not interested in performing this task

**6. If you were given a set amount of money for services and you were responsible for figuring out how best to spend it (such as you would under one of Colorado's self-direction programs), how would you keep track of your spending and how much money you had left?** [This is an open-ended question - do not prompt the responses listed. Mark the checkboxes only if the person mentions these items. Use the text box below to provide additional description]

- Unsure
- I would do it myself, describe below
- I would ask someone else to do it, identify the person below and describe role
- I would develop another solution, describe below
- Chose not to answer
- Other response(s), describe below

**7. What level of support does the participant and/or their representative believe that he/she would need to self-direct?** [If additional information is needed, document in the text box below]

- Very little or no support needed for self-direction
- Can self-direct with support, describe below
- Needs another person to direct their services, describe below
- Not applicable, describe below
- Other, describe below

**8. Assessor's Conclusions about the Person's Capacity for Independent vs. Supported Self-Direction** [This conclusion should also consider information gathered throughout the entire assessment process.]

- Very little or no support needed for self-direction [skip to item 9]
- Can self-direct with support
- Needs another person to direct their services
- Not applicable
- Other
- Don't have enough information to reach a conclusion

**8.A Rationale for conclusion**

**8.B Description of assistance recommended**

**9. Does the assessor believe the participant needs more support than the participant's response indicated?**

- No [end of module]

- Yes [Have discussion with participant about the assessor's concerns and determine if the participant agrees with the assessor's concerns or if he/she would like an external party to review the conclusion]

**9.A Conclusion from the discussion:**

- Participant now agrees with the assessor's conclusion
- Participant does not agree with the assessor's conclusion, but will be willing to have the additional assistance recommended by the assessor
- Participant requests an external party to review the assessor's conclusion