

INSTRUCTIONS

Initial Individual Assessment Team Determination

Use the Initial Individual Assessment Team Determination to document your Assisted Living Residence (ALR) community's decision regarding its ability to meet a potential resident's needs.

- Enter the individual's full name and enter the date the form is completed.
- Enter the name of the individual and date of determination in the document's header, starting on page 2.
- Answer all questions with a "yes" or "no," as appropriate. If a question is not applicable, mark "n/a".
- Document any other comments or considerations.
- Enter the name and title of all staff members who contributed to the discussion. If the individual receives Medicaid funding (Home and Community Based Services waiver), the Single Entry Point (SEP) Case Manager must be part of the Team Determination Assessment. While there is no requirement for the SEP case manager's signature, it does provide good documentation of the process. Consider faxing the document to the SEP case manager for their signature.
- Request that the individual sign the document.
- Date the document.