

### INSTRUCTIONS FOR THE QIS

These data sheets are appropriate for an Annual Quality Assurance Review of any and all adult service providers and Children's Group Homes.

There is no attached narrative, so in the comments sections it is imperative that bulleted information be included.

On each particular data worksheet, be sure to include narrative/bullets which explain deficiencies or commendations

Use appropriate scoring key listed at the top of each page ~ be consistent with the CODE you use.  
for example - if using "+" for yes, use "+" on all sheets -or- if using "X" for yes, use "X" on all sheets...

### SPECIFICS for WORKSHEETS

Please indicate in COLUMN M if there is a corresponding QAOS for narrative information included in each section

Refer to Appendix G in the Quality Assurance Process for more specifics of what to include

Adult Services Outline p1 - 3

Staff Training 1 & 2

IP Checklist

PSP Review

Add extra sheets as necessary, review the PSP, Actions, Protocols, Staff support provided, etc.

Residential Sites

Transportation

Staff Survey Pages 1 - 3

Ask one staff from each area one questions from each topic area. If they answer incorrectly, as a second question from that topic. If they still answer incorrectly, move on to the next topic area.

Refer to Appendix I in the Quality Assurance Process for specific questionnaire

Consumer survey 1

THIS SURVEY IS FOR CONSUMERS

USE this survey for consumers who can answer for themselves

Refer to Appendix J in the Quality Assurance Process for specific questionnaire

Consumer Support Survey 2

THIS SURVEY IS FOR CAREGIVERS

USE this survey to talk with caregivers when the consumer cannot answer for him/herself

Refer to Appendix J in the Quality Assurance Process for specific questionnaire

Developmental Disabilities Adult Service and Children's Group Home  
Annual Quality Assurance Review

**Agency N: Spring Meadow Resources**  
**Evaluator: Joe Beneventi**  
**Dates Covered by Review: 7-01-08 to 6-30-09**

<b>DESK REVIEW</b>	* QAOS = Quality Assurance Observation Sheet	insert * QAOS #
<b>Accreditation:</b> Accreditation is no longer required by the state contract.		
<b>Significant Events from the Agency:</b> The agency is doing a better job of documenting client issues. Staff have received updated training on client rights. The Agency has started a policy of refusing personal leave time to new employees until completion of a six month probationary period. This step has helped retain qualified staff and replace staff who may not be suited for the job. Spring Meadow should be commended on its thorough process of completing criminal background checks for new employees.		
<b>Agency Internal Communications Systems:</b> Spring Meadow employs administrative staff to field messages and calls to staff at the main office. Voice mail and E-Mail is available as well. In the group homes, a daily log is kept to enhance communication between one shift to the next. An on-call system is available on a 24 hour basis to handle emergencies, client issues, illness, etc. Supported living staff, especially the resource coordinators, carry cell phones to maintain contact with supervisory staff while in the community or client homes.		
<b>Policies and Administrative (DDP) Directives</b> Spring Meadow has policies that are updated and implemented to reflect DDP policies and directives.		

Developmental Disabilities Program Adult Service and Children's Group Home Annual Quality Assurance Review

Agency: Spring Meadow Resources  
 Evaluator: Joe Beneventi  
 Dates Covered by Review: 7-1-08 to 6-30-09

DESK REVIEW	insert QAOS #
<p><b>Fiscal (audits, cost plans, invoices):</b></p> <p>Galusha Higgins and Galusha conducted a financial audit as of June 30, 2008 and results were issued in a report dated December 29, 2008. The accounting firm made recommendations to the agency on modifying and improving the organization's practices and procedures.</p>	
<p><b>Licensing ( for Group Homes, Adult Foster sites and Assisted Living sites):</b></p> <p>SMR has qualified for all licensing agreements for the group homes.</p>	

Agency: Spring Meadow Resources  
 Evaluator( Joe Beneventi  
 Dates Covered by Review: 7-1-08 to 6-30-09

DESK REVIEW	insert QAOS #
<p><b>Quality Assurance Observation Sheets: (trends from past year)</b></p> <p>There were no QAOS sheets written last year and no trends to report.</p>	
<p><b>Medication Errors: (trends from past year)</b></p> <p>Medication errors are documented as part of the incident management process. In fiscal year 2009, there were a total of 94 medication errors reported. The majority of the medication errors occur in the group homes where almost all of the consumers require daily assistance with medications--as opposed to supported living services where the consumers typically are more independent and may not notify staff if an error occurred. Medication errors represented the largest number of reportable incidents based upon the trend reports submitted.</p>	
<p><b>Incident Management: (Incident Management Committees - IMCs &amp; trend reports, summary trends, steps to address trends, and investigation summaries)</b></p> <p>The Incident Management Committee meets weekly with representation from case management and the Quality Improvement Specialist. In fiscal year 2009, Spring Meadow Resources generated 537 reportable incidents and aside from medication errors, the majority of the incidents involved injuries, falls, and seizure activity. The agency continues to require staff to report all incidents, including the events that may not represent a problem but might be indicators of potential problems. The agency is encouraged to continue to include discovered incidents in the incident management process.</p>	

Developmental Disabilities Program Adult Service and Children's Group Home Annual Quality Assurance Review

Agency: SMR  
 Evaluator( Joe Beneventi  
 Dates Covered by Re 7-1-08to 6-30-09

KEY (mark "+" or "X" if present, "-" or "no" if not)

	insert QAOS #																														
<b>Staff Related:</b> <b>Evidence Found of Orientation Training</b> Use three to five staff ~ new hires <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">staff initials</td> <td style="width: 10%;">SJ</td> <td style="width: 10%;">TB</td> <td style="width: 10%;">CL</td> <td style="width: 10%;">SM</td> <td style="width: 10%;">MC</td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> </tr> <tr> <td>+ or X / - or no</td> <td>x</td> <td>x</td> <td>x</td> <td>x</td> <td>x</td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <b>Note where evidence found:</b> Agency training coordinator tracks the New Employee Training program.	staff initials	SJ	TB	CL	SM	MC					+ or X / - or no	x	x	x	x	x															
staff initials	SJ	TB	CL	SM	MC																										
+ or X / - or no	x	x	x	x	x																										
<b>Evidence Found DDCPT or equivalent:</b> For intensive staffing only - LOC for Waiver indicates Intensive determination <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">staff initials</td> <td style="width: 10%;"></td> </tr> <tr> <td>consumer initials</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>+ or X / - or no</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <b>Note where evidence found:</b> DDCPT is no longer part of the training process.	staff initials										consumer initials										+ or X / - or no										
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<b>Evidence of Criminal Background Checks:</b> Use three to five staff ~ new hires <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">staff initials</td> <td style="width: 10%;">SJ</td> <td style="width: 10%;">TB</td> <td style="width: 10%;">CL</td> <td style="width: 10%;">SM</td> <td style="width: 10%;">MC</td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> </tr> <tr> <td>yes/no</td> <td>x</td> <td>x</td> <td>x</td> <td>x</td> <td>x</td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <b>Note where evidence found:</b> personnel files, staff training records, agency employment application	staff initials	SJ	TB	CL	SM	MC					yes/no	x	x	x	x	x															
staff initials	SJ	TB	CL	SM	MC																										
yes/no	x	x	x	x	x																										
<b>Evidence of Staff Survey:</b> Interview at least one staff per site visited, no less than 5 staff <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">staff initials</td> <td style="width: 10%;">KM</td> <td style="width: 10%;">DC</td> <td style="width: 10%;">PD</td> <td style="width: 10%;">JL</td> <td style="width: 10%;">JD</td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> </tr> <tr> <td>+ or X / - or no</td> <td>x</td> <td>x</td> <td>x</td> <td>x</td> <td>x</td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <b>Note where evidence found:</b> personnel files	staff initials	KM	DC	PD	JL	JD					+ or X / - or no	x	x	x	x	x															
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KEY (mark "+" or "X" if present, "-" or "no" if not)

Staff Related:							insert QAOS #
<b>Evidence Found of Staff Training:</b>							
staff initials	SJ	CS	LW	GV	DT		
1st aid/CPR	x	x	x	x	x		
Abuse Prevention	X	x	x	x	x		
Client Rights	X	x	x	x	x		
Incident Reporting	X	X	X	X	x		
Confidentiality	X	X	X	X	X		
IP/PSP Process	x	x	-	-	x		
CDS* complete w/in 6 months of hire date?	X	X	X	X	X		
Medication Cert	X	X	X	X	X		
<b>Note where evidence found:</b>							
Staff training records. SMR employs a training coordinator to track completion of the College of Direct Supports curriculum, new staff orientation, CPR/ 1st aid, etc. S							
<b>Comments:</b>							
New employees are required to pass the state medication certification test and renew certification every two years. Staff are also required to pass an agency based medication test. Employees are suspended if a lapse in medication certification occurs. New employee training includes incident reporting guidelines.							

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IP Checklist:		Note Site Reviewed:				Add sites as needed:						insert
		GH	GH	SL	CSP	sl	gh	sl	sl	sl	sl	QAOS #
<b>Consumer Initials</b>												
<b>O n s i t e</b>	Consumer/Family Survey	x	x	x	x	x	x	x	x	x	x	
	PSP/IP Available to all Staff	x	x	x	x	x	x	x	x	x	x	
	IPP/Actions Implemented	x	x	x	x	x	x	x	x	x	x	
	Data for IPP/Actions	x	x	x	x	x	x	x	x	x	x	
	Data Internally Monitored	x	x	x	x	x	x	x	x	x	x	
	Self Medication Objective	no	no	n/a	no	no	no	no	no	no	no	
	Consumer informed of grievance procedure	x	x	x	x	x	x	x	x	x	x	
	SL consumer choice of SL staff	n/a	x	x	x	x	n/a	x	x	n/a	n/a	
	Rights Restrictions	no	no	no	no	no	x	no	no	x	no	
**	PSP/IP Checklist	no	no	x	x	x	x	x	x	x	x	
<b>C M P l e t e</b>	PSP/IP completed Annually?	x	x	No*	x	No*	x	x	x	x	x	
	Individual Needs Addressed?	x	x	x	x	x	x	x	x	x	x	
	Assessment Based?	x	x	x	x	x	x	x	x	x	x	
	Quarterly Reports?	x	x	x	x	x	x	no*	x	x	x	
	Incident Reports Addressed?	x	x	x	x	x	x	x	n/a	x	x	
	Behavioral Supports Addressed?	n/a	no	n/a	n/a	x	n/a	n/a	n/a	n/a	n/a	
	Functional Analysis Needed?	n/a	no	n/a	n/a	x	n/a	n/a	n/a	n/a	n/a	
Free from Aversive Procedures?	x	x	n/a	x	x	x	x	x	x	x		
<b>Comments: (regarding service planning and delivery)</b>												
<p>PSP's are not always completed within 365 days due to scheduling conflicts or because of staff turnover. Quarterly reports are occasionally late or missing which requires case managers to make individual requests to the responsible staff person. Consumers who have reached their highest level of independence with medications do not usually have self medication objectives. A temporary rights restriction on privacy was in place while (BH) was recuperating from illness but has since been discontinued.</p>												
** = Case manager												



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Make note of site reviewed

Residential Site Checklist:								insert QAOS #
	Site Name	waukesha	oregon	motor	tamarack	Lake	Hudson	
<b>H e a l t h  S a f e t y</b>	Bathing procedures posted	x	x	x	x	x	x	
	Clean/Sanitary Environment	x	x	x	x	x	x	
	Egress	x	x	x	x	x	x	
	Hot Water Temps	x	x	x	x	x	X*	
	Emergency Assistance	x	x	x	x	x	x	
	Fire Extinguishers/smoke Detectors	x	x	x	x	x	x	
	1st Aid/CPR Supplies Accessible/Available	x	x	x	x	x	x	
	PRN Medications	x	x	x	x	x	x	
	Medication Procedures	x	x	x	x	x	x	
	Medication Locked Storage	x*	x	x	X*	X*	x*	
	Medication Administration Records	x	x	x	x	x	x	
	Staff Ratios or ICP staffing	n/a	n/a	n/a	n/a	n/a	n/a	
	Awake Overnight Staff	x	x	x	x	x	x	
Adequate Supplies	x	x	x	x	x	x		
Storage of Supplies	x	x	x	x	x	x		
Free from aversive procedures?	x	x	x	x	x	x		
<b>D a i l y</b>	Weekly integrated activities	x	x	x	x	x	x	
	House or Site Rules	x	x	x	x	x	x	
	Opportunities for choice, self determination	x	x	x	x	x	x	
	Meal Prep, Mealtime	x	x	x	x	x	x	
	Engagement in Daily Life	x	x	x	x	x	x	
	Participation in Daily Living Skills	x	x	x	x	x	x	
	Daily Leisure Opportunities	x	x	x	x	x	x	
Staff Trained in Individual Specifics	x	x	x	x	x	x		
<b>Comments:</b>								
<p>The water heating system at Hudson Group Home is reportedly difficult to regulate so the temperatures tend to fluxuate. The water at the kitchen tap was too hot at 132 degrees but was only at 112 degrees back in the client bathrooms. The group home manager indicated that adjusting the temperatures required assistance from the agency maintenance person. All of the agency group homes had medications in a locked cabinet but the keys were easily accessible in most of the group homes surveyed. It is recommended that keys to med cabinets are locked and not accessible to the consumers.</p>								

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Residential Site Checklist:								insert QAOS #
	Site Name	Motor	Hudson	Tamarack	Lake	Waukesha		
<b>T r a n s p o r t a t i o n</b>	Driver Orientation Program	x	x	x	x	x		
	Wheelchair tie downs	x	x	x	x	x		
	Wheelchair Lift	x	x	x	x	x		
	Driver's Licenses	x	x	x	x	x		
	Emergency Supplies	x	x	x	x	x		
	Fire Extinguisher	x	x	x	x	x		
	Transportation Log	x	x	x	x	x		
	Scheduled Maintenance Program	x	x	x	x	x		
	Training--Staff Doing Maintenance Checks	x	x	x	x	x		
	Procedures for Timely Repairs	x	x	x	x	x		
MDT* inspection on file (MDT vehicles only)	no	no	no	no	no			
Comments:								
* MDT = Montana Department of Transportation								
<b>Comments:</b>								
<p>Staff are given specific training for non-traditional vehicles such as the larger vans and the wheelchair equipped vans. Further instruction for the vehicles are placed in each vehicle. Group home managers are responsible to oversee the maintenance checks for the vehicles assigned to their group home. A staff person is assigned to each vehicle at corresponding sites to ensure that repairs are completed in a timely manner. SMR has started a daily vehicle log as recommended by MDT for trip inspections of obvious safety checks such as broken mirrors, signal lights, cracked windshields, tire wear, etc.</p>								

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**FOR EACH STAFF:**  
**Ask one question per topic area, if incorrect as a second if still incorrect move on the next topic area.**

KEY (mark "+" or "X" if correct, "-" or "no" if not)

Staff Survey:		Staff Initials	km	JD	DC	JL	PD			insert QAOS #
<b>A b u s e</b>	Allegations are reported to? (APS)	x	x	no	x	x				
	Do you notify Supervisor first? (NO)	x	x	x	x	x				
	Steps to take if abuse is discovered?		x	no	x					
	Comments: Four out of five staff surveyed were able to give correct answers regarding the procedure to call APS in cases of abuse or neglect. On-going training and staff development in this area is recommended.									
<b>r i g h t s</b>	Suspect theft of gloves, steps to take?	x	x	x	x	x				
	IP/PSP requests Doctors appt	x	x	x	x	x				
	No jacket, -25 consumer wants to leave									
	Review Right's Restriction									
Comments: Staff were aware of the need to protect client rights, and offer choices to protect health and safety.										
<b>** b m p **</b>	describe consumer behaviors	x	x	x	x	x				
	staff response to behaviors by plan	x	x	x	x	x				
	list proactive or environmental strategies	x	x	x	x	x				
	Comments: Staff were all familiar with behavioral issues and were able to offer good strategies to handle behavior problems.									
<b>H o m e h e a l t h c a r e</b>	former employee wants info	x	x	x	x	x				
	what is consumer information?	x	x	x	x	x				
	training to meet health and safety needs?	x	x	x	x	x				
	emergency evacuation procedures?		x	x	x	x				
Comments: Staff were aware of the need to protect client confidentiality.										
Comments:										
** = Behavior Management Plans										

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KEY

Staff Survey:		km	JD	DC	JL	PD			insert QAOS #
<b>m e d i c a t i o n s</b>	describe procedure to assist with meds	x	x	x	x	x			
	if med is unavailable?	x	x	x	x	x			
	if gave wrong med?	x	x	x	x	x			
	if moving to a new place or gets new med?								
	requirement to assist with meds?								
	describe PRN or OTC* is to be given								
	what constitutes a med error?								
Comments:									
Staff were familiar with medication protocols and the kinds of errors that need to be reported through the incident management system.									
* OTC = over-the-counter									
<b>E R C</b>	steps to avoid power struggles	x	x	x	x	x			
	how to respond to someone who is upset	x	x	x	x	x			
	what if you start to lose control?				x	x			
	Comments:								
Staff gave proactive responses to deal with difficult behaviors.									
** = Emotionally Responsible Caregiving									
<b>I N C I D E N T R E P O R T I N G A N D M A N A G E M E N T</b>	when do you fill out an incident report?	x	x	x	x	x			
	notifications for Emergency Room visit?	x	x	x	x	x			
	consumer to consumer incidents	x	no	x	x	x			
	who writes the Incident Report?	x	x	x	x	x			
	Comments:								
Staff appear to have a good understanding of the incident reporting process. Only one staff did not realize that two separate incidents needed to be written for incidents involving two clients.									
* = Incident Reporting and Management									

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 Ask one question per topic area, if incorrect as a second  
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Staff Survey:		KEY (mark "+" or "X" if correct answer, "-" or "no" if not)						insert QAOS #
	Staff Initials	km	jd	dc	JL	PD		
<b>B E H A V I O R</b>	consumer destroying things	x	x	x	x	x		
	staff pinches consumer back	no	x	no	no	no		
	how do you know a support plan is needed?	x	x	x	x	x		
	Comments: Staff tended to be under the impression that minor infractions (pinching) between staff and clients would be handled internally by supervisors.							
<b>* I P / P S P</b>	what is IP/PSP based on?	x	x	x	x	x		
	you have an idea for an objective.....	x	x	x	x	x		
	why do assessments?		x	x	x	x		
	How do you find out what someone would like to do?		x	x	x	x		
	Comments Staff typically had a good understanding of the PSP process.							
<b>* P</b>	* = IP = Individual Plan PSP = Personal Support Plan							
Comments:								

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KEY (mark "+" or "X" if positive/correct, "-" or "no" if not)  
 "-" or "no" indicates need for follow up  
 and comments in lilac area below

Consumer Questionnaire by QIS.		ALL questions are MANDATORY						insert QAOS #
USE THIS FOLKS WHO CAN ANSWER QUESTIONS		Consumer initials						
Consumer has/shows ID card? (if PSP documents this is not applicable, mark NA)		x	x	x	x	x	x	
<b>c o n s u m e r</b>	Do you have nice staff at home/work?	x	x	x	x	x	x	
	Is anyone mean to you at home/work?	no	x*	no	no	no	no	
	Do you like where you live/work?	x	x	x	x	x	x	
	Are you ever afraid of anyone?	no	x	no	no	no	no	
	<b>Someone hits/hurts you, who can you tell?</b>	x	no	no	no	no	no	
	<b>Does anyone talk to you about this?</b>	no	no	no	no	no	no	
	Can you get help when you need it?	x	x	x	x	x	x	
	from staff?	x	x	x	x	x	x	
	from Case Manager?	x	x	x	x	x	x	
	Can you get your own food/drink?	no	no	x	x	x	x	
	Do people come into your house/room without knocking or getting permission?	no	no	x*	no	no	no	
	Do staff ever take things from you?	no	no	no	no	no	no	
	Can you get rides to places you need to go?	x	x	x	x	x	x	
Rides to the places you want to go?	x	x	x	x	x	x		
<b>Who is your Case Manager?</b>	x	x	x	x	x	x		
<b>Does s/he talk to you about waiver services?</b>	x	x	no	x	x	x		
<b>Does s/he help you get what you need?</b>	x		x	x	x	x		
<b>Comments:</b>								
Consumers did not typically understand the reference to Waiver services. Most of the GH clients are required to ask permission in order to 'get their own food or drink'. A few of the clients in group homes indicated that other clients will sometimes enter their room without knocking but there were no references to staff doing so. Occasionally a client might indicate that they were afraid of other clients, but there was no indication that they were afraid of staff. One client indicated that staff yell at him but it is typical for this individual to claim that most all of his staff, and fellow consumers yell at him so this did not appear to be a legitimate problem.								

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 and comments in the lilac area below

Consumer Questionnaire (used by QIS).		ALL questions are MANDATORY						insert QAOS #
ASK CAREGIVERS IF THE CONSUMER IS UNABLE TO ANSWER QUESTIONS								
		Consumer initials						
S u p p o r t	Who helps this person and how?	x	x	x				
	Are there some staff/peers they like better?	x	x	x				
	Staff/peers they don't like? Why?	x	x	x				
	Current needs not being met?	no	no	no				
	Health and Safety related?	no	no	no				
	Who do you talk to about these concerns?	n/a	n/a	n/a				
	Does the person have input to his/her life?	x	x	x				
	If you have concerns, who do you talk to?	x	x	x				
	are they resolved?	x	x	x				
	What are this persons wishes/dreams?	x	x	x				
	is the plan moving that direction?	x	x	x				
	what would make things better?	x	x	x				
	does this person ever seem afraid?	no	x	no				
	are you afraid for them?	no	no	x				
	<b>Does this person know how or where to report abuse?</b>	no	no	no				
	<b>who provided that training?</b>	x	x	n/a				
	Who will the individual call or report to?	no	n/a	n/a				
	who provided that info?	x	x	n/a				
	Does the person have transportation to all services and places s/he would like to go?	x	x	x				
	<b>who is the person's case manager?</b>	x	x	x				
<b>Does CM help the person access services</b>	x	x	x					
<b>Does the CM explain waiver services?</b>	x	x	x					
<b>Does the person understand this info?</b>	no	no	no					
Comments:								