

Shared Supports and the IFS Provider

Assisting People to Select Sharing Partners

What are Shared Supports?

In the Individual and Family Support Service, two or three waiver participants may share supports (using the same direct service worker) for units of time, either in the day or night. The types of IFS shared supports in the New Opportunities Waiver are:

- | | |
|----------------------------------|------------------------------------|
| IFS Shared Support, 2-person—day | IFS Shared Support, 2-person—night |
| IFS Shared Support, 3-person—day | IFS Shared Support, 3-person—night |

The Resource Allocation System in the *Guidelines for Support Planning* suggests use of shared supports for persons who live independently in level memberships 1A through 5.

IFS Provider Responsibilities in Delivery of Shared Supports

As an IFS provider, you are responsible for **assisting people to locate others using services (within your agency) with whom to share supports**. This responsibility means providing opportunities on an ongoing basis for people to develop relationships with others with whom they may have things in common. These relationships help ensure that shared supports will be more successful and will produce positive outcomes for people who share. Remember, people choose who they will share with, how they will share, and when they will share. In order to make these choices effectively, people may need your assistance.

When introducing people to other potential sharing partners, make sure you are familiar with **HIPAA** laws as well as your responsibility to protect people's protected health information (PHI). Do not reveal unnecessary information about one person to another without an appropriate release. Focus on providing basic information about a person to introduce him/her to a potential sharing partner, just as you would in any social situation. Let the participants decide for themselves what they will and will not reveal to each other.

You are responsible for **ensuring the health and safety of participants when sharing supports**. OCDD understands that assurances of health and safety can never be 100% guaranteed. Instead, the IFS agencies must work to minimize real risks by coming up with measures to reduce or address these risks in a sensible way. People should be granted opportunities to take chances and live their lives in a real way: to spend time with people they like and participate in a variety of activities they prefer, even if an element of risk is involved.

You are responsible for **arranging with the participants the day-to-day aspects of sharing supports**. This means being prepared to address changes in shared supports and sharing partners, both in roommate and in casual sharing situations. Make sure your agency has a policy in place (in-serviced and implemented) to address all participant requests for changes in shared supports in a consistent and efficient format. Make sure that participants are informed of this policy and know how to request changes.

Support coordinators and participants also have significant responsibilities in planning for, implementing, and monitoring the use of shared supports. Support Coordinators have a broader responsibility to assist participants to meet others who use services and develop relationships with potential sharing partners, including with others who use different IFS agencies. For information about support coordination responsibilities, see the *Guidelines for Support Planning* Section 6.5. For information about participant responsibilities, see the *Guidelines for Support Planning* Section 6.7.

It is not the IFS provider's responsibility to introduce their participants to participants served by other agencies. However, providers are expected to cooperate with the support coordinators who are arranging these meetings and accommodate sharing between participants served by different agencies. Participants are likely to meet others from different agencies that they would like to share with through work, day habilitation, or a community event. IFS providers cannot limit participant choices in sharing partners to only those within their agency.



Step 1: Identify how participants want to share supports.

New Participants: Once a new waiver participant has chosen you as IFS provider, his support coordinator should provide you with some preliminary information about the person. Based upon this information, focus on how your agency may best support him. The support coordinator should have already asked the person if he wants to use shared supports and how. At this point, begin thinking about how your agency may offer shared supports in ways that might work for the person. If the information you obtained is not sufficient, you may need to contact the support coordinator to get additional information. You may also want to contact the person to discuss how he would like to use shared supports.

Current Participants: If a person currently using your agency will be using shared supports, you may have the information you need to begin assisting with locating a suitable sharing partner(s) and arranging shared supports. However, you will need to contact the participant to verify preferences with regard to shared supports.

You may want to call the support coordinator to discuss what was learned about the person's preferences during the Discovery process. Determine whether the person wants to use roommate shared supports, casual shared supports or perhaps both. Make sure that you and the support coordinator have corresponding information so that you are both working toward the same goal.

Make sure that the person understands what the advantages and disadvantages are to roommate and casual shared supports. His support coordinator may have already discussed this with him, but you may need to follow up to make sure the person fully understands and does not have any outstanding questions.

If the person has decided that he wants a roommate, find out what his preferences are. Make sure that the support coordinator also has the same information.

Possible questions to ask about roommate shared supports: (*Use judgment and available assessment information to ask appropriate, relevant questions. Use follow-up probes.*)

- Do you know who you want to live with? Why do you want to live with that person?
- If you don't know who you want to live with, what type of roommate are you looking for?
- Do you want your own room?
- Do you want to share things (i.e., food/groceries, living space, personal belongings, etc.) or do you prefer privacy of your things?
- Have you ever had a roommate before? If so, what worked? What did not work?
- Do you like having visitors or friends over to your home a lot?
- When you are at home, do you like to be left alone or do you want to spend time talking and doing things with others?
- What activities do you enjoy doing at home? What activities do you not like doing at home?
- Do you like consistency in your home routine or do you like some spontaneity?
- Do you like having your home free of clutter and have every item in a particular place or is it okay if some things are left out on the floor, shelves, or tables?
- How do you prefer to handle disagreements with others you live with?

Possible questions to ask about casual shared supports: (*Use judgment and available assessment information to ask appropriate, relevant questions. Use follow-up probes.*)

- Who do you spend time with now? What do you do together?
- Do you have other friends you want to do things with? Who? What things do you want to do with them?
- What type of clubs/organizations are you already involved in?
- What are your hobbies?
- What do you like to do when you are not at work/day program?
- Do you prefer quiet environments with very little activity (i.e., library) or loud environments with a lot of activity (i.e., sports games)?
- Do you prefer indoor activities or outdoor activities?
- Are you dating anyone? Are you interested in dating?

Step 2: Identify people's support needs and risk factors when sharing supports.

New Participants: Information about support needs and risk areas of new participants can be obtained from the support coordinator's notes that she obtained during Discovery. The support coordinator should be able to give you the results of the SIS/LA PLUS, the Personal Outcomes Assessment, and possibly a draft of the new support plan.

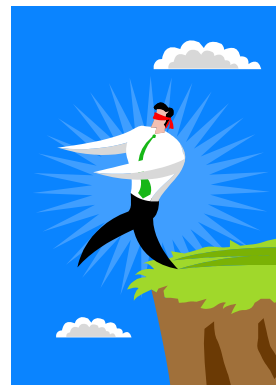
Current Participants: Information about current participants should be much easier to find internally. Refer to progress notes or quarterly summary notes on file. Refer to the current support plan. You may also obtain the results of the SIS/LA PLUS and Personal Outcomes Assessment from the support coordinator.

Identify how a person's support needs impact sharing supports: A person may have some support needs or particular activities of daily living (ADL's) that requires one-on-one assistance. However, typically there are times in which a person is not engaging in any ADL and does not have a support need for which he requires one-on-one assistance. Even people with significant physical limitations, such as those who use wheelchairs or those who receive nutrition through g-tubes, can share supports in certain circumstances.

1. Identify those times during which a person does not require one-on-one assistance. These may be the most appropriate times for a person to share supports as there are fewer factors to consider with regard to health and safety assurances.
2. Identify those specific times or activities during which a person does require one-on-one assistance. Think about how frequently these times or activities occur and the length of time it takes to complete. Consider whether one staff can provide the necessary assistance to this person while supporting another at the same time. Remember that the other person may also have support needs. Consider how the sharing partner having higher, lesser, or the same level of support needs will impact the shared supports arrangement. This will help you to determine whether the person can share supports during these particular occasions, and if so, who the most appropriate sharing partner is.

Identify *actual* risks associated with a person sharing supports: Refer to Section 6.3 and 6.4 in the *Guidelines for Support Planning* to get a better idea of what risk factors should be considered. The support coordinator should have previously identified a person's personal risk factors during the Discovery process (contact him/her to get the information.) If you have received a rough draft of the new support plan from the support coordinator, the risk factors associated with roommate and casual sharing should be documented in Sections III.B. and III.C of the plan.

1. Determine how a person's risk factors will impact his ability to share supports. Level of risk may vary depending upon what type of shared supports the person uses, when or where the person shares supports, or the number of people that he is sharing with. Be reasonable about which risks you are considering. Consider only those risks that are real and present, not the "what if" scenarios that are least likely to occur.
2. Identify ways in which you can address those risks and minimize them. What actions or precautions can be taken to minimize the risks sufficiently enough for the person to share supports in a way that he wants?



⇒ Remember, a certain amount of risk is allowable as long as proper precautions have been taken to minimize it. The goal is to provide opportunities for people to share supports in a real-life, flexible way even if there is some amount of risk involved.

Step 3: Identify potential sharing partners.

Whether the person is new or current, talk with him to find out who he is already friends with in your agency. Even a new participant may know some people in your agency. If the person has been with your agency a while, he may have already identified several friends or acquaintances with whom he would like to share supports. Assist the person with creating a list of names of friends to consider as sharing partners.

If the person does not know others in your agency, he will need assistance to identify potential sharing partners. Based upon the person's identified preferences, interests, support needs, and risk factors, come up with a list of other people in your agency that may make a suitable sharing partner for this person. The more people on the list, the more likely that he will find a compatible sharing partner that shares his same preferences and interests.

Step 4: Discuss potential sharing partners.

Using the list of potential sharing partners that the person has created or the list that you have created on the person's behalf, talk with him about each potential sharing partner on the list.

Discuss those potential sharing partners whom the person knows and is friends with. You may find that there is a significant issue (such as incompatible daily routines or living 50 miles from each other) which may prevent him from sharing supports with a particular friend on a regular basis or at all. Now is the time to discuss creative solutions and compromises. If the person lives a significant distance away from his friend, it may not be feasible for the friends to share supports on a daily basis, but perhaps they can plan to share supports once a week or for special events. Do not rule out friends as sharing partners unless absolutely necessary. A more thorough discussion of sharing criteria and the risks/benefits of sharing supports will be held at the planning meeting with input from all team members.

Discuss those potential sharing partners whom the person does not know but whom you believe they may have things in common with. Talk about the reasons why you think they should meet. Provide basic information about the potential sharing partners but don't get into details, especially in giving out sensitive or protected personal information. The goal is to "introduce" the potential sharing partners to the person and set up a face-to-face meeting between them.

⇒ To facilitate the process of meeting others with whom a person may share supports, you may require that all people who share supports sign a release of information form so that you can reveal their name, age, gender, and other non-invasive identifying information to other potential sharing partners.



For those persons who are interdicted, the legal guardian's approval is required in the finalization of any part of the support plan or your service plan, including a person's sharing partners.

At this point in the arrangement of shared supports, it may be a good time to contact the legal guardian to discuss the process with him/her and find out to what degree that he/she wants to be involved. The guardian may choose to be kept informed of every step of the process, including who the person meets, the date and time of the meetings, and the outcome of the meetings. The legal guardian may be very involved in the person's life and may want to assist the person with choosing sharing partners as well as attending the meetings between the person and the potential sharing partner(s). On the other hand, the guardian may decide that he/she only wants to be notified of the final arrangements of the shared supports after the person has chosen his/her sharing partner.

Make sure that you and the legal guardian are in agreement with how often and to what degree you will be updating the guardian on new information.

Step 5: Arrange for the person to meet potential sharing partners.

Once the person has decided which of the potential sharing partners he would like to meet and get to know in person, make arrangements for them to meet.

How, when, and where this meeting is held depends upon the two or three persons involved, as well as what you are able to accommodate.

- Consider those activities in which one or more of the persons are already involved in (e.g., a bowling league or Families Helping Families event).
- Consider having the meeting using an activity or location based upon shared interests or preferences. For instance, if both are interested in outdoor activities, then suggest holding a meeting at the park.

Whatever the setting may be, make sure that it is a comfortable setting that promotes meaningful interaction and conversation. The whole purpose is for people to get to know one another.

Call the potential sharing partner(s) on the participant's list to make sure that the other person is agreeable to meeting.

- If the person and the potential sharing partner are already friends, they may have already decided to share supports together. People who know each other well may decide to speak over the telephone to discuss arrangements for shared supports, rather than having a face-to-face meeting.

Make sure that the suggested date, time, and place for the meeting are agreed upon by both people.

Consider whether the planned activity is going to cost money. Assist people to prepare for this.

Also, make sure that any needed transportation is available.

These meetings are not a one-time event. People's lives and their relationships do not remain the same. Over time, people will want to change sharing partners as they develop new friendships and relationships. Your agency will need to offer opportunities for participants to meet others using services (in your agency) on an ongoing basis. This does not mean that you must host formal, scheduled events. Instead, use naturally occurring activities or community events to support people to meet others.



Step 6: Discuss the outcome of the meetings with potential sharing partners.

Follow up with each person after the meeting. Give each person an opportunity to talk privately and honestly with you (or familiar staff) about what he thought of the meeting as well as his decision about the other person as a sharing partner.

Talk with the person about his opinion of the potential sharing partner. Ask questions such as:

1. Did you like name?
2. Would you like to spend more time with name and get to know him/her better?
3. What did you like about name? What did you not like about name?
4. Do you want to share supports with name?



Discuss what type of shared supports (roommate/casual) the participant wants to use with that person.

If one or more of the persons involved are unsure, they may need another opportunity to meet and talk again. If necessary, assist them with setting up this meeting, making the same arrangements as in Step 5. However, they may also decide that they can discuss things further by telephone and don't necessarily need to meet in person again.

Discuss with the person that sharing supports is not permanent. He may change sharing partners later if he decides that they are not compatible. However, this process is much easier with casual sharing partners than it is with roommates.

- Discuss the process involved with changing sharing partners. Inform the person about your agency policy for addressing requests for changes in shared supports.

Discuss with the person that it may take some time to develop a relationship with another person and determine if sharing supports with a particular person is a good idea. It is important not to rush this process. Finding appropriate, compatible sharing partners requires time and thought.

- The more compatible the sharing partners, the less likelihood there will be time-consuming problems later on.

Step 7: Determine if the choice sharing partner wants to share supports.



Once a participant has chosen a sharing partner, you must make sure that the chosen partner is also in agreement with the shared supports arrangement.

Contact the chosen sharing partner(s) and discuss what he thinks about sharing supports with that particular person. Complete Step 6 with him just as you did with the other person.

Get a verbal commitment from each person.

Step 8: Determine if your agency can provide shared supports to the two or three particular persons.

Determine whether your agency can provide services in the shared supports arrangement requested while *reasonably* assuring the health and safety of each person involved during the shared supports times.

Identify the risks involved and determine whether you can address and minimize risks to an acceptable level. The level of risk involved with the shared supports situation depends upon a number of factors that interrelate with each other. Some things to consider include:

Staff capabilities –

- **Situational demands:** In this particular shared supports situation, what does the staff need to accomplish? Consider what ADL's or support needs the staff will address. Determine whether one staff is capable of assisting the particular two or three persons with all of their support needs while they are sharing supports. This involves consideration of the *time of day* during which the shared supports is occurring and the *location* in which the shared supports is occurring. The support needs of the sharing partners may be greater during certain times of the day, such as mealtimes or scheduled times for medication administration. In the case of roommates, support needs may be greater in the mornings (when both people are trying to get ready for work), while support needs may be less significant in the afternoons when they get home. In addition, support needs may vary depending upon the location in which the shared supports take place. Sharing partners may not require as much support while at home or in another familiar location, but may require more support while at an unfamiliar location in the community. For instance, persons may require additional assistance in navigating through a grocery store or department store to find the items they want, locate the cash register to pay for the items, as well as locate the restroom.
- **Individual staff abilities:** How well a shared supports arrangement works may depend in part upon which particular staff will be supporting the sharing partners. Some staff work well in situations that require multi-tasking, while others are better with completing one task or assisting one person at a time. Some staff can maintain their composure with chaotic or unpredictable situations, while others work much better with routine, predictable situations. Recognizing strengths and weaknesses of direct service workers and placing them in situations to suit their abilities will produce a better outcome, resulting in higher satisfaction for both staff and consumers.

Environment – The environment in which the shared supports occur may determine whether one staff can provide the necessary supports to the sharing partners.

- Some environments carry a larger level of risk, simply due to the unpredictability of the situation or the number of people in the environment. For instance, it is easier to minimize risks with shared supports at a library than minimize risk with shared supports at an amusement park. However, depending upon the level of independence of the sharing partners, sharing supports at an amusement park may present very little risk and can easily be accommodated.

Activity – The activity that the participants will be engaging in may determine whether one staff can provide the necessary supports to the sharing partners.

- Some activities carry a larger level of risk based upon the level of support that one or both of the sharing partners requires during the activity. For instance, if one or both of the sharing partners has hearing difficulties, there may be fewer risks associated with them sitting and watching a movie than riding bikes. However, if the risks are minimized by a few simple steps such as 1) making sure they ride bikes on a familiar bike path at a park rather than a crowded street with traffic, 2) making sure they wear helmets, knee and elbow pads, 3) making sure that the staff accompanying the sharing partners is trained in First Aid and emergency procedures and has a First Aid kit and cell phone, and 4) making sure that there are others nearby that can assist in case of an emergency, then one staff may be able to provide supports to two specific people with hearing difficulties while they ride bikes.

Step 8: Determine if your agency can provide shared supports to the two or three particular persons. (continued)

For Roommates:

You, along with each participant's support coordinator will need to hold an in-depth risk/benefit discussion. Refer to Section 6.4 of the *Guidelines for Support Planning* for a detailed review of the roommate risk/benefit decision-making process.

This conversation must be held without the participants due to discussion of PHI.

This discussion will help you to determine whether your agency can or cannot safely provide the necessary supports to the participants during their shared supports times.

For Casual Shared Supports:

Review your findings from Step 2 above (Identifying supports needs and risk factors) for each sharing partner. You may also refer to Section 6.3 of the *Guidelines for Support Planning* which outlines areas to assess for the provision of casual shared supports.

Determine whether your agency can safely provide the necessary supports to the participants during their requested shared supports times.

- It may be that you are able to provide shared supports to sharing partners during certain activities or certain locations, but not able to during other activities or in certain locations. For instance, if both sharing partners are at risk for choking and require one-one-one assistance during meals, then you may be able to provide shared supports while they go to an outdoor concert, but not while they go together to a restaurant for dinner.

For all Shared Supports Situations:

The support coordinator, along with the rest of the team, has a responsibility to try to resolve outstanding barriers and issues related to shared supports, removing barriers where possible while ultimately preserving health and safety of participants involved.

- Be prepared to work with the support coordinator on further risk mitigation and developing solutions to address any issues that may prevent a participant from sharing supports with the person of his choice.

However, there may be situations in which serious risks are involved and the team is unable to resolve all of the issues while still preserving health and safety. In this case, you may determine that your agency cannot support this particular sharing partner match under any circumstances. At this point, the person must make a choice:

1. The person and his/her team can focus on discussion of alternate sharing partners proposed by the person,
2. If no alternates are proposed, the person, with assistance from you and the support coordinator, can begin making arrangements to get to know other potential sharing partners,
3. The person can receive further assistance from the support coordinator, and if necessary, intervention from the regional waiver office to address the barriers with the particular living arrangement and/or assist him with identifying other sharing candidates, or
4. The person can choose another IFS provider agency who may have the capabilities to provide shared supports to him and his chosen sharing partner(s).



Step 9: Finalize the details of shared supports with sharing partners.

Once sharing partners have been agreed upon by the participants involved as well as the IFS provider agency, make the final arrangements to provide the shared supports.

For Casual Shared Supports:

- Consider the activities, hobbies, or organizations that people are already involved in. It makes sense for people who both participate in the same activity to continue that activity while sharing supports.
- Consider everyday activities or errands that people do on a weekly or even daily basis, such as going to the grocery store or going to the gym for a workout. Schedule the days and times of the shared supports based upon what people are already doing.
- Find out if there is a new activity or organization that both sharing partners want to become involved in. Consider the cost of participating in the new activity or joining the organization. Also, consider the transportation needs of the sharing partners. Make sure that the scheduled times for the activity or meeting times for the organization do not conflict with other plans. Sharing partners may need to discuss and agree on finalized arrangements.
- Make sure that the sharing partners are well-informed of their responsibilities with casual sharing. If they have agreed to participate in a certain activity at a certain time, they need to stick with their commitment. Making changes in one's own schedule will affect the schedules of others with whom a person shares.
- Make sure that sharing partners are aware of the "house rules" if they have agreed to share at one's home. They should discuss between themselves what rooms may be off-limits and what items (Playstation, Wii, computer, etc.) may be off-limits. The visiting partner should be respectful of the hosting partner and his/her personal possessions. Clear expectations about bringing/using food and beverages should be established.
- Sharing partners must decide what they can afford in terms of snacks, meals, and recreational spending.

For Roommates:

Consider the daily routine of each sharing partner (i.e., wake up time, work/day habilitation hours, mealtimes, bedtime) and natural times for roommates to share supports— at night while sleeping, early-morning, and late-evening hours. Roommates may also share supports in the afternoons and on weekends, based on their preferences.

Schedules for the roommates should coincide in nighttime hours, however there are exceptions. Roommates' daytime schedules may be different. For instance, one roommate may work 6 hours a day, while the other roommate works 3 hours a day and spends the other 3 hours with his family. However, scheduled times for sharing with roommates should match up between the roommates' schedules.

One or both of the partners may also be planning to share supports casually with another person. Make sure that this is considered when working out the schedules for the roommates.

Determine when each roommate wants to use 1:1 supports.

Back-up Planning:

Make sure you have a backup plan for supports in case the shared supports arrangement is unexpectedly interrupted.

- Depending upon his/her level of independence, a person may be able to use intermittent supports or have unsupported time if the shared supports arrangement is interrupted. The support plan must contain documentation on the use of intermittent supports. This can be incorporated into the back-up planning per support plan guidelines.

Step 10: Addressing requests for changes in shared supports.

Situations may arise in which a person wants or needs to make changes to his shared supports. People may request changes in their roommate shared supports or casual shared supports through either their provider agency or their support coordinator. OCDD encourages participants to work with their provider agency closely on requests for changes for the most timely and responsive resolution.

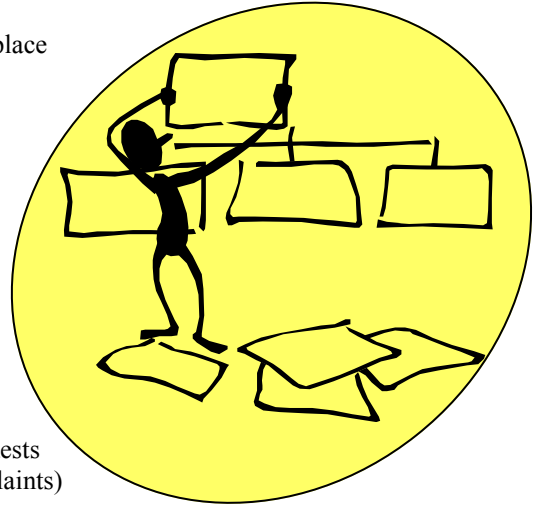
As stated earlier, IFS provider agencies must have an agency policy in place addressing requests for changes in shared supports arrangements.

- Inform people of the agency policy and details of what a person must do to request a change.
- Provide regular reminders.

Make sure sharing partners understand that requested changes may not happen immediately.

Make sure people feel you are responding to their requests for changes.

- Communicate with people about the progress of their requests and how things stand. Do not leave any requests (or complaints) unresolved.



Part of addressing the request for a change involves repeating Steps 3-9 of these instructions. The participant needs to meet or identify new potential sharing partners and finalize the details of the shared supports.