

Financial Security and Other Safeguards			
Do programs assure that participants have enough money to support themselves? Are participants able to feel secure in the community?	Children	Adults (non-elder)	Elders
1. Financial eligibility rules make it easy for persons to choose home care rather than nursing home care. (For example, people with moderate incomes can qualify for home care if they have high medical expenses. They can also protect some savings for a spouse.)			
2. Individuals who apply for services learn about all programs they are eligible for including assistance with housing, food, transportation, and fuel costs.			
3. The home and community based services programs coordinate with educational opportunities that consumers choose to participate in.			
4. Consumers who must pay for part of their care are able to keep enough income for an adequate lifestyle in the community.			
5. Public programs in the state encourage affordable, accessible housing and transportation.			
6. Persons with disabilities who choose to work have health insurance so that there are appropriate incentives to work.			
7. Monitoring systems make sure that the available types and amounts of service respond to the needs and preferences of consumers.			
8. Consumers help design and implement monitoring systems.			
Comments on Financial Security:			
Overall Comments or Priorities:			

Your State: _____

Rating Scale: 1 = We haven't begun to work on this yet
2 = We're making progress but have lots more to do
3 = We're almost there
4 = We recommend our state to others

Opportunity			
Do individuals have opportunities to participate in the community in ways that are meaningful to them?	Children	Adults (non-elder)	Elders
1. The state publicizes its programs so that individuals know what is available and how to apply.			
2. Information on all services is complete, in alternative formats, and in clear language.			
3. The application process for services is simple and coordinated.			
4. Eligibility rules are based on everyday needs and support consumers who need help to live in the community.			
5. Approved hours or budgets for services are sufficient to meet the person's needs and choices in the community.			
6. Consumers can pay adequate wages to their direct care workers so they have the opportunity to recruit a qualified workforce.			
7. Individuals can choose a consumer directed option. Individuals can select, manage and dismiss workers.			
8. Information on consumer directed options is available, clear complete, and in alternative formats.			
9. Service standards reflect consumer direction principles. (For example, doctors and nurses don't approve personal assistance.)			
Comments on Opportunity:			

Meaningful Participation			
Do individuals with disabilities participate in decisions affecting their lives? Are they consulted about changes in policies	Children	Adults (non-elder)	Elders
1. The HCBS programs involve consumers in decisions about coordinating services.			
2. Consumers, family members and advocates help design, develop, operate, and evaluate home and community based services. They are on advisory groups and give feedback through consumer surveys and other means.			
3. Consumers can resolve problems promptly.			
4. Consumers can make formal complaints and receive assistance from an advocate to file appeals, negotiate disputes, and voice concerns.			
5. Consumers choose the amount and types of services they use.			
6. Consumers decide whether to work with a service coordinator and how much assistance they need.			
7. Consumers select their service coordinator and decide whether to use a family member to arrange and coordinate supports.			
8. Programs have principles, goals, and objectives that clearly reflect consumer direction and choice.			
9. Consumers direct the decisions that affect their lives.			
10. Programs build support for consumer direction with other state agencies, legislators, providers, families, advocates, and potential consumers.			
Comments on Meaningful Participation:			

Independence			
Are individuals able to make decisions affecting their lives in the community?	Children	Adults (non-elder)	Elders
1. Outreach on home and community based services includes unbiased, one-on-one assistance to help consumers choose options that suit their preferences and needs.			
2. Programs educate consumers about how to make sure services meet their expectations.			
3. Consumers may choose from a full range of programs and services to meet their needs. Options include personal assistance, homemaker services, chore help, home-delivered meals, transportation, home health, rehabilitation services, adult day health, day treatment, and support at school or work.			
4. Program requirements accommodate consumers’ preferences and needs. Schedules are flexible so that consumers can have their needs met outside regular business hours.			
5. Consumers may choose services, workers, schedules, and tasks to be done, even when they don’t choose full direction.			
6. Consumers may use program funds to hire family members to provide services and supports.			
7. Consumers may use program funds to purchase appliances, assistive devices or home modifications to meet their needs.			
8. All staff working with consumers receive training on consumer direction. Service coordinators, eligibility workers, providers, evaluators, and other workers receive this training.			
9. Consumers who choose consumer directed services can receive help with handling their responsibilities if they want it. (For example, they can receive a list of available attendants and back-up assistance when workers don’t come to work.)			
Comments on Independence:			