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## Section V: Putting It All Together

## Putting It All Together

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### House or Apartment Checklist (from Towards Maximum Independence, San Diego, CA)

Here is a way to look at a house or apartment where you might want to live. It will help you decide what is good about the place and what could be better. The best way to use this checklist is as follows:

1. Make sure you get a chance to view the house or apartment and the immediate neighborhood.
2. If you need assistance with the checklist, ask you Community Support Coordinator or someone else you feel comfortable with.
3. Write notes about what you find out about the place in the box provided.
4. Think about all of these things before you decide if you want to live in the house or apartment or not.
5. You may be looking at several different places - use this checklist to decide which house or apartment is best for you.

- 1. The place is close to stores, banks, places to eat and other resources I will need.**

- 2. The place is clean inside and outside.**

From *Supported Living Services Your SLS Training Tool Box*;  
Connections for Information and Resources on Community  
Living (CIRCL; April, 2001)

## **Assisting the individual**

### **Personal Budget**

Discuss assisting the individual in developing a personal budget. Available funds will depend upon his or her status with the Social Security Administration (SSI/SSA and/or other monthly payments to the individual), access to paid work, family support, and other resources, if any. Individuals who are over a certain threshold may be assessed a share of cost against their Medi-Cal payments or IHSS hours. If a trust is involved, be sure you understand the terms and conditions as they relate to the person's daily life and future planning. Helping the individual set up an estimated budget at this point may also assist the person in deciding how much to pay for an apartment, etc. Most individuals will have very little money left after meeting the regular obligations of rent, utilities, phone service, cable, groceries, clothing, co-pays and other necessities. Money for social and recreational activities for the individual usually come from this pot of money, as well. For this reason, Entertainment Books and similar resources can be very valuable tools in supported living arrangements.

### **Housing, furnishings and household items**

A individual's experience in moving to a home of his or her own is much the same as for people without disabilities. The process begins with thinking about how and where one wants to live, and culminates in an actual move. It includes setting goals and timelines, and making realistic financial and lifestyle decisions.

Often, a individual may be unfamiliar with the choices he or she will need to make when it's time to think about living in his or her own place. The time to begin assisting a person with housing and furnishings for their own home is as soon as that person has decided they want to pursue SLS.

Individuals can begin to think about where they might like to live. They can start to look at apartments, condominiums, duplexes, and houses, so they can familiarize themselves with the pros and cons of various lifestyles. Having the opportunity to look at and think about different housing options is especially important if the

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person has lived only with parents or in group facilities. Asking if a person would rather live in a house or apartment is useless to the person who has no way of knowing the difference, or what that difference would mean to his or her own life.

A good way to approach this is to talk with the person and circle about personal preferences and what makes the person comfortable. Think about the features of each type of housing, and help the individual match up those features with his or her own personal choices and preferences. For example, if a quieter environment is preferred, away from lots of different people coming and going, a duplex or house might be better choices than the bustle of an apartment or condo complex. If social opportunities are important, an apartment or house in an area with an active community life or clubhouse might be a good option. In some cases, people are able to purchase a home, which means a search could begin anytime, and may take a little longer to finalize. However, home ownership means longer term security for the person, as well as more privacy and easier adaptation for special physical or other personal needs, and can be worth waiting for.

What about the impact of support needs and desires? First, if 24 hour or overnight support is necessary, a bedroom should be available for the personal attendant. Or, if the person would enjoy living with one or more housemates, a larger place with a flexible floor plan may be necessary. Privacy is an issue when more than one person lives in any home, and people tend to be happier for longer when they are comfortable in their surroundings. How can the circle of support and the vendor facilitate that comfort? Has the person always wanted a pet? If so, the housing search may focus on places that allow pets.

What about furnishings? Looking at magazines, catalogues and “window shopping” is a great way to get ideas and learn more about personal preferences. Visiting the homes of family members, friends, others in the circle of support, and individuals living in their own homes can help the person get a more vivid picture of “home” and feel the difference that colors, styles, and personal items in one’s surroundings can make. Talking to others who have gone through similar experiences also helps people visualize what individualized lifestyles look like, and how their own lives might look.

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Once people begin to imagine their own lifestyle choices and the reality gets closer, they may be anxious to acquire some of the things they will need.

Of course, budget and practicality do take their places amid all of the excitement. It should be noted here that furnishings, household items, groceries and other personal housing expenses are not allowable expenses for the SLS budget under the SLS Regulations; in other words, these are not regional center expenses. Exceptions can be made and approved by the Executive Director of each regional center under certain circumstances (see the SLS Regulations), and are determined on a case-by-case basis.

This is a time for everyone to help with creative ideas. For housing, remember that, for individuals who require overnight support, many costs should be shared, lowering the overall cost to the individual. When these costs are associated with paid support, they are legitimate expenses under the SLS Regulations. Two examples are paid housemates who receive room and board in lieu of all or part of their wages, and portions of rent & utilities attributed to a “staff bedroom/guest room” necessary when a individual with no housemate requires 24 hour support; labor law requires providing a place for staff to sleep with “an expectation of privacy”.

Accessing HUD (Section 8) housing assistance funding can further reduce costs by a considerable amount. Even home ownership is becoming more common, with innovative down payment, grant and special loan programs designed specifically for persons with developmental disabilities. HUD voucher (Section 8) funds may now be used toward mortgage payments in many communities. Shopping for bargain furnishings and household items can be fun and affordable at garage sales, thrift stores, discount stores and warehouse stores. Some household goods and decorative items can be even more special when they come from a friend or relative.

There are some unique resources available in some local areas. For example, several non-profit agencies have set aside revolving funds, allowing individuals to take no-cost loans of up to several thousand dollars for moving costs, household goods and furnishings, deposits, down payment assistance or any other cost associated with making the exciting step into their own homes. Some businesses will give or donate used computer equipment and other items for individuals with

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minimal resources. Advocating in your own community for similar resources, private funding, and creative community participation can make it possible for more people to live in homes of their choice, enriching and benefiting each of our communities.

### **Deposits: rental, utilities, phone**

Budget planning should include initial costs for housing, utilities, cable, and phone company deposits, as well as first and possible last months' rent payments, which can sometimes be substantial. When looking at rental properties, don't forget to ask about security deposits, cleaning fees and possible application and credit check fees. Make sure that you and the individual understand which costs are refundable, and the conditions of refund. There is a basic tenants' rights booklet that is available from a number of sources, including state agencies, the Department of Real Estate, and many housing coalitions and advocacy groups. There may also be a tenants' rights organization in your city.

It is also a good idea to call utility, cable, and telephone services to find out if they have deposits that will apply. Sometimes, explaining the situation to the person on the other end of the phone will result in special exemptions from or reductions of deposits or other charges.

### **Generic services**

Generic services are services or special programs that are available to a wide range of individuals in the community, and are not tied to labels of disability. Generic resources and services may be in the form of discounts, hours of support and cash grants or rebates. Following is a sampling of the types of generic services for which many individuals will be eligible:

- Gas and electric company low-income discounts (California CARE, etc.)
- Phone company - different types of special adaptive equipment and training available at no cost to the individual; some discount(s) if TTY is used.
- Some cable companies offer discounts to individuals who are low-income seniors or persons with disabilities.
- Water, trash and/or other city services may have discount or tax exempt services for individuals meeting certain income, age or disability guidelines.

- Programs such as the SHARE program for grocery/food bargains in return for minimal volunteer time.
- Free e-mail account

### **In-Home Supportive Services (IHSS)**

As discussed previously, the IHSS program offers funding for hours of support as determined and authorized by their own assessment. The program is administered through each county, and is generally considered a poor fit with supported living services because of inflexibility, lack of individual choice, a problematic and inadequate payment structure for service workers, and a relatively old service model grounded in basic care-giving. However, because it is considered a generic resource, IHSS-eligible individuals receiving supported living services are required to utilize IHSS hours first.

### **Local Housing Authority - Home Choice Voucher**

This is a rent subsidy program, and in some locales, mortgage payment assistance, to eligible individuals who have completed what can be a lengthy process. Many areas have long waiting lists, and even a waiting list to get on the waiting list. However, the subsidy can be substantial and is worth the work and wait. The “window” for applications varies by location, and it is important to keep in touch with their office until you have made it into the application process. Once an individual comes up on their list, income and living situation information is submitted and verified. The Housing Authority then completes an inspection of the home or apartment. When all required repairs, if any, have been made to the property, the subsidy is finalized. This can reduce the individual’s housing cost by hundreds of dollars.

### **(More than) A few words about finding and hiring support...**

Now that you have thought about financial requirements, housing, furnishings, household goods and generic resources, it’s time to start thinking more seriously about who will be hired to provide support. Although the actual hiring may be done later, many times individuals and vendors are able to find potential support staff in the early stages of planning. The number of support staff will depend upon the hours needed by the individual, and the configuration of support that works best for

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the individual. Some people receiving SLS require only one or two support persons, but typically, when a individual has 24-hour support, 7 days per week, he or she may require several people to provide different support at different times.

Most individuals and SLS providers will say that some of the best support persons they have hired were found through “word of mouth”, or have been referred by a friend who is excited about working with the individual. Ideally, individuals and individual vendors would be able to hire support staff referred to them by a reliable source. Although this is actually the case many times, the reality is that it isn’t always possible.

As mentioned previously, it is a good idea once you’ve decided on SLS to speak to everyone you and/or the individual can think of about your plans. Many times, this will lead you to potential support persons. The most important thing to remember when looking for staff is that the individual is the one that will interview and decide whom he or she wants to hire. Most individuals will need a fair amount of support in the interviewing and hiring processes, as well as the ongoing monitoring and evaluation of staff performance. This is a learning process for all involved.

Some individuals will prefer not to be overtly involved, but to make their wishes and satisfaction known in other ways. This is one of the challenges for the vendor and circle of support; part of their job is to encourage and support the individual to gradually take on more responsibility in this area. Sometimes, individuals have been trained to accept any “care” or support without complaint, or to hide or devalue their own opinions. One of the wonderful things about supported living is the opportunity for people to express their true likes, dislikes and satisfaction with support, including their treatment by various staff, without fear of reprisal. Like all freedoms, it can be a difficult adjustment. And, sometimes the role of the vendor or circle of support can be to act as a buffer for the individual. Issues that may be hard for the individual to address directly with a personal attendant can, at the individual’s request, be addressed either independent of the individual actually being there or with the individual, but with the vendor taking the “hard line” (also known as “good cop/bad cop”).

While we're here, let's talk for a moment about who is the employer. Unless the individual is his or her own vendor, the person or entity who is the vendor is "employer of record" with local, state and federal government agencies, as well as with insurers and other official entities. Some vendors incorporate as non-profit or for-profit agencies, in which case the agency is the employer. However, conceptually and philosophically, it is preferable to think of the individual as the "real" employer. Everyone involved is, essentially, working for the individual. The individual is the person whose opinion about the services and supports counts the most. Think of it as pleasing your boss. Especially for parents, this can be a big leap to take, but it is an important concept. It can be challenging for people to see the individual in this light, but individual vendors in most cases are providing their services specifically for the facilitation of supported living services for a particular individual (or two). The vendor/employer status is basically for the convenience and benefit of the individual. So, while the vendor gets to have all the headaches of human resources and following the labor and tax laws, we still should remember where the buck stops in terms of satisfaction with services - the individual.

Rapport with the individual, desire and ability to provide the support, and availability for times that the individual needs support are critical. Previous experience may or may not be good, depending on the quality and type of experience. Having worked in a day program or group home does not mean that the person is capable of embracing the values and philosophies of supported living, nor of seeing the individual as the "real boss". The capacity and motivation to switch gears from a "taking care of people" mode to one of providing support, following the lead of the individual, and respecting him or her as competent is not something that should be assumed. If the circle of support and the vendor project a presumption of competence, it will more likely be reflected in the evaluation process and, ultimately, in all of the people who provide support.

Where to look for staff? Be creative! College employment offices, job fairs and job boards, as well as newspapers and flyers, are excellent sources for recruitment. Small, independent or neighborhood papers are sometimes better than the mainstream newspaper. However, talking to people, including other adult service agencies and schools, are a good way to get the word out that you are looking for people to hire. Talk to the grocery store checker, the dry cleaner, the doctor's

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office staff, the aerobics teacher, and others that you see in your daily life. Put a flyer at the health food store or food co-op. Does the individual have any special interests? For a person who likes golf, for example, see if you can put up flyers or leave information at public courses in the pro shop. Check out private groups or organizations that have open, socially responsible, community-minded attitudes, as they may have members who might be interested in spending an occasional evening or even a weekend getting to know a individual and doing fun things in the community. Church bulletins and various newsletters can also be good sources of potential support. Internet listserves that are accessed by people interested in the field of developmental disabilities, recruiting sites, and other Internet resources are also good ways to advertise for support persons. Several examples of ads are in the Forms and Samples section of the manual. Now, with scanners and digital cameras, it's easy to include a favorite picture of the individual. Photos of people, especially doing fun activities, really draw interest and can make the difference in whether someone will respond. And remember... any place there are people, there are potential support staff!

### Updating the circle of support

It is important to remember that the circle of support team shares all of the tasks involved with creating a successful SLS arrangement. When there is a need for assistance with housing, furnishings, deposits, recruiting, and/or other specialized needs, it is helpful if each circle member takes responsibility for assisting the individual to accomplish a task. When family members want to take responsibility for follow-up or monitoring of many of the more personal tasks, and the individual agrees, it can be very successful.

The circle of support should have regularly scheduled meetings to update the individual, vendor and each other, discuss next steps, and re-distribute and share in the responsibilities necessary to meet the needs of the individual. To ensure success, it is crucial that the individual agrees to follow through with his or her commitments as well.

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## **Section VI: After the Plan is Approved**



**Developing  
Supported Living Services:  
A Guide to Essentials for Service Agencies  
and Regional Centers**

Connections for Information and Resources  
on Community Living (CIRCL)

September, 2000

Available at  
<http://www.dds.cahwnet.gov/LivingArrang/sls.cfm>

### **Regional Center Contract and Purchase of Service Authorization (POS)**

When you receive the SLS Purchase of Service (POS) and contract from the regional center, it is important to look at it closely to determine if there are changes that might need to be addressed. The contract should be exactly as you agreed with the regional center; neither of you may unilaterally make changes in the contract. Contract changes always require the written consent of both parties. The POS is critical in your billing and payment process. If there is a mistake on the POS, it could affect your cash flow. These are the working documents for services, and it is best to clarify all of the details before going any further.

### **Start-up Funds**

This varies greatly, depending on individual circumstances. Remember that your regional center payment for services will be almost two months in arrears. Unless the person already has IHSS in place, funds for these services may also be delayed. If the person is moving out of a licensed facility, it will take some time for Social Security to process the change of status. If the person is moving from a developmental center, the wait can be months.

It is important to have these frank discussions [about such cash flow issues] with the regional center. Some regional centers will provide some funding that will need to be paid back when IHSS, SSA and their own typical billing cycles catch up. When budgets are tight, this is less likely. Some individual vendors make arrangements with the regional center to be paid for “assessment”, including the time assisting the individual to determine needs, find and secure housing, support staff and make other necessary arrangements. SLS agencies do get paid for assessment, and sometimes transition, costs. You should be entitled to payment for those services, as well. These billings can go in to the regional center well before the person moves into their own home and officially begins receiving SLS. Your payment for services, then, would come in a timely manner that would allow you to use it for some start-up costs. Other options include lines of credit, loans from friends or family, grant possibilities from community service or other agencies, and any other creative resource you can find.

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### Individual's Funds

If the regional center is the payee for the individual, have a straightforward discussion with the person handling the individual's funds. You will need to know when to expect funds for the individual's portion of groceries, rent, utilities, other personal expenses; how long it takes if you need to request funds; and how to coordinate with the regional center how bills will get paid. If you or the individual are the payee, your job is infinitely easier - usually. Discuss these issues with the individual, including how to make sure that banking and budgeting procedures are coordinated.

### Other Technicalities

Remember, individualized supported living arrangements, even for one person, are essentially small businesses. The following information will help sort out some of the business aspects of the individual SLS arrangement.

#### Human resources ("HR")

Human resources issues can be complex and laws are constantly changing. It is vitally important that you maintain complete and accurate written records to document all employment-related matters. It is recommended that you have a resource for handling personnel questions and resolving problems that may come up. Workers' Comp and unemployment claims can be confusing and need immediate attention when they come up - and they will eventually come up, no matter how careful you are. Classes are offered periodically through EDD and other entities addressing HR issues, but in the long run it will pay to have a resource available to call if you need to. Absent any other expertise, the most important thing you can do to protect yourself is document everything!

Make sure you have submitted your federal and state employer forms to the IRS and EDD so you are ready to move forward as an employer. This was discussed in Section IV, which referred you to the websites for the IRS and EDD. The IRS form to get an Employer Identification Number is SS-4, and you can submit the form by mail, e-mail or do it by phone, which will get you an immediate number if you forgot to do this earlier. You can download or print the form, and many others, from the Forms and Publications section of [www.irs.gov](http://www.irs.gov). The EDD form to fill out

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if you are providing services in a person's home is DE 1 HW (Household Workers) to get your employer number with the state; there is also the standard DE 1 for "commercial employers", and a DE 1 NP if you are a non-profit. Also, print out or get from EDD copies of their form DE 34, Report of New Employee(s), which MUST be filled out and faxed or mailed for each new employee within 20 days of the start of work. Again, this website is [www.edd.ca.gov](http://www.edd.ca.gov), and you will find lots of helpful information there about your responsibilities as an employer. You may also access the mandatory employer posters that must be posted at every "worksite" (yes, even a home - put them on the inside of the door to the staff bedroom or other place that is out of the site of visitors, but accessed daily by employees). Filing these forms will trigger other forms you will need for payroll tax reporting, quarterly and annual filings. You also need to access the OSHA website for information on what you need to put in place regarding workplace and employee safety plans. The site for OSHA is [www.osha.gov](http://www.osha.gov).

In terms of health and/or dental insurance benefits for full time employees, there are options, but the cost and availability vary depending on where you are located. For example, Kaiser tends to be cheaper than Blue Cross, Blue Shield or Pacific Care, but Kaiser is unavailable in many areas. Changes in group insurance and the surge of people who are self-employed have created some options like the two-person group, which may be less expensive and have a little better coverage than paying for individual plans. Check this out with a good insurance agent, visit websites or call the insurers directly. Don't underestimate the importance of providing this benefit when you are trying to attract and retain quality people.

### **Accounting**

Finalize your accounting decisions, software choices (if applicable), payroll dates and bank account. As the vendor, you will be responsible for collecting and approving time sheets, mileage reimbursements and other occasional reimbursement to employees; processing and distributing payroll; payroll and other tax reporting and payments; overseeing the use and tracking of all household funds; coordinating with the individual so you can assist with tracking of his or her personal funds (this helps at SSI re-determination time);

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and, everything else that no one else wants to do or that otherwise would be overlooked.

Also, set up your ledgers and logs for tracking household funds and the individual's personal funds (individual funds at the individual's discretion). Binders are a good way to handle these, with pouches for receipts, money and change from purchases. Examples of household ledgers and other binder contents are in the back of this manual.

While it is your responsibility to ensure proper fiscal documentation, how you handle or delegate it is up to you. A good house manager or community support facilitator hired to oversee things and work in concert with you can be a great gift and an efficient use of resources.

### Employer insurances

***Important disclaimer: Always check with your own insurance agent or attorney. This information is simply that - information - and is not intended to be legal or professional insurance advice.***

The basics are: Workers' Compensation and general liability

Better to protect everyone: Umbrella liability policy and employer liability

The typical basic package for an individual vendor starts with renter's or homeowner's insurance, with the maximum (general) liability coverage (usually \$500,000), an "inservant" Workers' Comp rider for one or two individuals, and an umbrella policy for at least \$1,000,000. Even though the SLS Regulations omit renter's or homeowner's insurance, the regional center may make an exception and usually does. Why? This has been the least expensive way to provide necessary coverages. *Because the base policy is in the individual's name, make sure that the company writing the coverage allows you as an "additional insured". If not, choose an insurer who will.*

Talk with your agent about employer liability and additional coverages such as non-owned auto (relates to employees driving their own cars while working for you). Some regional centers still attempt to require professional liability

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coverage for individual vendors. Investigate this with your agent. Most vendors have found that, if all other coverages are adequate and in place, the only practical thing that professional liability would cover you for that you don't already have is if your son or daughter, or the individual you serve, sues you. This roughly equates to an errors and omissions policy in the event that you use poor professional judgment. If the regional center wants to pay for it, and you want to purchase it, then you should do so.

### **Making it to “home”**

This is the time to finalize a lease, rental agreement or purchase of housing; acquisition of household items and furniture; plan for stocking up the first groceries, cleaning supplies and everyday necessities; arrange for packers, boxes, movers and a truck; coordinate final dates for the move, utilities, phone and cable services; pay deposits (if not already done); and, handle all other little and big preparations for the actual move, like who will buy the pizza.

This can be a hectic and confusing time for everyone. Take special care to make sure that the individual is involved, supported in key decisions, and comforted through the times when it all seems a little overwhelming. This is also a perfect time for the circle of support to work together, both physically and emotionally. It is an opportunity to create a long-lasting bond as each person sees his or her contribution help to create a home and new life for the individual.

### **Schedules**

People's schedules vary according to their preferences and needs, but it should be clear by now how to schedule for day-to-day household chores and errands, job responsibilities, entertainment and social activities, personal time, and specific individual needs. This is where the individual's planning with the circle of support will start paying off, as many needs should be obvious because discussions and updates from the circle of support will have prepared for this kind of detail.

Actually writing down suggested daily, weekly, monthly and annual schedules will be helpful. Don't forget medical appointments, check-ups, periodic household repairs

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and maintenance (such as carpet cleaning), and even veterinarian appointments if pets are involved. Planning for support will be easier if these dates can be set early in the process. Although daily and weekly schedules vary greatly, and we generally avoid set “schedules” of activities in favor of a more natural approach to daily life, we do have daily routines and responsibilities. Also, you and the individual need to be able to schedule the appropriate people for specific things in which the individual wants particular people to be involved. Support staff also need to have a predictable schedule, at least in terms of their own time commitment for availability, so they can plan their own personal lives as well. One example of a tentative schedule is included in the Forms and Samples section of this manual. When we think about it, we all have daily schedules and routines in our lives. When people need assistance it’s even more important for everyone to be able to plan ahead.

### **Hiring and training support persons**

Now that you have a better idea about scheduling, the hiring process can begin. We have already addressed quite a bit about recruiting. However, this is an important subject, so we will share just a few reminders.

Some very competent support persons have been hired because they were attracted to an interesting job advertisement. When writing the ad, the circle should decide whether or not experience is necessary for the position, as there are pro and con thoughts regarding this requirement. Some applicants who have had no prior experience, but are enthusiastic, willing to learn and have other valuable traits or qualities, have proven to be excellent support staff and long-term friends. If the individual has a special interest such as boats, horses, sports, etc., post a flyer in an area where others with similar interests might be likely to see it. As with any relationship, common interests can be helpful.

In terms of logistics, your ad should ask the applicant to send, fax or e-mail a resume as a first step. Once resumes are received, initial screening can begin and interviews scheduled. Generally, a valid driver’s license, current auto insurance, and reliable transportation are requirements for the position; assisting the individual to shop, do errands and be in the community are part of the job, and public transportation is not always practical. To save everyone time, you may want to

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make this requirement part of the telephone screening you do prior to a face-to-face interview. The interview process should be written out so that everyone knows what to expect.

The first interview should begin with a brief history and overview of the philosophy of supported living. Although applicants may have all of the required qualities and some experience in this field, it should not be assumed that they have a full understanding of supported living - even if they say they do. If someone tells you they know about supported living, ask them to tell you what it means to them. You will be surprised at how much variation there can be in the definition of a simple phrase!

Going over the background, current status of services, and the individual's and your vision and plan for implementation can be valuable for everyone. It is wise to interview the applicants in a public place the first time you meet with them; this avoids letting someone unknown to you have the individual's address. Have him or her fill out an application that meets the requirements of the law. The individual will either do the interviewing with assistance, or be involved as much as he or she chooses. In some cases, individuals choose to have a member or two of their circle conduct the first interview, with or without the individual present (individual's choice). If, after explaining supported living, the applicant is interested in pursuing the position, a typical interview can take place. Questions should be asked that follow current laws. The vendor and circle of support should also assist the individual in making a list of questions that he or she want to ask. For example, one person was very interested in what foods the applicant likes to cook and eat. This is the type of question some of us may not think of, but is very important to someone who will be depending upon that staff for meals. Another excellent question to ask is about what types of hobbies and activities the applicant enjoys. If the applicant tends to be sedentary, it may not be a good match for an active person who loves to go out dancing.

Because this work sometimes has unusual hours, the person's availability, flexibility and schedule should be discussed. There should also be an opportunity for the applicant to ask questions and discuss any concerns he or she may have.

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Not all applicants will make it to the second interview; some will be screened out after the first interview. In some cases, individuals may decide immediately that there is something about the person that they do not like. It is critical to honor the individual's "gut reaction" in these cases, even if you feel that the person seems like a good prospect. Of course, if this happens with every applicant, there may be a need for more education about the interview & hiring processes.

Before scheduling the second interview for potential support staff, references should be checked following current laws. The second interview can be done in the place where the individual is currently living, working or spending his or her days so that the applicant can become familiar with daily routines. It is helpful if both the individual and the applicant have enough time together at this point so that they can ask each other questions and begin to get to know each other. One individual and his circle insist that the applicant go out to a public place, such as meeting at a restaurant or going bowling with the individual as part of the interview process. This helps to identify people who interview well, but are uncomfortable in public with a person who has disabilities. After a second this interview, the individual, vendor and circle can usually make a decision whether or not the applicant is someone they would like to hire. If there is still some indecision and a need for a third interview, it is wise to do that before jumping into a final decision. You are likely to find that after the individual, vendor and circle become more experienced in interviewing, their "gut" reactions will be a useful guide to making hiring decisions. Individuals are best at this, and we can all learn a great deal from watching and listening closely to their reactions to people. Above all, they are the ones who will be spending time with and depending most on the support person. The individual should always have veto power.

### Hiring requirements

Other than the qualities and skills the individual is seeking, here are some nitty-gritty recommendations for what to require of or get from each new employee:

- Standard application, with signature
- Completed W-4 (W-9 for consultants) and I-9
- Social Security or green card

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- Valid California driver's license, if driving is required as part of the job
- (or) Valid State of California I.D. card
- Copy of DMV driving record report (costs the employee \$5.00 at DMV)
- Copy of certificate of auto insurance (California coverage, in the employee's name). You may also want to require that they add you as an additional insured on their policy, and pay for any additional cost as a valid expense of doing business - it's worth it.
- Copy of current CPR and First Aid certifications
- Signed Confidentiality Agreement
- Drug testing is an option you should discuss with a human resources (HR) consultant or labor law attorney.
- Background checking: optional in supported living. If you are not an agency, you may have trouble getting fingerprints and background check information on your own. Consider contracting with an agency vendor or group that you can access through an HR consultant.

### Job Descriptions

Once you have job descriptions for all positions, each employee should be given one copy of the job description to keep, and one to give back to you with a signature. It's a good idea to put a statement in the job description, or even on your application, that stipulates that all employees are "at-will", according to California labor law. This helps clarify that you are not creating an employment contract, and that either party may terminate the relationship at any time.

One important point worth saying and repeating is that, in order to ensure that the employee is working under Wage Order 15, the appropriate and preferred wage order for support positions, be sure that you title the job as a "personal attendant". It is a good idea to read through Wage Order 15, which is in the back of this manual, to make sure that you know what it says, and can ensure that the job the employee is really fits into that position. This is important because Wage Order 15 exempts you from paying overtime and providing off-site meal breaks and 15-minute breaks, which would be cost-prohibitive, especially for individuals requiring 24-hour support. Misclassifying an employee could cost an employer thousands of dollars in back wages, fines and penalties should you ever have an action brought against you.

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In addition, state in your job descriptions that the position is under Wage Order 15.

Although the terminology of “staff” and “personal attendant” are much more impersonal than “person/friend providing support”, which is more aligned with SLS philosophy, using the term “personal attendant” will help preserve the exemptions

### Other pertinent documents

When there is live-in support, or a “housemate” or “roommate” (your choice of terms), it is a good idea to have a simple agreement - not a contract! - between the housemate and the individual. This can avoid misunderstandings and hurt feelings, as well as give the individual a foundation for those difficult conversations that happen when your housemate keeps leaving underwear in the living room. A grocery, utility and/or phone agreement might also be useful to clarify responsibilities and associated costs, if any.

Because of the constant nature of supported living services, employees are typically not able to go away from their “worksite” for meal breaks, as they would in many other jobs. In fact, the philosophies of SLS support individuals eating meals with their support staff, in a typical friend or family arrangement. California Wage Order 15 allows a meal break exemption for “personal attendants”, in recognition of this special situation. Having employees sign a meal break waiver, mirroring the language and terms of Wage Order 15, is a good idea. Lack of a waiver does not negate the exemption, but it’s a good idea to have a signature on a waiver, for the file, anyway.

At some point after things have settled down from the initial excitement of moving, you will want to produce a simple employee handbook. Basically, this will outline your standards, policies and procedures, giving employees a more clear understanding of things such as employee benefits, terms of vacation or sick time, unacceptable behavior, Workers’ Compensation procedures, and other policies, such as the terms of personal phone use during working time, long distance calls, etc. A human resources consultant can assist you, or you can check the web and the library for other resources.

### Training

Training should start as soon as possible. The new employee should observe whoever is currently assisting the individual, or you, and then begin working with supervision until everyone is comfortable with the new relationship. Sometimes family members are very involved at this point, as they are the ones who know the individual needs the best. Other times, friends or others may help with the training. It is crucial that the new employee is not left alone with the individual until every detail possible has been covered, and the individual, vendor and employee are comfortable with the level of support and communication. Putting in time and effort now will be worth it later.

As soon as the employees are hired, they should become part of the circle of support, attend meetings and give input. They will be instrumental in assisting the individual with moving and all of the details involved with setting up his or her new home, as well as providing support whenever needed. These employees will be instrumental in the success of SLS, and will eventually have ideas that can be very helpful based on the relationships they build with the individual. In some cases, support staff have been able to assist people to do things no one else thought possible and, in most cases, advocacy efforts are strengthened as they add their support to the individual and collective efforts of the circle of support. [Note: Although circle members are not typically paid, employees who attend circle meetings generally expect to be paid. To err on the side of labor law, you may want to set a policy to pay for these hours. Consult a labor law specialist if you wish to investigate this issue further.]

Make sure that the required SLS training, Mandated Reporter and Special Incident Reporting trainings occur within the first two weeks of employment, along with the other required trainings during that time in the SLS Regulations! This was discussed in Section IV of this manual.

### IHSS

Arrange a date for the IHSS assessment, or re-assessment if the person already has services (moving into supported living should always trigger a re-assessment). If the person has not or does not currently have IHSS, be sure that you tell the

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intake person you are making application “as of today”. This will preserve the individual’s services retroactive to the date of move-in, even if it is several weeks later when the assessment occurs. As the vendor, either you or someone who knows the individual well and whom you trust should always be at any assessment or re-assessment. Important information may be misconstrued if a person inexperienced in dealing with IHSS is the only person there other than the individual. This can result in fewer hours [of IHSS service], and your goal is to maximize supports from IHSS.

Regarding IHSS in relation to employees, remember that IHSS is a separate employer. IHSS workers still need to follow the individual’s rules, as they are working for the individual. Your connection to their oversight is that the individual has retained you, as the supported living vendor, to facilitate and assist in the management and coordination of all supports and services, regardless of employer. You might consider having a brief and concise “management agreement” with the individual that states this.

### **Individual standards and health & safety issues**

We all have personal preferences and standards for the way we live. We have routines that often determine what kind of a day we have. We have particular places we like to spend our leisure time, and certain stores we like better than others. We have times we want company and times we enjoy quiet time. We all have pet peeves; we all want to look and smell good each day. Some of us hate having dishes in the sink. Eating and sleeping habits, personal care, dressing and exercise, travel and recreation are all examples of areas we each have individualized in our own lives.

The circle of support can assist the individual to create his or her own list of Personal Standards. This can be valuable as new support staff are hired and can ensure that the individual’s standard of living isn’t compromised, especially when there are new people in his or her life. Of course, every list is completely individualized, but each should include personal, domestic and recreational preferences, as well as schedules and relationship standards. Some people like to

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include a document that outlines the individual’s House Rules as well, which can include things like “no smoking” and other issues of importance to the individual.

Health and safety concerns are often seen as barriers to individuals who want to live on their own. Most people involved with SLS have seen that people are actually safer in SLS, if SLS support staff are available to assist them with safety techniques and to lead healthier lives. These concerns need to be addressed in the circle meetings. Plans for emergencies, disaster preparedness, and everyday safety need to be made and shared with everyone involved.

### **Address specific concerns**

Life changes can be difficult for everyone. Before SLS can be successful, it is helpful to make sure that everyone involved has had a chance to share their fears and concerns. Individuals have a great new life ahead of them, but it can be frightening to actually make a change. Families and friends may be hesitant when they begin to think of all the changes that will take place. Members of the circle may begin to question the challenges involved with providing services. Support staff may feel overwhelmed with the challenges involved with providing SLS. Concerns need to be addressed and each person should have an opportunity to have his or her questions answered. If people are honest about their doubts or fears, the team can work together to support each other. This mutual support provides a stronger foundation for the person’s success in this new home and new life.



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**WELCOME** to the California Supported Living Network Website. The Network is a statewide organization of people and agencies committed to the belief that every Californian with a developmental disability can live in his or her own home if provided the supports and services needed to be safe and successful.

We hope you will find this website informative and helpful. We welcome your comments and ideas on how the website can further meet your needs and provide you with information about Supported Living Services and the Network.

**MISSION STATEMENT**

Our mission is to advocate for the systemic development of quality supported living services for Californians with developmental disabilities.

<http://www.supportedliving.com>