

# Peer/In-Reach Form A

## NORTH CAROLINA TRANSITIONS TO COMMUNITY LIVING INFORMED DECISION-MAKING TOOL

This form is designed as a tool for the In-Reach Peer-Specialist to guide conversations and document an informed decision-making process with individuals who are TCL eligible and have declined transitioning into the community, are undecided, and who want to remain in an Adult Care Home or those who are reluctant to discharge from a SPH.

Recognizing decision-making as an ongoing process, the approach outlined in this form is designed to take place over time with the individual and their guardian (when applicable). The ultimate goal is to raise the value of self-empowerment and each individual's right to choose where they want to live while pursuing pathways to recovery and community integration.

Whether or not their choice remains the same, it is critical that individuals have been fully informed of the available alternatives to living in a licensed facility and that any barriers have been identified and addressed.

Before using this form, it's important for In-Reach Specialists/Staff to acknowledge and explore the individual's current preferences and choices. This may be done in consultation with the individual's guardian and/or natural supports. For example, if an individual has chosen to remain in an ACH or SPH you may consider saying:

*You are the expert in yourself. May I ask you more about where you are currently staying (or where you would like to live)?*

*I remember a time plans were being made for me to move from (name setting) to (name setting).... As an In-Reach Specialist, you can share your experience as a peer considering a transition to an integrated setting.*

*My role is to just make sure that when a person says they want to live (name setting), that choice is an informed choice.*

*May I ask you what you like about where you are staying now?*

If the individual says they don't want to be asked, you may reply:

*There is no pressure for you to change your mind or make a decision today. I value your right to choose. That is one of the main reasons for visiting with you. There's no wrong or right answer here but, what have you been told about informed choice?*

*So your choice is to (restate their decision)? I've had the opportunity to meet a lot of individuals who have made a similar decision. (Offer an example of a person you worked with who benefited from having more information.)*

If the individual's guardian does not want the person to participate, helpful information is provided below to guide conversations with guardians:

*I understand your role as this individual's guardian and that you have the responsibility to make decisions with and for this individual. NC General Statute 35A-1201(5) states:*

*"Guardianship should seek to preserve for the incompetent person the opportunity to exercise those rights that are within his comprehension and*

*judgment, allowing for the possibility of error to the same degree as is allowed to persons who are not incompetent.”*

*Also, given your role as the guardian, you play a critical role in implementing Title II of the Americans with Disabilities Act (ADA) and the U.S. Supreme Court’s Olmstead Decision, an integration mandate which:*

- 1.) Prohibits discrimination by public entities in services, programs, and activities on the basis of disability;*
- 2.) Requires that services, programs, and activities be administered in the most integrated setting appropriate; and,*
- 3.) Enables people with disabilities to interact with people without disabilities to the fullest extent possible.*

You may follow up these replies by asking the guardian:

*What integrated living options have you explored with (name the individual)?*

*What would it take for (name of the individual) to live in the community?*

If the individual and/or guardian absolutely refuses to participate in exploring their options, skip to end of this form and provide documentation of their decision to refuse (under Section IV: Summary, Reflections and Signatures).

If the guardian who refuses participation is a public guardian, please report the situation to the Office of the Senior Advisor for the ADA, Tamara Smith, Project Manager, Community Transitions & Integration at [tamara.smith@dhhs.nc.gov](mailto:tamara.smith@dhhs.nc.gov) with as much detail as possible about how the public guardian was a barrier to choice. The Office of the Senior Advisor for the ADA will report the concern to the Division of Aging and Adult Services, which will contact the public guardian’s office for further discussion, education, and follow-up.

If you’ve engaged them in this way and they have given you permission to explore options more fully, ask if you can follow up with them to share information about their right to choose and about resources in the community.

Be sure to offer the individual the opportunity to meet with you in a community setting outside of the ACH or SPH where they may be currently living.

## **How to Complete Form A and Form B**

Form A is intended to be used as a guide on how to complete Form B to ensure the decision-making process is occurring over time and steps are being taken to advance transition to community living.

Meetings should be held face-to-face whenever possible, with alternative ways of meeting (that is, telephone or other technologies) used as needed, with reasons documented on this form.

Form B is a place for the individual to record their decision-making process, including unique needs and preferences toward making an informed choice. A copy is to be completed with the individual and either left with the person or mailed shortly after the visit. The In-Reach Specialist should make a digital copy of Form B for their records and implement next steps identified during the visit. Encourage the TCL member to review and contact the In-Reach Specialist with any questions. This copy should be brought with you at each follow up visit.

Based on the choices and interests of the TCL member, use the “NOTES” section as a space for brainstorming with the individual to mutually develop individualized strategies to be implemented and/or to advance transition to the community as well as any additional concerns to address. The “Summary, Reflections, and Signatures” section is to be completed after each visit to document the outcome of each discussion.

Form B (the individual’s form) consists of five sections that spell out the process of informed decision-making. Each section is also included in Form A (the guide) so that you can follow exactly what is included on the individual’s form. The sections are as follows:

- Section I     Exercising the Right to Choose
- Section II    Exploring Options
- Section III    Reflecting on Preferred Options
- Section IV    Planning Next Steps on Each Preferred Option
- Section V     Summary, Reflections and Signatures

Notice the first and second sections of this process may take more time as you obtain information related to barriers, brainstorm with the individual, educate the individual about community-based options, and/or consult with the barriers committee to develop an individualized plan for moving into a more integrated setting. Share with the individual that it’s their right to choose and you want to make sure by law that they have made an informed decision.

At the end of the form, both the In-reach Specialist and the individual will reflect on the following list:

- ✓ Information and resources about community services and supports, including supported housing settings not provided by the operator of the adult care home where they live (if applicable)
- ✓ Opportunities to visit such settings in the community
- ✓ Arrangements to meet with other individuals with disabilities who are living, working and receiving services in an integrated setting, with their families, and with community providers
- ✓ In-Reach as a service provided to individuals living in an ACH or SPH regularly and not less than on a quarterly basis

## **I. Exercising the Right to Choose**

It is essential to establish a connection with the individual through conversations that reflect on (but are not limited to) the value of informed decision-making. Use a Supported Decision-Making Aid (SDMA) such as those referenced below.

Supported Decision-Making Aids (SDMA):

*(These resources should be available through previous trainings)*

- Peer In-Reach Specialist shares their story, including a time when they had to make an informed decision about where to live;
- Provisions of the Olmstead Decision;
- How two women changed thousands of lives - Who were Lois Curtis and Elaine Wilson?
- Letter that was sent to the agency;
- Reflections on what is recovery? SAMHSA’s Eight Dimensions of Wellness (video or materials);

- Personal Bill of Rights in the Adult Care Home, and their right to choose where they live, work, and connect with community-based social supports and networks based on the unique interests and preferences of the individual.

After each visit, be sure to complete and record the TCL member's responses to the following questions, which can be used to outline next steps:

**From Form B, Section I: Exercising Your Right to Choose**

- a) What does it mean to you that you have a right to choose where you live?

- b) Do you want to choose where you live? Why or why not?

- c) How have you made important choices in the past?  
(examples: ask family and friends, read about choices, try something on a trial basis)

- d) How far along are you with making a choice about where you live?

Not thought about it     Thinking about it     Close to choosing

Made a choice      What is the choice? \_\_\_\_\_

Date: \_\_\_\_\_

- e) If you have made a decision, how did you go about making that decision?

- f) How can you gain more confidence about this choice?

**Support for Your Decision:**

Who else is involved? \_\_\_\_\_

What option do they prefer? \_\_\_\_\_

Is the person pressuring you? \_\_\_\_\_

How can they support you? \_\_\_\_\_

In what ways can the In-Reach Specialist help you? \_\_\_\_\_

What role do you prefer in making the choice?

Share the decision with ... \_\_\_\_\_

Decide myself after hearing views of... \_\_\_\_\_

Someone else decides... \_\_\_\_\_

## II. Exploring Your Options

During your conversation with the individual, you will explore living options with them. On the chart below, with your support, the individual can list these options, the reasons for choosing or avoiding these options, and how much these things matter to them.

From Form B, Section II: Exploring Your Options				
	Reasons to Choose this Option (Benefits/Advantages/Pros)	How much it matters to you: 0 ♦ =not at all 5 ♦ =a great deal	Reasons to Avoid this Option (Risks/Disadvantages/Cons)	How much it matters to you: 0 ♦ =not at all 5 ♦ =a great deal
LIVING OPTION #1		Choose an item.		Choose an item.
		Choose an item.		Choose an item.
		Choose an item.		Choose an item.
LIVING OPTION #2		Choose an item.		Choose an item.
		Choose an item.		Choose an item.
		Choose an item.		Choose an item.
LIVING OPTION #3		Choose an item.		Choose an item.
		Choose an item.		Choose an item.
		Choose an item.		Choose an item.

Which option(s) do you prefer?  Option 1     Option 2     Option 3

### III. Reflecting on Preferred Option(s):

Confirm that the person understands the process to ensure the decision they are making is an informed one. Reinforce their Knowledge, Values, Support, and Certainty through the following:

#### From Form B, Section III: Reflecting on Your Preferred Option(s):

- Knowledge: Do you know the benefits and risks of each option?  Yes  No
- Values: Are you clear about which benefits and risks matter most to you?  Yes  No
- Support: Do you have enough support and advice to make a choice?  Yes  No
- Certainty: Do you feel sure about the best choice for you?  Yes  No

### IV. Planning Next Steps on Each Preferred Option (as listed in the chart)

#### From Form B, Section IV: Planning Next Steps on Each Preferred Option

1. Knowledge – If you feel you do NOT have enough facts
  - Find out more about the options with the assistance of the In-Reach Specialist
  - List your questions
  - List where to find the answers (For example, the library, counselors, etc.)
2. Values – If you are NOT sure which benefits and risks matter most to you
  - Review the diamonds in the chart to see what matters most to you
  - Find people who know what it is like to experience the benefits and risks
  - Talk to others who have made the decision
  - Visit and learn from others that have transitioned to the community
  - Read stories of what mattered most to others
  - Discuss with others what matters most to you
3. Support – IF you feel you do NOT have enough support
  - Discuss your options with a trusted person (example: health professional, counselor, family, friends)
  - Find help to support your choice

If you feel pressure from others to make a specific choice.

  - Focus on the views of others who matter most
  - Share your guide with others
  - Ask others to fill in this guide (See where you agree. If you disagree on facts, get more information. If you disagree on what matters most, consider the other person's views. Take turns to listen to what the other person says & what matters most to them)
  - Find a person to help you and get others involved
4. Certainty – If you feel UNSURE about the best choice for you
  - Work through steps two (II) and four (IV), focusing on your dreams and needs.

#### NOTES:

Barriers making the decision difficult or unclear:

Strategies that may overcome these barriers:

## V. Summary, Reflections, and Signatures

Summarize what was discussed today, explore any additional concerns or objections, document next steps, and set the date of the next follow-up visit. A copy is to be completed with the individual and either left with the person or mailed to them shortly after the visit.

Notes:

- Based on the preferences of the individual, I provided information and resources about community services and supports, including supported housing not provided by the operator of the adult care home where they live (if applicable).  Yes  No  N/A
- I offered the opportunity to visit such settings in the community.  Yes  No  N/A
- I offered the opportunity to meet with other individuals with disabilities who are living, working, and receiving services in integrated setting with their families and with community providers.  Yes  No  N/A
- I explained that In-Reach will be provided to individuals living in an ACH or SPH regularly and not less than on a quarterly basis.  Yes  No  N/A

### Signatures (Names and Date):

Individual: \_\_\_\_\_

Guardian: \_\_\_\_\_

In-Reach Specialist: \_\_\_\_\_

Support/Team Member: \_\_\_\_\_

### From Form B, Section V: Summary, Reflections, and Signatures

#### Summary, Reflections, and Signatures

**Summary** of what was discussed today and next steps, including date of follow-up visit:

\_\_\_\_\_

#### Reflections on In-Reach Visit:

- I was provided information and resources about community services and supports, including supported housing settings not provided by the operator of the adult care home where I live (if applicable).  Yes  No  N/A
- I was offered the opportunity to visit such settings in the community.  Yes  No  N/A
- I was offered the opportunity to meet with other individuals with disabilities who are living, working and receiving services in integrated setting, with their families, and with community providers.  Yes  No  N/A
- I learned that in-reach is provided to individuals living in an adult care home or state psychiatric hospital regularly and not less than on a quarterly basis.  Yes  No  N/A

#### Signatures (Names and Date):

Individual: \_\_\_\_\_

Guardian: \_\_\_\_\_

In-Reach Specialist: \_\_\_\_\_

Support/Team Member: \_\_\_\_\_