

**Home and Community Based Setting (HCBS) Rules  
On-Site Assessment**

***Observation and Community Interviews***

On-Site Visit Date:	
Total Number of Community Interviews:	
Name and Title/Role	
Name and Title/Role	
Name and Title/Role	
Team Number:	
Team Member Name:	
Team Member Name:	

*The purpose of this component is to gather information by observing the location, environment and community engagement of the facility to identify characteristics that may or not be consistent with the HCBS Rules. The Team Member will be responsible for providing a description of the facility environment and the proximity to the community (i.e. transportation, businesses, churches, etc.). Additionally, the Team Member will be talking with community members, who have an association with the facility, to gather information about their level of interaction with members in the facility and the strategies the facility employs to maximize community engagement.*

<b>Instructions:</b> To accommodate the schedule of the community members for interviews, steps 2 and 3 may occur in a different order.		<b>Task Completed</b>
<i>Step 1</i>	Complete the preliminary review section prior to the onsite assessment and attach documentation. Bring all documents to the on-site assessment.	[ ]
<i>Step 2</i>	Complete observation portion of the assessment.	[ ]
<i>Step 3</i>	Make copies of the Community Member Interviews section ( <i>page 8</i> ). The number of copies will depend on the number of interviews scheduled.	[ ]
<i>Step 4</i>	Complete the community member interviews.	[ ]

## Preliminary Review

1. Research the zoning designation for the property via city or county websites.
2. Research the ownership and operations of the facility on the company website. For example, identify any information regarding shared administration, finance, staff and transportation resources.
3. Conduct Google map and real estate website search to provide pictures and maps of the facility and the surrounding area.
4. Research forms of public transportation available to members and visitors to the setting (i.e. bus, light rail, community operated transportation, etc).

Bring documentation of the research conducted to the on-site assessment and attach to the completed Observation and Community Interviews On-Site Assessment.

### Observations/Comments

## Observation

<i>Please indicate how much you agree or disagree with the following statement.</i>						<b>General Setting</b>
	<b>Strongly agree</b>	<b>Agree</b>	<b>Neutral</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>Reviewer Comments</b>
The zoning designation of the property is consistent with observations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The setting/home is labeled or identified in a way that sets it apart from the surrounding businesses or residences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The vehicles (i.e. cars, vans, etc.) in the setting/home are labeled or identified in a way that sets it apart from the surrounding businesses or residences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The setting/home is within walking distance to <u>other houses</u> .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Please indicate how much you agree or disagree with the following statement.						General Setting
	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Reviewer Comments
The setting/home is within walking distance to <u>other businesses</u> .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The facility utilizes environmental design to address mitigate exit-seeking behavior while supporting a member's freedom to navigate in and outside of the facility.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Describe the outside and inside of the facility including the secure perimeter.						

## Observation

<i>Please indicate how much you agree or disagree with the following statement.</i>						Unit/Room
	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Reviewer Comments
The units/bedrooms have lockable doors, with only appropriate staff having keys to the doors.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Measures are in place to preserve and protect an individual's privacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The individuals have freedom to furnish and decorate their unit/bedroom.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

## Observation

<i>Please indicate how much you agree or disagree with the following statement.</i>						<b>Transportation</b>
	<b>Strongly agree</b>	<b>Agree</b>	<b>Neutral</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>Reviewer Comments</b>
Public transportation pick-up/drop-off locations are in close proximity to the home/setting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The pick-up/drop-off locations are physically accessible without access barriers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

## Observation

<i>Please indicate how much you agree or disagree with the following statement.</i>						<b>Community Engagement</b>
	<b>Strongly agree</b>	<b>Agree</b>	<b>Neutral</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>Reviewer Comments</b>
A calendar of activities is posted for members and in a format easily understood by members.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The activities posted in the calendar appear to be activities that foster interaction with the general community including going out into the community and inviting members of the community into the home/setting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The staff is aware of opportunities for members to interact in their location communities (i.e. flyers posted about local events, maps of activities to do in the community, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Visiting hours are posted.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	



## Community Member Interviews

Interview Questions	Interviewee Responses	Reviewer Comments/Observations
Please describe the value of the home/setting to the overall general community.		
Please describe how staff promotes a positive perception of the value the home/setting brings to the community.		
Please describe how staff fosters member interaction with the general community that addresses individual preferences.		