Checklist – CDC+ Consultant

This checklist is provided as a helpful guide; however, it is ultimately your responsibility to ensure all documentation supporting the standards under review are made available. Refer to the CDC+ Consultant Service Specific Record Review Tool for review standards and protocols at: https://florida.qlarant.com/

The Qlarant reviewer will tell you the names of the files you need to submit.

- ☐ Medicaid Waiver Eligibility Worksheets with signature pages
- ☐ Documentation to establish program eligibility
- ☐ Support Plans with signature pages
- ☐ Annual Report
- ☐ Cost Plan
- ☐ Documentation of applicable legal representation e.g. Power of Attorney, Guardianship
- ☐ Documentation current Support Plan was provided to person / legal representative and CDC+ Representative
- ☐ Documentation of Significant Additional Needs (SAN) requests (if applicable)
- ☐ Documentation related to employment preferences
- ☐ Safety Plan along with evidence of distribution and review with pertinent providers (if applicable)
- ☐ Documentation to ensure services are delivered in accordance with the service plan, including type, scope, amount, duration, and frequency specified in the Cost Plan
- ☐ Progress Notes
- ☐ Pre Support Plan Meeting Planning - Interactive discussions prior to the expiration of the current Support Plan(SP) to include: purpose of planning, current goals/outcomes, current services and providers, potential changes to goals, services and providers, possible SP meeting dates, times, locations and attendees.
- ☐ Participant-Consultant Agreement
- ☐ CDC+ Consent Form
- ☐ Participant-Representative Agreement
- ☐ Purchasing Plans
- ☐ All applicable Quick Updates - Review period
- ☐ Participant's Information Update form (if applicable)

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- ☐ Corrective Action Plan (if applicable)
- ☐ Emergency Backup Plan
- ☐ Assist person to define abuse, neglect and/or exploitation - Annual interactive discussion about individual's definition, basic concepts and various types.
- ☐ Assist person with knowing when and how to report any incidents of abuse, neglect and/or exploitation - Annual interactive discussion including: scenarios, warning signs, and ways to report.
- ☐ Documentation to support the invitation to take the satisfaction survey was provided to the person receiving services
- ☐ Documentation to support the review of the QO's disciplinary process with the person receiving services
- ☐ Documentation to support the review of the QO's code of ethics with the person receiving services

Documentation that shows the person-centered topics below are being addressed on an ongoing or continuous basis.

- ☐ Documentation to support informed decisions when choosing waiver services & supports on an ongoing basis - Interactive discussions to include: services,supports, needs and preferences.
- ☐ Documentation to support informed decisions when choosing among waiver service providers on an ongoing basis - Interactive discussions to include:options available, needs and preferences.
- ☐ Physical and behavioral/emotional health - Interactive discussion examples include: Medication, allergies, appointments, adaptive equipment use, medical conditions, behavior or safety plans, emotional well-being concerns.
- ☐ Safety needs - Interactive discussions include: Fire safety, emergency preparedness, fall prevention, household hazards, community risks.
- ☐ Documentation regarding history of abuse, neglect, and/or exploitation on an ongoing basis - Interactive discussions to include: past or present experiences, efforts to identify and address needs in this area.
- ☐ Community participation and involvement based on his/her interests - Describe how and what you learned, acted on, and expanded the person's community-interest areas; examples of specific education, exposure, and experience.
- ☐ Rights education to the person/legal representative - Interactive discussion examples could include: Rights most important to the person, access to personal possessions, privacy, confidentiality, freedom from harm and discrimination, self-determination.