

Settings Rule Compliance Checklist

Location: Home Instead

Contact: Amy Bosch

Medicaid Consumers: 3

Site Visit Date: 8/12/2025
8/12/2025

Current Census: 3

Visit Completed by: Erica
Reiner

HCBS Setting Requirements establish an outcome-oriented definition that focuses on the nature and quality of individuals experiences. The requirements maximize opportunities for individuals to have access to the benefits of community living and to receive services in the most integrated setting.

Requirements	Meets	Does Not Meet	Comments
Setting is selected by the individual from among settings options including non-disability specific settings and an option for a private unit in a residential setting.	x		All residents have a private room, and chose the agency foster home setting.
Provides opportunities to seek employment and work in competitive integrated settings, engage in community life, and control personal resources.	x		Agency offers opportunities for community integration, individuals or their designated family members assist with control of
Is integrated in and supports access to the greater community	x		Agency home is located in a residential area of Bismarck, ND.
Optimizes individual initiative, autonomy, and independence in making life choices	x		The residents choose their own schedules, decorate their rooms as they choose, and have access to communication devices, TV, etc.
Ensures an individual's rights of privacy, respect, and freedom from coercion and restraint	x		The resident's rooms have locks and they are provided a key, and they have private rooms.
Facilitates individual choice regarding services and supports and who provides them	x		The residents are able to choose their services and supports.
Ensures the individual receives services in the community to the same degree of access as individuals not receiving Medicaid HCBS	x		Agency now has an accessible van which can be used to take residents into the community.
Person-centered service plan (HCBS)	x		Agency collaborates with the HCBS case manager, and develops an IPP.
The individual has a lease or other legally enforceable agreement providing similar protections	x		Each resident has a lease agreement.
The individual has privacy in their unit including lockable doors, choice or roommates and freedom to furnish or decorate unit	x		Each resident has a private room, lockable doors, and the freedom to decorate.
The individual controls his/her own schedule including access to food at all times	x		Meals are served as scheduled with opportunities to access food at all times.
The individual can have visitors at any time	x		This is evidenced in policy and observation/discussion.
The setting is physically accessible	x		There are accessible ramps in and out of the agency home.

Requirements	Meets	Does Not Meet	Comments
Person-centered planning meetings must be timely and occur at times/locations convenient to all involved.	x		Agency collaborates with the HCBS case manager, the individual, and their family/guardian.
Reflects cultural considerations/uses plain language	x		
Discusses individual preference for community integration within and outside the setting.	x		Evidenced by intake information, policies, and person centered planning.
Includes strategies for solving disagreement	x		Evidenced in policy.
Offers choices to the individual regarding services and supports the individual receives and from whom	x		Individuals are provided with a choice as evidenced by discussion and policy review.
Provides method to request updates to person centered plan	x		Updates are requested through the HCBS case manager and the agency coordinator.
Reflects what is important to the individual to ensure delivery of services in a manner reflecting personal preferences and ensuring health and welfare	x		Identified in the person centered plan and IPP.
Identifies the individual's strengths, preferences, needs (clinical and support), and desired outcomes	x		Identified in the person centered plan and IPP.
May include whether and what services are self-directed and includes risks and plan to minimize them	x		Identified in the HCBS risk assessment.
Includes individually identified goals and preferences related to relationships, community participation, employment, income and savings, healthcare and wellness, education, and others	x		Identified in person centered plan and IPP.
Signed by all individuals and providers responsible for implementation and a copy provided to all chosen by the beneficiary	x		Person centered plans are signed by the individual and/or legal decision maker.