

Instrumental Activities of Daily Living Training

As a Direct Support Staff with Opportunity Matters, Inc. (OMI) it is important for you to demonstrate that you are aware of and understand how to implement the following Instrumental Activities of Daily Living in a safe and effective manner:

- meal planning and preparation
- basic assistance with paying bills
- shopping for food, clothing, and other essential items
- performing household tasks integral to the personal care assistance services
- communication by telephone and other media
- traveling, including to medical appointments and to participate in the community.

Meal Planning and Preparation

All of the programs at OMI use a menu plan that was created by a Registered Dietician. These are found in a menu book at the site. Some persons served enjoy planning a meal or snack that is not on the menu plan. This will generally be in a formal or informal outcome for that person. If someone shows interest in planning a meal that is not on the menu, staff will communicate this to the site supervisor so needed items can be purchased.

Each person served by OMI is a unique individual and will have their own skill set with regard to meal planning and preparation. Based on the person's ability and interest, staff are to include the person(s) in the meal preparation as much as possible, including helping to complete the grocery list, going with to the store to purchase the food, preparing the meal and cleaning up after. Staff should always keep in mind the safety of the person and will need to check their care plans to determine if they are able to use certain appliances and utensils safely.

Some of the people that we serve have special diets ordered by their doctors or other providers. This may be due to the person having diabetes, having high cholesterol, being allergic to certain foods such as gluten, having nutritional deficiencies, being overweight or having another condition which requires a special diet. If anyone in the home you work at has any of these special diets, you will be specifically trained on that diet and how to modify the persons menu to meet the conditions of the diet. Sometimes, you may have to provide support to the person to track what they eat, the number of carbs, sodium or fat they eat, etc. This is very important in these situations as it can affect their overall health. One thing to remember though is that just because one person in the home is on a special diet does not mean that everyone in that house needs to follow it. Unless the person has been prescribed a special diet by a medical professional, we cannot dictate what or how much they eat. We can encourage them to consume healthy foods in moderate portions, but they do have the right to eat what they want.

On another note, there are individuals who have medical or mental health issues which cause them to be compulsive with food. In these situations, it is a health risk to allow them free access to food and therefore, a team decision has been made to have the food in that home kept in a locked location. This might include just some foods such as sweets, or might encompass all foods where the fridge, freezer and all cupboards are locked to keep the person safe.

Specific Site training on meal planning and preparation:

Person served	Special Diet/Type	Food Allergy/Type	Other pertinent meal/food information

Basic Assistance with Paying Bills

Each person served by OMI is a unique individual and will have their own skill set with regard to paying their bills. Staff members may need to help persons served with paying bills; however, this task is most often completed by the site supervisor or lead staff as they have more knowledge of the person's financial matters. When staff are required to assist with paying bills, it is important that the person served is involved in the process as much as possible. Most of the individuals have very few bills to pay if any. Some they might have could be a personal cell phone, co-pays to the pharmacy for their medications, insurance premiums depending on what type of medical insurance they have, co-pays to OMI for room and board, etc. Staff need to ensure that the individual understands what the bill is for, the money amount being paid and when the bill is due. Staff will encourage the person to write out their own check if they are able to do so and sign their name. Staff will then document the transaction according to OMI's policy and procedure or provide support to the person to do so if they are able.

Specific Site training on basic assistance with paying bills:

Person served	Number of bills per month	Due date(s)

Shopping for Food, Clothing and Other Essential Items

Many of the person's served at OMI are quite independent in shopping for clothing and other personal needs items. There are; however, people who do require staff assistance which may include simply providing the transportation to the store up to actually going out to purchase the items for the person. At times, you may need to help the person plan a budget so they know what they can afford to buy, create a list of items they need and then possibly provide support for them to stick to their list at the store. Often times, the Direct Support Staff will be the ones to provide this assistance. It is preferable that the individuals we support are always involved in purchasing their personal needs items as this supports their independence. As stated above, typically the PM, PC or LSS will do the grocery shopping weekly. It is desirable for staff to include the individuals we support in this activity if it is something they are interested in doing. When the individuals are in need of clothing or personal items, it is important that we involve them in this process as much as they are able to be. This may include helping them to figure out a monthly or weekly budget so they know how much they have available to spend, providing transportation, helping them find what they need including the correct size, help with paying for the purchase and getting the correct change and receipt and tracking their expenditures in their checkbook and/or petty cash log. Each person you will be working with has a different level of independence in these processes, so you will receive individualized training on this as well.

Specific site training on shopping for food, clothing and other essential items:

Performing Household Tasks Integral to Services

The home that you are or will be working in belongs to the individuals you support. This is important to remember for several reasons. As much as possible, the individuals should be the ones to clean and maintain their home. Often times, they may need assistance with this in varying degrees from verbal prompts and/or encouragement up to hand-over-hand instruction. It is easy to feel as if you are there to "take care" of the people we support. This is not the case. Our job is to provide the necessary support to help them to be as independent as possible. At times, the individuals may be resistant to this as they may be used to being dependent on staff for completing these tasks. It is important for you to encourage them to be independent and provide positive feedback for each new task they attempt or complete. If they are truly unable to complete these tasks or if they

refuse even after encouragement and prompting, it then becomes your responsibility to ensure that the home is maintained in a clean and safe manner. This may include preparing meals, doing dishes, laundry, dusting, vacuuming, sweeping, mopping, shoveling snow, cleaning bathrooms, etc. It is also important that we respect the property of the individuals and the organization. This includes the home and the organization vehicles.

Specific site training on performing household tasks integral to services:

Communication by Telephone and Other Media

The people you support have the right to place and receive private phone calls from a non-coin operated telephone. They may also make long distance calls either using a prepaid calling card or if the house has long distance accessibility on the phone, they can be billed by OMI for the charges. The individual does need to keep cost in mind when placing these calls as they can be expensive and most of the individuals we support are on a fixed income.

Some of the people we support are very independent with using the phone and do not need any support from staff to do so. Other individuals may require you to help find the correct number, dial the correct number and possibly even help by holding the phone or providing prompts to get the information they need or to keep the conversation flowing. Along with the right to use the phone, the individuals do have some responsibilities including being respectful of others' time in regards to when and how often they are calling and as well as using appropriate language and tone while on the phone. Again, this is specific to each house and individual and you will receive pertinent training as needed.

There are a few people who are supported in OMI homes who either have computers, smart phones and/or internet access on a device to be able to participate in social media. It is stated in the *Rights of Person's Served* that individuals have the right to: **“Receive and send, without interference, uncensored, unopened mail or electronic correspondence or communication.”** At this time, there are not many people we support who do exercise the right to use electronic correspondence or communication but as these continue to be more and more popular ways of communication we will see an increase in this trend. OMI has a practice to discuss creation of any social media or e-mail accounts with the person's legal representative before providing any assistance to the person to do so. This is decided on a case by case basis by the person's team if that is something that is safe and/or appropriate for the person to participate in. If the person does have this access, unless there have been right's limitations formally placed on the person which are documented in their permanent record, staff are not to censor the person's e-mail or social media communication in any way. If a staff does however suspect or the individual reports that there are dangerous or inappropriate interactions occurring through this means of communication, it should be addressed following the Maltreatment of Vulnerable Adult Policy and reporting procedure. Your supervisor will then have a discussion with the person's team to determine if any changes need to be made to the person's plan ensure that the person remains safe.

Specific site training on communication by telephone and other media:

Traveling, Including Medical Appointments and to Participate in the Community

It is our job to encourage the people we support to be as independent as possible with participating in their community, including travel. Some are able to use public transportation to get to where they need to go whether it be work, appointments or to go to activities. Others may ride a bike or walk to certain activities and functions. For some though, it is not safe for them to travel alone or they may not be able to use public transportation. In these situations, we use our organization vehicles to provide transportation to get them where they need to go. This is why it is a requirement of OMI staff to maintain a valid driver's license and meet our insurance eligibility requirements. It is important for you to know which of the individuals, if any, are able to be

alone in the community and if they are able to use public transportation, bike or walk. You will receive specific training on this at your site. When it has been determined by a person’s team that he or she is able to use public transportation, they must receive training on how to use this system. Metro Bus does provide a training course for people to use to learn the system for the fixed route bus lines. There is also the option for some to use Dial-A-Ride which is a bus service where they can set up the ride in advance and a bus comes directly to pick them up from the house and/or a set location. The person has to meet certain criteria to qualify to use this service, but once they do, they can purchase a monthly pass for unlimited rides which can be used for most activities. Individuals who regularly use the fixed route bus also typically purchase a monthly bus pass.

A person must also have demonstrated that they are able to use bike and/or pedestrian safety skills independently before they are able to do so alone in the community. This is done on a case by case basis and it will be determined by the person’s team. Before a person leaves the home either biking or walking, they should be aware of the current and upcoming weather conditions and consider if it is safe to travel that way at the time.

When an individual is unable to benefit from any of these forms of independent transportation, staff will transport the individual in the organization vehicle as available to get them to their various activities and appointments. Some individuals may use wheelchairs and in these situations, you must be specifically trained on how to secure the person in their wheelchair and then secure the wheelchair into the van to ensure that the person is able to be transported safely.

Specific site training on travel including medical appointments, and to participate in the community:

Person	Amount of Community Alone time	Fixed Route bus? Dial-A-Ride?	OMI transports?