

## **Developing Supported Decision-Making Agreements; Overview of Best Practices**

### STEP 1: Community Services Provider (Trained Volunteer, Clinical Social Worker, Care Coordinator or Case Manager)

#### Initial interview

1. Content: background information, long term goals, how do decisions get made now, what methods person wants to keep, methods person wants to change, who are supporters/who does person want to have as supporters
2. Method: facilitating open-ended discussion, creating person-directed support (note: functionality assessments are not part of this process)
3. Documents: Use existing tools, modify or create own; good notes are essential

#### Contact supporters

#### Meet with decision-maker and supporters (supporters individually or together)

1. review obligations, give materials, confirm commitment, understand support and not supplant

#### Writing a narrative for legal service provider

#### Final meeting with decision-maker

#### Flag file for 6-month follow-up

### STEP 2: Legal Services Provider (nonprofit or private)

#### Intake specialist takes call

1. Referral to Community Service Provider if no narrative has been done
2. Ask caller to bring relevant documents to the appointment (powers of attorney, court orders, representative payee agreements, advanced directives, etc.)

#### Review narrative from Community Service Provider and prepare for initial interview

#### Initial interview

1. Review narrative together and confirm client choices
2. Get authorization for sharing information with Community Service Provider and potential supporters, etc.

#### Writing draft SDMA, with document attachments and releases ready for signature

#### Review draft with client

#### Execute SDMA (notary/witnesses, guardian consent if required)