



SERVICE DELIVERY & EVALUATION

Self-Monitoring Checklist - Home and Community-Based Services Licensed under Minnesota Statutes, chapter 245D

The license holder is responsible for the coordination of service delivery and evaluation of the service delivery for each person that receives services. This coordination and evaluation is fulfilled by a designated coordinator. The designated coordinator has primary responsibility for the oversight of the majority of service delivery requirements related to individual service recipients and provides supervision, support, and evaluation of those activities. This oversight and evaluation helps ensure compliance with the coordinated service and support plan (CSSP), accomplishment of assigned outcomes, instruction and assistance to staff, and evaluation of program related to individual service delivery.

The license holder is responsible for the program management and oversight of the services provided. These duties are fulfilled by a designated manager. The designated manager has primary responsibility for maintaining an understanding of licensing requirements and using this knowledge to maintain compliance with all applicable laws and rules, ensuring that the designated coordinator requirements are fulfilled, ensuring implementation of corrective action following incident, emergency, or maltreatment reports and as ordered by the commissioner including terms and condition of the license and any variances are met, and evaluating information to develop, document, and implement ongoing program improvements.

Each license holder determines how many designated coordinators and designated managers are needed to fulfill their duties. Some license holders may elect to have the same person fill both roles.

Basic Support Services vs. Intensive Support Services

There are different licensing requirements when a license holder is providing basic support services and intensive support services during the early period of service provision [section 245D.03, subdivision 1]. The checklist designates when the licensing standards apply to a specific service type. When there is no designation, the licensing standards apply to both basic support services and intensive support services.

Basic support services include:

- In-home and out-of home respite care
- Adult companion services
- Personal support
- 24-hour emergency assistance
- Night supervision
- Homemaker
- Individual community living support

Intensive support services include all other 245D licensed services, such as:

- Intervention services
 - Positive support services
 - In-home and out-of-home crisis respite
- In-home support services, including
 - In-home family support
 - Independent living skills training
 - Semi-independent living services
- Residential supports and services, including:
 - Supported living services and foster care services provided in a child foster care residence, a family adult foster care residence, a community residential setting, or a supervised living facility
 - Residential services provided in an ICF/DD
- Day services, including
 - Structured day services
 - Day training and habilitation
 - Prevocational services
- Employment exploration, development and support services

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Definitions

"Coordinated service and support plan" [CSSP] has the meaning given in sections [256B.0913, subdivision 8](#); [256B.0915, subdivision 6](#); [256B.092, subdivision 1b](#); and [256B.49, subdivision 15](#), or successor provisions [section 245D.02, subdivision 4b].

The CSSP is developed by the case manager in consultation with person and/or their representative. The CSSP provides direction to license holders and assigns responsibilities, including:

- *Services/tasks that the license holder is responsible to implement*
- *Reporting requirements above the minimum reporting required in Chapter 245D*
- *Person-centered planning elements*
- *Additional assessments to be completed by the license holder, if any.*

"Coordinated service and support plan addendum" [CSSP addendum] means the documentation that this chapter requires of the license holder for each person receiving services [section 245D.02, subdivision 4c].

The person's support team or expanded support team must participate in the development of the CSSP addendum. The CSSP addendum is not a single document. It is multiple documents or documentation the license holder is required to develop that identify how services will be delivered in order to meet a person's identified needs and desired outcomes.

Within the scope of services and the responsibilities assigned to the license holder in the CSSP, the CSSP addendum may include the following elements:

- *Documentation when the person's rights have been restricted, including justification and the plan for full restoration of rights [section 245D.04, subdivision 3, paragraph (c)]*

- *Documentation of the health needs procedures, including psychotropic medication monitoring [sections 245D.04, subdivision 3, paragraph (c) and 245D.051]*
- *Reports of incidents [section 245D.06, subdivision 1]*
- *Documentation of the positive support transition plan, when required [section 245D.06, subdivision 8]*
- *Individual abuse prevention plan (IAPP) [section 245A.65, subdivision 2, paragraph (b)]*
- *Assessments and service planning [sections 245D.07, subdivision 2 and 245D.071, subdivision 3]*
- *Documentation of the methods to be used to support a person's identified needs and accomplish identified outcomes [section 245D.071, subdivisions 3 – 5] including:
Documentation of any continuous use of permitted actions and procedures [section 245D.06, subdivision 7, paragraphs (b) and (c)] and
Documentation of the support team's review of emergency use of manual restraint and any changes to the person's service plan [section 245D.061, subdivision 7]*
- *Progress reports and recommendations [sections 245D.07, subdivision 3 and 245D.071, subdivision 5]*

"Legal representative" means the parent of a person who is under 18 years of age, a court-appointed guardian, or other representative with legal authority to make decisions about services for a person. Other representatives with legal authority to make decisions include but are not limited to a health care agent or an attorney-in-fact authorized through a health care directive or power of attorney [section 245D.02, subdivision 12].

"Most integrated setting" means a setting that enables individuals with disabilities to interact with nondisabled persons to the fullest extent possible [section 245D.02, subdivision 20a].

"Outcome" means the behavior, action, or status attained by the person that can be observed, measured, and determined reliable and valid [section 245D.02, subdivision 21a].

"Self-determination" means the person makes decisions independently, plans for the person's own future, determines how money is spent for the person's supports, and takes responsibility for making these decisions. If a person has a legal representative, the legal representative's decision-making authority is limited to the scope of authority granted by the court or allowed in the document authorizing the legal representative to act [section 245D.02, subdivision 29a].

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"Service" means care, training, supervision, counseling, consultation, or medication assistance assigned to the license holder in the coordinated service and support plan [section 245D.02, subdivision 22].

"Working day" means Monday, Tuesday, Wednesday, Thursday, or Friday, excluding any legal holiday [section 245D.02, subdivision 37].

Key

Language that is contained in [brackets], *italics*, or ■ bulleted is provided for clarification.

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LAW / RULE CITE	LICENSING STANDARD	RECORD 1	RECORD 2	RECORD 3	NOTES
9544.0030 subpart 1	<p><u>Positive Support Strategies and Person-Centered Planning:</u></p> <ul style="list-style-type: none"> • Positive support strategy. “Positive support strategy” means a strengths-based strategy based on an individualized assessment that emphasizes teaching a person productive and self-determined skills or alternative strategies and behaviors without the use of restrictive interventions. • For Example: CSSP/Addendum, IAPP, SMA <p><u>Positive Support Strategies Required</u> The license holder must use positive support strategies in providing services to a person. These positive support strategies must be incorporated in writing to an existing treatment, service, or other individual plan required of the license holder.</p>				
	<p>At least every six months, the license holder must evaluate with the person the identified positive support strategies.</p> <p>Based upon the results of the evaluation, the license holder must determine whether changes are needed in the positive support strategies used, and, if so, make appropriate changes.</p>				
245D.03 Subd. 1	<ul style="list-style-type: none"> • Services identified in 245D.03 Subdivision 1, paragraph (c), clauses (1) and (2), item (ii) are exempt from service planning and delivery requirements in 245D.071; however they must comply with requirements in 245D.07, subdivision 2. <p>(2) Intervention services, including:</p> <ul style="list-style-type: none"> (i) behavioral and positive support services; (ii) in-home or out-of-home crisis respite services; (iii) specialist services; and <p>(3) In-home support services, including:</p> <ul style="list-style-type: none"> (i) independent living services training; and 				

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245D.07 , Subd. 1 and 245D.03 , Subd. 2	Provision of Services The license holder provided assigned services assigned in compliance with applicable laws and regulations.				
245D.07, Subd. 1	The license holder provided services assigned in the CSSP.				
	The provision of services complied with the requirements of this chapter and the federal waiver plans.				
245D.03 , Subd. 2, (h)	The documentation required under sections 245D.07 and 245D.071 met the individual program plan requirements identified in section 256B.092 or successor provisions.				
245D.07, Subd. 2, (a)	Basic Support Services: Initial Service Planning License holders that provided basic support services met the requirements of this subdivision.				
245D.07, Subd. 2, (b)	Basic Support Services: Preliminary CSSP Within 15 calendar days of service initiation the license holder completed a preliminary CSSP addendum based on the CSSP.				
245D.07, Subd. 2, (c)	Basic Support Services: Review of initial plan Within 60 calendar days of service initiation the license holder reviewed and revised as needed the preliminary CSSP addendum to document the services that will be provided including how, when, and by whom services will be provided, and the person responsible for overseeing the delivery and coordination of services				
245D.07, Subd. 2 (d)	Basic Support Services: Meetings The license holder participated in service planning and support team meetings for the person following stated timelines established in the person's CSSP or as requested by the person or the person's legal representative, the support team or the expanded support team.				
245D.07, Subd. 3	Basic Support Services: Reports The license holder provided written reports regarding the person's progress or status as requested by the person, the person's legal representative, the case manager, or the team.				

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245D.071, Subd. 1	Intensive Support Services: Initial Service Planning License holders that provided intensive support services met the requirements of this section.				
245D.071, Subd. 3 (a)	Intensive Support Services Preliminary CSSP Addendum: Within 15 calendar days of service initiation the license holder completed a preliminary CSSP addendum based on the CSSP.				
245D.071, Subd. 3, (b)	Intensive Support Services: Review of Initial Plan Within the scope of services, the license holder, at a minimum, completed assessments in the following areas before the 45-day planning meeting:				
	<p>Assessments must include the following areas:</p> <p>1) the person's ability to self-manage health and medical needs to maintain or improve</p> <p>physical,</p> <p>mental, and</p> <p>emotional well-being, including, when applicable,</p> <p>allergies,</p> <p>seizures,</p> <p>choking,</p> <p>special dietary needs,</p> <p>chronic medical conditions,</p> <p>self-administration of medication or treatment orders, preventative screening, and medical and dental appointments;</p> <p>2) the person's ability to self-manage personal safety to avoid injury or accident in the service setting, including, when applicable,</p> <p>risk of falling,</p>				

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	mobility,				
	regulating water temperature,				
	community survival skills,				
	water safety skills, and				
	sensory disabilities;				
	3) the person's ability to self-manage symptoms or behavior that may otherwise result in an incident as defined in section 245D.02, subdivision 11, clauses (4) to (7),				
	4) suspension or termination of services by the license holder, or				
	other symptoms or behaviors that may jeopardize the health and safety of the person or others.				
	Assessments produced information about the person that described the person's overall strengths,				
	functional skills and abilities, and				
	behaviors or symptoms.				
	Assessments were based on the person's status within the last 12 months at the time of service initiation.				
	Assessments based on older information were documented and justified.				
	Assessments were conducted annually at a minimum or within 30 days of a written request from the person or the person's legal representative or case manager.				
	The results were reviewed by the support team or expanded support team as part of a service plan review.				
245D.095 Subd. 3	The license holder maintained copies of assessments in the person's record.				

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245D.071 , Subd. 3, (c)	Intensive Support Services: License holders that provided intensive support services met the requirements of this section.				
	the person's legal representative, the				
	case manager, and				
	other members of the support team or				
	expanded support team to determine the following based on information obtained from the assessments identified in paragraph (b): the person's identified needs in the CSSP, and				
	the person's identified needs in the CSSP, and				
	the requirements regarding service outcomes and reports and				
	person centered planning and service delivery:				
	(1) the scope of the services to be provided to support the person's daily needs and activities;				
	(2) the person's desired outcomes and the supports necessary to accomplish the person's desired outcomes;				
	(3) the person's preferences for how services and supports are provided, including how the provider will support the person to have control of the person's schedule;				
	(4) whether the current service setting is the most integrated setting available and appropriate for the person; and				
	(5) how services must be coordinated across other providers licensed under this chapter serving the person and members of the support team or expanded support team to ensure continuity of care and coordination of services for the person.				

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245D.071 , Subd. 3, (d)	Intensive Support Services: License holders that provided intensive support services met the requirements of this section.				
	<p>A discussion of how technology might be used to meet the person's desired outcomes must be included in the 45-day planning meeting;</p> <p>the coordinated service and support plan or support plan addendum must include a summary of this discussion;</p> <p>the summary must include a statement regarding any decision that is made regarding the use of technology and a description of any further research that needs to be completed before a decision regarding the use of technology can be made;</p> <p>nothing in this paragraph requires that the coordinated service and support plan include the use of technology for the provision of services.</p>				
245D.071 , Subd. 4,	Intensive Support Services: Outcome and Support Development The license holder met all requirements for intensive support services regarding outcome and support development within the required timelines.				
245D.071 , Subd. 4, (a)	Within ten working days of the 45-day planning meeting, the license holder developed a service plan that documented the service outcomes and supports based on the assessments and person centered planning.				
245D.071, Subd. 4 (b)	<p>The license holder must document the supports and methods to be implemented to support the person and accomplish outcomes related to acquiring, retaining, or improving skills and physical, mental, and emotional health and well-being.</p> <p>The documentation must include:</p> <p>(1) the methods or actions that will be used to support the person and to accomplish the service outcomes, including information about:</p> <p>(i) any changes or modifications to the physical and social environments necessary when the service supports were provided;</p> <p>(ii) any equipment and materials required; and</p> <p>(iii) techniques that were consistent with the person's communication mode and learning style;</p>				

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	(2) the measurable and observable criteria for identifying when the desired outcome had been achieved and how data would be collected;				
	(3) the projected starting date for implementing the supports and methods and the date by which progress towards accomplishing the outcomes would be reviewed and evaluated; and				
	(4) the names of the staff or position responsible for implementing the supports and methods.				
245D.071, Subd. 4 (c)	Within 20 working days of the 45-day meeting, the license holder:				
	submitted to and				
	obtained dated signatures from the person or the person's legal representative and				
	case manager to document completion and approval of the assessment and CSSP addendum.				
	If, within ten working days of the submission of the assessment or CSSP addendum, the person or the person's legal representative or case manager had not signed and returned to the license holder the assessment and CSSP addendum or had not proposed written modifications to the license holder's submission, the submission is deemed approved and the assessment and CSSP addendum became effective and remained in effect until the legal representative or case manager submitted a written request to revise the assessment or CSSP addendum.				

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245D.071 , Subd. 5	Service Plan Review and Evaluation: Ongoing Meetings The license holder met all requirements for ongoing review and development of the service plan and evaluation of methods used.				
245D.071 , Subd. 5, (a)	The license holder gave the person or the person's legal representative and case manager an opportunity to participate in the ongoing review and development of the methods used to support the person and accomplish outcomes identified in assessments and service outcomes and supports.				
	The license holder, in coordination with the person's support team or expanded support team, met with the person				
	the person's legal representative, and				
	the case manager, and				
	participated in progress review meetings				
	following stated timelines established in the person's CSSP or CSSP addendum or within 30 days of a written request by the person, the person's legal representative, or the case manager, at a minimum of once per year.				
245D.071 , Subd. 5, (b)	at least once per year, the license holder, in coordination with the person's support team, met with the person, the person's legal representative, and the case manager to discuss how technology might be used to meet the persons desired outcomes.				
	The summary included a statement regarding any decision made related to the use of technology and a description of any further research that must be completed before any decision can be made.				
	The license holder summarized the person's progress toward achieving the identified outcomes;				
	The license holder summarized the person's progress toward achieving the identified outcomes;				
	made recommendations; and identified the rationale for changing, continuing, or discontinuing implementation of supports and methods identified in subdivision 4				

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	in a report available at the time of the progress review meeting.				
	The report was sent at least five working days prior to the progress review meeting if requested by the team in the coordinated service and support plan or coordinated service and support plan addendum.				
245D.071 , Subd. 5, (d)	The license holder sent the coordinated service and support plan addendum to the person,				
	the person's legal representative, and				
	the case manager				
	by mail within ten working days of the progress review meeting.				
	Within ten working days of the mailing of the coordinated service and support plan addendum, the license holder obtained dated signatures from the ___person or the ___person's legal representative and the ___case manager to document approval of any changes to the CSSP addendum.				
245D.071 , Subd. 5, (e)	If, within ten working days of submitting changes to the coordinated service and support plan and coordinated service and support plan addendum, the person or the person's legal representative or case manager has not signed and returned to the license holder the coordinated service and support plan or coordinated service and support plan addendum or has not proposed written modifications to the license holder's submission, the submission is deemed approved and the coordinated service and support plan addendum becomes effective and remains in effect until the legal representative or case manager submits a written request to revise the coordinated service and support plan addendum.				

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245D.095 Subd. 3	The license holder maintained copies of written reports regarding the person's status when requested according to section 245D.07, subdivision 3;				
	progress review reports as required under section 245D.071, subdivision 5;				
	progress or daily log notes that are recorded by the program; and				
	reports received from other agencies involved in providing services of care to the person.				
<u>245D.09,</u> Subd. 4a	In the event of an emergency service initiation, the license holder documented the reason for the unplanned or emergency service initiation and maintained the documentation in the person's service recipient record.				

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245D.07 , Subd. 1a	Person-Centered Planning and Service Delivery The license holder provided person-centered services through planning and delivery.				
245D.07 , Subd. 1a, (a)	The license holder provided services in response to the person’s identified needs, interest, preferences, and desired outcomes as specified in the CSSP and the CSSP addendum, and in compliance with the requirements of this chapter. License holders providing intensive support services also provided outcome-based services according to the requirements in section 245D.071.				
245D.07 , Subd. 1a, (b)	Services were provided in a manner that supported the person's preferences, daily needs, and activities and accomplishment of the person's personal goals and service outcomes, consistent with the principles of: (1) person-centered service planning and delivery that: (i) identified and supported what is important to the person as well as what is important for the person, including preferences for when, how, and by whom direct support service is provided; (ii) used that information to identify outcomes the person desires; and				

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	(iii) respected each person's history, dignity, and cultural background;				
	(2) self-determination that supported and provided:				
	(i) the affirmation and protection of each person's civil and legal rights; and				
	(ii) used that information to identify outcomes the person desired; and				
	(3) provided the most integrated setting and inclusive service delivery that supported, promoted, and allowed:				
	(i) inclusion and participation in the person's community as desired by the person in a manner that enabled the person to interact with nondisabled persons to the fullest extent possible and supported the person in developing and maintaining a role as a valued community member;				
	(ii) opportunities for self-sufficiency as well as developing and maintaining social relationships and natural supports; and				
	(iii) a balance between risk and opportunity, meaning the least restrictive supports or interventions necessary were provided in the most integrated settings in the most inclusive manner possible to support the person to engage in activities of the person's own choosing that may otherwise present a risk to the person's health, safety, or rights.				

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245D.081 , Subd. 1	Program Coordination, Evaluation, and Oversight The license holder ensured that responsibilities for the coordination and evaluation of the program were met.				
245D.081, Subd. 1, (a)	The license holder was responsible for (1) coordination of service delivery and evaluation for each person served by the program as identified in subdivision 2; and (2) program management and oversight that includes evaluation of the program quality and program improvement for services provided by the license holder as identified in subdivision 3.				
245D.081, Subd. 1, (b)	The same person may have performed the functions in subdivision (a) if the work and education qualifications were met in subdivisions 2 and 3.				
245D.081 , Subd. 2	Coordination and Evaluation of Individual Service Delivery The license holder ensured that a designated coordinator provided supervision, support and evaluation of the services.				
245D.03 , Subd. 2, (e)	A license holder who provided residential services to persons in an ICF/DD is exempt from compliance with subdivision 2.				
245D.081 , Subd. 2, (a)	Delivery and evaluation of services provided by the license holder were coordinated by a designated staff person.				

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	<p>The designated coordinator provided ___supervision, ___support, and ___ evaluation of activities that included:</p> <p>(1) oversight of the license holder's responsibilities assigned in the person's CSSP and the CSSP addendum;</p> <p>(2) taking the action necessary to facilitate the accomplishment of the outcomes according to the requirements in section 245D.07;</p> <p>(3) ___instruction and ___assistance to direct support staff implementing the CSSP and the service outcomes, ___including direct observation of service delivery sufficient to assess staff competency; and</p> <p>(4) evaluation of the effectiveness of service delivery, methodologies, and progress on the person's outcomes based on the measurable and observable criteria for identifying when the desired outcome has been achieved according to the requirements in section 245D.07.</p>				
<p>245D.081, Subd. 3</p>	<p><u>Program Management and Oversight</u> The license holder ensured that a designated manager provided management and oversight of the program and services.</p>				
<p>245D.081, Subd. 3, (a)</p>	<p>The license holder designated a managerial staff person or persons to provide management and oversight of the program and services provided by the license holder.</p>				
	<p>The designated manager was responsible for the following:</p> <p>(1) maintaining a current understanding of the licensing requirements sufficient to ensure compliance throughout the program as identified in section 245A.04, subdivision 1, paragraph (e), and when applicable, as identified in section 256B.04, subdivision 21, paragraph (b);</p> <p>(2) ensuring the duties of the designated coordinator were fulfilled according to the requirements in [245D.081,] subdivision 2;</p>				

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	(3) ensuring the program implemented corrective action identified as necessary by the program following review of incident and emergency reports according to the requirements in section 245D.11, subdivision 2 , clause (7).				
	An internal review of incident reports of alleged or suspected maltreatment was conducted according to the requirements in section 245A.65, subdivision 1 , paragraph (b);				
	(4) evaluation of satisfaction of ___persons served by the program, ___the person's legal representative, if any, and ___the case manager, with the ___service delivery and progress towards accomplishing outcomes identified in sections 245D.07 and 245D.071 , and ___ensuring and protecting each person's rights as identified in section 245D.04 ;				
	(5) ensuring staff competency requirements are met according to the requirements in section 245D.09, subdivision 3 , and				
	ensuring staff orientation and training is provided according to the requirements in section 245D.09, subdivisions 4 , 4a, and 5;				
	(6) ensuring corrective action is taken when ordered by the commissioner and				
	that the terms and conditions of the license and any variances are met; and				
	(7) evaluating the information identified in clauses (1) to (6) to ___develop, ___document, and ___implement ongoing program improvements.				