

Pre meeting accommodation checklist

- Confirm preferred communication method and accessible materials.
- Confirm helpful time, place, meeting duration, and breaks.
- Confirm chosen participants, roles, and information-sharing authority.
- Arrange private communication with necessary access supports.
- Confirm whether an interpreter, device, or specialist is needed.
- Obtain appropriate authorization for relevant records or consultation.
- Identify the particular decision and applicable legal standard.
- Confirm actual deadlines and any accommodation request procedure.
- Send a brief agenda and explain what the meeting will involve.
- Plan an accessible recap and follow-up contact.

Use notes

- Use this checklist with the person. Confirm that arrangements work rather than treating completion of a form as proof of access.
- Adapt it to the legal office, fiduciary meeting, or court proceeding and to the duties of the professional involved.

Client communication profile

- Client and matter:
- Preferred name and contact method:
- How I prefer to receive information:
- How I express agreement, disagreement, or uncertainty:
- Tools or communication methods I use:
- Helpful time, place, meeting length, and breaks:
- What makes communication harder:
- Person I want involved and the agreed role:
- Information sharing permission and limits:
- How to arrange confidential communication:
- Preferred format for documents and next steps:
- Date confirmed with client and next review:

Use notes

- Complete this with the person. Distinguish their preferences from someone else's report.
- Include only information needed for the representation or access arrangement. Handle it under applicable confidentiality and security requirements.
- This is a practice template, not a clinical assessment or capacity determination.

Decision and support documentation

- Date, setting, participants, and roles:
- Client identity and authority relevant to this matter:
- Particular decision and governing legal standard:
- Relevant information, options, risks, and consequences explained:
- Supports and accommodations provided:
- Client's expressed goals, responses, and reasons:
- Observations before and after support:
- Collateral or clinical information and its limits:
- Remaining concern and its relevance to the standard:
- Consent or other authority for consultation or disclosure:
- Conclusion, next step, and rationale:
- Follow-up date and responsible person:

Use notes

- Describe what occurred instead of labeling the person globally "competent" or "incompetent."
- When a legal conclusion is necessary, connect it to the specific standard, evidence, and task.
- This template organizes a record. It does not establish a universal capacity test or replace required jurisdiction-specific forms.

Communication phrases to use

Purpose	Sample phrase
Invite participation	"What do you want to happen?"
Offer access support	"What would make this easier to discuss?"
Introduce a choice	"Here are the options. Which parts matter most to you?"
Check meaning	"I want to check how clearly I explained this. How would this affect you?"
Invite disagreement	"You can disagree or ask for another option."
Clarify a supporter role	"What help would you like from this person?"
Offer a pause	"Would you like a break or more time?"
Confirm the next step	"What happens next, and who will help with that?"

Use notes

- Adapt the phrase to the person's language and communication method.
- A short phrase begins the conversation. It does not substitute for complete advice about legal consequences.

Court access checklist

- How can participants find and request accommodations?
- Who coordinates arrangements and confirms them before the hearing?
- Are notices forms and electronic files accessible to this participant?
- What aid service or procedural modification does the participant request?
- How will the court receive sensitive supporting information?
- Who has approved any supporter role or change to questioning?
- How will remote interpretation, captioning, and document access work?
- How will staff check effectiveness and respond if arrangements fail?
- How can the participant understand the order and next steps?
- What review grievance or other process is available if a request is denied?

Use notes

- Tailor the checklist to the court's rules and roles. Confirm arrangements and deadlines separately.
- Justice intermediaries offer one model of neutral communication assistance in some jurisdictions. Verify local availability, qualifications, and authority before proposing one. They assist communication rather than answering or deciding for the person.

Accommodation request template

Re: [Matter and proceeding date]

The participant requests [specific modification or communication aid] for [particular task or proceeding]. The access barrier is [brief functional description]. The proposed adjustment would assist participation by [explanation].

Please advise of any required form, supporting information, or approval process. Please confirm [arrangements requested] by [date], or identify an effective alternative for discussion.

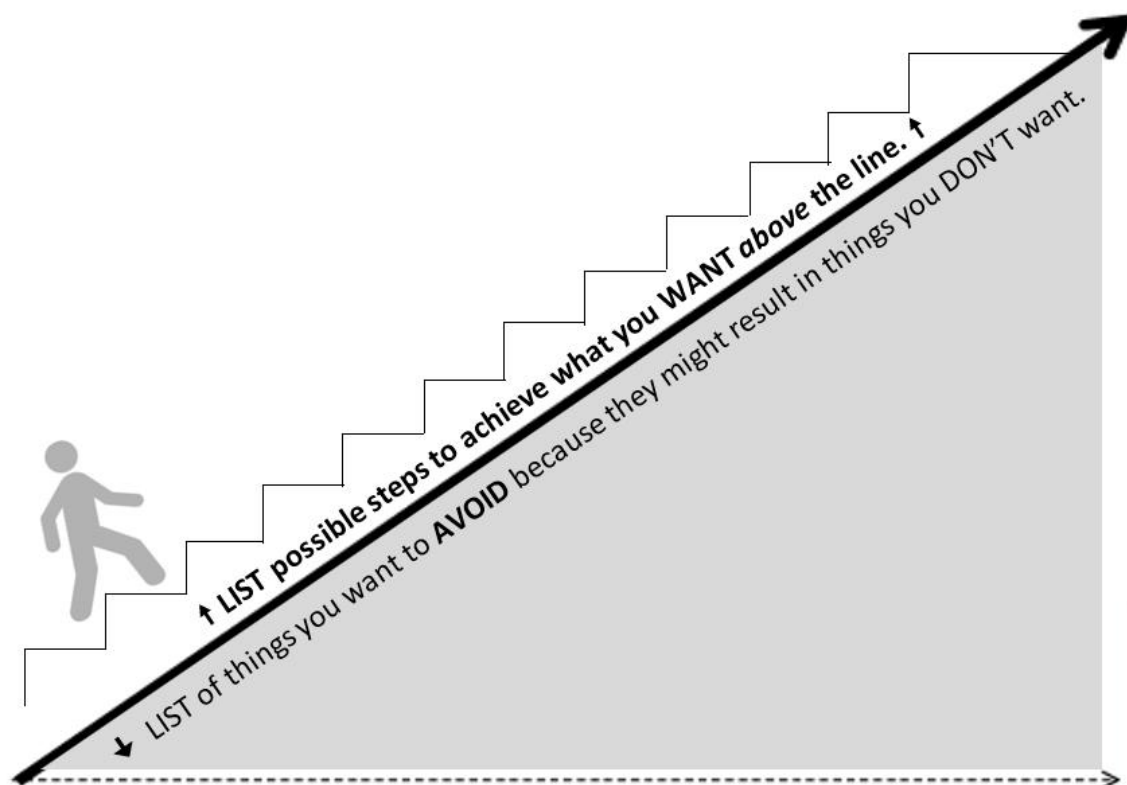
Contact for coordination: [authorized name and contact information]. Please advise how sensitive supporting information should be submitted and handled under the applicable procedure.

Use notes

- Obtain appropriate authorization and follow the forum's request and documentation procedures.
- Disclose information appropriate to the request. Use the proper confidential filing mechanism when applicable rather than assuming the request is confidential.
- Confirm arrangements and protect deadlines independently. Assess any alternative with the person.
- A representative's supporter request, remote participation request, or change to questioning may require additional rulings.

Name: _____

Today's date: _____



What I WANT

What I DON'T Want

IDENTIFYING DECISION-MAKING SUPPORTS

This tool is designed to assist with identifying an individual's ability to make decisions and manage key areas of life. It is intended to assist with exploring options for integrated decision-making services & supports.

Name of Individual: _____

Name of individual completing this form: _____

Relationship to individual (*circle one*): Self Family Friend Guardian Other: _____

How long have you known the individual? _____

Step 1: If yes, put a checkmark in the GREEN column – this means the individual is good to go. If NO, put a mark in the yellow column.

Step 2: When you have completed all the questions, explore integrated services & supports options for supported decision-making for all questions marked in the yellow column.

Step 3: ONLY if NO integrated services or supports can be identified should substitute decision-making be considered for those specific areas of need.



Can individual decide or direct this activity independently most of the time?



Can individual decide or direct this activity with assistance most of the time?



Does the individual require substituted decision making support?



DAILY LIVING at HOME

Can the individual make and communicate choices in regard to getting dressed in the morning (what to wear, appropriate attire for weather/event, etc.)?

Can the individual make and communicate choices in regard to bedtime and/or morning routines (i.e. what time to go to bed, when to get up, bathroom, etc.)?

Is the individual able to manage their money (i.e. give change, use a debit/credit card, etc.)?

Is the individual able to identify and resist financial exploitation?



HEALTHY LIVING

Does the individual make decisions about where, when, and what to eat?

Can the individual follow a prescribed diet and/or take medicines as directed?

Does the individual understand the need to maintain individual hygiene and dental care?

Can the individual make and communicate decisions regarding medical treatment, including understanding the consequences of not accepting treatment?

Does the individual understand health consequences associated with high-risk behaviors (*substance abuse, overeating, high-risk sexual activities, etc.*)?

Can the individual alert others and seek medical help for serious health problems?

Is the individual able to decide and direct what kinds of support they need or want, and select who provides those services or supports?

IDENTIFYING ALTERNATIVES TO GUARDIANSHIP



SOCIAL RELATIONSHIPS

Can the individual differentiate appropriate relationship behaviors as with family, friends, co-workers, intimate partners, etc. (*how we talk to and touch others*)?

Is the individual able to make appropriate decisions concerning marriage and intimate relationships?

Does the individual understand consent and permission in regards to sexual relationships?



SAFETY & SECURITY

Does the individual avoid common environmental dangers (*traffic, sharp objects, hot stove, poisonous products, etc.*)?

Can the individual alert others and seek medical help for serious health problems?

Is the individual able to recognize when someone is taking advantage of them, hurting them, or abusing them (physical, sexual, emotional) and protect themselves?

Does the individual know who to contact if they are in danger, being exploited, or being treated unfairly (*police, DSS, Arc, Lawyer*)?



COMMUNITY LIVING

Is the individual able to be on their own without risk of serious harm or injury to themselves?

Does the individual understand what is involved with managing a home that is safe (*home maintenance, sanitary conditions, secure, etc.*)?

Is the individual able to access community resources critical to functioning successfully and safely in community settings (*post office, transportation, bank, grocery store, emergency services, church, etc.*)?



CITIZENSHIP & ADVOCACY

Is the individual able to identify someone they want to represent their interests and support them with decision making?

Is the individual able to communicate approval to share information with parents, family members, and friends who are not legal guardians?

IDENTIFYING DECISION-MAKING SUPPORTS



SOCIAL RELATIONSHIPS

Is the individual able to differentiate and make appropriate decisions concerning appropriate relationship behaviors with family, friends, intimate relationships (*how we talk and touch each other*)?



SAFETY & SECURITY

Does the individual avoid common environmental dangers (*traffic, sharp objects, hot stove, poisonous products, etc.*)?

Can the individual alert others and seek medical help for serious health problems?

Is the individual able to recognize when someone is taking advantage of them, hurting them, or abusing them (physical, sexual, emotional)?

Does the individual know who to contact if they are in danger, being exploited, or being treated unfairly?



DAILY LIVING at SCHOOL and in COMMUNITY

Is the individual able to be on their own without risk of serious harm or injury to themselves?

Is the individual able to identify and resist financial exploitation?



CITIZENSHIP & ADVOCACY

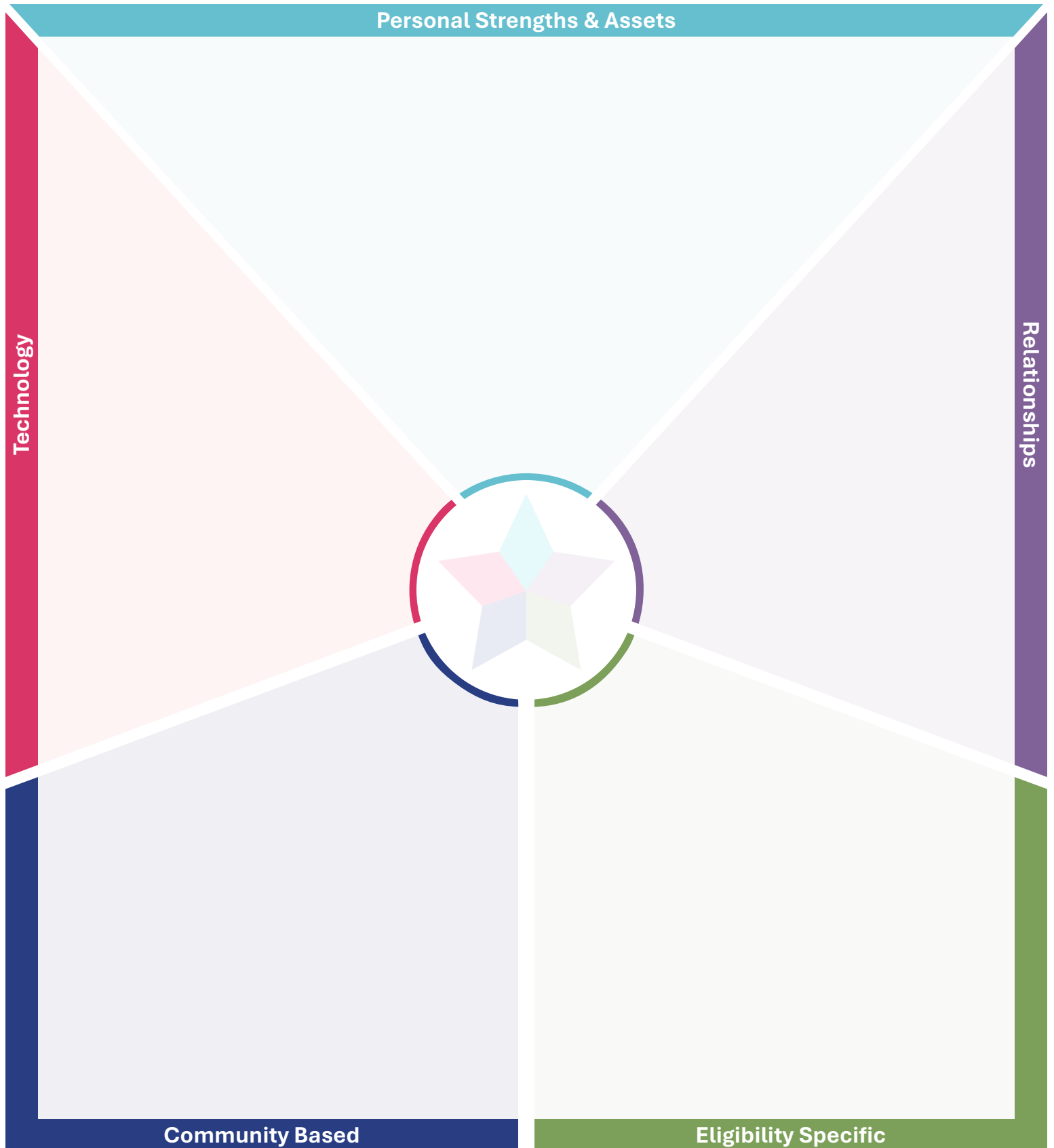
Is the individual able to identify someone they want to represent their interests and support them with decision making?

Is the individual able to communicate approval to share information with parents, family members, and friends who are not legal guardians?

[illegible]



My Name is:





Integrated Supports Star

Prompts to help you fill out the Integrated Supports Star:

The Integrated Support Star helps anyone map out current services, solve specific problems, and plan next steps. It can be used to explore needs, find gaps, or plan how to get future support.

Personal Strengths & Assets

- Skills, personal abilities, knowledge or life experiences;
- Strengths, things a person is good at or others like and admire;
- Assets, personal belongings and resources

Technology

- Personal technology anyone uses;
- Assistive or adaptive technology with day to day tasks;
- Environmental technology designed to help with or adapt surroundings

Community Based

- Places such as businesses, parks, schools, faith-based communities, health care facilities;
- Groups or membership organizations;
- Local services or public resources everyone uses

Eligibility Specific

- Needs based services based on age, geography, income level, or employment status;
- Government paid services based on disability or diagnosis, such as special education or Medicaid

Relationships

- Family and others that love and care about each other;
- Friends that spend time together or have things in common;
- Acquaintances that come into frequent contact but don't know well

7 Decision Making Options For People With IDD

When a person with intellectual and developmental disabilities (IDD) turns 18, they are considered an adult and have the right to make decisions about their life, just like anyone else. But we all need help, sometimes! This handout explains the different ways someone with IDD can receive decision-making support in Colorado, **listed from the least to the most restrictive options.**

DID YOU KNOW?

Not everyone with IDD needs help making decisions. Many people with IDD can make their own choices, and might not need any of the options listed.

A person with IDD is not required to have a guardian when they turn 18. In many cases, people may say they are "their own guardian," meaning they can make their own decisions.

SETTING UP SUPPORT

The process to establish these support roles is different for each. Some are easy to set up, while others may require a court hearing or come with costs. There are **supportive roles that assist** the person in making their own decisions, and **surrogate roles that make** decisions on the person's behalf.

MULTIPLE SUPPORTERS

A person with IDD can have different people helping with different things. For example, one person might help with financial needs, while another helps with healthcare decisions.

ONE SIZE DOESN'T FIT ALL—AND THAT'S OKAY!

The right support looks different for everyone because everyone's needs are different. When in doubt, start with **less** restrictive options. It's okay to explore what works best.

01

Supported Decision-Making (SDM)

Supported Decision-Making (SDM) allows a person with IDD to choose trusted supporters to help them understand options and make decisions. Supporters can give advice and guidance—but the person still makes their own decisions. In Colorado, SDM agreements are voluntary and must be in writing. To download an agreement, visit: thinkchange.info/SDMexampleagreement

02

Authorized Representative (AR)

An AR (Authorized Representative) helps a person with IDD access the services and supports they need, as defined by the person with IDD. The person with IDD usually designates an AR through their service provider or Case Management Agency (CMA) and can be changed at any time. To become an AR in Colorado, contact the service provider or CMA for the process and paperwork.

03

Representative Payee

A Representative Payee helps manage Social Security benefits for someone who needs assistance with their finances. They can only manage Social Security funds, not other financial matters. To become a Representative Payee in Colorado, contact the local Social Security office, fill out Form SSA-11, provide ID, and go through an interview: <https://www.ssa.gov/payee/>

04

Medical Proxy (Healthcare Agent)

A Medical Proxy makes medical decisions for someone who can't make them themselves. Their role is limited to healthcare decisions only. To become a Medical Proxy in Colorado, the person must appoint an 'agent' in writing through a Medical Durable Power of Attorney (MDPOA), and forms are available through the Colorado Department of Public Health and Environment: <https://cdphe.colorado.gov/palliative-care/advance-care-planning-for-patients-and-families>

05

Power of Attorney (POA)

A Power of Attorney (POA) is a legal document that lets someone make decisions for another person, for example, like handling finances or medical care. The POA can have broad or limited authority, and it can remain in effect if the person becomes unable to make decisions. To create a POA in Colorado, fill out the form (notarization is recommended) available from the Colorado Bar Association: <https://www.cobar.org/portals/cobar/repository/SLH/chap23.pdf>

06

Conservator

A Conservator is a person appointed by the court to manage the finances and property of someone who cannot do so on their own. Conservators are responsible for handling money, assets, and property. To become a Conservator in Colorado, you must file a petition with the court, provide financial information about the person, and attend a court hearing. Visit the Colorado Judicial Branch's website for more details: <https://www.coloradojudicial.gov/self-help/conservatorship-adults>

07

Guardianship

A Guardian is a person appointed by the court to make personal and healthcare decisions for someone who is unable to make those decisions on their own. Guardians are often family members, friends, or professional organizations. The court determines how much decision-making authority the Guardian has. To become a Guardian in Colorado, you must file a petition with the court, attend a court hearing, file an annual Guardianship Report, and pay any required court and filing fees. For forms and more information, visit the Colorado Judicial Branch's website: <https://www.coloradojudicial.gov/self-help/guardianship-adults>

7 Opciones de tomar decisiones Para personas con IDD

Cuando una persona con discapacidad intelectual y del desarrollo (IDD en inglés) cumple 18 años, se la considera adulta y tiene derecho a tomar decisiones sobre su vida, como cualquier otra persona. Pero, a veces, ¡todos necesitamos ayuda! Este folleto explica las diferentes maneras en que una persona con IDD puede recibir apoyo para la toma de decisiones en Colorado, enumeradas de la opción menos restrictiva a la más restrictiva.

¿LO SABÍA?

No todas las personas con IDD necesitan ayuda para tomar decisiones. Muchas personas con IDD pueden tomar sus propias decisiones y puede que no necesiten ninguna de las opciones enumeradas.

Una persona con IDD no está obligada a tener un tutor cuando cumple 18 años. En muchos casos, las personas pueden decir que son «sus propios tutores», lo que significa que pueden tomar sus propias decisiones.

ESTABLECER EL APOYO

El proceso para establecer estas funciones de manutención es diferente en cada caso. Algunas son fáciles de establecer, mientras que otras pueden requerir una vista judicial o conllevar costes. Hay funciones de apoyo que ayudan a la persona a tomar sus propias decisiones y funciones de sustitución que toman decisiones en su nombre.

APOYOS MÚLTIPLES

Una persona con IDD puede tener diferentes personas que le ayuden con diferentes cosas. Por ejemplo, una persona puede ayudar con las necesidades económicas y otra con las decisiones sanitarias.

LA TALLA ÚNICA NO SIRVE PARA TODOS, ¡Y NO PASA NADA!

El apoyo adecuado es diferente para cada persona, porque las necesidades de cada uno son diferentes. En caso de duda, empieza por las opciones **menos** restrictivas. No pasa nada por explorar lo que funciona mejor.

01

La Toma de Decisiones con Apoyo (SDM en inglés)

La Toma de Decisiones con Apoyo (SDM) permite a una persona con IDD elegir a personas de confianza que le ayuden a entender las opciones y a tomar decisiones. Las personas de apoyo pueden dar consejos y orientación, pero la persona sigue tomando sus propias decisiones. En Colorado, los acuerdos de SDM son voluntarios y deben hacerse por escrito. Para descargar un acuerdo, visite: thinkchange.info/SDMexampleagreement

02

Representante autorizado (AR en inglés)

Un AR (Representante Autorizado) ayuda a una persona con IDD a acceder a los servicios y apoyos que necesita, según lo definido por la persona con IDD. La persona con IDD suele designar a un AR a través de su proveedor de servicios o Agencia de Gestión de Casos (CMA) y puede cambiarlo en cualquier momento. Para convertirse en un AR en Colorado, póngase en contacto con el proveedor de servicios o CMA para el proceso y el papeleo.

03

Representante del beneficiario

Un representante del beneficiario ayuda a gestionar las prestaciones de la Seguridad Social de una persona que necesita ayuda con sus finanzas. Sólo pueden gestionar los fondos de la Seguridad Social, no otros asuntos financieros. Para convertirse en un representante del beneficiario en Colorado, póngase en contacto con la oficina local de la Seguridad Social, rellene el formulario SSA-11, proporcione un documento de identidad y pase una entrevista: <https://www.ssa.gov/payee/>

04

Apoderado médico (agente sanitario)

Un apoderado médico toma decisiones médicas por alguien que no puede tomarlas por sí mismo. Su función se limita únicamente a las decisiones sanitarias. Para convertirse en apoderado médico en Colorado, la persona debe nombrar a un «agente» por escrito mediante un poder médico duradero (MDPOA), y los formularios están disponibles a través del Departamento de Salud Pública y Medio Ambiente de Colorado: <https://cdphe.colorado.gov/palliative-care/advance-care-planning-for-patients-and-families>

05

Un poder notarial (POA en inglés)

Un poder notarial (POA, por sus siglas en inglés) es un documento legal que permite a alguien tomar decisiones por otra persona, por ejemplo, como la gestión de las finanzas o la atención médica. El poder puede tener una autoridad amplia o limitada, y puede seguir en vigor si la persona queda incapacitada para tomar decisiones. Para crear un poder en Colorado, rellene el formulario (se recomienda la notarización) disponible en el Colegio de Abogados de Colorado: <https://www.cobar.org/portals/cobar/repository/SLH/chap23.pdf>

06

Un Curador

Un curador es una persona designada por el tribunal para administrar las finanzas y los bienes de alguien que no puede hacerlo por sí mismo. Los curadores son responsables del manejo de dinero, bienes y propiedades. Para convertirse en curador en Colorado, debe presentar una petición ante el tribunal, proporcionar información financiera sobre la persona y asistir a una audiencia en el tribunal. Visite el sitio web del Poder Judicial de Colorado para obtener más detalles: <https://www.coloradojudicial.gov/self-help/conservatorship-adults>

07

Tutela

Un tutor es una persona designada por el tribunal para tomar decisiones personales y sanitarias en nombre de alguien que no puede tomarlas por sí mismo. Los tutores suelen ser familiares, amigos u organizaciones profesionales. El tribunal determina el grado de autoridad del tutor para tomar decisiones. Para convertirse en tutor en Colorado, debe presentar una petición ante el tribunal, asistir a una audiencia judicial, presentar un informe anual de tutela y pagar las tasas judiciales y de presentación requeridas. Para obtener formularios y más información, visite el sitio web del Poder Judicial de Colorado: <https://www.coloradojudicial.gov/self-help/guardianship-adults>