

A Resource Document



Developing Roommate Agreements under the NC Innovations Waiver *Supported Living Service* Definition

The Purpose of This Document

This document is provided as a starting place for people using Supported Living Services as defined in the North Carolina Innovations Waiver.¹

The waiver's Supported Living service definition is framed by the expectation of North Carolina Medicaid that those who qualify for and receive services under the Supported Living definition will develop a roommate agreement, as stated in the waiver's clinical coverage policy:

A formal roommate agreement, separate from the landlord lease agreement, is established and signed by individuals whose names are on the lease.

--NC Division of Medical Assistance, NC Innovations Waiver, Clinical Coverage Policy 8-P, November 1, 2016, pg. [108](#).

The policy does **not** mandate the contents of a roommate agreement, but rather provides guidance to people who will be living together – and those who support them– as they develop their roommate agreements. The suggestions and considerations for the Roommate Agreement's content are provided from the perspective of the person using Supported Living services. While the person may require assistance in developing this agreement, the agreement must reflect the preferences, interests, needs and priorities of those who will live together.

The Purpose of Roommate Agreements

Person-centered roommate agreements are thoughtfully developed between the people living together and those who support them to do so, including the organizations that provide Supported Living services. Roommate agreements help assure living habits and the needs of each roommate are made known to the other, to help minimize possible conflicts due to behaviors and expectations.

Because each living arrangement and roommate relationship is unique, each roommate agreement will be different. For example, some roommate dynamics may more closely

¹ Thanks to the Supported Living Standards Committee for its assistance and guidance in developing this resource document.

resemble a family household, where household resources are comfortably shared and living preferences are learned and developed over time. Others may require a high level of clarity in their arrangement, with each role and responsibility clearly noted. This document provides some things to consider as people and their support teams think through their living arrangement and develop their roommate agreement. It is *not* expected that every consideration be formally documented in the agreement. The topics included in a roommate agreement and the level of detail provided are best determined by the roommates and their supports, with assistance from their supported-living organization(s).

Roommate agreements help people plan how to live together, however, a written roommate agreement **does not replace** a rental agreement (“lease”) with a landlord or change any of the laws related to rental agreements.² If a person using Supported Living services is renting his/her home, some of the considerations in this document may already be included in the terms of the rental agreement/lease.

[What to Consider When Developing a Roommate Agreement: Questions to Ask Yourself](#)

Questions to Ask Yourself Before Developing an Agreement

- What is important for others to know about your preferences, living habits and routines?
- What are some of the qualities that are important to you in a roommate?
- How have you selected the home you will share?
- What does your ideal roommate arrangement look like?

Thinking through Needed Supports

- Who is playing a formal role in supporting me to live in my own home?
 - Me
 - My family
 - My supported living organization
 - My direct support staff
 - Other:
- What kind of support do I need to live in my home?
 - Do I need help finding a place?
 - Do I need help paying bills?

² Disclaimer: A written roommate agreement does not supersede the North Carolina Residential Rental Agreements Act in Chapter 42 of the General Statutes or the North Carolina Fair Housing Act in Chapter 41A of the General Statutes. Additionally, no part of this document is intended to address whether or not written roommate agreements are or should be crafted as legally enforceable contracts between the parties involved.

- When do I need staff?
- Will other people who aren't paid be helping me live in my own home? What will they be doing?

Understanding Our Living Arrangement: Questions for Roommates to Ask Together

Our Living Arrangement

- Who am I choosing as my roommate?
- What are we each looking forward to about living together?
- Why does living in our own home matter to us?
- Will we select a new place to live together or will one of us move in with the other?
- Where are we living? Do we own it? Do we rent it?
- Are we using a program to help in pay our mortgage or rent?
 - Examples include assistance programs managed by the NC Housing Finance [Agency](#) or assistance through our local housing [authority](#)?

Paying for Bills and Household Needs

- How will rent/mortgage payment be divided?
- How will utilities be divided?
- How will each bill be paid (directly, using representative payee, etc.)?
- Who will pay for household supplies (like light bulbs and toilet paper)?
- Who is responsible for maintaining the little things in the house (like changing air filters, cleaning)?
- If we aren't renting, who is responsible for maintaining the big things like, the roof and the home owners' insurance?
Is anyone bringing furniture? Are there things that need to be purchased? Who will be responsible for each purchase?

Taking Care of the Home

- How will chores be divided (both inside and outside)?
- Who do we call if something goes wrong with the place where we are living?
- Who will take the lead on calling this person/entity?

How We Want to Live Together

- How do we feel about having pets?
- How do we choose who gets which bedroom?
- Are we going to share food? If so, how will we split the bill?
- How will we prepare our meals?
- What do our personal schedules look like? Will this impact the other person?
- How often are we going to clean our home?

Developing a Roommate Agreement under the NC Innovations Supported Living Service Definition: A Resource Document

December, 2016

Page 3 of 7

- How will we divide chores like taking out the garbage and doing the dishes?
- How do we feel about overnight guests?
 - How long can they stay?

Handling the Challenges

- If we disagree on something about living together, how will we talk about it?
- If our families disagree on something about our living together, how will they talk about it?
- If we decide we can't be roommates anymore, who moves?
- If one of us unexpectedly can't cover the share of the expenses, how will we handle it?
- If one of us is doing something that puts our housing in danger (like violating the lease, etc.), how will we talk about it?

Support Staff (Companions)

- Do we want to/will we need to share staff?
- Do we want to have our own support staff?
- How are we involved in selecting our support staff?

Example of Person-Centered Roommate Agreement Language

The Scenario:

- John and Ralph have been friends for years and liked living together in ABC Group Home, run by ABC provider (“ABC”). They have decided to live together in a two-bedroom apartment at Awesome Apartment Complex. They chose this particular apartment because it’s affordable and they can easily get to the grocery store. ABC will continue supporting them under the Supported Living service definition, in a part of the ABC organization referred to as “ABC Community.”
- John and Ralph are both really excited about living in their own apartment and with each other. John is looking forward to painting his bedroom “Carolina Blue” and Ralph is looking forward to living in a complex with a pool.
- The lease starts Feb. 1, 2017. John and Ralph have agreed to evenly divide the rent and utilities. Awesome Apartment Complex participates in NC’s Targeting/Key Program, which will pay \$307 of the \$600 monthly rent. John will pay will pay his half directly. Ralph’s sister, Sherry, who is Ralph’s rep-payee, will pay the other half with Ralph’s money. Since the rent is due on the 5th, Sherry will deliver the check by the 2nd of the month. To make it easier for the landlord, John and Ralph’s staff will help them put both checks in an envelope and deliver it to the leasing office by 5:00 p.m. on the 5th of each month to avoid late fees.
- Water and trash are included in the rent, leaving John and Ralph with only an electric and internet bill. John and Ralph have decided to not have cable in order to save money. John and Ralph are responsible for paying for their household’s utilities. They will each write a check to cover half of the utilities. John and Ralph’s support companions will help them keep track of when the bills are due and to find ways of keeping utility costs low. Ralph and his companion will make sure Sherry (Ralph’s sister and rep-payee) knows when all of the bills are due and Sherry agrees to provide Ralph’s portion of the payment one week before the bills are due.
- John and Ralph want to shop together and will share food and small household needs like toilet paper and light bulbs. ABC Community will help John and Ralph get set up with food stamps.
- If something is wrong with the apartment, John and Ralph will notify the landlord. Their companions may also help advise them on when to call and for what.
- John and Ralph both need support with most activities they do, including overnight sleep support. John and Ralph agree to share an overnight companion but want their own companions for as much time as their household staff budget will allow (including during the day). John’s staff really needs to share John’s interest in volunteering at the Nature Park and Ralph’s companion should like to swim. ABC Community Agency will screen potential applicants and complete interviews. John and Ralph will then conduct an interview with questions that are important to them to determine if the staff is a good fit. John and Ralph will provide their input to ABC Community Agency with regard

to whom they would like to work for them. ABC Community Agency will complete hiring paperwork and all other processes that are required for the staff to begin working.

- To help stretch the household staffing budget and because they enjoy time together, Sherry is going to pick up Ralph every Sunday morning for church and afternoon time with their family.
- John's family is providing John's bedroom set, a living room couch and a side table. Ralph's family is providing a dining room table. John and Ralph will both access Community Transitions funding under the Innovations waiver. Through Community Transitions Funding, John will purchase two living room chairs and dishes. Ralph will purchase a bedroom set.
- John and Ralph will decide together how they will split chores but agree they want dishes done every night and neither likes a messy house.
- With their companions' support, John agrees to be responsible for checking the smoke detectors on a regular schedule and Ralph will change the air filters.
- At this point, John and Ralph don't want any pets together. Ralph has goldfish and will purchase all items related to the gold fish with his own money.
- John and Ralph like to shop together and want to try cooking together. Their companions will help them learn ways of saving money on groceries and help them in preparing weekly shopping lists. John and Ralph want to shop on Friday evenings.
- Ralph is a "night owl" and agrees to listen to his music on his headphones after John has gone to bed, which is typically between 10 p.m. and midnight.
- John and Ralph agree that it's ok for friends and family to stay overnight as long as each roommate is aware and the person visiting doesn't stay longer than a weekend without everyone agreeing to it first.
- John and Ralph have known each other for a long time and know when the other is irritated. If either one has concerns about their living arrangement, they agree to talk about it. Ralph has asked that they talk about any issues in the afternoon or evening, since he isn't a "morning person."
- If either John or Ralph's companions or family's think there are unresolved issues that may impact either John or Ralph's housing can request a household meeting, which Community First staff will coordinate.

Elements that could be included in John and Ralph’s roommate agreement:	
“We want to live together at Awesome Apartment Complex.”	WHERE JOHN and RALPH WILL LIVE
“We will split our rent, which will be \$143 each every month. We will split our electricity bill and our internet bill fifty/fifty.”	HOW BILLS WILL BE PAID AND MONEY MANAGED
“I, John will pay my half of the rent to the landlord directly.” “I, Sherry, Ralph’s sister, will pay Ralph’s portion to the landlord.” “We all understand rent is due on the 5 th of the month.”	ROLE ABC COMMUNITY PROVIDER PLAYS (many of these support roles may also be played by natural supports)
“I, Sherry, will make sure I bring Ralph’s portion to the apartment by the 2 nd of the month.”	
“We want to do our grocery shopping together.”	
“We, ABC Community will help make sure John and Ralph pay their bills on time.”	
“We, ABC Community assist John and Ralph on trips to grocery store and for applying for food stamps.”	
“We, ABC Community, will help John and Ralph learn to budget.”	ROLE OF NATURAL SUPPORTS
“We, ABC Community, will support John and Ralph with staffing overnight and 1:1 daytime staffing. We understand John and Ralph want to share an overnight staff person and want as much individual time as possible. We also understand John and Ralph want to have final approval of anyone who supports them. Our staffing schedule will be developed together and put in writing before John and Ralph sign the lease.”	
“I, Sherry, will pick up Ralph every Sunday around 10 a.m. for the afternoon. We will return around 4 p.m.”	WHO TO CONTACT with QUESTIONS OR TROUBLESHOOTING
“If we get annoyed at each other, we know we can ask for help from ABC Community to help us figure it out.”	
“If any of us have questions about this agreement, we can call:-----“	SIGNATURES OF THOSE WHO HAVE COMMITTED TO DOING SOMETHING
Signatures: John’s, John’s legal responsive (if applicable), Ralph and Ralph’s sister Sherry, ABC Provider	
OTHER SPECIFIC AGREEMENTS JOHN, RALPH and SUPPORTS MAY WANT TO INCLUDE.	