

1915(i) Individual Plan Agenda (IPA) Guide

When to use the IPA

- Must be used for all quarterly reviews
- Changes to the conflict of interest
- Changes to (or additions to) a goal on the plan of care (POC). The only exception would be if you are changing provider name from TBD to a provider's name, or from one provider's name to another provider, with nothing else but the name of the provider changing on the goal. In these instances, you would just use a Change Form.
- Changes to the Risk Management/Crisis Plan.
- Changes to the HCBS Setting

Discussion and Documentation focus

When you make an update to the POC, you should focus on not only the update that the member is wanting or needing but also review the entirety of the POC. This will help you as a care coordinator see the entire picture of services, 1915(i) and non-1915(i), the member is receiving. Here are some of the main points to make sure you focus on:

- Discussion of all goals on the POC.
- Do any goals need to be added, subtracted, or modified? Do not forget to see what non-1915(i) services the member could benefit from, or that they may be using that should have their own non-1915(i) goal on the POC.
- What progress occurred and what needs to happen to continue or start making progress during the next quarter.
- Action plan(s) for next quarter to help get the member closer to achieving a goal.

How to create an IPA

You must be in the State Oversight account to create an IPA.

- You will need to go to the member's individual home page. Start by clicking on the Individual Home Page tab. You can search for the members whose IPA you need to create. If you have recently looked up a member they will be listed under Recently Accessed Individuals. Click on the member that you need to create an IPA for.

- Once you are in the member's Individual Home Page, click on Individual Plan Agenda, under Modules. It will show you a dropdown of either New or Search. If this is a new IPA, click on New. If the member has had IPAs already created for past POC changes, they will now be listed. To proceed with the new IPA, you need to click on Create New.
- If you click on Search, you will be able to search for an IPA that you previously worked on and want to come back to.
- For the meeting date, you will put the date that you had the meeting with the member where you reviewed the POC. When you meet with the member, you and the member need to sign a Meeting Attendee Signatures and a Member and Care Coordinator Signatures & Acknowledgements form. Add these to the POC itself when it comes time to edit it. Do not add them to the IPA.
- For Meeting Type, select Quarterly Review for a quarterly review or Change of Services when doing an interim update to the plan of care.
- Add a Discussion Topic (in the Individualized Item section) for each goal on the plan of care. Detail what the member is trying to work toward. Click Add Individualized Item to add a Discussion Topic. This will bring up a pop-up where you will fill in what goal the member has been working toward over the last quarter.
- Add a Desired Outcome (in the Progress Towards Outcome section). The Desired Outcome will describe what progress has been toward the goal. Click Add Other Outcome to add the Desired Outcome(s). In the Progress Towards Outcome pop-up box, you will describe the person's desired outcome, the goal they are trying to achieve.
- You must have a Desired Outcome for each Discussion Topic listed, and there must be a Discussion Topic for each goal on the POC.
- For each Desired Outcome you need to select the progress that is being made on that goal. Here are the progress selections for you to choose from.
 - Completed if the member has achieved their goal.
 - Discontinued if you are ending the member's goal for any reason other than completion, if the goal is no longer realistic due to a member's changed circumstances.
 - Fluctuating if members making and losing progress over the review period
 - Maintaining if the member is working on the goal but has not made any marked improvements or losses of progress.
 - Making Progress if your discussion with the member shows there is progress toward that goal being made.
 - Needs more Data is used when you are not able to get sufficient data from a service provider about a member's goal status.
 - Not Making Progress if the member's progress is stalled. Your notes should identify why the member's progress is stalled.

Each goal on the POC must be listed in the Discussion Topics with a corresponding Desired Outcome. There could also be areas the member has been working on that are not specifically listed as goals on the POC but warrant being listed as a Desired Outcome. You want a holistic review of the member's growth over the past quarter. Care coordinators should be reviewing a member's entire scope of current and needed services. This includes 1915(i) and non-1915(i) services.

- Once you have added all the Discussion Topics and Desired Outcomes, you will click Submit on the bottom right of the IPA. This will send the IPA to the 1915(i) admins for their review. If you want to save the IPA to come back and work on it later, you will click Save.
- Do not make any changes to the POC until the IPA has been approved by a 1915(i) admin. If there are changes that need to be made to the IPA before it is approved, it will be returned to you.
- If you make changes to the POC before the IPA is approved, you will no longer have an approved POC.

Individual Plan Agenda List

When an IPA has been approved, it will appear in the Pending Meeting Minutes line under the Individual Plan Agenda section of your To Do tab.

From the member's Individual Home Page, in the State Oversight account you can search for all IPAs that you have submitted for a member. From the Individual Home Page, you will click on Individual Plan Agenda and then Search. On the Search Individual Plan Agenda page, you do not have to enter any details; you can just click on Search. This will bring up a list of all IPAs that the member has. The next page will list all of the member's IPAs. Under the Status column, it will say Approved once the 1915(i) admins have approved a specific IPA.

If the IPA is returned to you, it will state that the IPA is back in Draft status. If it is returned, it will also appear on the Worklist line under the Individual Plan Agenda section of your To Do tab.

Getting to the IPA from the To Do tab or from the Individual Home Page gets you to the same IPA.

Recording Meeting Minutes

Once an IPA is approved you have to record the Meeting Minutes. Think of the Meeting Minutes as the detailed report you are generating from meeting with the member for their quarterly or interim review.

- When you click into the approved IPA, scroll to the bottom. Click on Record Meeting Minutes. A pop-up will appear; you will click on Yes to proceed.
- You will now see the IPA with the Comments boxes added to the Discussion Topic(s) and Desired Outcome(s).
- For each Discussion Topic you will select either Action Plan or Issue Resolved. Action Plan is selected when the goal has not been achieved, and you are identifying action steps for the next quarter for the member to work on to achieve the goal. Issue resolved is selected when the goal has been achieved. Make sure to detail how you have measured that the goal has been achieved. Enter the corresponding information in the Comments box to detail the Action Steps that you and the member came up with at the quarterly or interim review meeting.
- For each Desired Outcome, describe the member's progress in the goal over the previous quarter in the Comments section. If you are ending or modifying the goal, explain what happened over the previous quarter as to why the change is necessary.
- Once you are done adding in the Comments for the Discussion Topic(s) and Desired Outcome(s), click Save Meeting Minutes.

Adding the IPA to the Plan of Care

To update the POC with the needed changes, you will now create a Change Form. If it is a quarterly review, or interim update, that requires an IPA to be created, and you instead only create a Change Form (skipping the IPA creation), you will no longer have an approved POC.

- Go to the member's plan of care. Scroll to the bottom of the POC and click Create Change Form.

Creating a Change Form

- Select Individual Plan for Document(s) being changed, added or discontinued.
- Reason for Change will always be Other
- Other Reason will be the reason you are making the change(s). For example, if it is a quarterly review, you would put something along the lines of, "Making changes to the plan of care as detailed from the quarterly review meeting."
- List Specific Changes is where you will specifically list and detail the changes you are making. Do not just say "changing plan of care." Tell the reader what you are specifically changing. For example, "Updated the member's peer support goal to add non-medical transportation."
- Where is the Change Documented? This is where you will tell the reader where the changes are being made on the plan of care, for example, "Changes are in the peer support goal."

- Once you have the Change Form filled out, select Activate and Edit Individual Plan. This will take you right into the POC to make the changes that you detailed on the Change Form.

Making the Changes to the POC

- You will scroll down the member's POC to the Action Plans section of the POC. Click Import from Individual Plan Agenda. Search for the IPA (you don't have to enter anything here; you can just click Search). Then select the IPA you want to import into the POC and click on Select.
- You will then select the Desired Outcome(s) from the IPA that need to be listed on the POC. By doing this, the POC will list the actions that came out of the different quarterly and interim meetings you have had. This allows whoever is reviewing the POC to see the progress that has been made to the POC over time.
- Once the Action Plan has been added to the POC you need to make the changes to the POC that came out of the meeting you had with the member. Make the changes.
- You will now attach the Member and Care Coordinator Signatures & Acknowledgements form to the POC.
- Once you have made all of the changes to the POC, you need to click on the Update without Closing the Change Form button. Do not click on the Update button. If you click on the Update button 1915(i) admins will not be notified to review your changes, and the POC will no longer be considered to be an approved POC.

Reviewing Changes to the POC

To review what comments the 1915(i) admins have on your Change Form, in the Change Form(s) section of the POC, click on the pen icon in the action column of the Change Form you made the changes in. This will take you into the Change Form to see who has acknowledged it and what, if any, comments they have made. If the 1915(i) admins make any comments with their acknowledgement, you need to follow them. If you do not, you will not have an approved POC.

Once you receive the notification the Change Form has been acknowledged by 1915(i) admins you can also Acknowledge the Plan of Care. This is not a required step, but it will show in your To Do list until completed.

To see what IPAs have been linked to a POC, on the bottom of the POC click on Linked Individual Plan Agenda. This will give you a popup that shows all IPAs that have been linked to this POC. Clicking on each IPA will take you to the IPA to see all of the notes that were made on it.

Click on the “I” icon next to Approved at the top of the POC, then select Update History. You can then select different versions of the POC to compare and to see what was changed from version to version.