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# Quarterly/Interim Reviews & Individual Plan Agendas

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Guidance for Care  
Coordinators



# When to use the Individual Plan Agenda (IPA)

- Must be done for all quarterly reviews
- Changes to the conflict of interest
- Changes to (or additions of) a goal on the POC.
  - Only exception would be if you are changing provider name from TBD to the provider's name that accepted the referral. Then you would use a Change Form.
- Changes to the Risk Management/Crisis Plan.
- Changes to the HCBS Setting



# Discussion and Documentation focus

Do for **EACH** Plan of Care goal:

Discussion of all goals on the POC.

Whether there has been progress, and members satisfaction with each goal.

What progress occurred and what needs to happen to continue/start making progress during the next quarter

Whether the goal has been reached.

Action plan for next quarter to help get closer to/achieve goal

# How to start an Individual Plan Agenda

- From the State Oversight Account, go to the Member's Individual Home Page
- Click under Modules Individual Plan Agenda and select New. Once you are in the list, select Create New

The screenshot displays a web interface for managing Individual Plan Agendas. On the left, a sidebar titled 'Modules' contains a list of options: 'Case Note', 'General Event Reports (GER)', 'Individual Plan', and 'Individual Plan Agenda' (which is expanded). Below this list is a blue 'New' button and a search input field. The main content area on the right shows 'Showing 1 to 1 of 1 entry'. Below this, there is a blue 'Create New' button and an 'Export to Excel' option with a document icon.

# Filling out the Individual Plan Agenda

## Individual Plan Agenda New ⓘ

Individual	testt testt ⓘ
Meeting Date	<input type="text" value="MM/DD/YYYY"/>
Meeting Type	Quarterly Review
Review Period Start Date	<input type="text" value="12/01/2025"/>
Review Period End Date	<input type="text" value="03/01/2026"/>

The Review Period start and end date are the dates of the Quarter of services you are reviewing. Or for an interim update, the date the POC was last updated to the date you met with the member to update the POC.

Add a Discussion Topic, (in the Individualized Item section) for each goal on the plan of care, telling us what the member is trying to work towards

Add a Desired Outcome, (in the Progress Towards Outcome section). The Desired Outcome will describe what the progress has been towards the goal.

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.

We will now break down each individual part of the IPA.

### Individualized Item

Discussion Topics	Action
1. Reviewed the member's peer support goal, and their desire to connect to recovery resources by going to more AA meetings and growing their recovery network, and building community living skills by focusing on their needs to understand how to take care of daily activities to keep their employment and their house.	<input type="button" value="Edit"/>

### Progress Towards Outcome

Desired Outcome	Periodic Progress	Linked ISP Report	Action
Member is making progress growing their recovery community and has been working on employment and job community living skills. Member states they still have room that they want to grow in in these areas.	<input type="text" value="Making Progress"/>		<input type="button" value="Edit"/>

# Select your dates and type of meeting

Indicate the Meeting Type in the drop down You will primarily need to select “Quarterly Review” or “Change of Services” when doing interim meetings regarding service changes. Do not select Six Month Review as our requirements are that you meet with each member at least quarterly.

For the Meeting Date put in the date, you had the quarterly review.

When you have your quarterly review, you and the member need to sign a Meeting Attendee Signatures, and a Member and Care Coordinator Signatures & Acknowledgements form. Add this to the POC itself when it comes time to edit it.

The screenshot shows a form with the following fields and options:

- Meeting Date:** A date input field with a calendar icon and the placeholder text "MM/DD/YYYY".
- Meeting Type:** A dropdown menu currently showing "Quarterly Review".
- Review Period Start Date:** An empty date input field.
- Review Period End Date:** An empty date input field.

The dropdown menu for Meeting Type is open, showing the following options:

- Please Select -
- Annual
- Change of Services
- General
- Intake
- Quarterly Review** (highlighted)
- Six Month Review
- Transition

# Adding Discussion Topics

Click Add Individualized Item to add a Discussion topic. This will bring up a pop up where you will fill in what the goal is the member has been working towards over the last quarter.

Individualized Item

Discussion Topics	Action
1. Reviewed the member's peer support goal, and their desire to connect to recovery resources by going to more AA meetings and growing their recovery network, and building community living skills by focusing on their needs to understand how to take care of daily activities to keep their employment and their house.	<input type="button" value="Edit"/>

# Adding Discussion Topics

Once you have added a Discussion Topic for each goal, Click Add Other Outcome to add the Desired Outcome(s). You will then describe the person's desired outcome – i.e., what they are trying to achieve (goal). You need to have a Desired Outcome for each Discussion Topic listed.

Progress Towards Outcome

Nothing found to display

Add Action Plans from Individual Plan as Outcome

Add Other Outcome

## Progress Towards Outcome ⓘ

\* **Desired Outcome**

Member is making progress growing their recovery community and has been working on employment and job community living skills. Member states they still have room that they want to grow in in these areas.

About 2797 characters left

**Periodic Progress**

Making Progress

**Linked ISP Report**

Remove Continue

# Progress Towards Outcomes

Then select the appropriate field under “Periodic Progress”.

Choose **Completed** if the member has achieved their goal

Choose **Discontinued** if you are ending the member’s goal for any reason other than completion – i.e., if the goal is no longer realistic due a member’s changed circumstances.

Choose **Fluctuating** if member’s making/losing progress.

Choose **Making Progress** if your discussion with member shows there is progress towards that goal being made. Add any additional comments about further steps to achieve the goal in the comments section.

Choose **Not Making Progress** if the member’s progress is stalled. Your notes should identify WHY the member’s progress is stalled and there should then be a corresponding action plan to identify ways to create progress.

Then click Continue

The image shows a screenshot of a web form. On the left, there are two labels: "Periodic Progress" and "Linked ISP Report". To the right of "Periodic Progress" is a dropdown menu. The menu is currently open, showing a list of options. The top option is "Making Progress" with a small downward arrow. Below it is a greyed-out option "- Please Select -". The remaining options are "Completed", "Discontinued", "Fluctuating", "Maintaining", "Making Progress", "Needs more Data", and "Not Making Progress".

# Submitting Individual Plan Agenda

Once you have added all the Discussion Topics and a corresponding Desired Outcome, you will click Submit at the bottom.



A screenshot of a light blue horizontal bar containing four buttons. From left to right: 'Cancel', 'Back', 'Save', and 'Submit'. A red arrow points down to the 'Submit' button.

Clicking SUBMIT will send the Individual Plan Agenda to 1915i program staff to review and approve (or return it to you) if there are areas where you need to fix it.

# Individual Plan Agenda List

testt testt Admitted

Home Profile Plans Case Status About Me

ISP Programs

No isp programs found to display

Modules

- Case Note
- Document Storage
- Individual Plan
- Individual Plan Agenda
- New Search
- Personal Focus Worksheet
- Referral

Go To

Click on Search under Individual Plan Agenda in the Member's Individual Home Page. On the next screen you can just click on search, and it will list all IPAs that have been done for this member

Once the IPA has been approved by the 1915i program staff it will say Approved in the status box. You will see the Individual Plan Agenda as showing No for Meeting Minutes Recorded? Click on this IPA to add the Meeting Minutes.

Form ID	Individual	Status	Meeting Date	Meeting Type	Review Period Start Date	Review Period End Date	Meeting Minutes Recorded?	Time Zone
		Approved	12/17/2024	Quarterly Review	10/01/2024	12/30/2024	No	US/Central

# Recording Meeting Minutes

Click on Record Meeting Minutes at the bottom of the screen and click Yes on the popup.

**Individualized Item**

**Discussion Topics**

1. Member's Goal 1 - to do one healthy activity per day.

**Progress Towards Outcome**

Desired Outcome	Periodic Progress	Linked ISP Report
One healthy activity per day each week	Making Progress	

**Required Items**


Nothing found to display

**External Attachment(s)**

Nothing Attached

View PDFs

Cancel Back Discontinue Edit **Record Meeting Minutes** Copy



# Discussion Topics

You will choose Action Plan or Issue Resolved for each Discussion Topic (goal on the POC) you created.

Choose **Action Plan** when the goal has not been achieved, and you are identifying action steps for the next quarter.

Choose **Issue Resolved** when the goal has been achieved.

Use the Comments section to lay out the Action Plan steps that you and the member came up with at the quarterly review.

Action Taken

Action Plan

- Please Select -

Action Plan

Deferred

Discussion Record

Issue Resolved

Individualized Item		
Discussion Topics	Action Taken	Comments
1. Member's Goal 1 - to do one healthy activity per day.	Action Plan	<p>Member has identified they could bike to their NA meeting on Sundays to add one healthy activity. They are going to start with this for this coming Sunday.</p> <p>They are also going to start walking with their friend Janice every Saturday morning and will call Janice to arrange this on Friday evenings two weeks from Sunday (put date here).</p> <p>About 2662 characters left</p>

# Desired Outcome

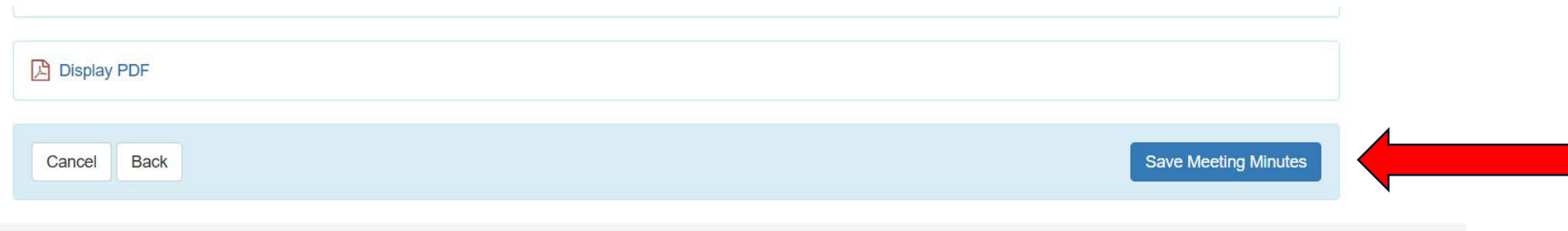
For each Desired Outcome (how the goal is going), select from the Periodic Progress drop down the nature of the member's progress. Then describe the member's progress in the Comments section. If you are ending or modifying the goal, explain why that's necessary. Think of the meeting minutes as the detailed report you are generating from meeting with the member for their quarterly/interim review, and you are putting in all the things you discussed with them about this desired outcome.

## Progress Towards Outcome

Desired Outcome	Periodic Progress	Linked ISP Report	Comments
One healthy activity per day each week	<input type="text" value="Making Progress"/>		<p>Member has been doing one healthy activity per week. Mostly walking. Member is having trouble motivating themselves to do more than that. Our goal is to move from 3 healthy activities per week to 5 healthy activities by adding an activity day every two weeks.</p> <p>About 2741 characters left</p>

# Saving Meeting Minutes

Click Save Meeting Minutes once you have entered in all the needed information in the Individualized Item and Progress Towards Outcome sections.



The screenshot shows a web interface with a light blue header bar. Below the header, there is a white input field with a document icon and the text "Display PDF". Below this, there is a light blue footer bar containing three buttons: "Cancel", "Back", and "Save Meeting Minutes". A large red arrow points to the "Save Meeting Minutes" button.

# Adding the Individual Plan Agenda to a Member's Plan of Care with the Change Form.

Go to the member's plan of care. You will now click Create Change Form at the bottom of the Plan of Care. Now, you will start making the needed changes to the POC that come out of the meeting with the member.



# Adding the Individual Plan Agenda to a Member's Plan of Care with the Change Form

Select Individual Plan under the Document(s) being changed, added or discontinued section.

Reason for Change: Other

Other Reason: In this case it is a quarterly review. If not a quarterly review, detail the reason for the change.

List Specific Change(s): List and detail what you are changing on the POC

Where is the Change Documented?: In most cases it will be in the Individual Plan Agenda and the member's goal area. But you could also be updating other areas of the POC, depending on what you learned from the meeting with the member.

Document(s) being changed, added or discontinued

- Financial Plan
- Individual Plan
- Protocol(s)
- Safety Plan
- Other Document(s)

Reason for Change

Other

Other Reason

Quarterly Review

About 2984 characters left

List Specific Change(s)

Added Individual Plan Agenda

About 2972 characters left

Where is the Change Documented?

Individual Plan Agenda and Member Goal 1 updated

# Adding the Individual Plan Agenda to a Member's Plan of Care with the Change Form

You will now click Activate and Edit Individual Plan. This lets you open the member's Plan of Care and edit it with the changes that came out of your meeting with the member. Do not select Activate.



# Editing the member's Plan of Care

You will scroll down the Member's Plan of Care to the Action Plans section. 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.

**Action Plans** Jump to ?

Nothing found to display

**Import from Individual Plan Agenda** Add Action Plan

Select the Desired Outcome (how the goal is going). Then select Add from Individual Plan Agenda. You will now see Action Plan items listed on the POC from the IPA.

**Action Plan List**

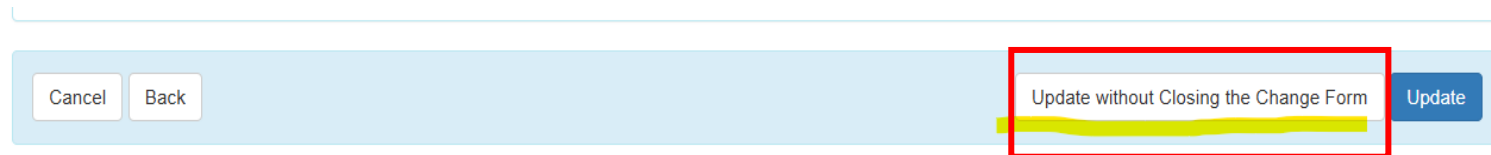
You have selected 1 items.

Select	Desired Outcome	Need/Issue
<input checked="" type="checkbox"/>	Ricky will keep on working with his peer supports and the outlined action steps on his plan of care.	Ricky Bobby will actively improve his teamwork skills by engaging in structured peer support activities at least twice a week, such as participating in team-building exercises, seeking feedback from colleagues, and offering assistance to at least one teammate per week.

Back Add from Individual Plan Agenda

# Editing the member's Plan of Care


You can now update the section(s) of the plan of care you stated you are updating. When you are done making all the updates to the POC you will select **Update without Closing the Change Form**. This Change Form will now populate under 1915i program staff's To Do tab for them to review it.



A screenshot of a form's footer area. It features a light blue horizontal bar containing four buttons. From left to right, the buttons are: 'Cancel', 'Back', 'Update without Closing the Change Form', and 'Update'. The 'Update without Closing the Change Form' button is highlighted with a yellow underline and enclosed in a red rectangular box.

# Editing the member's Plan of Care

To review what comments the state, or BCBSND, admins have on your Change Form, click on the pen icon in the action column. This will take you into the Change Form to see who has acknowledged it, and what, if any comments they have made. If the 1915i program staff, make any comments with their Acknowledgement, you need to follow them. If you do not, you will not have an approved POC.


Change Form(s)				
Change Date	Status	Reason for Change	Form ID	Action
10/20/2025	Active	Quarterly Review		

[Linked Individual Plan Agenda](#) | [Acknowledgement Report](#)


Once you receive notification the Change Form has been acknowledged by 1915i program staff, 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.


Cancel Back Discontinue Acknowledge Create Change Form Edit

# Review the history of a POC

Click on the  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.

**TEST ENVIRONMENT - Do Not Enter Real Data**

1915(i) Plan of Care 1.7.2025 **Approved** 

<b>Individual</b>	Ricky Bobby 
<b>Oversight ID</b>	ND1111111 (SPA-ND)
<b>Date of Birth</b>	01/01/1969
<b>Medicaid Number</b>	ND1111111
<b>Residential Address</b>	1111 1st Ave North, Fargo, ND 58104, USA

**Form ID :** OISP-SPAND-PBH4NBUZ6MULP

**Time Zone :** US/Central

**Entered By :** Cody Stanley, Care Coordinator **on** 09/15/2025 02:11 PM

**Last Updated By :** Cody Stanley, Care Coordinator **on** 09/15/2025 04:06 PM

**Submitted By :** Cody Stanley, Care Coordinator **on** 09/15/2025 02:32 PM

**Approved By :** Cody Stanley, Therap Admin **on** 09/15/2025 02:33 PM

**Plan Type :** Individual Support Plan

**Template Form ID :** IPPT-SPAND-P384PDGULEMN7

[Update History](#)