# Quarterly/Interim Reviews & Individual Plan Agendas

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.
- Any changes to the HCBS Setting
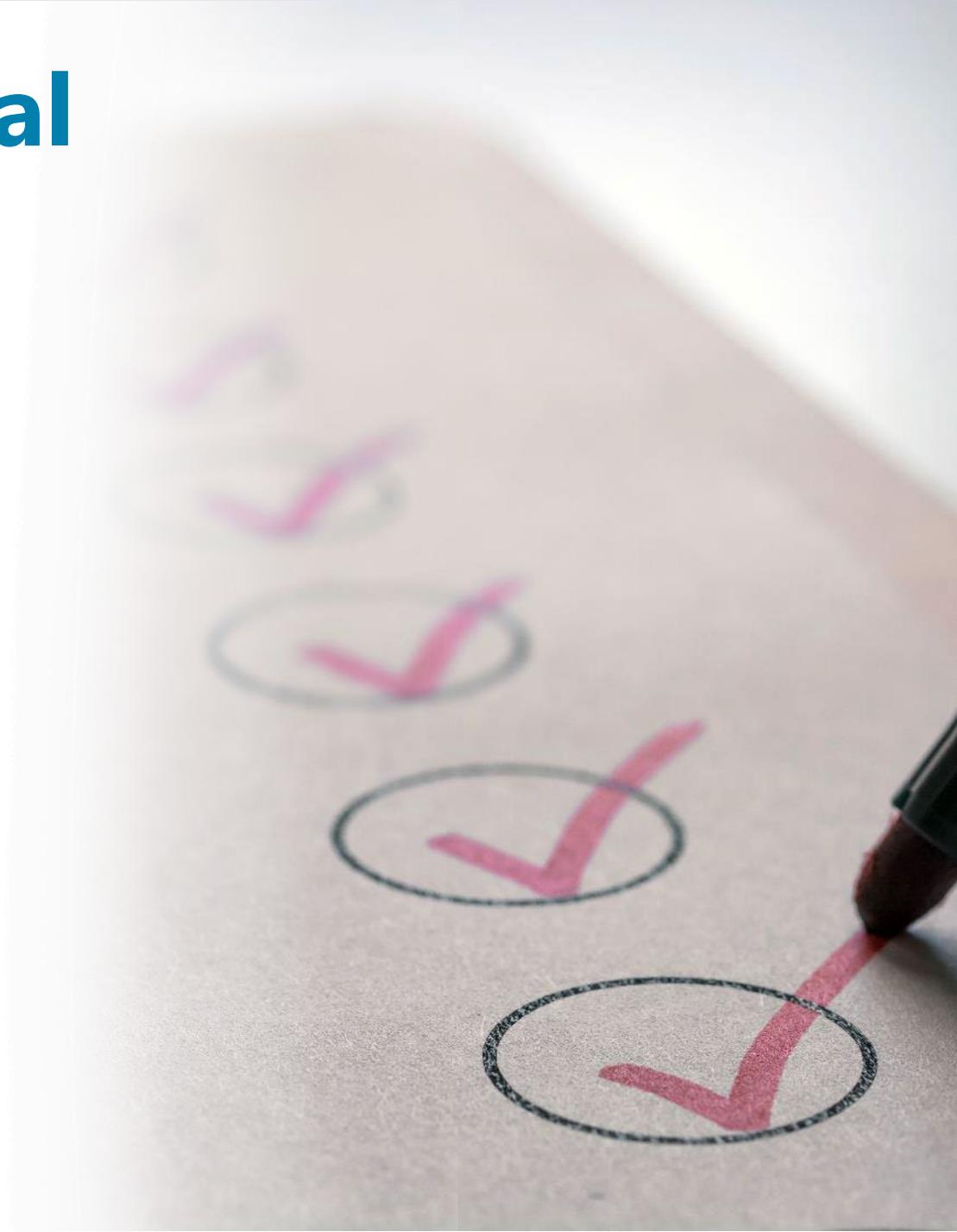
Discussion and Documentation focus

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. If so, POC needs changing to remove that goal and possibly set another one.

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

NORTH Dakota | Health & Human Services
Be Legendary.

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" or once you are in the list, select "Create New"
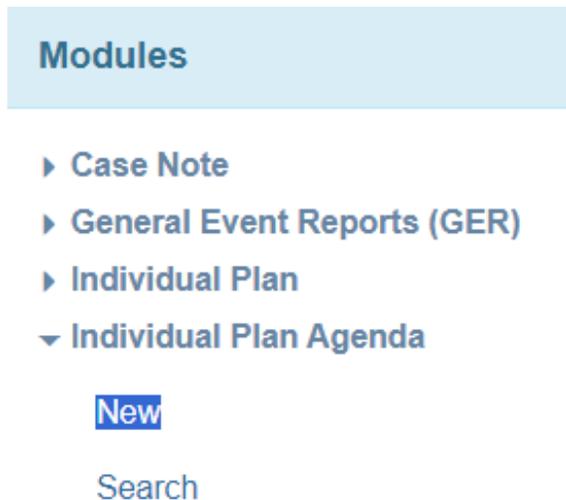
Modules

▸ Case Note
▸ General Event Reports (GER)
▸ Individual Plan
▾ Individual Plan Agenda
    New
Search
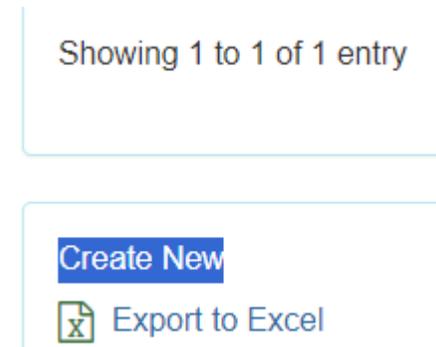
Showing 1 to 1 of 1 entry

Create New
Export to Excel

NORTH
Dakota | Health & Human Services
Be Legendary.

Filling out the Individual Plan Agenda

Meeting Date 12/19/2024

Meeting Type Quarterly Review

Review Period Start Date 12/02/2024

Review Period End Date 12/26/2024

The Review Period start and end date are the dates of the Quarter of services you are reviewing. The first quarterly review should be done 90 days after the POC is approved. Subsequent quarterly reviews should then be every 90 days.

This is what an Individual Plan Agenda (IPA) looks like. Think of the IPA as you telling the state what the goals of the member are (Discussion Topics, in the Individualized Item section) and then describing what the progress has been on the goal(s) (Desired Outcome, in the Progress Towards Outcome section).

Remember, every 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 that are not specifically listed as goals on the POC but warrant being listed as a Discussion Topic. You want a holistic review of the member's growth over the past quarter. Think of the IPA as the pre-game you are doing to create a game plan to follow for the meeting with the member, where you will do a deep dive into the POC with the member

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

Individualized Item

Discussion Topics	Action
1. We discussed Goal #1 and member's progress. Member's goal is to do one healthy activity per day. We talked about what kinds of activities member is doing - those activities are ...	Edit

Link Personal Focus Worksheet   Add Individualized Item

Progress Towards Outcome

Desired Outcome	Periodic Progress	Linked ISP Report	Action
Member has been doing three healthy activities per week. They mostly enjoy walking. Their goal was to do one health activity per day so we are making progress. We discussed adding in one more day per week for two weeks and then adding in another day after two weeks and so on. Member thinks this is doable.	Making Progress		Edit

Add Action Plans from Individual Plan as Outcome   Add Other Outcome

NORTH Dakota | Health & Human Services
Be Legendary.

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, and that is the period we are measuring.

NORTH Dakota | Health & Human Services
Be Legendary.

Adding Individualized Items

Click "Add Individualized Item" to add a <u>Discussion topic</u>. Each discussion topic should relate to a goal on the plan of care or the member's services in support of achieving that goal. See below example.

Individualized Item

Discussion Topics	Action
1. Member's Goal 1 - to do one healthy activity per day.	Edit

Link Personal Focus Worksheet   Add Individualized Item

NORTH
Dakota | Health & Human Services
Be Legendary.

Adding Progress Towards Outcomes

Click "Add Other Outcome" to add the <u>Desired Outcome</u>. You will then describe the person's desired outcome – i.e. what they are trying to achieve (goal). You should have a Desired Outcome for each Discussion Topic listed.

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

Submitting Individual Plan Agenda

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

Clicking SUBMIT will send the Individual Plan Agenda to the state (or BCBSND) to review and approve (or return it to you) if there are areas where you need to fix it. When the state (or BCBSND) reviews the IPA, they will be looking for a case note for the meeting date on the IPA that confirms a quarterly review took place. When you have a quarterly review, you will need to have signed by the member and the care coordinator a Meeting Attendee Signature and a Member and Care Coordinator Signatures & Acknowledgements form. These will be attached to the POC when you update it.

NORTH
Dakota | Health & Human Services
Be Legendary.

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. Then 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 state admins (or BCBSND admins) you will see the Individual Plan Agenda as showing "No" for Meeting Minutes Recorded? Click on this Plan Agenda.

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

NORTH Dakota | Health & Human Services
Be Legendary.

Recording Meeting Minutes – documenting

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

Individualized Item section

You will choose Action Plan or Issue Resolved for each <u>Discussion Topic</u> 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, example below.

Discussion Topics	Action Taken	Comments
1. Member's Goal 1 - to do one healthy activity per day.	Action Plan	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. 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).

Progress Towards Outcome section

For each Desired Outcome in the Progress Towards Outcome section, 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. See below example. 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	Making Progress		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. About 2741 characters left

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.

You will then get a message like this confirming that the Meeting Minutes have been saved.

Meeting Minutes for the form AGN-SPAND-P4T4QDAZJ4RNZ has been successfully saved

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

Go back 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.

| Cancel | Back | | Discontinue | Acknowledge | Create Change Form | Edit |

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
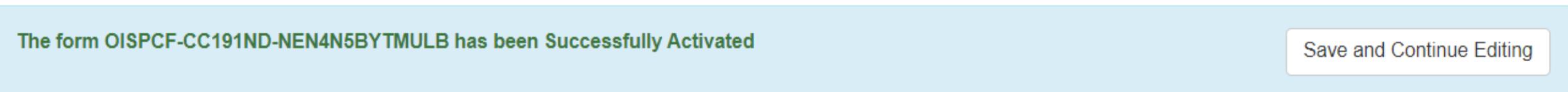
Where is the Change Documented? Individual Plan Agenda and Member Goal 1 updated

Adding the Plan Agenda to a Member's Plan of Care/Change Form Request

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.

Back   Save   Activate   Activate and Edit Individual Plan

You will see the following confirmation at the top of your screen after you click Activate and Edit Individual Plan.

The form OISPCF-CC191ND-NEN4N5BYTMULB has been Successfully Activated   Save and Continue Editing

NORTH Dakota | Health & Human Services
Be Legendary.

Change Form Request and Editing the Member's POC

You will scroll down the Member's Plan of Care to the <u>Action Plans</u> section. Click <u>Import from Individual Plan Agenda</u>. 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.

Select the Desired Outcome and Needs/Issues from the Action Plan List. Then select "Add from Individual Plan Agenda". You will now see Action Plan items listed on the POC from the IPA.

Editing the member's Plan of Care

You can now go in and updated the section(s) of the plan of care you stated you are updating. When you are done making updates to the POC you will select "Update without Closing the Change Form"

Once you have selected Update without Closing the Change Form, you will get a confirmation message like this.

The form OISP-CC191ND-NCB4STAZ7EQLQ has been successfully updated

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.

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.