1915(i) Plan of Care Change Forms

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When to use the Change Form

- Change in the care coordinator within the agency (Example: Member was working with care coordinator John, and John quit, now the member works with care coordinator Jane)

- The provider for a goal was listed as TBD when the POC was approved by the state, and now you found a provider for that goal. Nothing else in the goal changes just the provider's name.

- Typographical error (for example, you misspelled the member's doctor's name)

- If you are adding, or changing, a service authorization on an approved POC, where the only thing you are adding or changing, is the service authorization.

- Once the IPA is approved, and you've added meeting minutes, you will Create a Change Form. Follow the step-by-step process laid out in the [Quarterly/Interim Reviews & Individual Plan Agendas](#) guide

In the approved POC, scroll down to the bottom of it, and click on Create Change Form

View PDFs

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

Once the change form is open, you will select the **Change Date**. Then you will select **Individual Plan**, for most instances for Document(s) being changed, added or discontinued.

Individual Plan Change Form New ⓘ

Individual	
Template Name	
Individual Plan Form ID	
Individual Plan Status	Approved

* **Change Date**	11/18/2025 📅
Send Date	MM/DD/YYYY 📅 ❓
Change Initiated By	

Document(s) being changed, added or discontinued
- ☐ Financial Plan
- ☐ Individual Plan
- ☐ Protocol(s)
- ☐ Safety Plan
- ☐ Other Document(s)

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Reason for Change will always be **Other**.

Other Reason is where you will detail the reason that you are making the change to the POC.

List Specific Change(s) is where you will list the changes you are making, using as much detail as possible.

Where is the Change Documented? Is where you will point out specifically where you made the change on the POC.

Reason for Change	- Please Select - ▼
Other Reason	
	About 3000 characters left
List Specific Change(s)	
	About 3000 characters left
Where is the Change Documented?	
	About 3000 characters left

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Once you have filled out the Change Form, the easiest thing to do is to click on **Activate and Edit Individual Plan**. This will take you right into the POC to make the changes.

Once you have done this, the state will be notified of your Change Form creation. The state admins can just acknowledge it, if they see no errors with it. They can also Edit it if they see edits that are needed to it. Or, if it is not an acceptable use of the Change Form, they can Delete it.

| Back | | Save | Activate | Activate and Edit Individual Plan |

When you go back to the POC, it will list all Change Forms that are on that POC. The ones that are in Active status, still allow you to go into them to make changes to the POC. To access a Change Form, click on Edit at the bottom of the POC. This will take you to a list of any Active Change Form. Select the Change From that you are making the changes in. This will then take you to the POC, where you are able to edit it.

Once you are done editing the POC you have two options. One is to select Update without Closing the Change Form. Doing this will allow you to come back to that change form to make edits. Two, is to click on Update. This will make the updates to the POC and close the Change Form. Meaning, that if you want to come back to edit the POC again, you won't be able to with that Change Form.

When you are in the Change Form, you will be able to see any comments from the state admins. Make sure to review these, as any corrections you need to make will be listed here. If there is a comment that you should have done an Individual Plan Agenda, you will need to follow all the steps for this laid out in the Quarterly/Interim Reviews & Individual Plan Agendas guide.

Change Form(s)

Change Date	Status	Reason for Change	Form ID	Action
11/18/2025	Deleted	testing	OISPCF-SPAND-PDL3ZJRUHMULT	
11/18/2025	Active	Adding peer support	OISPCF-SPAND-PDL3LEJURMULW	
11/18/2025	Closed	testing	OISPCF-SPAND-PDL425U8XMULY	

This button will allow you to open the Change Form to see the comments from the state admins.

Acknowledgement List

Acknowledged By	Date	Comments
Cody Stanley, Therap Admin	11/18/2025	
Cody Stanley, Therap Admin	11/18/2025	testing change form

Verbal Acknowledgement

Nothing found to display