Quarterly/Interim Reviews & Individual Plan Agendas

Guidance for Care Coordinators

Individual Plan Agendas capture your member meeting happenings

Care Coordinators, use the Individual Plan Agenda to document quarterly/interim meetings with members.

Document discussion and evaluation of plan goals and progress towards those goals. The Plan Agenda and Action Planning will identify new/changed steps for the Plan of Care.

Areas of focus for Individual Plan Agendas

- Discussion/review of member goals
- Discussion/review of steps member is taking with service provider to reach goals
- Discussion of member's satisfaction with services/progress
- Identification of progress/steps/resources needed to make progress or make more progress

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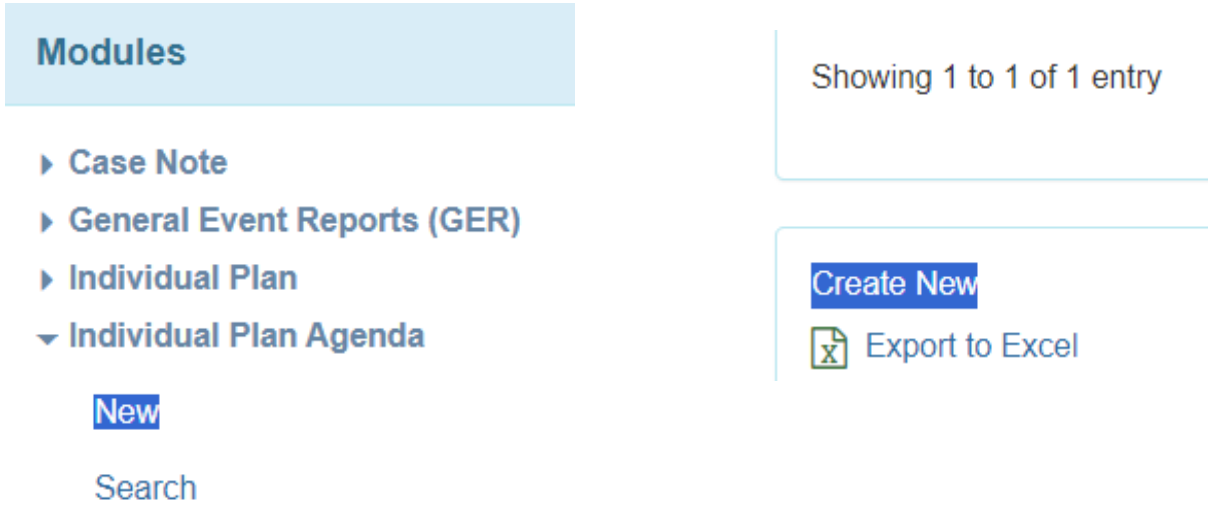
Discussion and Documentation focus

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

- Discussion of goal
- Whether there has been progress
- 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

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"



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

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

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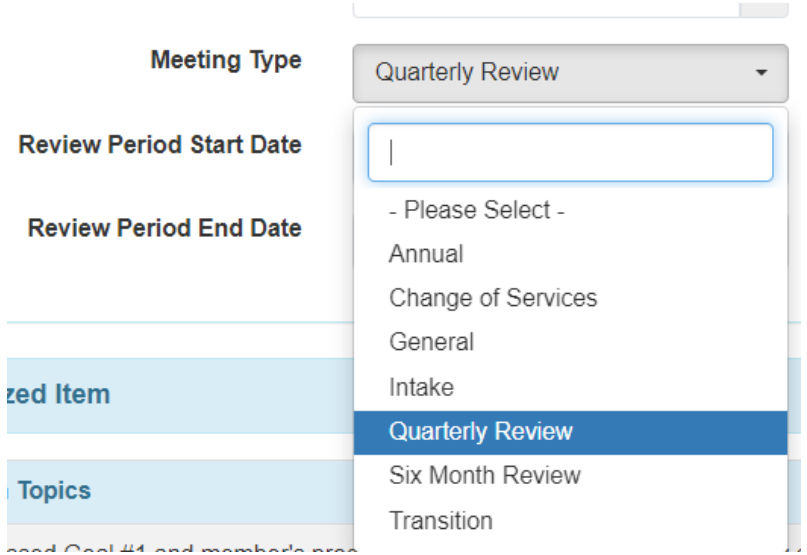
Select your dates and type of meeting

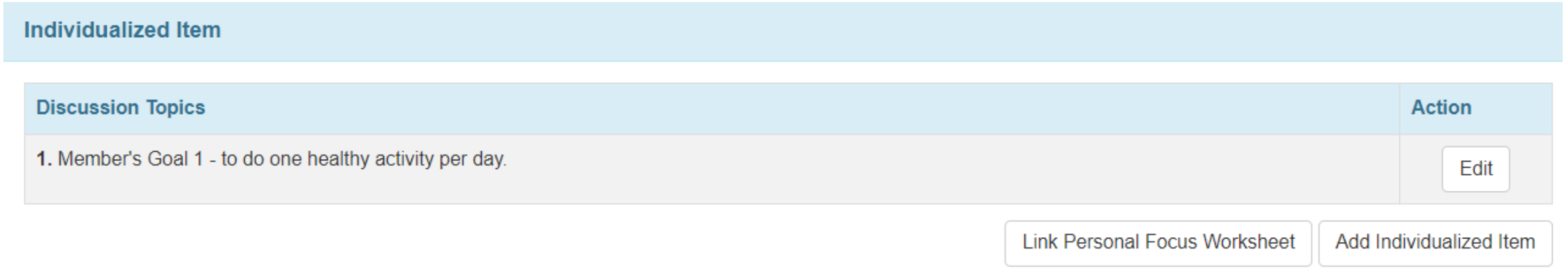
Enter the Quarterly/Interim Meeting Date. Indicate the Meeting Type in the drop down

You will primarily need to select “Quarterly Review” or “Change of Services” when doing interim meetings regarding service changes. Please 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.



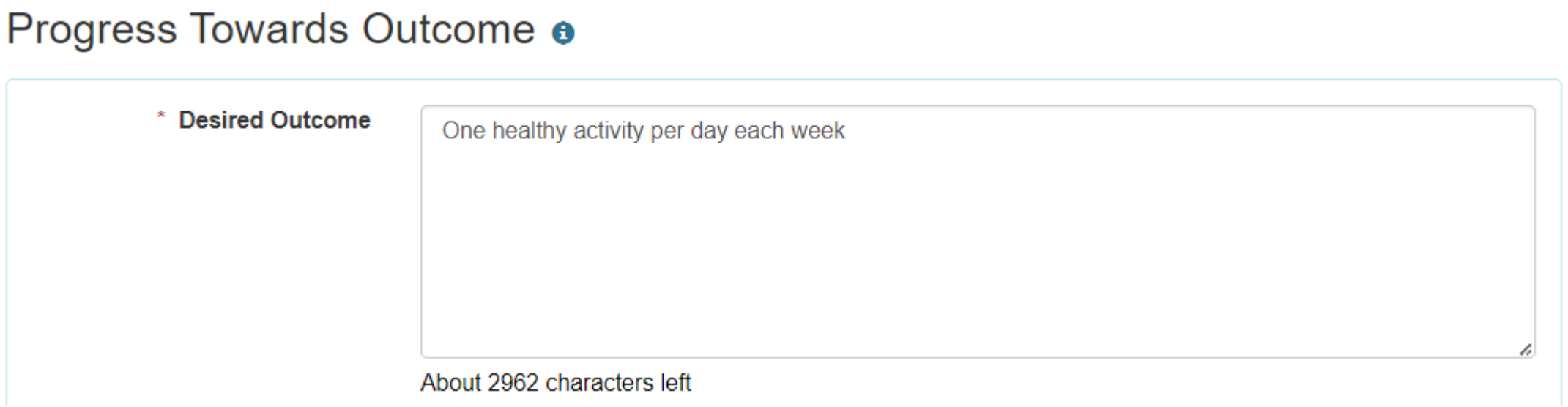
Adding Individualized Items

Click “Add Individualized Item” to add a Discussion topic. 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.



Adding Progress Towards Outcomes

Click “Add Other Outcome” to describe the person’s desired outcome – i.e. what they are trying to achieve (goal). You should have a desired outcome note for each discussion topic listed.



Adding Progress Towards Outcomes

Then select the appropriate field under “Periodic Progress”.

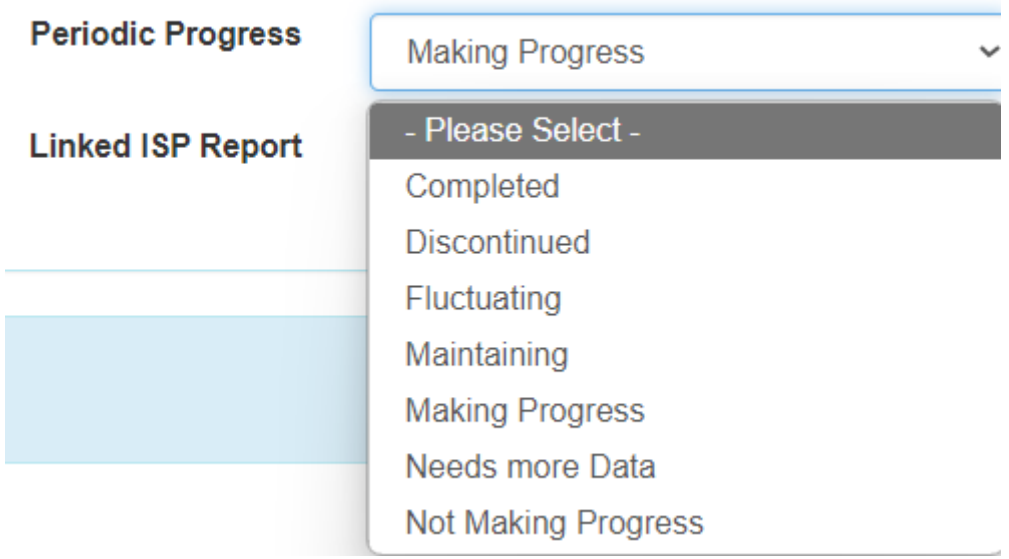
Choose **Completed** if the member has achieved their goal

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.



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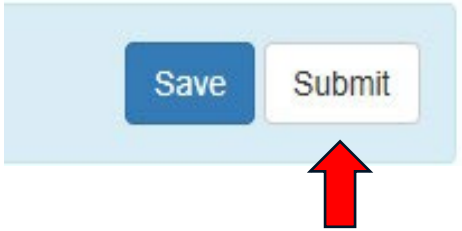
Submitting Individual Plan Agenda

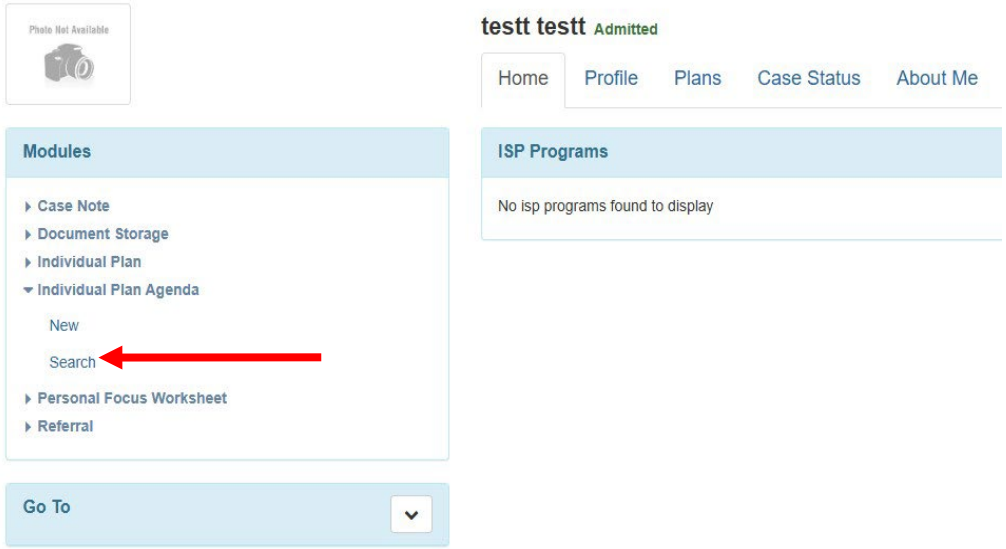
Click “Submit” at the bottom.



*Clicking SUBMIT will send your IPA to the state to review and approve.

The form AGN-CC191ND-NEN4N5BYSMULT has been successfully submitted

Individual Plan Agenda List



Click on Search under Individual Plan Agenda. 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 it's been approved, you will see the 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
[redacted]	[redacted]	Approved	12/17/2024	Quarterly Review	10/01/2024	12/30/2024	No	US/Central

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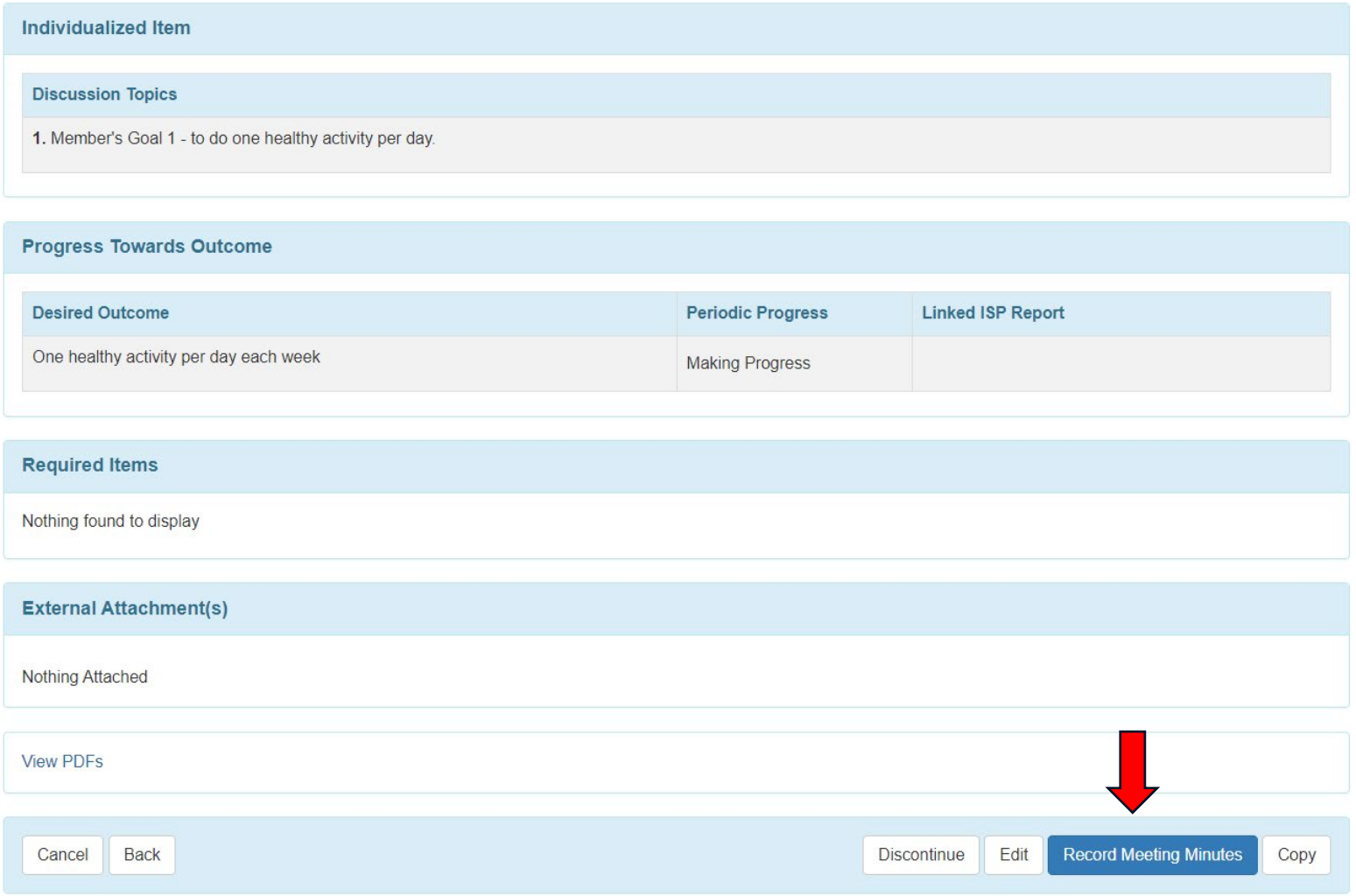
Recording Meeting Minutes – documenting

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



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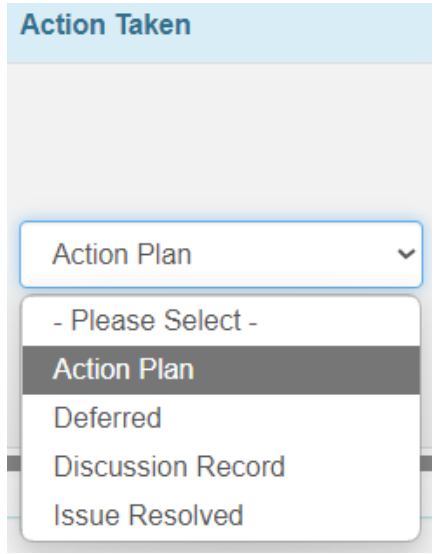
Filling out Individualized Item section

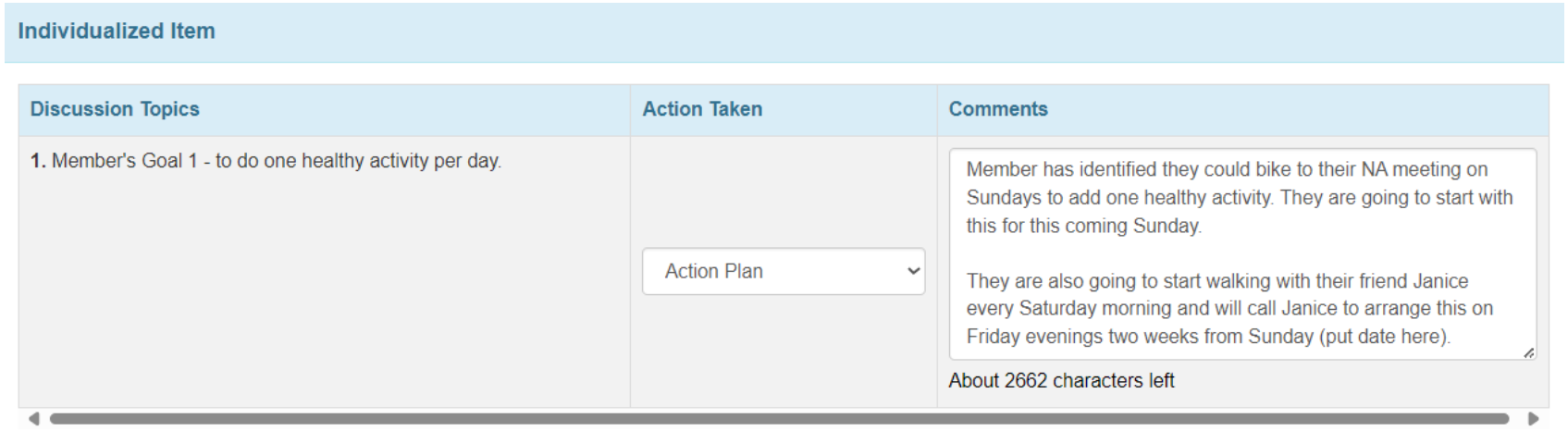
Select Action Taken. You will choose Action Plan or Issue Resolved.

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.

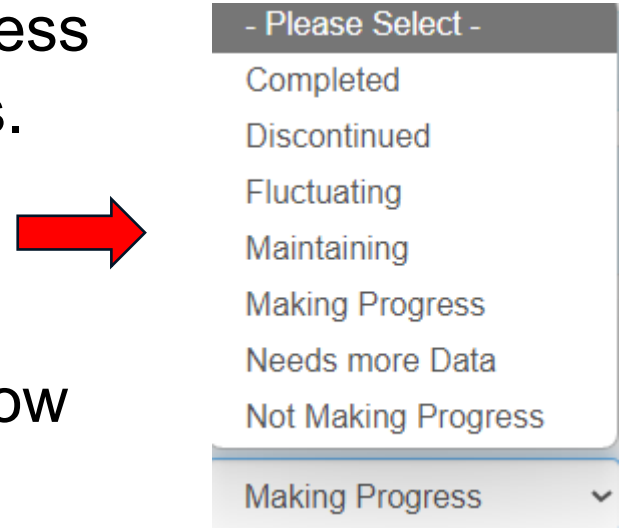


Use the Comments section to lay out the Action Plan steps, example below.



Filling out Progress Towards Outcome section first

Use the Comments section to outline the member's progress – whether that is a lack of, fluctuating, or making progress.



Describe the member's progress. If you are ending or modifying the goal, explain why that's necessary. See below example:

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

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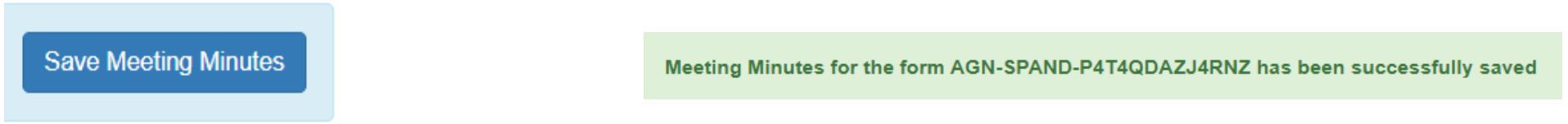
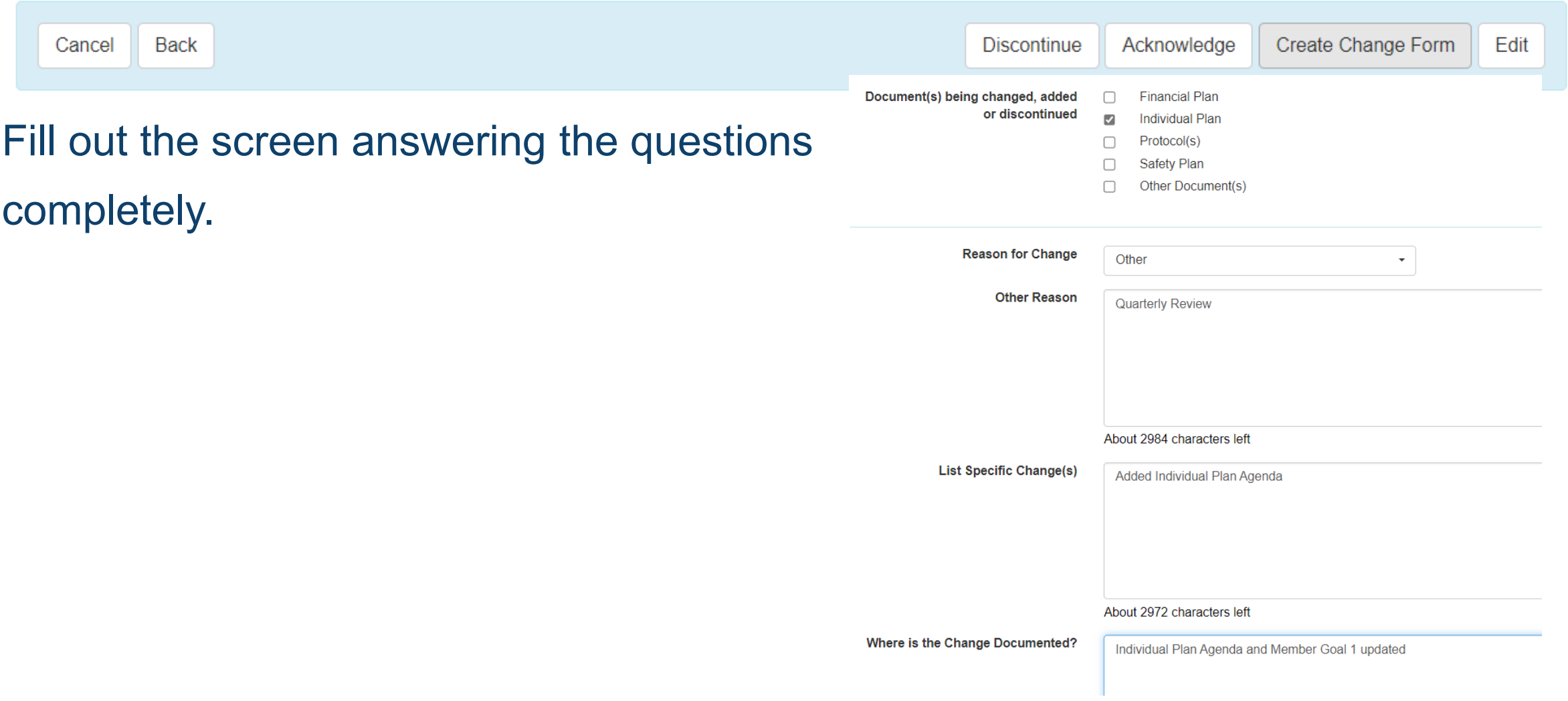
Saving Meeting Minutes

Click “Save Meeting Minutes”



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

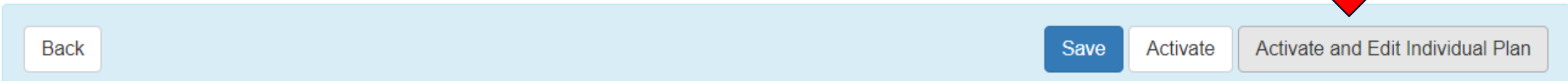
You will now click "Create Change Form" at the bottom of the Plan of Care.



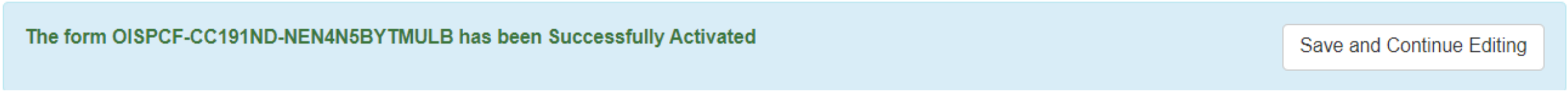
Fill out the screen answering the questions completely.

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 any changes that came out of your meeting with the member.



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



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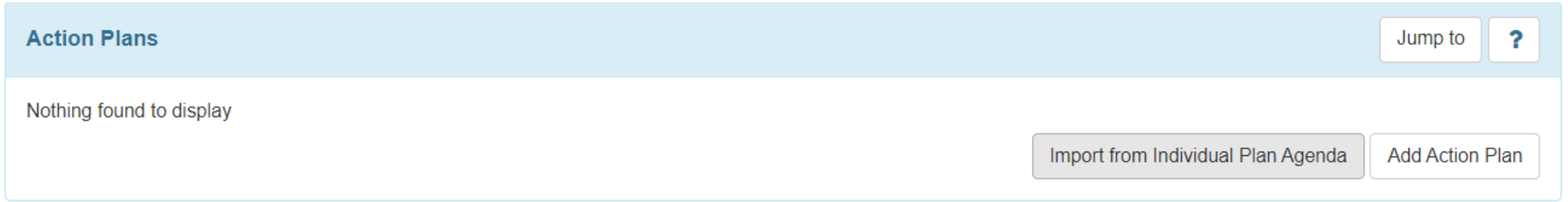
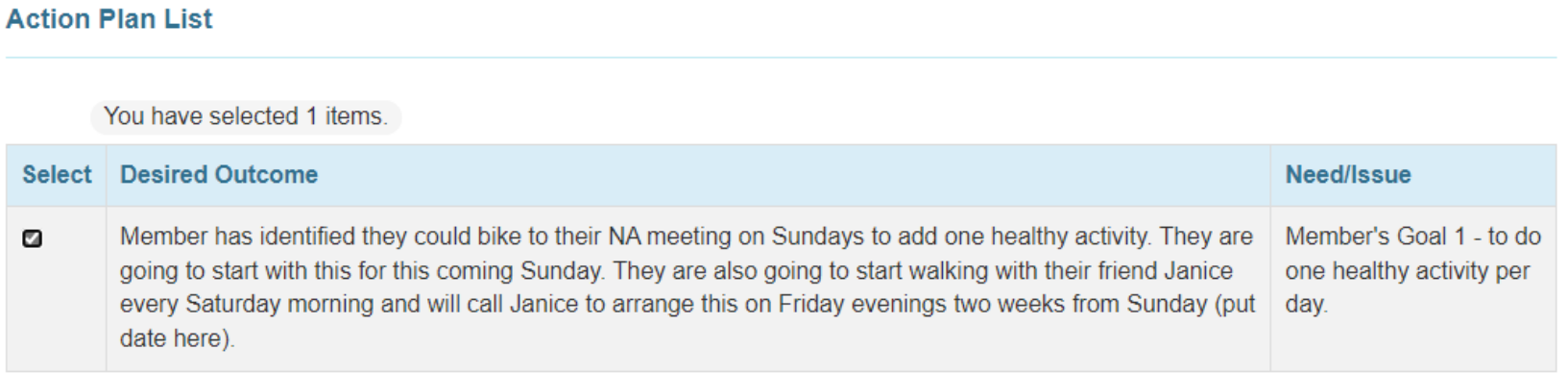
Change Form Request and Editing the Member's POC

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 and select the correct option.



Select the Desired Outcomes 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.

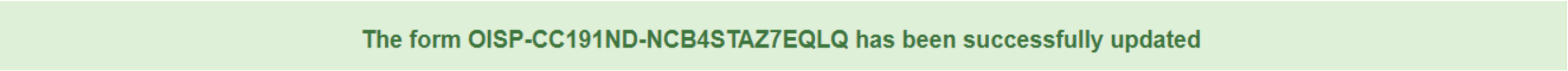


Editing the member's Plan of Care

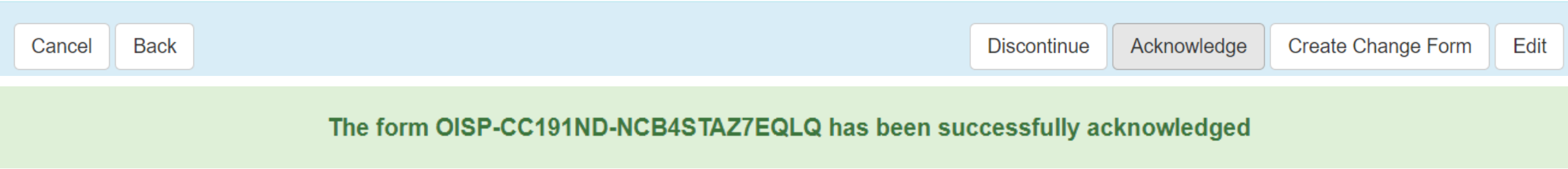
Member Plan of Care goals must be updated as needed each quarter.

When you are done making updates to the POC you will select "Update without Closing the Change Form"

Then you will see this confirmation.



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.



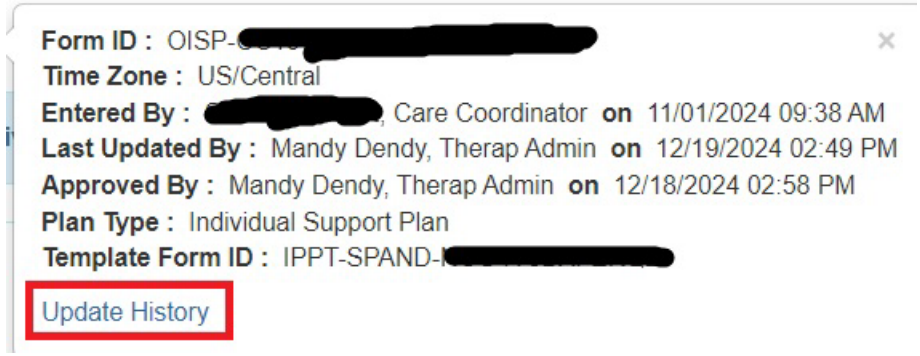
Submitting the Plan Change Form

Click on the next to Approved and this will show you the Plan's history – submission, approval, updates, etc.

1915(i) Plan of Care 11.2024 Approved

The Change Form feature for POCs is NOT for YEARLY reviews. This is for quarterly reviews or interim updates only.

Members need a completely new plan of care developed on at least an annual basis which requires going through all questions and inputting new member information (i.e. new WHODAS/DLA, eligibility dates, strength and preference assessment answers, etc.)



Click Update History to see more details.