

IPC Team Meeting Checklist

Ongoing discussions between the case manager and participant or legally authorized representative shall occur throughout the plan year. These discussions shall be documented in the case manager's monthly case notes.

Prior to any team meeting, the case manager shall assist the participant and legally authorized representative to:

- ☐ Identify desired outcomes, dreams, employment, and service utilization over the plan year.
- ☐ Identify non-waiver services, self-directed services, traditional services, and potential providers to meet desired outcomes. Document how the participant was offered choice in service providers.
- ☐ Coordinate new provider visits if needed.
- ☐ Ensure the provider has verified that they have the capacity and commitment to provide the services necessary to meet the participant's needs.
- ☐ Identify the amount of time the participant would like to spend in each service.
- ☐ Review other service setting options, including setting options that are not disability specific.
- ☐ Identify who should be at the meeting.
- ☐ Identify a date and time for the team meeting that is convenient for the participant and legally authorized representative.
- ☐ Determine if there are sections of the individualized plan of care (IPC) the participant or legally authorized representative would like to present at the meeting.
- ☐ Review and update the following sections of the plan: Individual Preferences, Demographics, Medical Appointments and Information, Specialized Equipment, Circle of Supports, and Needs and Risks.
- ☐ Review the Rights section.

Case Manager shall:

- ☐ Distribute written meeting notices at least 20 calendar days prior to the annual IPC meeting and the 4-6 Month Review. Notice shall be sent to all identified team members and uploaded into the document library in EMWS.
- ☐ Review assessments to determine recommendations, notable comments, strengths, weaknesses, learning style, possible reinforcement tools, motivators, and behavioral concerns.
- ☐ Review monthly case notes to identify trends regarding incident reports, seizure logs, medical needs, health and safety, medication assistance records (MARs), PRN medication usage, and targeted behavior frequency.
- ☐ Request and obtain the positive behavior support plan (PBSP) document and functional analysis completed by the provider for identified behaviors.
- ☐ Request and obtain from each service provider a written summary of how the current services are going and, if applicable, a summary of the current goal. The goal summary should include progress on objectives, areas of concern or lack of progress, and suggestions for future or ongoing goals.

Annual Plan of Care Meeting Checklist

- ☐ Facilitate the opportunity for the participant and legally authorized representative to address the team regarding dreams, desires, and what they want for their future. Encourage full participation throughout the meeting, and obtain verbal approval from the participant and legally authorized representative regarding changes made to each section of the IPC.
- ☐ Review and discuss current progress on objectives.
 - Ensure objectives are developed based upon participant's desire, assessments, task analysis, and baseline data.
 - Identify timelines for established benchmarks towards reaching final goals.
- ☐ Review and discuss assessments and resulting recommendations.
- ☐ Review and discuss summary of incident reports and seizure logs.
- ☐ Identify and address any health and safety issues.
- ☐ Discuss frequency and trends of targeted behaviors.
- ☐ Review and discuss activities, events, needs, and preferences that should be included in the IPC.
 - Discuss how each provider will align their services with the participant's preferences

- ☐ Review the updated functional analysis and use it to develop the positive behavior support plan.
- ☐ Discuss Rights section, and how the team will support the participant's rights.
 - Discuss how maximum privacy will be afforded to the participant in the event of a restriction to the participant's right to privacy.
- ☐ Discuss how the participant will have input into how their money is budgeted, managed, and spent.
- ☐ If remote support is utilized, complete the Remote Support Risk Assessment and develop a Remote Support Protocol
 - Document how informed consent has been obtained from housemates. This information shall be included in the Supervision Needs section of the Needs and Risks screen in the Electronic Medicaid Waiver System (EMWS).
- ☐ Discuss schedules to verify they accurately reflect the activities, timeframes, preferences, and needs of the participant.
- ☐ Discuss level of support and units for each service.
- ☐ Create Service Authorization form.
- ☐ Obtain dated signatures.
- ☐ Submit IPC to Division 30 calendar days before the intended start date. **If there is an Extraordinary Care Committee (ECC) request, it must be submitted 60 calendar days before the intended start date.**

Mid-Year IPC Review Meeting Checklist

The purpose is to review and assess as a team whether or not the IPC is working as written and if not, identify what the team can do to make it work.

- ☐ Facilitate the opportunity for the participant and legally authorized representative to address the team regarding dreams, desires, and what they want for their future. Encourage full participation throughout the meeting, and obtain verbal approval from the participant and legally authorized representative regarding changes made to each section of the IPC.
- ☐ Update all sections of the IPC to reflect any and all changes
- ☐ Review schedules to verify they accurately reflect the activities, timeframes, preferences, and needs of the participant.
- ☐ Discuss summaries of incident reports, seizure logs, and current services.
- ☐ Celebrate progress on the participant's objectives.
- ☐ Review or revise the positive behavior support plan based upon identified trends in behaviors.
- ☐ Review rights and any modification, restrictions, or restorations needed.
- ☐ Review health and safety risks and plans to address them in the Needs and Risks section.
- ☐ If Remote Support is utilized, review the risk assessment, protocol, and incidents that occurred during remote support. Amend documents as necessary.
 - Document agreement from the participant, legally authorized representative, and team that remote support is still an appropriate option.
- ☐ Determine what assessments will need to be completed prior to the next annual meeting.
- ☐ Review service utilization and determine whether modifications will be needed prior to the IPC ending.
- ☐ Obtain dated signatures.