

201 – INDIVIDUAL SERVICE PLAN POLICY

POLICY TITLE	201 Individual Service Plan
HEADER INFO - Adopted - Revised	201 Individual Service Plan 11/90 10/94, 08/02, 07/07, 08/14, 2/20, 1/21
RULE REFERENCE	<del>5123:2-3-17</del> 5123-4-02; 5123:2-2-01
GLOBAL POLICY STATEMENT  (what and why)	It is the policy of CICL to implement the ISP as agreed upon by the individual and the interdisciplinary team. ISP's should reflect what is important <b>TO</b> and important <b>FOR</b> the individual being served. We believe a good ISP includes input from CICL staff and identifies the services CICL agrees to deliver. CICL will only provide services reflected in the ISP following the guidance of DODD regulations.
GUIDELINES/PROCESS STATEMENTS (how)	<p><b>Individual Service Plans (ISP)</b></p> <ul style="list-style-type: none"> <li>• The County Board of DD Services SSA completes an Individual Service Plan for each client involved in Choices in Community Living, Inc. The Individual Service Plan has a description of the services important to and for the client's needs, concerns, and interests.</li> <li>• Request for changes to the Individual Service Plan of a client should be given to the SSA and shared with the Interdisciplinary Team.</li> <li>• The Program Directors will enter or designate the ISP task elements into CICL's electronic documentation system, make sure that the Individual Services Plans are available to the individual, managers and direct care staff, and that the service plans are up to date.</li> <li>• Program Managers will ensure that the appropriate training for implementing ISP services occurs prior to providing services.</li> <li>• Program Managers monitor the implementation of the ISP and ensure proper documentation of services provided.</li> </ul> <p><b>Interdisciplinary Team</b></p> <p>The Interdisciplinary Team considers the interests, aspirations, and concerns of individuals who are unable to speak for themselves. The team reviews what they know about the client and pays attention to the client's nonverbal language or other forms of communication. Person Centered Planning should be used to develop the goals, outcomes and services for individuals.</p> <p>Interdisciplinary Team meetings occur initially and annually at a minimum. The team is expected to maintain frequent and on-going communication regarding the ISP and services.</p> <p>The Annual Individual Service Plan packet should be completed prior to the Individual Service Plan meeting (Residential and/or Day Hab). The Interdisciplinary Team will review the needs of the client and create a list of</p>

priorities. In order to meet these needs, strategies are determined by the Interdisciplinary Team. Included in the discussion of needs are:

- What is important **TO** and **FOR** the individual
- Supervision and assistance required to fulfill daily needs
- Client’s and legal guardian’s preferences
- Long and short term goals
- Adaptive equipment and supports
- Strategies to meet client’s needs
- Assessments by specialists
- Medical and Health Care
- Client Finances

Choices In Community Living, Inc will reassess the client’s needs during the first 30 days after the client begins receiving services in the home and/or program. Day program participants will sign a participation agreement.

The client or any member of the Interdisciplinary Team may request a meeting with his/her Interdisciplinary Team at any time. Choices In Community Living, Inc. will accommodate the request as soon as reasonably possible.

Client disagreement about the decisions of the Interdisciplinary Team is noted as a difference in opinion. The client is informed of the right to an appeal as per the grievance appeal procedure under Choices In Community Living, Inc.’s client rights policy. CICL will give special attention to the individuals who are unable to verbally communicate their disagreement. The staff reviews what they know about the client and pays attention to the client’s nonverbal language or other forms of communication

CICL staff provides ongoing information to supervisors and team regarding the individuals services.

**Annual Appointments and Health Maintenance**

Choices In Community Living, Inc. recommends the following:

<u>Type</u>	<u>Recommendation</u>
Physical Examination	Yearly (physical restrictions)
Medication review	As recommended by the physician
Dental Examination	Semi-annually or as recommended by the dentist
Visual Examination	Every two years or as recommended by physician

Choices In Community Living, Inc. assists the client in obtaining other preventative health care screens and procedures as recommended by best practice.

	<p>As identified in the service plan, Choices In Community Living, Inc. assists the client in scheduling and attending all appointments with physicians and specialists, <del>and</del> along with following through with any recommendations made at the appointments. The Program Manager will maintain a record that identifies reoccurring appointments with medical or health care specialist. Choices In Community Living, Inc. works with the client’s Interdisciplinary Team to ensure the client receives evaluations by specialists as needed or requested by the Interdisciplinary Team (i.e. speech, hearing, physical therapy, occupational therapy, psychological, psychiatric).</p> <p>The Interdisciplinary Team updates the health care needs of clients as needed and during Interdisciplinary Team meetings. Physician and/or other health care professional’s recommendations from examinations are reviewed with the Interdisciplinary Team.</p> <p><b>ISP’s – Review and Documentation Process</b>                  The Program Director and Program Manager are responsible for reviewing the ISP to ensure it is accurate and fully descriptive of the HPC/Adult Day/NMT services CICL will provide for the individual. (Summary of Paid Supports and Services).</p> <p>The Billing Administrator is responsible for managing the CPT/ PAWS and DODD billing data for each ISP to ensure it is accurate and fully represents the HPC/Adult Day/NMT services CICL provides for the individual.</p> <table border="1"> <thead> <tr> <th data-bbox="505 1186 1063 1228"><u>PROGRAM PROCESS</u></th> <th data-bbox="1063 1186 1594 1228"><u>BILLING ADMINISTRATIVE PROCESS</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="505 1228 1063 1890"> <p>Team meeting should occur 90 days prior to ISP</p> <ul style="list-style-type: none"> <li>• Staffing patterns, (including unscheduled time) mileage and add-ons identified</li> <li>• PD will monitor staffing patterns and mileage utilization</li> <li>• PD, Prog Mgr, Day Service Director will review the individual’s need for medical, behavioral or community inclusion add-on prior to full team annual meeting.</li> <li>• Staffing patterns required to implement the ISP for the ISP span will be created for each client. PD works with Prog Mgr</li> </ul> </td> <td data-bbox="1063 1228 1594 1890"> <ul style="list-style-type: none"> <li>• Provides team with utilization data on hours, ratios, service codes and mileage</li> <li>• Billing Administrator reviews proposed staffing patterns, unscheduled time, and add-ons, compares to any utilization data, and makes recommendations back to PD.</li> <li>• Billing Administrator forwards proposed staffing patterns and request for add-ons to the county board</li> </ul> </td> </tr> </tbody> </table>	<u>PROGRAM PROCESS</u>	<u>BILLING ADMINISTRATIVE PROCESS</u>	<p>Team meeting should occur 90 days prior to ISP</p> <ul style="list-style-type: none"> <li>• Staffing patterns, (including unscheduled time) mileage and add-ons identified</li> <li>• PD will monitor staffing patterns and mileage utilization</li> <li>• PD, Prog Mgr, Day Service Director will review the individual’s need for medical, behavioral or community inclusion add-on prior to full team annual meeting.</li> <li>• Staffing patterns required to implement the ISP for the ISP span will be created for each client. PD works with Prog Mgr</li> </ul>	<ul style="list-style-type: none"> <li>• Provides team with utilization data on hours, ratios, service codes and mileage</li> <li>• Billing Administrator reviews proposed staffing patterns, unscheduled time, and add-ons, compares to any utilization data, and makes recommendations back to PD.</li> <li>• Billing Administrator forwards proposed staffing patterns and request for add-ons to the county board</li> </ul>
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	<p>to ensure information is complete, accurate and is given to Billing Administrator</p>	<p>representative for the individual.</p>
	<p>Review of proposed ISP</p> <ul style="list-style-type: none"> <li>• County board representative sends draft ISP to CICL, forwarded to the proper PD.</li> <li>• PD reviews ISP.</li> <li>• If not accurate, PD request the change</li> <li>• If accurate, SSA is informed of CICL approval by receiving the signed ISP from the PD.</li> </ul> <p>Note: All documents sent encrypted and opened and forwarded to PD by the scanner.</p>	<ul style="list-style-type: none"> <li>• Billing Administrator is informed by PD on changes (if any) for staffing patterns and add-ons</li> </ul>
	<p>Final ISP sent to <a href="mailto:ISP@CICLOH.com">ISP@CICLOH.com</a></p> <ul style="list-style-type: none"> <li>• ISP distributed to individual's Program Director/Day Service/NMT director</li> <li>• PD does final review and if correct, PD sends ISP to scanner to upload into client file. Only copies of ISP's sent to scanner from a PD will be scanned into client file.</li> <li>• Scanner sends the client summary page of paid supports and services and Add-ons from the DINA to Billing Adm.</li> <li>• The PD revises (Prog Mgr revises and PD reviews in Day programs) the ISP task elements for service documentation in the PROVIDE system.</li> <li>• PD provides a written copy of the ISP to the Prog Mgr. The ISP is kept at the residential service location with the ISP training signature sheets. Day programs keep only the ISP sign off sheets at the program (HIPAA).</li> </ul>	<p>Reviews paid supports summary, compares to previous utilization data</p> <ul style="list-style-type: none"> <li>• Compares new/revised CPT/PAWS DODD data to ensure accurate with paid support summary.</li> <li>• Updates Dashboards, PROVIDE authorizations</li> </ul>

	<ul style="list-style-type: none"> <li>The Prog Mgr removes the old ISP from the service location and turns in the old ISP training signature sheets to the scanner.</li> </ul>	
	<p>Prior to the ISP's effective date all DSP's are trained on new/revised ISP (PA/PD) and document this by signing the ISP training signature sheet. This form is kept with the ISP at the service location.</p>	<p>Four times a year runs reports comparing client services to billing to identify discrepancies.</p>
	<p>PA responsibility is to run the monthly audit report (Choicesyou, managers, audit report HPC) to ensure the ISP is being implemented and documented.</p> <p>Monthly Outcome report – PA responsibility to ensure ISP outcomes are being properly addressed, submits outcome report to PD monthly.</p>	
	<p><b>Recommendations</b></p> <p>CICL encourages client participation in community integrated recreational and social activities of the clients choosing as much as possible limited only by program and fiscal constraints.</p>	
<p>FORMS Titles of forms</p>	<p>IP meeting Bill of Rights Release of information Staff area consent Statement of delegation (insulin and g-tube only) Medication consent form Person/Site specific training Behavior add-on Medical add-on Copy of client insurance/Medicaid card Client demographics</p>	

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TRAINING Titles of training	New Employee ISP training