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# Quarterly/Interim Reviews & Individual Plan Agendas

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Guidance for Care  
Coordinators

Last updated: 12/27/24



# 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

# 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

- 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"

The screenshot displays a web application interface. On the left, a sidebar menu titled 'Modules' is shown with a light blue header. The menu items are: 'Case Note', 'General Event Reports (GER)', 'Individual Plan', and 'Individual Plan Agenda' (which is expanded). Below the menu, there is a blue button labeled 'New' and a search input field. On the right side of the interface, there is a message 'Showing 1 to 1 of 1 entry' and a list of actions: a blue button labeled 'Create New' and a button with an Excel icon labeled 'Export to Excel'.

# Filling out the Individual Plan Agenda

Meeting Date	<input type="text" value="12/19/2024"/>	
Meeting Type	<input type="text" value="Quarterly Review"/>	
Review Period Start Date	<input type="text" value="12/02/2024"/>	
Review Period End Date	<input type="text" value="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 ...	<input type="button" value="Edit"/>

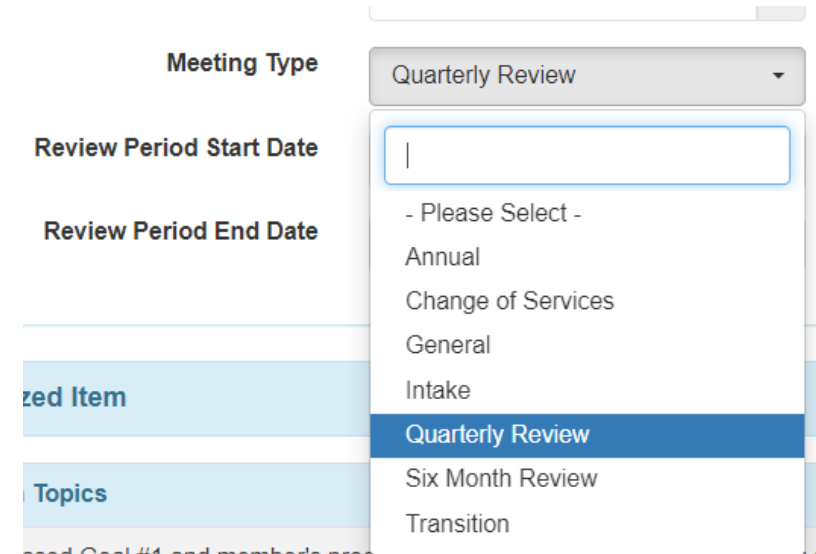
## Progress Towards Outcome

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.	<input type="text" value="Making Progress"/>		<input type="button" value="Edit"/>

# 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.



The screenshot shows a web form with the following fields and options:

- Meeting Type**: A dropdown menu currently set to "Quarterly Review". The open menu shows the following options: "- Please Select -", "Annual", "Change of Services", "General", "Intake", "Quarterly Review" (highlighted in blue), "Six Month Review", and "Transition".
- Review Period Start Date**: An empty text input field.
- Review Period End Date**: An empty text input field.

Below these fields, there are sections for "Agenda Item" and "Topics", each with a light blue header and a white content area. The "Topics" section has a small text snippet: "eed Goal #1 and member's pro".

# Adding Individualized Items

Click “Add Individualized Item” to add a Discussion topic. Each discussion topic should relate to a goal 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.	<a href="#">Edit</a>

[Link Personal Focus Worksheet](#)

[Add Individualized Item](#)



# Adding Progress Towards Outcomes

Click “Progress Towards Outcome” to describe the person’s desired outcome – i.e. what they are trying to achieve (goal).

## Progress Towards Outcome ⓘ

\* Desired Outcome

One healthy activity per day each week

About 2962 characters left

# 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.

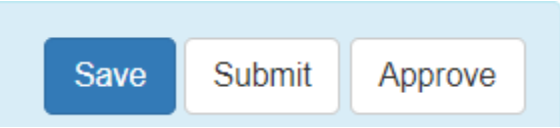
Choose **Making Progress** if your discussion with member shows there is progress towards that goal being made. Add any additional comments about further steps to achieve the goal in the comments section.

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.

The image shows a screenshot of a web form. On the left, there are two labels: "Periodic Progress" and "Linked ISP Report". The "Periodic Progress" label is positioned above a dropdown menu. The dropdown menu is currently open, showing a list of options. The top option is "Making Progress" with a downward arrow. Below it is a grey bar with the text "- Please Select -". The remaining options are "Completed", "Discontinued", "Fluctuating", "Maintaining", "Making Progress", "Needs more Data", and "Not Making Progress". The "Making Progress" option is highlighted with a light blue background.

# Saving Individual Plan Agenda

Click “Save” at the bottom.



Go to the Individual Plan Agenda List.

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
██████████	██████████	Approved	12/17/2024	Quarterly Review	10/01/2024	12/30/2024	No	US/Central

The form AGN-CC191ND-NEN4N5BYSMULT has been successfully submitted

# Recording Meeting Minutes – documenting

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

**Individualized Item**

**Discussion Topics**

1. Member's Goal 1 - to do one healthy activity per day.

**Progress Towards Outcome**

Desired Outcome	Periodic Progress	Linked ISP Report
One healthy activity per day each week	Making Progress	

**Required Items**

Nothing found to display

**External Attachment(s)**

Nothing Attached

View PDFs

Cancel Back Discontinue Edit **Record Meeting Minutes** Copy

# 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:

- Please Select -

- Completed
- Discontinued
- Fluctuating
- Maintaining
- Making Progress
- Needs more Data
- Not Making Progress

Making Progress ▾

## Progress Towards Outcome

Desired Outcome	Periodic Progress	Linked ISP Report	Comments
One healthy activity per day each week	Making Progress ▾		<p>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.</p> <p>About 2741 characters left</p>

# 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.

Action Taken

Action Plan

- Please Select -

Action Plan

Deferred

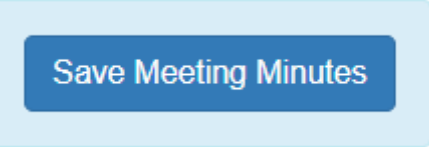
Discussion Record

Issue Resolved

Individualized Item		
Discussion Topics	Action Taken	Comments
1. Member's Goal 1 - to do one healthy activity per day.	Action Plan	<p>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.</p> <p>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).</p> <p>About 2662 characters left</p>

# Saving Meeting Minutes

Click “Save Meeting Minutes”



You will now go in to Edit the member’s Plan of Care.

[Linked Individual Plan Agenda](#) | [Acknowledgement Report](#)

At the bottom you will click “Link Individual Plan Agenda”

You will see the Individual Plan Agenda you approved Listed. Click on it to make sure it shows your Individual Plan Agenda.

### Individual Plan Agenda List

Review Period Start Date	Review Period End Date	Meeting Date	Status	Form ID	Time Zone
10/01/2024	12/30/2024	12/17/2024	Approved	AGN-CC191ND-NEN4N5BYQMULM	US/Central

Showing 1 to 1 of 1 entry

# Using the Individual Plan Agenda

By looking at a member's Individual Plan Agenda you can see whether their Plan of Care has been updated based on a Plan Agenda.

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**Individual Plan created/updated  
based on this Individual Plan Agenda**

OISP-CC191ND-NCB4STAZ7EQLQ

Start Date: 08/22/2024

End Date: 05/31/2025



# 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 screen.

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

Fill out the screen answering the questions completely.

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 and edit it.

Back

Save

Activate

Activate and Edit Individual Plan

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

The form OISPCF-CC191ND-NEN4N5BYTMULB has been Successfully Activated

Save and Continue Editing

# Change Form Request and Editing the Member's POC

You will scroll down the Member's Plan to the Action Plan section. Click "Import from Individual Plan Agenda" and select the Individual Plan Agenda.

**Action Plans** Jump to ?

Nothing found to display

[Import from Individual Plan Agenda](#) [Add Action Plan](#)

Select the Desired Outcome and Need/Issue.

## Action Plan List

You have selected 1 items.

Select	Desired Outcome	Need/Issue
<input checked="" type="checkbox"/>	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).	Member's Goal 1 - to do one healthy activity per day.

# 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” and then you will see this confirmation.

The form OISP-CC191ND-NCB4STAZ7EQLQ has been successfully updated

Once you receive notification the Change Form has been acknowledged by program staff, you will also Acknowledge the Plan.

Cancel

Back

Discontinue

Acknowledge

Create Change Form

Edit


The form OISP-CC191ND-NCB4STAZ7EQLQ has been successfully acknowledged

# Edit the Desired Outcome and Need/Issue if more detail is needed

Selecting “Edit” will allow you to add any detail here.



You are describing the action the member will be taking as the Need/Issue and any things they need to overcome to achieve the goal.



You are describing the Desired Outcome as what you and the member expect to see for progress by the end of next quarter.



# Submitting the Plan Change Form

Click “**Update without Closing the Change**

**Form**” to submit the Changed Plan for program staff approval.

Cancel Back Update without Closing the Change Form Update

⚠ TEST ENVIRONMENT - Do Not Enter Real Data

The form OISP-CC191ND-NEJ4N56KUMULZ has been successfully updated

Updating without Closing the Change Form will generate a work item for state staff to review the change request/changed POC.

# Submitting the Plan Change Form


You should never submit a Change Form without also editing the member's POC as the changes need to be reflected on the POC itself.

Program staff must acknowledge Plan changes. The changed Plan is not considered Approved until you receive acknowledgement from program staff.

You will see this acknowledgement tracked through Therap.




# 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.)

Form ID : OISP- ×


Time Zone : US/Central

Entered By :  Care Coordinator on 11/01/2024 09:38 AM

Last Updated By : Mandy Dendy, Therap Admin on 12/19/2024 02:49 PM

Approved By : Mandy Dendy, Therap Admin on 12/18/2024 02:58 PM

Plan Type : Individual Support Plan

Template Form ID : IPPT-SPAND-

[Update History](#)

Click Update History to see more details.