
Creating a Change Form for POC Updates

Guidance for Care
Coordinators

Last updated: 12/27/24



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



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- x


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.