

ISP Meeting Preparation Checklist:
For Residential, Day, PA, Therapeutic & Behavior Service Providers

Preparing for the ISP/Planning Meeting is the first step for providers in ensuring that their staff is able to effectively implement the ISP. All providers of services should be prepared to be an active participant in the Planning Meeting to help develop an accurate and meaningful ISP for the person. Communication between all providers is a vital element in the development of a quality ISP. It is also important to have team members who are knowledgeable about the person present at the meeting and who can make decisions for the agencies supporting the person. This provides for more accurate information about the person.

The checklist that follows identified things the provider of residential, day, therapeutic and clinical services should address in preparation for the ISP Planning Meeting and information to bring to the meeting. The person representing the agency at the meeting should have first hand, in depth information about the individual. Being familiar with all the materials identified in the checklist is critical, especially if the agency staff does not have considerable first hand knowledge.

It is critical that all providers involved in implementing the ISP understand what is in the plan and what their roles are in assisting the individual accomplish the identified outcomes and actions.

What should I do during Pre-Planning?

Complete a Risk Assessment for all services that you provide
Send Risk Assessment to ISC 90 days prior to ISP effective Date
Complete required formal assessments (including but not limited to):
PT Vocational
OT Behavior
SLP ICAP
Nutrition/RD Health Care Oversight
Orientation & Mobility PSR
Complete informal assessments
Forward copies of assessments to ISC 90 days prior to ISP effective date
Forward copies of new or updated medical consultation reports to ISC
Provide financial eligibility documentation
Provide information to the ISC that is related to what is important to the person having a quality life.

How do I prepare for the planning meeting?

Review the Draft ISP
Note any discrepancies, concerns, inaccurate data
Summarize progress toward each outcome and action for which the provider is responsible
List any barriers that prevented the outcomes or actions from being accomplished. Include what is not working and consider what else needs to be learned about how best to support the person.
List any modifications needed for specific outcomes or actions and new ones that are needed. Include a balance of what is important to the person and what is important for the person, including issues of health, safety and what is seen as important for the individual to be a valued member of the community. Be sure to consider those things the person wants/needs to learn.
Be prepared to discuss scheduling needs for the provision of services
Identify whether or not the person has indicators for therapy needs.
Provide the Level of Need, Rate and Billing Codes
Is a special needs adjustment needed? If yes, provide justification.
If the person already has a special needs adjustment and it needs to continue, provide justification.
Determine whether or not the individual has any one time needs such as Environmental Modifications, Vehicle Modifications, Establishment or Re-establishment needs.
If the person needs any of the above, provide justification, budgets, quotes, etc. as indicated.
Does the person need MR Housing? If yes, provide the necessary documentation to support this request.
Know which services can be submitted by which entity (Waiver vs. State) and know when they must be submitted to coincide with the implementation of the ISP.
Review the staffing plan for the person's residential and day services as well as any activity schedule and bring to the ISP meeting.
As a therapeutic services provider, if you are unable to attend the meeting, you should communicate with the ISC and other providers if necessary to provide the necessary information as indicated above.