



# HURON BEHAVIORAL HEALTH PROCEDURE

Procedure #: **QI.2.34**  
Issue Date: 01/12/11  
Rev. Date: 01/03/18  
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## Title: Pre-Planning Requirements for Person Centered Plans Procedure

Prepared By: Clinical Director

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### Purpose:

To define the practices to comply with the Michigan Mental Health Code and the Michigan Department of Health and Human Services (MDHHS) requirements for conducting Pre-Planning for Person Centered Planning (PCP).

### Scope:

This procedure applies to all clinical employees (including full-time employees, part-time employees, contractual providers, students, and/or interns) of Huron Behavioral Health (HBH) and all individuals served by HBH.

### Information:

1. Pre-planning is prefaced on the belief that all individuals served by the Community Mental Health Services Program (CMHSP) have the right to make their own choices and must be provided with choices regarding their services at HBH.
2. A Pre-Planning meeting must be completed by the worker in advance of the Person-Centered Planning (PCP) meeting (except for those receiving short-term outpatient therapy only, medication administration only, or who are incarcerated). This must be done face-to-face unless there is a guardian involved and the guardian is not available. In this case, it may be conducted over the phone. In all cases, this must be completed prior to the PCP meeting date with sufficient time to take all necessary/preferred actions prior to the PCP meeting. However, the worker must meet face-to-face with the consumer and his/her supports (if needed) to assure that the consumer has given input into the planning of his/her PCP in order to have a valid Pre-plan and must obtain the consumer's signature on the pre-plan.

### Procedure:

1. In accordance with the Michigan Mental Health Code (330.1712), new consumers need to have a Person-Centered Plan (PCP) developed within seven (7) days of the commencement of services (see also "[Person-Centered Planning \(PCP\) Policy](#)" [QI.1.05](#) and "[PCP Procedure](#)" [QI.2.18](#)). Part of the Person-Centered Plan includes the requirement to conduct a PCP Pre-Plan meeting with the consumer. If the consumer is already active in services at HBH, the Pre-plan is to be developed about the time of the third (3<sup>rd</sup>) Periodic Review.
2. Using the Pre-Plan form in the Electronic Medical Record (EMR) system, the primary worker will meet with the consumer to identify the his/her choices for the PCP meeting, which includes determining their choice for:
  - The date they would like their PCP meeting
  - The time of their PCP meeting
  - The location of their PCP meeting
  - Who they want (and do not want) to attend their PCP meeting
  - What they would like discussed (and not discussed) at their PCP meeting
  - Accommodations so that the individual can meaningfully participate in the PCP meeting (i.e. assistive technology, assistance with Limited English Proficiency/LEP, and assistance for individuals who use behavior as communication)
  - An Independent Facilitator, if desired
  - A Recorder for their meeting
3. The primary worker must also provide information relative to Self-Determination and Independent Facilitation. The consumer will be given a choice of at least two (2) independent facilitators (see also "[Independent Facilitation Procedure](#)" [QI.2.15](#)). If the consumer is on a Habilitation Waiver, the pre-planning session must

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include information to assist the consumer in providing options for services under the Habilitation Waiver service array. A signature must be obtained from the consumer/guardian to evidence this.

**Definitions/Acronyms:**

**Acronyms:**

- CMHSP – Community Mental Health Services Program
- COA – Council on Accreditation
- EMR – Electronic Medical Record
- HBH – Huron Behavioral Health
- LEP – Limited English Proficiency
- MDHHS – Michigan Department of Health and Human Services
- PCP – Person Centered Plan

**Definitions:**

*Independent Facilitator* – refers to an individual chosen by the consumer to serve as the consumer’s guide throughout the PCP process, assisting with pre-planning activities and co-leading the PCP meeting with the consumer.

**Forms:**

PCP Pre-Plan (in EMR)

**Records:**

Completed Pre-plans are retained in the consumer’s case record in accordance with the [“HBH Record Retention and Storage Policy” \(QI.1.23\)](#).

**Reference(s) and/or Legal Authority**

- COA standards
- MDHHS contract attachment C3.3.1
- [QI.1.05 PCP Policy](#)
- [QI.1.23 HBH Record Retention and Storage Policy](#)
- [QI.2.15 Independent Facilitation Procedure](#)
- [QI.2.18 PCP Procedure](#)

**Change History:**

Change Letter	Date of Change(s)	Changes
None		New procedure to define the existing philosophies and practices of HBH and to better clarify requirements.
A	03/07/11	Removed section “B” (“Consumers Already in Services” and combined with section “A” (New Consumers), added last sentence in #3 in “Procedure” section,
B	04/17/14	Removed reference to “90-1004” and “regional form” in “Forms” section, added reference to MDCH contract, added “CMHSP” & “LEP” in “Acronym” section, in #2 reordered bullets to reflect contract language, made numerous other small grammatical changes without changing sentence content.
C	03/23/16	Added “Definitions” section, in “Procedure” section added last sentence in #1 and 2 <sup>nd</sup> sentence in #3, in “information” section added parenthetical statement in #1 1 <sup>st</sup> sentence (“except for those...”) and in #2 added “with sufficient time to take all necessary/preferred actions prior to the PCP meeting”, added reference to QI.2.15 (2 places).
D	01/03/18	In “Procedure” section 5 <sup>th</sup> bullet in #2 changed “Assistive technology or assistance with LEP (Limited English Proficiency) needed” to “Accommodations so that the individual can meaningfully participate in the PCP meeting (i.e. assistive technology, assistance with Limited English Proficiency/LEP, and assistance for individuals who use behavior as communication), made several minor wording/grammatical changes/corrections throughout document without changing sentence content.