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) process and developing an Individual Plan Of Service (IPOS).

Scope:

This procedure applies to all clinical employees (including full-time employees, part-time employees, contractual clinical 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 Huron Behavioral Health.

2. A Pre-Planning meeting must be completed by the primary worker in advance of the Individual Plan Of Service (IPOS) meeting. Pre-planning should 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 IPOS meeting date with sufficient time to take all necessary/preferred actions prior to the IPOS meeting. However, the primary 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 IPOS meeting 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 an Individual Plan Of Service developed within seven (7) days of the commencement of services (see also “Person-Centered Planning (PCP) Policy” QI.1.05 and “Person Centered Planning Process and Individual Plan of Service (IPOS) Procedure QI.2.18” Part of the person-centered planning process includes the requirement to conduct an IPOS pre-planning 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 (3rd) 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 IPOS meeting, which includes determining their choice for:
   - The date they would like their IPOS meeting
   - The time of their IPOS meeting
   - The location of their IPOS meeting
   - Who they want (and do not want) to attend their IPOS meeting
   - What they would like discussed (and not discussed) at their IPOS meeting
   - Accommodations so that the individual can meaningfully participate in the IPOS 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...”)
Title: Pre-Planning Requirements for Individual Plan Of Service (IPOS) Procedure

Prepared By: Clinical Director

NOTE: This Document Copy is Uncontrolled and Valid on this date only: December 9, 2019. For Controlled copy, view shared directory I:\ drive

Facilitation Procedure" QI.2.15). If the consumer is on a Habilitation Waiver, the pre-planning session must 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
IPOS – Individual Plan Of Service
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 person-centered planning process, assisting with pre-planning activities and co-leading the IPOS meeting with the consumer.

Forms:
IPOS 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
QI.1.05 Person Centered Planning Policy
QI.1.23 HBH Record Retention and Storage Policy
QI.2.15 Independent Facilitation Procedure
QI.2.18 Person Centered Planning (PCP) Process and Individual Plan Of Service (IPOS) Procedure

Change History:

<table>
<thead>
<tr>
<th>Change Letter</th>
<th>Date of Change(s)</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td></td>
<td>New procedure to define the existing philosophies and practices of HBH and to better clarify requirements.</td>
</tr>
<tr>
<td>A</td>
<td>03/07/11</td>
<td>Removed section “B” (“Consumers Already in Services” and combined with section “A” (New Consumers), added last sentence in #3 in “Procedure” section.</td>
</tr>
<tr>
<td>B</td>
<td>04/17/14</td>
<td>Removed reference to “90-1004” and “regional form” in “Forms” section, added reference to MDCH contract, added “CMHSP” &amp; “LEP” in “Acronym” section, in #2 reordered bullets to reflect contract language, made numerous other small grammatical changes without changing sentence content.</td>
</tr>
<tr>
<td>C</td>
<td>03/23/16</td>
<td>Added “Definitions” section, in “Procedure” section added last sentence in #1 and 2nd sentence in #3, in “Information” section added parenthetical statement in #1 1st 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).</td>
</tr>
<tr>
<td>D</td>
<td>01/03/18</td>
<td>In “Procedure” section 5th 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.</td>
</tr>
<tr>
<td>E</td>
<td>11/29/19</td>
<td>Changed “Person Centered Plan/PCP” to “Individual Plan Of Service/IPOS” (24 places), made several minor wording/grammatical changes/corrections throughout document without changing sentence content.</td>
</tr>
</tbody>
</table>