



HURON BEHAVIORAL HEALTH  
**PROCEDURE**

Procedure #: **QI.2.34**  
Issue Date: 01/12/11  
Rev. Date: 08/05/25  
Page: 1 of 3

**Title: Pre-Planning Requirements for Individual Plan of Service (IPOS) Procedure**

**NOTE:** This Document Copy is **Uncontrolled and Valid on this date only: November 12, 2025.** For Controlled copy, view shared directory I:\ drive

**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 process and developing an Individual Plan of Service (IPOS).

**Scope:**

This procedure applies to all clinical employees (including full-time and part-time employees), contract 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. The purpose of pre-planning is for the individual to gather the information and resources necessary for effective person-centered planning to assure that an effective IPOS is developed and to set the agenda for the person-centered planning process. Pre-planning helps assure successful person-centered planning process.
3. A Pre-Planning meeting must be completed by the primary worker in advance of the Individual Plan of Service (IPOS) meeting with sufficient time to take all necessary/preferred actions prior to the IPOS meeting. Pre-planning should be done face-to-face unless circumstances prohibit this. The consumer and his/her supports need to give input into the planning of his/her IPOS meeting in order to have a valid pre-plan. The consumer's signature is required on the pre-plan.
4. For consumers enrolled in Outpatient Therapy only, the pre-plan and IPOS may be developed on the same day if the consumer specifically requests this to facilitate expedited service delivery. For all other programs, the pre-plan must be completed at least one day prior to the development of the IPOS.

**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 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 (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 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
  - Any concerns related to conflicts of interest associated with invited parties and/or strategies for resolving possible disagreements that may arise during the planning process
  - What they would like discussed (and not discussed) at their IPOS meeting

**Title: Pre-Planning Requirements for Individual Plan of Service (IPOS) Procedure**

Procedure #: **QI.2.34**  
Issue Date: 01/12/11  
Rev. Date: 08/05/25  
Page: 2 of 3

Prepared By: Clinical Director

**NOTE: This Document Copy is Uncontrolled and Valid on this date only: November 12, 2025. For Controlled copy, view shared directory I:\ drive**

- Accommodations so that the individual can meaningfully participate in the IPOS meeting (e.g., assistive technology, assistance with Limited English Proficiency/LEP, and assistance for individuals who use behavior as communication)
  - Who will facilitate their meeting
  - Who will record what is discussed at the meeting
3. The primary worker will also provide information to the consumer regarding various tools available to them to assist in the person-centered planning process and the development of their IPOS. The consumer will be given a copy of the "[Optional Person-Centered Planning Tool Brochure](#)" (90-769). Optional tools include, but may not be limited to:
- McGill Action Planning System (MAPS)
  - Essential Lifestyle Planning (ELP)
  - Planning Alternative Tomorrows with Hope (PATH)
  - Personal Futures Planning (PFP)
  - Other suitable tools requested by the consumer
- Note – If the consumer declines the option of using one of the available tools, the worker will note this on the Pre-Plan form in the EMR system
4. If the consumer is interested in utilizing any of the optional person-centered planning tools, the primary worker will coordinate with the Independent Facilitator to see that this occurs (see also "[Independent Facilitation Procedure](#)" QI.2.15).
5. The primary worker must also provide information relative to Self-Determination and self-determined services as well as 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 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  
ELP – Essential Lifestyle Planning  
EMR – Electronic Medical Record  
HBH – Huron Behavioral Health  
IPOS – Individual Plan of Service  
LEP – Limited English Proficiency  
MAPS – McGill Action Planning System  
MDHHS – Michigan Department of Health and Human Services  
PATH – Planning Alternative Tomorrows with Hope  
PFP – Personal Futures Planning

**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:**

[90-769 – Optional Person-Centered Planning Tool Brochure](#)  
IPOS Pre-Plan (in EMR)

**Title: Pre-Planning Requirements for Individual Plan of Service (IPOS) Procedure**

**Procedure #: QI.2.34**  
**Issue Date: 01/12/11**  
**Rev. Date: 08/05/25**  
**Page: 3 of 3**

**Prepared By: Clinical Director**

**NOTE: This Document Copy is Uncontrolled and Valid on this date only: November 12, 2025. For Controlled copy, view shared directory I:\ drive**

**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 Process and Individual Plan of Service \(IPOS\) 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.
E	11/29/19	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.
F	10/20/21	In "Information" section added #2 and in #3 removed "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" and added "circumstances prohibit this", made several minor wording/grammatical changes/corrections throughout procedure without changing sentence content.
G	10/28/21	In "Procedure" section added #3, in "Acronyms" section added "MAPS" & "PATH".
H	10/05/22	In an effort to better clarify MDHHS Person-Centered Planning Practice Guidelines, in "Procedure" section #3 added second sentence & "PFP", added #4, in "Acronyms" section added "ELP" & "PFP", in "Forms" section added 90-769, made several minor wording/grammatical changes/corrections throughout procedure without changing sentence content.
I	08/05/24	Made several minor wording/grammatical changes/corrections throughout procedure without changing sentence content.
J	08/05/25	In "Information" section, added #4.