



Policy Number:

34

Effective: January 1, 2013

Revised: September 18, 2017,

December 10, 2020

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Subject: Quarterly/Monthly Reviews

## **PURPOSE:**

Camden County Developmental Disability Resources (CCDDR) shall have a policy to perform a Quarterly or Monthly Review of the Individual Support Plan for each person who receives Support Coordination services from CCDDR.

## **DEFINITIONS:**

DDD Service Monitoring Guidelines: The Division of Developmental Disabilities (DDD) Support Coordinator Manual describes requirements of Support Monitoring, as well as information regarding maintaining and updating Individual Support Plans.

Individual Support Plan: This is a document resulting from a process directed by the individual served, with assistance as needed by a representative. It is intended to identify strengths, capacities, preferences, needs, and desired outcomes of the participant. The process may include other individuals freely chosen by the participant who are able to serve as contributors to the process. The person-centered planning process enables and assists the individual to access a personalized mix of paid and non- paid services and/or supports that will assist him/her to achieve personally defined outcomes.

Quarterly Review: This is a review of the effectiveness of the services outlined in the Individual Support Plan that occurs every three months. The quarters are established from the implementation date of the Individual Support Plan.

Monthly Review: This is a review of the effectiveness of the services outlined in the Individual Support Plan that occurs every calendar month.

## **POLICY:**

Services authorized in all Individual Support Plans that are funded through the Department of Mental Health, including all Medicaid Waiver plans, shall comply with Division of Developmental Disabilities' Service Monitoring guidelines. Service provision, programming, and progress shall be documented. This information may result in the modification of the Individual Support Plan. Such plans shall be modified and updated, depending on the client's needs and preferences.

## I. Plan\_Monitoring/Reviews

Quarterly or Monthly Reviews shall be completed for all clients. The review period requirements shall be identified by the Division of Developmental Disabilities, which is also based on the type of services authorized for each individual client. The Quarterly and Monthly Reviews shall provide an overview of progress made toward plan Personal Outcomes and Goals, recommendations for changes to plan, Support Coordinator contacts, Service Monitoring notes, and other pertinent information relating to the client.

The Support Coordinator and provider agency QDDP (if applicable) shall regularly monitor implementation of the Individual Support Plan and progress in meeting plan Personal Outcomes and Goals. Changes shall be made if necessary to plan outcomes and action steps based upon input from team members.

## II. Quality Assurance

The Quality Assurance Coordinator(s), Targeted Case Management Supervisor(s), and/or other designated CCDDR staff will monitor Quarterly Reviews, Monthly Reviews, and Individual Support Plans to ensure that the mandatory components of the Individual Support Plan Guidelines are implemented.

### **REFERENCES:**

- CARF Standards Manual
- Individual Support Plan Guidelines – Medicaid Waiver Manual
- RSMo 633.110
- Division of DD Quality Outcomes Discussion Guide
- 9 CSR 45-3.010
- RSMo 630.655
- Division of DD Directive 3.020
- Division Directive 4.060