

DATE: July 23, 2010

TO: All DD Waiver Case Management Providers; DHI Surveyors; Regional Office Managers & Regional Case Management Coordinators

FROM: Jennifer Thorne-Lehman (*signature on file*)

RE: DOCUMENTATION OF REVISIONS

Recently, it has been brought to our attention that there may be some inconsistency among Case Management Agencies, with regard to how to document and distribute Revisions to the Annual Individual Service Plan, and or MAD 046 Budget. The following information should clarify this issue:

1. **For changes to the Annual Budget only**, other than changes in Providers, a copy of the MAD046 Budget should be attached to the Addendum C Revision Form, and distributed to all IDT Members. (Example: Reducing DH units from 560 units to 530 units)
2. **For changes to Outcomes and Action Plans, including changes of Provider or Services**, those portions of the ISP should be marked clearly at the top of each page, "Revision, Date: ____". Those pages of the ISP should then be attached to the completed Addendum C Revision form, and distributed to the IDT. (Example: The individual has achieved an outcome, and the Team meets to revise the Action Plan to continue to move the person closer to their stated Vision. OR The Individual changes Community Living Providers and the Action Plans need to be updated to reflect new supports).
3. **For extensive changes in the Individual's life**- for example when the Individual's health or living situation has changed dramatically- then the whole ISP needs to be revised to reflect these changes, and the entire ISP should be marked as a Revision, clearly dated, and distributed to the IDT. (Example: The Individual suffers a stroke and mobility is impaired, and the team revises Narrative and all/most Action Plans to reflect current life- situation, new desired Outcomes OR the person reaches 65 years old, and decides to retire from work).