



Informational Memo

Annual Review Update Date For The Individual Support Plan (ISP)

ODP Communication Number 051-11

AUDIENCE: Administrative Entity (AE) Administrators and Directors, County Mental Health/Mental Retardation (MH/MR) Programs Directors, Supports Coordination Organizations (SCO), and Direct Service Providers

PURPOSE: This Office of Developmental Programs (ODP) communication is intended to provide the following:

- A definition of the Home and Community Services Information System (HCSIS) term **Annual Review Update Date**.
- Instructions on when to correct the **Annual Review Update Date** in HCSIS if it does not align with what is stated in this communication.

BACKGROUND

In 2008, two modifications were made in HCSIS that involved the **Annual Review Update Date**. These included:

- The **Annual Review Update** was added to the **Category of Plan Change** drop-down list in the **Individual Support Plan (ISP) Plan Creation** screen.
- ISP terminology was modified and the term **Review Date** was changed to the term **Annual Review Update Date**. The **Review Date** represented the end date of the last non-Fiscal Year (FY) model ISP.

As a result of the modification made to the **Annual Review Update Date** terminology, ISP Review alerts in HCSIS now use the term **Annual Review Update Date** instead of **Review Date**. The **Discussion** and **Action Required** sections on the following page define the **Annual Review Update Date**, its purpose, and the action required to ensure the field is populated accurately.

DISCUSSION

By definition, the **Annual Review Update Date** is the end date of the current plan year. The ISP team and the AE must ensure that an **Annual Review ISP** is completed, approved, and services authorized by the **Annual Review Update Date**. In addition, Supports Coordinators (SCs) must ensure that all **Annual Review ISPs** are distributed to required team members within 14 calendar days prior to the **Annual Review Update Date**.

In order to assist the ISP team, HCSIS generates an alert for the SC based on the date entered into the **Annual Review Update Date** field. This alert is intended to inform the SC that an update to the current ISP is due within 45 days.

The **Annual Review Update Date** does not change from year to year. Only the year changes, not the month or day. For example: if last year's **Annual Review Update Date** was 1/9/10, this year's **Annual Review Update** would be 1/9/11. The only exception is during a Leap Year.

ACTION REQUIRED

The **Annual Review Update Date** is used to ensure that all ISPs are reviewed, approved and have services authorized within 365 calendar days in order to meet CMS Waiver Assurance and ODP licensing requirements.

ISPs must be corrected if the **Annual Review Update Date** does not reflect the end date of the current plan year. Corrections must be made during the FY 2011-2012 Renewal process. The **Annual Review Update Date** must be within the fiscal year that the **Annual Review ISP** is being completed.

Ongoing, SCs should enter the **Annual Review Update Date** as well as the **Annual Review Meeting Date** into HCSIS when completing Annual Review plans. Correct completion of these fields will ensure that reporting mechanisms in HCSIS related to the ISP data are accurate.

SCs should collaborate with provider agencies prior to updating the **Annual Review Update Dates** as the change in date will affect their quarterly meetings as they are based on the **Annual Review Update Date** per the ISP Regulations.

All ODP resources, communications and monitoring for compliance processes will be updated by the summer of 2011 to reflect the **Annual Review Update Date** as defined in this informational memo.

INQUIRIES

If you have any questions regarding information in this communication, please contact your ODP Regional Office.