

CIL-NET Presents...

Effective Service Coordination:

Engaging Consumers with a Holistic Approach to IL Services

Reporting Requirements

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3:00 – 4:00 P.M.

Presenter:

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Reporting Requirements

How does RSA know that you are fulfilling your contract to provide core services?

- You report annually on your 704 report
 - Goals set and met
 - Services provided
 - ILPs and ILP waivers
- They review the Consumer Service Records as part of any compliance review

Consumer Record Review

- Eligibility—does the person have a significant disability? Determination signed and dated?
- What IL services were requested?
- An ILP or a waiver signed by staff member and consumer.
- What IL services were provided—including evidence of core services?
- Goals and objectives established with consumer (whether or not in ILP). NOT a list of services, but what the person wants to accomplish.

Consumer Service Record, cont'd

- Goals or objectives achieved.
- How CIL assisted in goal development, pursuit or achievement
- Review of ILP *at least* annually with determination—Continue? Modify? Discontinue? Refer?
- Signed release of information
 - Some compliance reviews have also required photo releases
- Required notifications—satisfaction, CAP, appeal rights, alternate formats and communication modes.

From actual compliance reviews...

- If most consumers waive plans, required retraining and processes to present and understand advantages of developing ILP.
- ALL records must include development and achievement of IL goals selected by individuals.
- If CSR does not clearly document services, question if four core services are actually provided.
- If consumers interviewed didn't understand IL philosophy and core services, required retraining and processes to assure that staff communicate these things.

Resolution of concerns may require

- Corrective Action Plan with target dates
- Addressing in the three-year program and financial planning objectives for the center, including the goals that flow from the mission
- Written policy and procedures
- Training for staff regarding expectations
- Implementation thoroughly documented

Documentation is a legal requirement

- Take it seriously
- Review the consumer records *regularly* to assure the information is being collected
- If you use electronic notes, review these whether or not you print them for the CSR
- Continually remind staff to complete reports of any contact with consumer
- Train staff regarding expectations
- Monitor and correct as needed—continually, not just before a compliance review. That is too late.

For more information or TA on documentation...

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