



**SENIOR & LONG TERM CARE DIVISION  
COMMUNITY SERVICES BUREAU**

**BIG SKY WAIVER  
Policy Manual**

**Section: PERSON CENTERED PLANNING**

**Subject: Person Centered Planning Annual  
Visits**

**ARM reference: 37.40.1005, 37.40.1114**

**PURPOSE**

The purpose of the annual Person-Centered Planning (PCP) visit is to review the member's current PCP form (SLTC-200) and create a new PCP form that is current to the member's situation.

**REQUIREMENTS**

1. The Community First Choice/Personal Assistance Services (CFC/PAS) person centered planning process must be formally completed by the Plan Facilitator on an annual basis. The Plan Facilitator must review the member's PCP form, specifically related to CFC/PAS services. The annual visit must include an updated evaluation of member's strengths/interests, goals, services, personal care attendant skills and schedule preferences, and back-up plan.
2. The Personal Emergency Response System (PERS) section of the PCP form must be completed at every annual visit and appropriate follow-up action should be taken. Refer to CFC/PAS and Big Sky Waiver Section 1111.
3. The intake section of the PCP form does not need to be completed during the annual visit.
4. The PCP form must be completed in-person with the member.

**PROCEDURES**

There are two procedures for completing an annual visit. One if the case manager is the Plan Facilitator and another if the provider is the Plan Facilitator

1. If a case manager is the Plan Facilitator:
  - a. The annual PCP meeting should be done in conjunction with the annual visit requirements for case management.

- b. The annual PCP meeting should be done at a location determined appropriate through the requirements for case management.
  - c. The annual PCP meeting must be coordinated with the CFC/PAS agency. Refer to CFC/PAS and Big Sky Waiver Section 1104 for information on coordinated visits.
  - d. The Plan Facilitator is responsible for completing the new PCP form and ensuring proper signatures are obtained and distribution is made. The member, or the person authorized to sign on behalf of the member (as determined appropriate by the case manager), the CFC/PAS provider agency, and the Plan Facilitator must sign the form and receive a copy for their records.
  - e. The CFC/PAS provider will complete a Recertification Form (SLTC-210) and update the CFC/PAS Service Plan (SLTC-170/175) at the annual visit.
  - f. The Plan Facilitator must review and sign the CFC/PAS Service Plan that is developed at the annual visit.
  - g. The CFC/PAS provider agency is responsible for ensuring compliance in service delivery within the parameters of the CFC/PAS program. If a concern about member or worker health and safety comes up as a part of delivery of the CFC/PAS Service Plan, then the CFC/PAS provider must complete a risk assessment using the Risk Negotiation form (SLTC-230). This form should be completed in collaboration with the member and Plan Facilitator.
  - h. If general health and safety issues come up during the planning meeting it is the responsibility of the case manager to identify and address these issues through the case manager's risk assessment process. The Case Manager Plan Facilitator may work with the provider agency, as necessary, to resolve these issues.
2. If the CFC/PAS provider is the Plan Facilitator:
- a. The annual PCP meeting should be done in conjunction with the annual visit requirements for the CFC/PAS provider.

- b. The annual PCP meeting must be done in the member's home, unless approved by the RPO.
- c. The Plan Facilitator is responsible for completing the new PCP form and ensuring proper signatures are obtained and distribution is made. The member or personal representative, CFC/PAS provider agency, and Plan Facilitator must sign the form and retain a copy for their records.
- d. The CFC/PAS provider must complete a new Recertification Form and CFC/PAS Service Plan at the annual visit.
- e. The Plan Facilitator must review and sign the Service Plan that is developed at the annual visit.
- f. The CFC/PAS provider agency is responsible for ensuring compliance in service delivery within the parameters of the CFC/PAS program. If a concern about member or worker health and safety comes up as a part of delivering the CFC/PAS Service Plan then the provider agency must complete a risk assessment using the Risk Negotiation form (SLTC-230), if necessary.
- g. If health and safety issues come up related to the member's participation in the CFC/PAS program the Plan Facilitator is responsible for completing the Risk Negotiation form, if necessary.