

Developing an Implementation Plan

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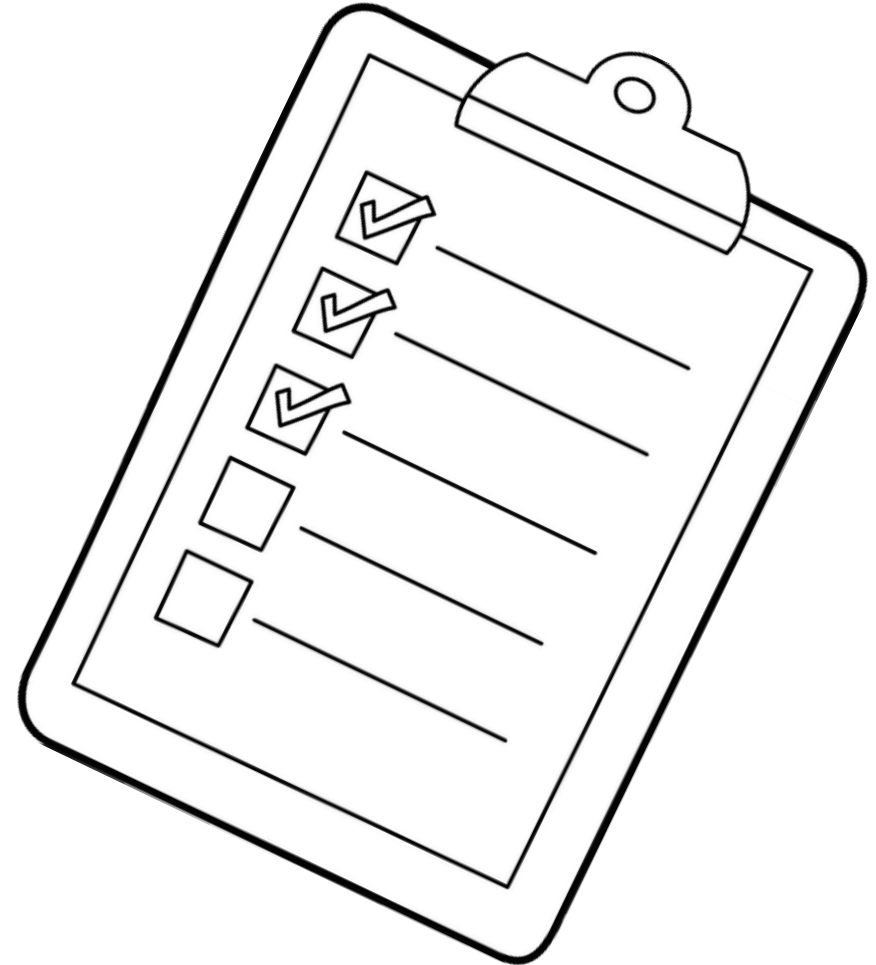
Brian Rothey, Director of Adult Community Programs, PARC

Implementation Plan Definition

A plan developed by the provider with direction from the recipient and includes the name of the recipient receiving services. The implementation plan details the support plan goal(s) that the service will address, the methods employed to assist the recipient in meeting the support plan goal(s), and the system to be used for data collection and assessing the recipient's progress in achieving the support plan goal(s).

Documentation Basics

- Know the requirements
- Know your audience
- Keep it simple and obvious
- Meet Medical Necessity



The Audience

- Individual
- Support Coordinators
- Guardian / Legal Representative
- Employees
- APD
- Qlarant



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Services Requiring Implementation Plans

- Residential Habilitation
- Adult Day Training
- Supported Living Coaching*
- Supported Employment (Employment Stability Plan)*

* Additional requirements

IP Components: Goals

- The Implementation Plan goals are derived from the support plan.
- Most goals are broad and need to be broken down into manageable and achievable steps or objectives.



IP Components: Methods

- Methods are how the provider will assist the individual in meeting their goals.
- The methods employed should vary based on the nature of the goal(s)/outcome(s), person's preferences and according to the person's learning style i.e. hand over hand, verbal prompt, simulations, role play, step by step instructions, demonstration, repetition.

IP Components: Systems

- Systems are used for data collection and assessing the recipient's progress in achieving the support plan goal.
- Data collection systems and assessment of progress toward Support Plan goals/outcomes should vary based on the nature of the goal(s)/outcome(s) and be consistent with methods. Examples may include but not be limited to data collection sheets, skill acquisition forms, progress notes.

IP Requirements: Dates

- Implementation Plan must be developed, at a minimum, within 30 days of the initiation of the new service, or within 30 days of receipt of the support plan for continuation of services and annually thereafter.
- A copy of the Implementation Plan is provided to the person and when applicable, the legal representative, within the required 30-day time frame.

IP Requirements: Date Exceptions

- Exception: When the support plan is received more than 30 days prior to the Support Plan effective date the following may apply -Implementation plan must be developed no later than 30 days prior to the SP effective date or within 30 days of receipt of the Support Plan, whichever date is later.

IP Requirements

- Individual's Name
- Date Support Plan Received
- Effective Date of Support Plan
- Implementation Date of Implementation Plan

- **Keep Proof of Sent Documents and Received Documents**

IP Requirements

- Individual's Signature and Date (prior to implementation)
- Date Given to Individual (prior to implementation)
- If Applicable; Guardian Signature & Date of Copy/Sent Date (keep track of attempts to get signature)
- Date Sent to WSC and Method
- **Keep Proof of Sent Documents and Received Documents**

IP Development: Goals

Determining Goals and Objectives from the Support Plan

- What does the goal mean to the individual?
- What are the barriers to achieving the goal?
- Are there multiple steps in achieving the goal?
- Is the goal still applicable?

Goals: Client Meaning

Support Plan Goal: I want to be healthy.

What does that mean to Brian and Michelle

- Brian: I want to bulk up by joining a gym and remember to eat 3 meals a day.
- Michelle: means I want to take my pills every day to remain healthy and drink less diet coke.

IP Development: Barriers

What will it require for Brian to go to the gym?

1. Can Brian afford the gym?
2. How much does a gym cost? How do we find that out?
3. How will Brian get to the gym?
4. Does Brian need to be staffed at the gym?
5. Is this a relevant goal right now?



IP Development: Barriers

What will it require for Michelle to take her pills everyday?

1. Does Michelle willingly take her pills?
2. Can Michelle self administer, or does she need staff assistance?
3. Can Michelle afford her pills?
4. Is this a relevant goal right now?

IP Development: Barriers

1. Can Brian afford the gym? No. Brian has \$133 a month in spending allowance. Most of this goes towards treats, video games and his cell phone. He will need to save money to join a gym and pay the monthly fees.
2. Where do we find the cost of gym? Search the internet.
3. How will Brian get to the gym? Group home van or companion.
4. Does Brian need to be staffed at the gym? Yes- Brian is a flirt!
5. Is this a relevant goal right now? No, going to the gym is not applicable right now due to Covid-19.

IP Development: Barriers

What will it require for Michelle to take her pills everyday?

1. Does Michelle willingly take her pills? Sometimes. Sometimes she refuses. Note that Michelle was moved into a group home from supported living due to declining health from not taking her meds.
2. Can Michelle self administer, or does she need staff assistance? Staff assistance, Michelle while capable is forgetful and has refusals.
3. Can Michelle afford her pills? Yes
4. Is this a relevant goal right now? Yes

IP Development for Brian

- Brian needs to learn how to budget so he can eventually afford a gym membership.
- Can Brian count? Does he understand the concept of money?
- Can he hold onto money in his pocket or does he need assistance from staff?
- Does he have a bank account ATM or credit card?

IP Development for Michelle



- Michelle needs to agree to take her pills daily.
- Why does Michelle refuse pills: they upset her stomach and make her tired.
- Can her pills be changed to something with less side effects?

TASK ANALYSIS

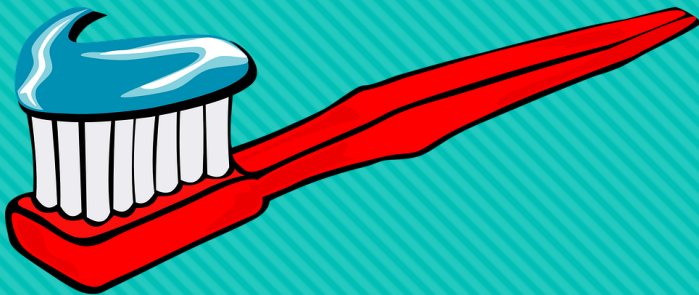
<https://www.youtube.com/watch?v=NkQ58I53mjk>

- breaks down an activity into smaller, discrete steps.
- allows the learner to develop complex skills that would otherwise be difficult to acquire
- considerations when developing a task analysis:
 - ▶ person's learning style
 - ▶ person's ability to perform multi-step operations
 - ▶ best order of steps
 - ▶ most natural way of doing the task
- common errors include missing steps; over-reliance on the trainer

<https://www.youtube.com/watch?v=prUlcZ8pXNA>

Task Analysis

Task Analysis: Brushing Teeth



Pick up the tooth brush
Wet the brush
Take the cap off the tube
Put paste on the brush
the outside of the bottom row of teeth
Brush the outside of the top row of teeth
Brush the biting surface of the top row of teeth
Brush the biting surface of the bottom row of teeth
Brush the inside surface of the bottom row of teeth
Brush the inside surface of the top row of teeth
Spit
Rinse the brush
Replace the brush in the holder
Grasp cup
Fill cup with water
Rinse teeth with water
Spit
Replace cup in holder
Wipe mouth on sleeve
Screw cap back on tube

www.behavioradvisor.com/TaskAnalysis.html

IP Development for Brian

- Task Analysis: Task analysis is the process of breaking a skill down into smaller, more manageable components.
- Brian knows his numbers but does not have a good concept of money.
 - Goal 1- recognize and identify money
 - Goal 2- addition and subtraction skills
 - Goal 3- learn to use a ledger sheet for expenses

IP Development for Michelle

- Task Analysis: Task analysis is the process of breaking a skill down into smaller, more manageable components.
- Michelle knows when she takes her pills she feels better overall, regardless of side effects.
 - Goal 1: Schedule a doctor's appointment to review and discuss potential of medication changes.
 - Goal 2: Michelle will take her meds with staff assistance.
 - Goal 3: Michelle will take meds independently.

SMART GOALS

All goals, objectives and or tasks should be Smart Goals

- S: Specific
- M: Measurable
- A: Achievable
- R: Relevant
- T: Time Bound



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SMART GOAL WORKSHEET

Initial goal:	Write the goal you have in mind
Specific:	What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?
MEASURABLE:	How can you measure progress and know if you've successfully met your goal?
ACHIEVABLE:	Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?
RELEVANT:	Why am I setting this goal now? Is it aligned with overall objectives?
TIME-BOUND:	What's the deadline and is it realistic?
SMART GOAL:	Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed

IP Development for Brian

Let's make "recognize and identify money" SMART

- S: Specific: identify \$1, \$5, \$10, \$20, \$50, \$100
- M: Measurable: 100% proficiency to meet goal
- A: Achievable: Yes
- R: Relevant: Yes
- T: Time Bound Yes, for 2 consecutive weeks within 3 months.

Brian will identify \$1, \$5, \$10, \$20, \$50, \$100 bills by pointing at the bill with verbal prompts 100% of the time for 2 consecutive weeks.

IP Development for Michelle

Michelle will take her meds with staff assistance.

- S: Specific: Michelle will take her medication
- M: Measurable: 90% Proficiency
- A: Achievable: Yes
- R: Relevant: Yes
- T: Time Bound Yes, 4 weeks of 90% or better within 6 months.

Michelle will take 90% of her medication with verbal prompts from staff for 4 weeks.

IP Development for Brian

- What Methods will we employ to assist Brian in meeting his goal?
- Brian is a visual learner he will require actual money or replica to identify through verbal prompting.

IP Development for Michelle

- What Methods will we employ to assist Michelle in meeting her goal?
- Michelle will require verbal prompts and positive reinforcement to take her medication daily.
 - *Note: talk to behavior analyst about adding an incentive for meeting weekly goals.

IP Development for Brian

- Systems are used for data collection and assessing the recipient's progress in achieving the support plan goal.
- How will we document Brian's progress?
 - Choices: Data sheet, Progress note, Quarterly Report, Annual, Service Logs
 - We are choosing a data sheet; progress will be noted on quarterlies and annuals.

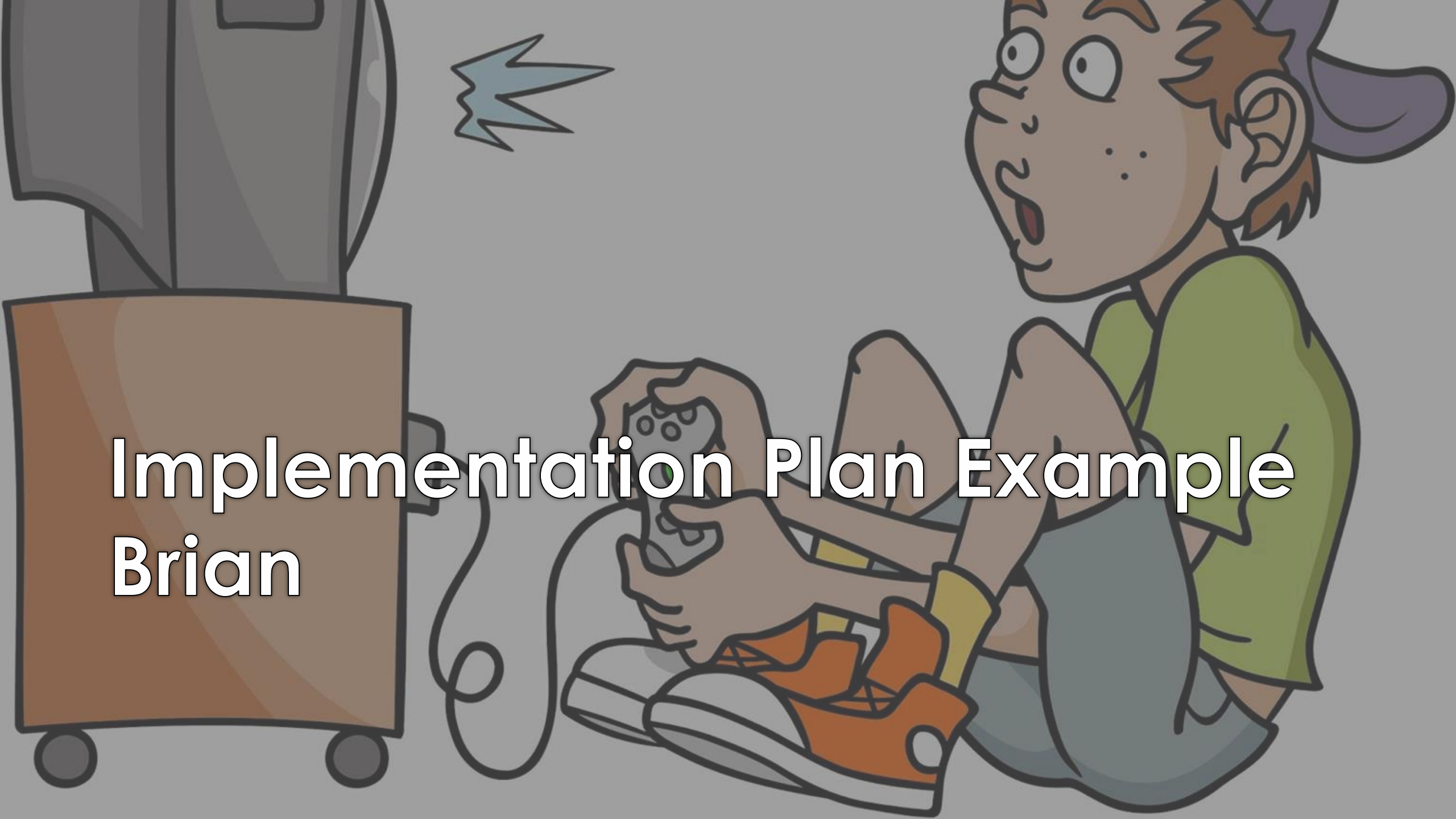
IP Development for Michelle

- Systems are used for data collection and assessing the recipient's progress in achieving the support plan goal.
- How will we document Michelle's progress?
 - Choices: Data sheet, Progress note, Quarterly Report, Annual, Service Logs, MAR
 - We are choosing a MAR; progress will be noted on quarterlies and annuals.

Notes:

○ Brian: Brian would have additional steps or objectives on his IP to include researching the cost of gym membership. This could easily be documented in his quarterly and annual

○ Michelle: Michelle should have an additional steps or objectives of seeing her doctor to discuss medication changes. This could be documents on the doctor visit form, a future MAR and in her quarterly and annual.



Implementation Plan Example

Brian

Supported Living Coaching

SLC must include the following to the IP in addition to the requirements previously reviewed:

- The frequency of the supported living service.
- How home, health, and community safety needs will be addressed, and the supports needed to meet these needs, including a personal emergency disaster plan, which must be updated annually and any time the recipient moves to a different residence.
- The method for accessing the provider 24 hours per day, 7 days per week for emergency assistance. Back up SLC with contact information
- A description of how natural and generic supports will be used to assist in supporting the recipient.

SLC Implementation Plan

Employment Stability Plan

Data Collection Examples

- MAR
- Data sheet
- Service Logs
- Behavior data tracking
- Incident Reports
- Client Meeting Minutes
- Activity Calendars
- Med Error Forms
- Medical Visit forms
- Quarterlies
- Annuals
- Client Accounting

Questions?



Reference Materials

- Developmental Disabilities Individual Budgeting Waiver Services Coverage And Limitations Handbook; June 2018
<https://apd.myflorida.com/ibudget/docs/iBudget%20Waiver%20Handbook%20June%202018.pdf>
- Qlarant Service Specific Individual Record Reviews
<https://florida.qlarant.com/Public2/resourceCenter/providers/discoveryReviewTools/index.html>