

Overall Status of the Individual	What is the individual's demeanor? How does the individual look? Do they appear to be healthy, happy, wearing appropriate clothing for weather, well kept, etc.? Review details of the individual's typical week (Monday-Sunday) and other records that define what actually is taking place and how the person currently spends their time each day to monitor movement toward their preferred life. Is the individual doing more of "what works" for them?
Community Involvement	What activities have they done and want to do again? What new connections did they make? Did they go out as often as they wanted – why or why not? Who did they spend time with?
PCISP Implementation	Are they working on things that support their desired accomplishments for the year? If not, why not? If so, what are they learning about those areas? Is the PCISP available to the individual and staff? What was observed about implementation of outcomes and strategies identified in the PCISP? Do staff appear knowledgeable about the individual's PCISP?
Health/Medical	Have there been any changes in their health? Any new medications changes or new medical needs? Changes in PRN medication usage?
Satisfaction & Concerns	Are they having any issues with providers or staff who work with them or other people around them? How are things going? Do staff demonstrate they understand and respond to the individual's communication style? Are staff interactions respectful, attentive, and positive?
Friendship and Social Interactions	Ask about friendships. Are they talking to their friends, able to hang out with them, need help making friends, etc.? Do they have internet access, use social media or email to stay in touch with friends?
Self-Determination	Are they making their own choices, choosing places to go? Are people listening to them? What was observed in terms of the individual making choices and determining their activities for the day and when and with whom they engage? Do staff ask the individual about their needs and preferences? Are they knowledgeable about the individual's capabilities, interests, and preferences?
Employment	Do they want to look for a job? Or if working, how is their job going? Is it a job they like to do? Any issues? Do they want to look for a different job or doing something else at work?
Environment	Is the home well kept? Is the individual satisfied with their bedroom and other personal space? What type of tasks does the individual complete or assist with in the household? What was the individual doing when the CM arrived?
School Attendance & Satisfaction (for school age persons)	How is school going? Any extended absences or barriers to school involvement? Anything happening in school that should be incorporated into the PCISP? Are strategies in the PCISP consistent with the IEP (e.g. behavior plans)?
Financial (for individuals with representative payees who are not family members)	Are they able to access money when needed for personal expenses? Do they know where their spending money is kept? Do they have input on how it is spent? Do they express any concerns with manner in which their money is being managed? When applicable, can the individual show where recently purchased items are located? <i>It is important to note, bank statements should never be uploaded to the document library.</i>

In completing documentation reviews (on-site documentation, provider reports, incident reports, etc.), Case Managers should be noting the following issues for follow-up and/or discussion with the IST:

- Progress and/or obstacles related to outcomes and strategies identified in the PCISP;
- Any trends and/or concerns relative to incident reports, medical needs/indicators, behavior needs, PRN usage, etc.; and
- Changes in types / frequency of an individual's behavior.

In preparing for a team meeting, the Case Manager will assist the individual and guardian to identify:

- Desired outcomes, dreams, employment, and service utilization over the plan year;
- Non-waiver services, traditional services, and potential providers and technology to meet desired outcomes;
- The amount of time they would like to spend in each service;
- Who should be at the meeting and the date of team meeting; and
- What sections of the support plan the individual and/or guardian would like to present at the meeting.

In addition, the Case Manager will:

- Review assessments and summarize recommendations, notable comments, strengths, weaknesses, learning style, behavioral concerns;
- Review and consider trends regarding incident reports, medical needs, health and safety, and behavior needs;
- Summarize progress toward outcomes and strategies, areas to celebrate, areas of concern or lack of progress and suggestions for development; and
- Maintain on-going contact with providers seeking feedback on how services are going? Any concerns regarding the individual, outings, behavior, health, etc.? And, follow-up on incident reports and/or issues identified by the Case Manager during visits, contact with the individual or guardian, and documentation review.

Case Managers will maintain an on-going record by documenting the outcomes from these activities, including immediate action items and/or items to address during the next team meeting, in their case notes.

Prior to team meetings, the Case Manager will work with the individual and guardian on developing the agenda.

In completing this activity, the Case Manager will ensure the following is used to inform the agenda:

- Review the current PCISP with the individual and their guardian to identify changes and updates; determining what is working and not working for the individual;
- Review of issues identified in the Case Manager's on-going record of contact and documentation reviews; and
- Review all available assessments, including Life Course Tools, person-centered planning MAPs, level of care assessment, recent medical examinations, etc.

The following questions may be useful in supporting the individual and/or guardian in identifying issues to include in the agenda:

- What are other people your age doing (for work, fun, etc.) and what adaptations or accommodations are needed so you can have similar life experiences?
- Are you learning how to create or maintain community connections and social capital?
- How could assistive technology, adaptations or accommodations assist you in living the life you want?
- Are you learning how to access and integrate a variety of types of support (relationships, community assets, technology) in addition to any paid supports you receive?
- Do you have someone to talk to about your feelings, emotions, and concerns, so that you don't feel alone?
- Do you feel empowered to ask questions or disagree with professionals, and do you have support to know questions to ask and how to assert your wishes/opinions to professionals and supporters?

- Are you supported in creating a vision for your own life and have the life experiences to get you there?
- How are you being encouraged to be self-determined at all ages, stages, and aspects of your life?
- How are you supported in keeping an eye to the future or the next stages of life?