|  |
| --- |
| **BEFORE** |
| * Be familiar with Life Course Portfolio materials
* Prepare and forward all Individual Progress Reviews, reports, assessments, protocol, guidelines, including nursing/behavioral to all team members 14 days prior to meeting.
* Review LON and provide updates as indicated – send back to case manager 14 days prior to IP.
* Review IP and be prepared to provide status updates/summaries.
* Prepare financial assessment as required
* Review Incident Reports in preparation for meeting.
* Assist individual to participate in their IP meeting.
 |
|  |
|  |

|  |
| --- |
| **DURING** |
| * Assist with taking minutes during meeting as needed
* Participate in development of individual’s plan
* Bring required reports and assessments, be ready to provide summaries for status updates
* Ensure any consents are signed
* Ensure emergency fact sheets are updated
* Assist individual to attend and participate in their IP meeting
 |

|  |
| --- |
| **AFTER** |
| * Notify case manager within 2 weeks of receipt if not in agreement of plan
* Identified Health and Safety procedures and services will be implemented from date of IP meeting as well as supports identified in the IP as funded and continued from last year.
* New supports and services shall be developed, implemented in line with IP, including teaching strategies, protocols, guidelines and program plans within 30 days.
* Maintain data
* Document progress on goals and specific plans
* Complete and forward 6 month reports to team
 |

**PROVIDER CHECKLIST FOR IP**