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| **BEFORE** |
| 1. Schedule meeting to ensure individual’s participation and send written verification to team members. (Use either email or US mail as needed for team members for all noted correspondence) 2. Send out Life Course portfolio and Annual Notification form to individual/guardian. 3. Clone LON and send it out to team members prior to meeting. 4. Review providers’ reports including behavioral, nursing, guidelines, protocols, and assessments received from providers 14 days prior to IP date. 5. Send late docs memo to agency, resource manager if not received from providers 14 days prior to IP. 6. Verify e-CAMRIS information is accurate – check: status of guardianship, PRRP info. Can print out summary sheet and review at meeting for accuracy. 7. Check master file for: HIPPA Notification, Legal Liability Notification, guardianship info 8. Print out Signature Sheet, review for errors 9. Gather copies of:   Voter Registration form and Declination form ED682  HIPPA Notification, Legal Liability Notification (if change in guardianship)  One Page Notification form (as needed for those without email)  IP document and signature page  Fall Risk Screening/Assessment   1. Review all incident reports and IPSP/OPA information, PRC/HRC data and recommendations/next URR date 2. If IP meeting is held beyond the same calendar month as the previous IP – complete extension process |

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| DURING |
| 1. Facilitate meeting, unless individual chooses to do it or identifies an alternate facilitator 2. Ask for volunteer to take meeting minutes if appropriate 3. Complete “My Life Course Portfolio” and “Vision for a Good Life” 4. Review LON/Summary make corrections as needed 5. Complete IP being certain to address LON risk areas and review and discuss: Incident Reports, Financial Support Needs, Guidelines, Assessments, Reports, Protocol, Nursing, Behavior, IPSP/AID, BRS/DORS, Aquatic Activity Screening, Self-Medication, Falls Risk, Referrals for Declining Treatment as necessary 6. Provide HIPPA/Legal Liability, form 222 if change in guardian or marriage 7. Complete Annual Declining to Register To Vote form 8. Assist person with Voter Registration as needed 9. Provide one page Annual Notification to those without email (or if not previously sent) 10. Consents (PRAT, Release of Information, HCBS forms as indicated) 11. Ensure LON, IP, Nursing Plan, Behavior Plan, Level of Supervision, PRC/HRC, URR contains consistent information 12. Identify 6 month meeting date as indicated 13. Complete and have team sign Signature Sheet |

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| **AFTER** |
| 1. Write case note regarding meeting and progress 2. Update LON and distribute as needed 3. Type Individual Plan 4. Send plan out to all team members along with attachments to team within 2 weeks to review 5. Update e-CAMRIS (IP date, Voter Registration date, Check Probate Court information) 6. File in Master Record 7. Monitor via 6 month IPR, quarterlies for behavior/nursing; 6 month meeting as indicated. 8. QSR completion annually 9. Maintain minimum of quarterly contact |