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| **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. |
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| **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 |

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| **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**