

Service Plan Proficiency Scoring: Termination Service Plan: FY 26

Criteria	Quality Reviewer Evaluation	Quality Reviewer Response to Prime Agency
Termination Service Plan Components		
Service Plan was completed prior to the Class Member's 19 th month in the community	☐ Yes ☐ No	If no, provide a reminder of the timeliness expectation.
Prime Post Transition WebApp care management and RN notes detailing clinical observations, needed services, and provider collaboration related to high impact/ high risk needs are incorporated into termination service plan.	☐ Yes ☐ No	If no, the service plan may not be proficient. If not proficient, the Prime must update service plan to incorporate missing details from service plan.
Previous initial and transition service plan quality review feedback and areas of improvement incorporated into termination service plan.	☐ Yes ☐ No	If no, the service plan may not be proficient. If not proficient, the Prime must update service plan to incorporate missing details from service plan.
There is a signed closure letter present in the WebApp	☐ Yes ☐ No	If no, provide feedback advising the Prime that a signed closure letter should be provided to the Class Member and uploaded to the WebApp within five business days of the case closure.
There is a 5.6 Discharge Community Resource List present in the WebApp	☐ Yes ☐ No	If no, provide feedback advising the Prime that a 5.6 Discharge Community Resource List should be provided to the Class Member and uploaded to the WebApp within five business days of the case closure.
There is a signed copy of the service plan present in the WebApp	☐ Yes ☐ No	If no, the service plan is not proficient Prime must upload a signed copy of the service plan/associated signature page.
Service Plan completed with active participation and involvement of the Class Member and Legal Guardian (<i>if applicable</i>). The service plan includes the Class Members strengths and preferences.	☐ Yes ☐ No	If no, provide feedback that the Class Member's active involvement in service planning should be documented. Service plan should include input from the Class Member and Legal Guardian (<i>if applicable</i>).

Service Plan completed with involvement of indicated additional assessments/documentation such as: Nursing or occupational therapy assessments	☐ Yes ☐ No ☐ NA – no additional assessments included for review	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk or would be included in multiple small risk. If not proficient, the Prime must update the service plan to incorporate missing details from assessment. If proficient, suggest to the Prime in the “areas of improvement” section.
Service Plan completed with involvement of indicated additional assessments/documentation such as: UIC ATU documentation	☐ Yes ☐ No ☐ NA – no additional assessments included for review	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk or would be recommended for consideration. If not proficient, the Prime must update the service plan to incorporate missing details from assessment. If proficient, suggest to the Prime in the “areas of improvement” section.
All sections of the service plan completed: Service Plan Details: Overview of service plan and Class Member details	☐ Yes ☐ No ☐ NA – sections within service plan domains may not be completed secondary to being not applicable to Class Member	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the Class Member, the Prime must include appropriate rationale and plan to address in future.</i>
All sections of the service plan completed: Background and Demographics: Current insurance, advanced directives, income, and criminal/legal involvement	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale</i>
All sections of the service plan completed: Housing Preference: Preferred housing type and location	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale</i>
All sections of the service plan completed: Condition Status: Update the Class Member’s diagnoses, medications, and functional status	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale</i>

All sections of the service plan completed: • Employment & Income Support: Employment history, status of integration supports, education	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale</i>
All sections of the service plan completed: • Medical Equipment and Supplies: Indicate durable medical equipment and supply needs and their status (e.g., pending referral/order from provider, referral/order pending approval, member in possession of the equipment)	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale</i>
All sections of the service plan completed: • Transition Services: Indicate clinical and non-clinical supports and services and document their current status	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale</i>
All sections of the service plan completed: • Individualized Plan: Document the individualized plan to address the Class Member's clinical and non-clinical high impact needs and preferences	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale and plan to address in future.</i>
All sections of the service plan completed: • Community Provider List: Current known providers	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale and plan to address in future.</i>
All sections of the service plan completed: • Plan Development: Participants in the development of the service plan (e.g., CCMTF staff, facility staff, providers, CMHC staff, informal supports, the Class Member)	☐ Yes ☐ No ☐ NA	If no, the service plan is not proficient. The Prime must complete the service plan in full. <i>To justify not having completed an item within the service plan that applies to the CM, the Prime must include appropriate rationale and plan to address in future.</i>

Service Plan Quality

The service plan identifies and establishes goals discussed with and agreed upon by the Class Member for high risk needs to be addressed while the Class Member remains in the community. If a Class Member prefers not to address a high-risk need, the Class Member's preference is documented in the SP.

The below domains should each be assessed in terms of high impact needs, risks, CM preferences and goals related to the Class Member's ability to remain into the community following completion of the CCMTTP.

Service Plan addresses high impact needs, risks, CM preferences and goals related to Medical Needs (Physical/Medical Conditions, Home Health, Skilled Medical Needs/Therapies, Taking Medications as prescribed, Utilization of ER/Hospital Admissions, Fall Risk, Vision, Hearing)	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Cognitive Impairment Needs (Neurocognitive Disorder, Other Cognitive Impairment, Mental Status)	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Intellectual and Developmental Disability Needs	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Mental Health Conditions/Behavioral Health Needs (Depressive, Anxiety, Trauma-Related, Bipolar, Schizophrenia Spectrum and other Psychotic Disorders, Taking Medications as prescribed, Other)	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Substance Use	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Functional Needs (ADLs, IADLs, Adaptive Equipment, Accessibility Needs, Communication, Ability to Access Community Resources, Other Resources Food, Clothing, Transportation)	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.

Service Plan addresses high impact needs, risks, CM preferences and goals related to Safety Needs (Suicide Risk/ SI, Physical or Verbal Aggression, Antisocial Behavior, Victimization/ Exploitation, Other Safety Needs, Legal Involvement, Utilization of ER/Hospital Admission (Psychiatric))	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Housing .	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Income Support . (Employment, Financial/Money Mgmt)	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Community Integration, Recreation, and Leisure . (Social/Interpersonal Needs)	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
Service Plan addresses high impact needs, risks, CM preferences and goals related to Class Member's Education and/or Employment needs	☐ Yes ☐ No ☐ NA	If no, the service plan may not be proficient. UIC CON will need to determine if missing details are high risk and require immediate modification or would be recommended for consideration in a future SP update.
The Service Plan demonstrates shared, defined and identified specific accountability partners (Class Member, Care Manager, Prime team members, CMHC team based on defined roles, identified providers, community support systems, etc.)	☐ Yes ☐ No	If no, the service plan may not be proficient. If not proficient, the Prime must update the service plan to incorporate missing accountable partner(s) into the appropriate intervention.
For Class Members still in non PSH settings, section three must be completed in full, with goals and interventions also included in section eight. This includes identifying services the Class Member needs that are not provided in PSH, as well as treatment objectives/skills to eventually move to PSH.	☐ Yes ☐ No	If no, the service plan is not proficient. The Prime must modify the service plan to incorporate missing components.