

Service Plan Proficiency Scoring: Initial Service Plan: FY 26

Criteria	Quality Reviewer Evaluation	Quality Reviewer Response to Prime Agency
Assessment		
Maximus transitional assessment summary uploaded to the WebApp	☐ Yes ☐ No	If no, UIC will access and upload the Maximus Transitional Assessment Summary. UIC will advise the Prime this was missing.
Supplemental documentation - Progress notes within the last 30 days - Face sheet - Medication Administration Record (MAR)	☐ Yes ☐ No	If no, and no documented efforts to obtain/documentation that the Prime was unable to obtain, the service plan is not proficient . The Prime must upload supplemental documentation.
Initial Service Plan Supplementals: Not a requirement but will be reviewed if available		
Supplemental notes Additional progress notes	☐ Yes ☐ No ☐ NA - no additional notes included for review	Not a requirement for quality review proficiency, but may be requested by UIC CON if needed for clarification purposes.
Initial Service Plan Components		
The service plan was completed within 45 days of the referral date.	☐ Yes ☐ No	If no, UIC CON will provide reminder of the timeliness expectation.
There is a signed copy of the service plan/associated signature page uploaded into the WebApp.	☐ Yes ☐ No	If no, the service plan is not proficient . The 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 Member's 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>).
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 – 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: Housing Preference: Preferred housing type and location	☐ 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: Condition Status: Update the Class Member's diagnoses, and functional status	☐ 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: Employment & Income Support: Employment history, status of integration supports, education	☐ 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: 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 – 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:	☐ Yes ☐ No ☐ NA – sections within service plan domains may	If no, the service plan is not proficient. The Prime must complete the service plan in full.

Transition Services: Indicate clinical and non-clinical supports and services and document their current status	not be completed secondary to being not applicable to Class Member	<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: Individualized Plan: Document the individualized plan to address the Class Member's clinical and non-clinical high impact needs and preferences	☐ 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: Community Provider List: Current known providers	☐ 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: Plan Development: Participants in the development of the service plan (e.g., CCMTP staff, facility staff, providers, CMHC staff, informal supports, the Class Member)	☐ 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>

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 is in the SNF/SMHRE. 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 transition into the community.

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	☐ Yes ☐ No	If no, the service plan may not be proficient. UIC CON will need to determine if missing

related to Cognitive Impairment Needs (Neurocognitive Disorder, Other Cognitive Impairment, Mental Status)	☐ NA	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 .	☐ 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

(Employment, Financial/Money Management)		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 details. If proficient, suggest to the Prime in "areas of improvement" section.
The Service Plan includes a transition timeline.	☐ Yes ☐ No	If no, the service plan is not proficient. If the transition timeline is prior to the development of the service plan, the service plan is not proficient. The Prime must modify the service plan to identify a transition timeline as well as a timeline for all goals to be completed.
For Class Members moving to 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.