

Training of Individual Plan of Service (IPOS) and Specialty Plans Question/Answer Document

April 16, 2018

Q1: Home Managers now access to the IPOS within ELMER. They are not being alerted when a new IPOS is completed and they have to keep logging into the system to see whether or not the current IPOS is completed and signed. Is there a way the Home Manager can be alerted when the new IPOS is complete?

A: Pathways Case Manager should be sending a copy to the home manager by adding their name to the "#11 Send Copy To" feature in the IPOS, by clicking on the "send to staff" link and selecting the appropriate Home Manager. Once the CSM does this, it would show up in the envelope on the top of ELMER whenever the Home Manager logs into ELMER. Home Managers should be logging into ELMER daily to see if there are items they need to take care of, i.e. IR's, IPOS' that are complete, etc.

Q2: Can the Case Manager and/or Specialty Discipline staff (OT, PT, SLP, or Behavioral) train the Home Manager and/or Assistant Home Manager on the Treatment Plan and then they in turn train their staff in their home(s)?

A: Yes, as long as the Case Manager/Specialty Discipline staff is comfortable with this and as long as the Home Manager and/or Assistant Home Manager have signed the training form indicating they have been properly trained and are willing to train the home staff. The Home Manager and/or Assistant Home Manager must agree to this and must agree that they are properly trained to do so. They should not be agreeing to train their staff unless they feel they have received proper training by the Case Manager and/or Specialty Discipline staff.

Q3: Can the Case Manager and/or Specialty Discipline staff (OT, PT, SLP, or Behavioral) train the Lead Staff or Supervisor on the Treatment Plan and then they in turn train the staff in the setting?

A: Yes, as long as the Case Manager/Specialty Discipline staff is comfortable with this and as long as the Lead Staff or Supervisor have signed the training form indicating they have been properly trained and are willing to train the home staff. The Lead Staff or Supervisor must agree to this and must agree that they are properly trained to do so. They should not be agreeing to train their staff unless they feel they have received proper training by the Case Manager and/or Specialty Discipline staff.

Q4: Can the Case Manager and/or Specialty Discipline staff (OT, PT, SLP, or Behavioral) train a family member to be responsible for training the staff that works with the individual in the family and/or individual's home?

A: No. The training must be completed by the Case Manager and/or Specialty Discipline staff.

Q5: Is the Case Manager required to train the Home Manager/Assistant Home Manager or Lead Staff/Supervisor face-to-face?

A: No. It is acceptable to train via telephone. It is more important to provide quality training and allow an opportunity for the person receiving the training to ask questions. The Case Manager will need to complete the training form stating that they have trained the Home Manager/Assistant Home Manager or Lead Staff/Supervisor. Once the training is completed, the Home Manager/Assistant Home Manager or Lead Staff/Supervisor will have to sign stating that they have been properly trained and are willing to train the home or setting staff.

Q6: Is the Specialty Discipline staff required to train the Home Manager/Assistant Home Manager or Lead Staff/Supervisor face-to-face?

A: Yes. Training via video-conferencing is acceptable and is considered a face-to-face training.

Q7: Can an IPOS be trained to the Home Manager and/or residential staff prior to it being signed by the resident/guardian in ELMER?

A: The IPOS doesn't need to be signed in order for the Case Manager/Specialty staff to train. If there are any changes after the training before the resident/guardian signs the IPOS, the Case Manager/Specialty Staff would need to circle around and retrain. If retraining occurs, the person who is completing the training would need to fill out another training form and ensure all staff are trained and sign it. It would be ideal, however, to wait for verbal approval by recipient/guardian prior to training on the plan.

Q8: Who determines whether or not the Home Manager and/or Assistant Home Manager can train the home staff after they have been trained by the Case Manager?

A: This is a discussion that needs to occur between the Case Manager and the Home Manager.

A clinician may determine that they are more comfortable training as many of the home staff as they can at a scheduled staff meeting and then letting the Home Manager and/or Assistant Manager train the staff who were unable to attend or any new staff.

If a Home Manager, for whatever reason, does not feel comfortable training on the IPOS, they need to let the Case Manager know that. The Case Manager would then be responsible for training on the IPOS.

Q9: Can the training be videotaped and used to train other staff?

A: ON HOLD - MATT MASKART IS LOOKING AT THIS ONE. HE HAS SOME SERIOUS CONCERNS WITH STORAGE, ETC.

A: Yes, as long as there is some type of "quiz" that the staff who watch the videotaped training session take following the viewing.

The Home Manager and/or Assistant Home Manager would be responsible for coordinating the videotaping and storing for future viewing.

The Case Manager would be responsible for developing a quiz for the staff to take.

Q10: At times, the Home Manager is receiving the training from the CSM who states that the IPOS and/or Amendment are effective immediately. This doesn't give the Home Manager time to train the staff and they can't be expected to work 24/7 to do so. How much time before the implementation date does the Case Manager need to give the Home Manager to be able to provide the training to their staff?

A: For regular IPOS': There is no set answer for this question. The Case Manager and Home Manager need to be discussing this well in advance of the implementation date during preplanning and the Case Manager needs to train the Home Manager in a timely manner for them to be able to realistically train all the staff in the home prior to the implementation date. Communication between the Case Manager and Home Manager is key.

Amendment Needed for Health/Safety (H/S) Issue: There are going to be times due to a health and/or safety issue that an Amendment needs to be completed and implemented that same day. The Case Manager needs to work with the Home Manager to get as many people trained on that day as possible. For those staff who are unable to be trained face-to-face by the CSM/Home Manager, they should be required to read a copy of the Amendment when arriving at work, sign that they have read the Amendment, and then whomever is going to be responsible for training on the Amendment will need to follow up with face-to-face or over the phone training and have the documentation form completed and sent to Pathways Medical Records Department.

Q11: Does the training documentation form need to be sent to Pathways Medical Records each time a new staff is trained?

A: Residential Home: No. When the IPOS, Amendment, or Specialty Treatment Plan are initially trained, once all staff in the home have received the training and signed the Training Documentation Form, the Home Manager will submit the form to Pathways Medical Records Department. The Home Manager will maintain a copy of the form in the residents file at the home. When new staff come on and receive the training, they will be required to sign the same form. A copy of this form will be maintained in the home and be made available for future audits. If the Home Manager has signed off stating that they will provide the training, the Home Manager will be responsible for ensuring all new staff receives the training. If the Case Manager is going to be responsible for training the new staff, the Home Manager will be responsible for notifying the Case Manager that a new staff is starting and arranging a time for the Case Manager to come to the home to train the staff.

Unlicensed Setting with a Lead Staff/Supervisor: No. When the IPOS, Amendment, or Specialty Treatment Plan are initially trained, once all staff in the setting have received the training and signed the Training Documentation Form, the Lead Staff/Supervisor will submit the form to Pathways Medical Records Department. The Lead Staff/Supervisor will maintain a copy of the form in the individuals file at the setting. When new staff come on and receive the training, they will be required to sign the same form. A copy of this form will be maintained in the home and be made available for future audits. If the Lead Staff/Supervisor has signed off stating that they will provide the training, the Lead Staff/Supervisor will be responsible for ensuring all new staff receives the training. If the Case Manager is going to be responsible for training the new staff, the

Lead Staff/Supervisor will be responsible for notifying the Case Manager that a new staff is starting and arranging a time for the Case Manager to come to the home to train the staff.

Unlicensed Setting without a Lead Staff/Supervisor (Lakestate, Northern Homecare Services, GT Independence) and Pathways ABA Aides and Life Skill Technicians: No. When the IPOS, Amendment, or Specialty Treatment Plan are initially trained, once all staff who work with the individual have received the training and signed the Training Documentation Form, the Case Manager and/or Specialty Discipline Staff will submit the form to Pathways Medical Records Department. When new staff are going to be scheduled to work with the individual, they will be required to be trained and to sign a new Training Documentation Form. This form will be submitted to Pathways Medical Records Department. The Case Manager and/or Specialty Discipline Staff will be responsible for ensuring any new staff scheduled to work with the individual receives the training.

Q12: At times, the Behavior Plan start dates doesn't line up with the date the IPOS is completed. If the Behavior Plan was previously trained by the Behavioral staff, does it need to be trained again when the IPOS is completed?

A: No, as long as the training was completed and the Training Documentation Form is completed and supports that the training occurred for all staff working with the individual.

Q13: When Specialty Services (OT, PT, SLP, or Behavioral) are being added at the time the IPOS is developed or through an Amendment, does the training need to occur prior to the implementation date of the specialty plan?

A: Yes. It is important that the Case Manager and Specialty Discipline staff communicate on this as the training has to be completed prior to the implementation of the specialty treatment plan. Based on when the Specialty Discipline staff are able to train, the effective date for these services may be a couple weeks out from the effective date of the IPOS and/or Amendment.