



EOR IMPORTANT ACTIVITIES & DEADLINES

Dates to Remember!

The annual health risk assessment is scheduled for this month: _____

My person's annual plan meeting occurs during this month: _____

My person's plan starts in: _____

Start preparing for the annual plan meeting during this month: _____

Start developing the new budget and goals during this month: _____

New EOR budget and goals ready before this date: _____

Monitoring may be this month: _____

General Information about the Annual Plan Meeting:

- The “team” for that meeting includes the MCO Care Manager (CM), family, staff, natural supports, and the person (maybe).
- CM “writes” the individual’s Care Plan.
- EORs *must – must – must* read the plan carefully before signing! “*I didn’t know*” is not an excuse if the plan is not exactly as it needs to be. “*I didn’t understand what that meant*” is also not an excuse!
- If the plan is written on a tablet and the CM asks the EOR to sign at the end of the meeting, it is reasonable to ask for time to review the document and sign later.
- CM submits the plan to the LME’s Utilization Management Department, where it is approved or denied. (Denial info below.)
- Approved new plans start the first day of the month after the birth month.

Preparation for the Annual Plan Meeting:

- Contact your CM/CCM to confirm the time/date for the plan meeting.
- FIRST will help EORs prepare for the meeting but do not necessarily attend.
- What goals from the last plan have been met and/or are needed for the new plan?
- What improvements or opportunities have occurred over the past year?
- Any new information on health status, behaviors and/or incidents? Remember that families become used to behaviors that are not the “norm” for other families. It doesn’t benefit the person supported if the EOR presents everything in only the most positive light.
- What changes in hours or services are needed—and why!
- Give consideration to securing new letters of medical necessity to submit with plan.
- Understand what the SIS and budget letter mean to the plan.
- EORs *must – must – must justify – justify – justify* the services in the plan.

Develop New Budget and Goals

- Start with the DSP schedule – weekly/monthly or school/summer or by staff. Include time for supervision and training activities.
- Draft an EOR budget based on that service schedule. Remember that the approved MCO budget provides these budget numbers—but includes more services that are not on the EOR budget.
NOTE: the FIRST budget tool can easily be revised to show EORs the impact of a salary increase or elimination of mileage, etc., etc. Ask your FIRST CNAV for the budget tool.
- Finalize, sign and send the EOR budget to the FSA.
- Develop new goals for the new plan year. Start with an “action plan” where your family member is, where you’d like them to be and what goals will help them get there.

Train your Staff

- Provide annual staff training on the new plan and goals.
- The **initial training** is for a new employee, while the **annual training** for current employees includes only some of the topics in the initial training.
 - Communication – **initial**
 - Person-Centered Practices - **initial** and **annual**
 - Health/Wellness Evaluation and Observation **initial** and annual BBP and Med Admin
 - Professionalism and Ethics **initial** and **annual** HIPPA and Client Rights
 - Community Inclusion and Networking – **initial**
 - Cultural Competency – **initial**
 - Documentation and Record Keeping – **initial**
 - Crisis Prevention and Intervention - **initial** and **annual** NCI or equivalent
 - Education, Training and Self-Development - **initial** and **annual**

DOCUMENTS TO MANAGE!

Every two weeks:

- Verify staff time sheets and documentation.
- EORs must keep these documents! And keep it confidential!

Every month:

- Review the monthly budget report from FSA. Compare it to the time sheets and look for errors.
- File time sheets and documentation. EORs must keep these documents! And keep it confidential!
- Provide and document supervision of DSPs.
- Read informational emails from the Community Navigator and ask questions as necessary.

Every Quarter:

- Look at the goals and progress. What is working and what is not; why? Make notes.
- Revise goals if necessary—if they have been met, if they aren’t working.

As Needed:

- Get all the signed plan documents from the CM and keep on file: Care Plan, Service Request authorization (SARS), the individual budget and any updates.
- Get on the MCO provider mailing list and read about the waiver, changes, etc., etc.
- Advertise, interview, hire and train new staff.
- Maintain staff files with all necessary paperwork.

Plan Denials:

When the plan submitted to the MCO has been denied, the EOR will receive a registered letter explaining the decision. Often this represents a lack of justification for the services requested or a request for more services than are permitted in the waiver. Discuss the denial with your CM and the FIRST Community Navigator.

Plan Revisions:

All plan revisions require a budget update from both the MCO and for the EOR.

Miscellaneous Considerations:

- Why do staff leave? Or stay? What things are important to them? What support do they need?
- Goals with unlimited verbal prompting are not the real world. Learn how to write SMART goals.