ODP Role Expectations and Required Timeline for ISP Activities

**The start of each activity is dependent on the completion of the previous activity				
Step	**Activity**	**SC Actions**	**Administrative Entity Actions**	**Provider Actions**	**Individual/Family Actions**
1	**Information Gathering** Begin this activity at least 90 calendar days prior to the end date of the ISP.	1. Collaborate with individual, family, provider, and other team members to coordinate a date, time and location for the Annual Review meeting. 2. Distribute invitations to team members at least 30 calendar days before Annual Review meeting is held. File copies. 3. Coordinate information gathering & assessment activity, which may include gathering assessment results. 4. Pull ISP utilization report.	None	1. It is recommended that the provider work with SC to schedule the Annual Review meeting. 2. The provider must send the individual's provider assessments to the SC. The provider assessments include information such as: medical visits over the course of the previous year, behavioral support plan, and lifetime medical history.	It is recommended that the individual and/or family work with the SC to schedule the Annual Review meeting, determine meeting dates, times, and location.
2	**ISP Meeting** Hold the ISP meeting at least 60 calendar days prior to the end date of the ISP.	1. Facilitate Annual Review meeting with individual/family/ team members to update plan. 2. Request unit/dollar Fiscal Year service definition limitation exception if needed. 3. Discuss and incorporate the information from PA Universal Summary Report into the ISP. 4. Incorporate Annual Review meeting results into ISP. 5. Review & update PUNS if needed. 6. Discuss Participant Direct Services (PDS) if the individual is eligible for services. 7. Complete ISP Signature Form (DP 1032).	1. Attend/participate in Annual Review meeting (optional). 2. Inquire during meeting whether any units of service exceed FY limitations detailed in the Service Definitions.	1. Attend and participate in Annual Review ISP meeting. 2. Be prepared to provide procedure codes associated with the needed services. 3. Ensure FY exception limitations are approved by ODP prior to delivery of service. 4. Be prepared to discuss prior authorization and service needs for upcoming year.	1. Attend/participate in Annual Review ISP meeting. 2. Select services based on need and select service delivery model that supports ISP outcomes. 3. Choose providers and/or FMS/AWC providers, if services are eligible.
3	**Documentation** Complete at least 30 calendar days prior to the end date of the ISP. **Submit For Approval** Complete at least 30 calendar days prior to the end date of the ISP. **Revise and Resubmit** Complete within 7 calendar days of the date the ISP was returned for revision.	1. Create Annual ISP draft in HCSIS. 2. Record information gather at meeting. 3. Update PUNS in HCSIS if needed. 4. Submit Annual Plan for approval. 5. Revise and resubmit for approval. * SCOs may have procedures unique to their organization.	1. Review/approve/authorize ISP in HCSIS, or request revisions and approve/authorize once completed. 2. Notify SC when ISP is approved and authorized. 3. Notify providers that HCSIS authorizations are available. * AEs may have procedures unique to their organization.	1. Review Service Authorization Notices (SANs) in HCSIS. 2. Before rendering a service, confirm services discussed at the meeting are present on the Service Authorization Notices.	None

	Approval and Financial Authorization The AE is responsible to review, approve and authorize the ISP in HCSIS within 30 calendar days prior to the end date of the ISP.			

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4	**Distribution** Complete within 14 calendar days of the approval/authorization date.	1. Distribute DP 1032 to provider. 2. Send approved/authorized ISP and DP 1032 to individual, family and team members who have no HCSIS access.	None	Print the approved/authorized ISP in HCSIS.	Receive ISP.
5	**Service Implementation**	Monitor services as required.	None	Render approved services as detailed in the Service Authorization Notices.	1. Receive services. 2. Participate in SC monitoring of services.