



**TO:** Care Coordination Organizations  
CEOs of Voluntary Provider Agencies  
DDSOD Directors  
DDRO Directors  
Provider Associations

**FROM:** Kate Bishop/Kate Marlay  
Division of Person Centered Supports

A handwritten signature in black ink, appearing to read "Kate Bishop".

**DATE:** August 29, 2018 (Replaces June 8, 2018 Memo)

**SUBJECT: REVISED** – Care Coordination (CCO) Individualized Service Plan (ISP) to Life Plan Conversions for July, August, **September and October 2018**

The purpose of this memo is to provide clarification and guidance on the timeframe for Care Managers to convert Individualized Service Plans (ISPs) due in July, August, September and October 2018.

Life Plans will be created for all enrollees within twelve (12) months from the start of CCO services (July 1, 2018). The Life Plan will be implemented at the time of the individual's regularly occurring cycle of ISP meetings. Using the individual's existing ISP review schedule will reduce an immediate workload and allow for a smoother transition.

Today, the ISP is reviewed at least twice annually during a review meeting which occurs face-to-face with the individual and his/her service providers. In most cases, the development of the individual's Life Plan will follow the individual's established schedule for annual care planning meetings. However, there are some cases where the individual's transition from ISP to Life Plan will not coincide with the individual's annual care planning meeting.

The schedule for completing the initial Life Plan for individuals who transition to CCO services is as follows:

- For individuals in Tier 4, the highest payment Tier, the Life Plan must be completed on or before the individual's next review meeting, but no later than 12/30/18.

- For individuals in Tier 1, 2, or 3, the Life Plan must be completed on or before the individual's next annual review meeting, but no later than 06/30/19.

It is the expectation that July, August, **September and October** ISP reviews will continue to be conducted on schedule. With the permission of the individual, and as long as the individual's care needs are generally stable, the Care Manager may delay the annual review for up to six months. However, the "semi-annual" review must be conducted in July, August, **September or October** in lieu of the annual review meeting. During this period, the ISP would continue to be in place. A note in the Care Coordination record must reflect the rationale for the revised time frame.

For all individuals enrolling in a CCO, the initial Life Plan development must occur earlier than the above schedule if there is a significant change in the individual's needs or if requested by the individual and/or his/her family or representative.

All planning and development of Life Plans must adhere to person-centered planning processes. The planning process guides the delivery of services and supports to the individual in a way that leads to outcomes in areas of the individual's life that are most important to him/her. (e.g., health, relationships, work and home). To the maximum extent possible, an individual directs the planning of his/her services and makes informed choices about the services and supports that he/she receives.

The Transition Plan is available at the following link:

[https://www.health.ny.gov/health\\_care/medicaid/program/medicaid\\_health\\_homes/idd/draft\\_idd\\_1115\\_waiver.htm](https://www.health.ny.gov/health_care/medicaid/program/medicaid_health_homes/idd/draft_idd_1115_waiver.htm)

Questions regarding the transition to CCOs may be directed to:

[care.coordination@opwdd.ny.gov](mailto:care.coordination@opwdd.ny.gov)