

Service Coordination Function List
Effective 7/1/23
Last Updated 3/28/23

ID	Category	
System Navigator		
A1	System Navigator	Identify needs and supports to assist the eligible individual in obtaining services
A2	System Navigator	Assist the individual and family by providing information and education related to services and support options to best meet the individual needs of the participant; including topics such as guardianship and/or supported decision making
A3	System Navigator	Assist the individual to connect with medical, social, educational or other programs, resources, and services that address identified needs and support achievement of the individual's goals
A4	System Navigator	Assist the individual/guardian or rep. to access and maintain benefits for which they are eligible including public medical and financial benefits, specific grant programs, etc.
A5	System Navigator	Describe to the individual, guardian, or representative their waiver service options and method of service delivery
A6	System Navigator	Work collaboratively with vocational rehabilitative service administrators to help individuals connect with employment resources
A7	System Navigator	Collaborate and assist with access to behavioral health services
A8	System Navigator	Facilitate transition planning to and from waiver & community services
A9	System Navigator	Inform individuals of the service appeals process
Person-Centered Planning (Person-Centered Planning is to inform the service agreement)		
B1	Person-Centered Planning	Coordinate the service planning process as outlined in He-M 503
B2	Person-Centered Planning	Ensure that service documentation is maintained as outlined in He-M 503, adhere to record retention requirements
B3	Person-Centered Planning	Identify individual's needs, goals, and/or preferences
B4	Person-Centered Planning	Convene service planning meetings
B5	Person-Centered Planning	Develop the ISA, including updates and renewals, specifying goals and/or actions to address the medical, social, and other services needed by the individual
B6	Person-Centered Planning	Support the individual to facilitate the choice and selection of service providers to deliver services, conduct outreach on behalf of the individual to confirm capacity and ability to provide services
B7	Person-Centered Planning	Manage budget development and service authorization process from approximately July 2023-December 2023
B8	Person-Centered Planning	Submit the room and board request for individuals in 24/7 staffed residential services to BDS when a request is received from the provider for funds above and beyond the participant's room and board payment
B9	Person-Centered Planning	No less than 45 days in advance of the annual service planning meeting, ensure that all needed evaluations and assessments are complete; including the Supports Intensity Scale (SIS) (readministered at least every 5 years for individuals 16 years old or older), Health Risk Screening Tool (HRST) (readministered at least annually), and/or any other assessments specific to the individual to support plan development
B10	Person-Centered Planning	Complete annual functional screen (renewals)
B11	Person-Centered Planning	In advance of the annual service planning meeting, identify risk factors and plans to minimize them, as outlined in He-M 503, when applicable
B12	Person-Centered Planning	Ensure communication and collaboration with the local Human Rights Committee (HRC) and/or Risk Management Committee to adhere to the formal process, as outlined in He-M 504, when applicable
B13	Person-Centered Planning	In advance of the annual service planning meeting, assess an individual's interest in or satisfaction with employment

B14	Person-Centered Planning	In advance of the annual service planning meeting, assess the individual's progress on goals and help the individual prepare for the development of new goals
B15	Person-Centered Planning	Update and revise an Individual Service Agreement (ISA) when: <ul style="list-style-type: none"> * request of a new service or change in individual goals * an individual requests a change in service delivery including amount, scope and/or duration of the service * changes in diagnosis or demographic information * change in legal status - including guardianship, marital status, etc. * change in rendering provider for a service * any other relevant changes impacting the individual's access to or receipt of services
B16	Person-Centered Planning	If the individual chooses to receive services sooner than anticipated, or chooses to discontinue and terminate all services, notify the designated Area Agency upon notification from the participant
Monitoring and Assuring Individual Outcomes		
C1	Monitoring and Assuring Individual Outcomes	Ensure continuity and quality of services provided
C2	Monitoring and Assuring Individual Outcomes	Monitor utilization of services (which will eventually include comparing authorized and billed services to ensure adequate services are being provided) and follow up with the individual and rendering providers for any under or over utilization that is out of alignment with the ISA and develop recommendations to realign utilization with the documented service needs in the ISA
C3	Monitoring and Assuring Individual Outcomes	Monitor satisfaction and service outcomes at least quarterly, as outlined in He-M 503
C4	Monitoring and Assuring Individual Outcomes	Monitor goal progression at least monthly. Determine and implement necessary actions and document resolution when goals are not being addressed, support services are not being provided in accordance with the service agreement, or when health or safety issues have arisen
C5	Monitoring and Assuring Individual Outcomes	Assist in coordination of National Core Indicator survey interviews, including consent, pre-interview packet, and follow up as appropriate
C6	Monitoring and Assuring Individual Outcomes	Advocate on behalf of individuals for services to be provided in accordance with the service guarantees in He-M 503
Monitoring and Assuring Health and Safety		
D1	Monitoring and Assuring Health and Safety	Monitor and document services provided to the individual
D2	Monitoring and Assuring Health and Safety	Document service coordination visits and contacts as outlined in He-M 503
D3	Monitoring and Assuring Health and Safety	Coordinate, complete, and document appropriate follow up related to incident reports and sentinel events, including reporting to area agencies
D4	Monitoring and Assuring Health and Safety	Participation and follow up with complaint investigations
D5	Monitoring and Assuring Health and Safety	Ensure completion of home visits at least four times a year related to assessing individual health and safety, including identifying and reporting notable issues of noncompliance with rules and standards in accordance with He-M 503
D6	Monitoring and Assuring Health and Safety	Monitor, document, and promote the individual's health and welfare and update HRST as needed
D7	Monitoring and Assuring Health and Safety	Monitor and document assessed risks and mitigation plans. Work with the individual and people who know the individual well to review an individual's risks, eliminate or reduce risks, document and implement a risk mitigation plan when appropriate
D8	Monitoring and Assuring Health and Safety	Organizations that provide service coordination must maintain 24/7 access for participant outreach
D9	Monitoring and Assuring Health and Safety	Share critical information with and seek guidance from area agencies related to crisis mitigation and management

D10	Monitoring and Assuring Health and Safety	Provide crisis and critical incident coordination and planning, including managing emergency intervention, in coordination with the individual's area agency, when services may need to change to ensure health and safety
D11	Monitoring and Assuring Health and Safety	Actively coordinate crisis situations including submitting crisis service funding requests to BDS
D12	Monitoring and Assuring Health and Safety	Complete monitoring and documentation in accordance with state and federal requirements for services as outlined in He-M 503
D13	Monitoring and Assuring Health and Safety	Ensure implementation and documentation of informed choice, freedom of choice, and protecting individuals rights
D14	Monitoring and Assuring Health and Safety	Complete federal and state reporting requirements