

WELCOME

Thank you for joining today's webinar!
BPHASA and the Arc Michigan PCP Webinar Series

Meeting IPOS Training Requirements

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We are waiting for more attendees to join.
The webinar will begin at 3:00 pm.

While we wait, a few housekeeping items:


- All webinar attendees have been muted and your videos are turned off
- Questions can be asked using the Q&A Function. The Webinar Moderator may answer your question during today's presentation but may also wait until the presentation is completed to provide a response via email.
- Following the webinar, participants will receive a PDF of the presentation and a link to a recording.
- We do not offer CEU's for this webinar series.
- To find recordings of previous Webinars or to access the Helpdesk please go to [Person Centered Planning Quality Improvement Project - Michigan \(arcmi.org\)](https://www.arcmi.org)

Thank you again for attending and we will begin soon.



Meeting IPOS
Training
Requirements

Overview

- 
- Basic Requirements
 - Trainers
 - Unacceptable Evidence
 - What should be covered
 - Generic Documents

The Basics

Credentialing Requirements


Non-Professional (Aide Level) Staff - Individual with specialized training, is able to perform basic first aid procedures; trained in the beneficiary's plan of service (i.e. training shall be provided by; the supports coordinator/case manager or other qualified staff that are responsible for monitoring the IPOS and are not providers of any other service to that individual and by each specialized professional within the scope of their practice, as appropriate), as applicable; is at least 18 years of age; able to prevent transmission of communicable disease; able to communicate expressively and receptively in order to follow individual plan

The Basics

- Must be done annually or as needed
- Training must occur before staff can work with person
- Evidence
 - *All evidence must be legible*
 - *If signature is not legible, a legible printed full name needs to accompany the signature*




The Basics

- Evidence must include:
 - Date of training
 - Content of training
 - Who was trained
 - Who did the training
- 



Unacceptable Evidence

- Self-attestations
 - Initialing or signing the IPOS document
 - Initials provided, rather than names or legible signatures
 - Documentation of attendance at the PCP meeting
- 

Who Can Train

Training is done by:

- Case Manager or someone trained by the case manager (with documentation).
- It needs to be clear that the initial trainer is the case holder. If it is not clear at time of review evidence will be asked for.

Training Essentials



Credentialed Trainer
should review Goals
& Objectives



What is important
to/for the person



Preferences and
implementation of
care



Any specific
behavior/medical
needs (crisis plan)



Possibly overview of Tx
plans (if prof. staff
unavailable)

Best Practice

Avoid confusing running logs

One Document for each training

Trainer Signature with Staff's

IPOS date covered- train well
before IPOS starts when possible

Example IPOS Documentation

PIHP/CMHSP LOGO	
Generic IPOS Training Documentation Form	
Date:	Service Recipient Name
IPOS/Amend Dates:	WSA Case ID:
Staff Name:	Staff Title:
Staff Signature:	
<p><u>On the above date</u>, this staff person was trained on the Individual Plan of Service and Crisis Plan, or Amended Plan of Service, for the service recipient (identified above). The staff was trained on implementation of the IPOS/Amendment and were able to ask questions/receive clarifications as needed. If any questions/concerns develop related to the IPOS and or Crisis Prevention and Safeguard Plan/Amended Plan, they are to be brought to the attention of the Support Coordinator/TCM/Home Based Therapist/WA Facilitator.</p>	
Trainer name:	Trainer Title/Credentials:
Trainer Signature:	

Example IPOS Documentation

Generic IPOS Training Document

Section 1: TCM trained presenters

Bene Name: Bob Smith		Case Holder's name: Terri Johnson		ID# 1234567
PCP dates covered: 2/23/2023-2/22/2024 The following staff were trained on this person's IPOS on the training date listed.		Signature	Trainer w/title: <i>Terri Johnson</i> , QIDP	Training Date:
Employee Name & Signature		Date		
Blanche Arreola	<i>Blanche Arreola</i>	2/2/2023	<i>Terri Johnson</i> , QIDP	2/2/2023
Juan dela Cruz	<i>Juan dela Cruz</i>	2/4/2023	<i>Terri Johnson</i> , QIDP	2/4/2023
Andre Johnson	<i>Andre Johnson</i>	2/4/2023	<i>Terri Johnson</i> , QIDP	2/4/2023

Section 2: Non-TCM trainers listed above

The following staff were trained on this person's IPOS on the training date listed.		Signature	Trainer: Andre Johnson Juan dela Cruz	Training Date
Employee Name & Signature		Date		
Eric Roberts	<i>Eric Roberts</i>	2/11/2023	<i>Andre Johnson</i>	2/11/2023
	<i>Sheila Richards</i>	2/11/2023	<i>Andre Johnson</i>	2/11/2023
Sun Qi	<i>Sun Qi</i>	2/11/2023	<i>Andre Johnson</i>	2/11/2023
Emily Bronson	<i>Emily Bronson</i>	2/20/2023	<i>Juan dela Cruz</i>	2/20/2023
Joshua Blum	<i>Joshua Blum</i>	2/20/2023	<i>Juan dela Cruz</i>	2/20/2023
Walter Truong	<i>Walter Truong</i>	2/20/2023	<i>Juan dela Cruz</i>	2/20/2023
Lisa Shull	<i>Lisa Shull</i>	2/20/2023	<i>Juan dela Cruz</i>	2/20/2023

Generic IPOS Training Document

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Training Date

Content of Training



Example IPOS Documentation

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Generic IPOS Training Document

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Example IPOS Documentation

Generic IPOS Training

Section 1: TCM ID# 1234567

Bene Name: Bob Smith		Case Holder's name: [Redacted]		Trainer w/title: Terri Johnson, QIDP	
<p>PCP dates covered: 2/23/2023-2/22/2024</p> <p>The following staff were trained on this person's IPOS on the training date listed.</p>				Training Date:	
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To make this document work, the reviewers must know what dates the document covers. This not only legitimizes the intent of the document but also ensures that no worker is being trained outside of the correct training period.



Tailor
Documentation
to CMH needs

- Seems simple keeping track of all the individual providers:
 - **who** worked with the beneficiary and who trained them,
 - **when** they started to work with that individual
 - **how** many changes to the plan(s) there were
 - **what** was covered, and...

Why?

Why do we ensure providers are trained on and understand the plan?

- To reach outcomes
- To understand what matters and drives the person served
- To know what to do when something goes wrong
- To prevent behavioral or medical crises
- To provide quality services
- To be pivotal in improving the person's quality of life



Questions?