

Virginia Waiver Management System (WaMS)

demo(On behalf of: AVALON CSB, SCStaff)

Person: **Mary Mallon** Age: 35 ID: 1039424AM318121 DOB: 10/23/1984

Individual Support Plan

Status: ISP Complete

Overview

Waiver: Community Living

Create Date: 07/06/2020

Source: WaMS

Annual ISP - recertification

Effective Date: 10/01/2020

End Date: 09/30/2021

Comments:

Status: Pending Support Coordinator Input

Version: 3.1

ISP Type:*

Providers

Provider Name	Provider NPI	Provider Address	Phone	Actions
ENGAGING AVALON	0049444117	TERI LEWIS, 4412 MOUNTAIN DR, AVALON, VA	5551234567	
RESIDENTIAL SERVICES OF AVALON	1104986017	GROVER GIBNEY, 1145 DIOHPYT DR, AVALON, VA	5559876543	
NURSES WITH SKILL	1316133739	ZANETTA FORD, 4007 NURSES HIGHWAY, AVALON, VA	5551237895	

Part I. Personal Profile

This ISP belongs to Mary

Legal Last Name*

Mallon

Legal Middle Name

Legal First Name*

Mary

Preferred Name

Mary's Meeting

How I am best supported to direct my planning process:*

Mary is best supported by having her family attend the meeting. If they are not able to attend in person, they should be included via video chat. Mary relies on her family to help her express her preferences and advocate for things that are important to her.

My preferences for annual planning:*

Mary prefers to have her planning meeting occur first thing in the morning after she has finished her morning routine when she is alert. She prefers to have the meeting in her home as no one else is home at that time and her home is quiet. She enjoys greeting people as they arrive.

My preferred date, time, and location
for my meeting:*

Mary's support team notes that she is the most alert and engaged in the morning after her housemates have departed. The meeting shall occur in her home in the morning after everyone has left and preferably on a Tuesday so it won't conflict with her day support activities.

Mary's Talents & Contributions

List great things about Mary

Mary is playful and laughs a lot.

Mary has a strong spirituality.

Mary loves music, colors and scents.

Mary enjoys animals and nature.

Mary enjoys spending time with people who are cheerful and kind.

Mary is pretty and has beautiful blue eyes.

Mary has strong family values.

Mary is very stylish and takes pride in her appearance.

Important TO/FOR Mary

Instructions: To complete this section, consider and discuss the following life areas: Employment, Meaningful Day, Community Living, Safety & Security, Healthy Living, Social & Spirituality, and Citizenship & Advocacy.

Describe what's important TO Mary *

Employment - Having more money to go shopping, finding activities that matches passions or interests
Meaningful Day - Being understood, making choices and decisions
Community Living - Living with fewer people, following a routine, being complimented on her looks, looking nice/stylish, going to get hair & nails done, buying and wearing new clothes, interacting with and/or watching animals
Safety and Security - Mary's mother supports her to make decisions
Social and Spirituality - Belonging to a faith community whose services involve music and are uplifting as opposed to solemn, frequent visits with mom and Frank (brother), regularly video chat Brian (brother), becoming familiar with people in the community
Healthy Living - Eats preferred food, has smooth healthy skin, is understood by others, remains free from hospitalizations, Citizenship and Advocacy - Mary's mother supports her to make decisions.

Describe what's important FOR Mary *

Employment - Having medical and personal care supports in place, having means for effective communication, identifying if a skill or interest could be transferred to a job task, addressing barriers to obtaining employment, exploring assistive technology to overcome barriers to employment
Meaningful Day - Exploring new places in the community, meeting community members, explore assistive technology to overcome barriers to accessing and/or interacting with the community
Community Living - Follow daily protocols, stay awake during the day, remains safe at home and in the community, adapted living space with DME equipment, wheelchair accessible van
Safety and Security - Develop a personal emergency evacuation plan, remain safe at home and in the community, receive support to maintain finances, free from abuse, neglect and exploitation
Social and Spirituality - Being introduced to new activities that may form new interests, have funds for social activities, visits new locations/ has new experiences to enhance her community involvement, addressing barriers to community involvement
Healthy Living - Follows all protocols with DSP support, utilizes AT and DME items

The Life Mary Wants

Describe Mary's vision of the life he or she wants*

Mary is a very loving and devoted sister. Her family is very important to her. Mary spends the night at her mother's house once a month with the support of her brother Frank, goes to Frank's house monthly for dinner, has regular visits from from her brother Frank, and video chats with her brother Brian. Mary lives in a quiet setting with plenty of room for her to move around. She is in close proximity to her family, lives in the country where she can see wildlife from a front or back porch, has a lot of bird feeders around and has a dog. Mary has her wants and needs met by familiar caring people who keep her involved with others, safe, healthy, clean and dry, and help her eat only foods and supplements she likes in the manner she likes to eat them. Mary is not a morning person and does not like to be awoken and taken out of bed for breakfast. While she gets nutrition and liquids through her g-tube during the day in addition to meals, in the morning she

only wants to be supported by receiving nutrition through her g-tube with minimal interactions. Mary wants to remain healthy, free from injuries, and free from hospitalizations. Mary spends time each day out of her wheelchair resting on the couch in the family room, reclining in a chaise on the front porch, sitting in her swing or lounging in her hammock. Mary enjoys spending time outdoors and lights up when she sees animals, particularly dogs. Mary's never taken to loud or crowded places (except when music is involved) or has to spend time around angry people who raise their voice. Mary has a variety of music to listen to throughout the day with close attention paid so that the music matches her mood and energy level. Mary has lotions and creams that are rubbed on her skin often, and she gets to have regular gentle massages, manicures and pedicures.

What Mary Doesn't Want

Describe what Mary doesn't want in his/her life*

Mary's planning team believes she does not want the following in her life: hospitalizations, pain/discomfort, solemn or boring religious services, excessive noise (unless it's music), sudden movements, any barriers that would keep her from her time with her family, boredom, having others not know what she is communicating, cold days where she cannot comfortably sit outside.

Part II Essential Information

Representation

Individual has the following*

Legal Guardian

Are there any concerns with having or needing a substitute-decision maker?

☒ Yes ☐ No

*

If yes, describe*

Mary's mother is often not able to attend her planning meetings or medical appointments requiring that forms be mailed to her for signatures. This occasionally has caused some delays in medical services being obtained as services could not be rendered until her signature was obtained on the medical forms. Mom and Frank are pursuing Co-Guardianship.

Decisions that the representative is authorized to make (check all that apply)*

☒ Medical

☒ Financial

☒ Housing

☒ Service Planning

☐ Other

Individual has a power of attorney? *

☐ Yes ☒ No

Is there an advanced directive? *

☐ Yes ☒ No

If yes, provide a copy to relevant parties.

Disability Determination

SSA Disability Determination Completed? *

☒ Yes ☐ No

Health Information

All identified needs related to health, mental health, or behavioral support needs, must be addressed in outcomes in the plan. When present, this includes the eight DBHDS-identified health risks: skin breakdown, aspiration pneumonia, falls, urinary tract infections, dehydration, constipation and bowel obstruction, sepsis, and seizures.

Date the Annual Risk Assessment was completed.* 07/06/2020

Are there identified health (medical or mental health) and/or behavioral support needs to be addressed under outcomes in Part III Shared Planning?*

☒ Yes ☐ No

List the identified needs*

Tube feeding, dehydration, choking/swallowing/aspiration/aspiration pneumonia, seizure management, osteoporosis, falls, range of motion

Do any needs listed above require a referral for Therapeutic Consultation Behavioral Services? *
 ☐ Yes
 ☒ No

Behavioral and Crisis Supports

Is there a Crisis Plan?*
 ☐ Yes
 ☒ No
 Is there a formal behavior support Plan? *
 ☐ Yes
 ☒ No
 Is a formal behavior support plan needed? *
 ☐ Yes
 ☒ No
 Current or past substance use including alcohol, prescription and nonprescription medications, and/or illicit drugs? *
 ☐ Yes
 ☒ No
 Does this person have any previously unidentified risks (medical or mental health and/or behavioral)? *
 ☒ Yes
 ☐ No
 Describe how this/these risks will be addressed *

Skin breakdown - Mary has not had any issues with skin breakdown but she is at risk. SN will be used to develop a repositioning protocol to keep her free from skin breakdown. Constipation - Mary has not had any issues with constipation but takes a supplement to address this potential concern. SN will be used to develop a seating protocol to keep Mary free from constipation.

Medications

Medications Required? *
 ☒ Yes
 ☐ No
 Did the SC/CM ask all providers who are administering psychotropic medications if evidence of consent for use has been obtained (according to the providers' own policies)? *
 N/A

Medication name	Location of side effect information
Lamictal	Electronic Health Record (EHR)
Os-Cal Calcium+D3	<p>WaMS ISP - Get emergency medical help if you have signs of an allergic reaction: hives; difficult breathing; swelling of your face, lips, tongue, or throat. Call your doctor at once if you have signs of too much calcium in your body, such as: nausea, vomiting, constipation; increased thirst or urination; muscle weakness, bone pain; or confusion, lack of energy, or feeling tired. Common side effects may include: an irregular heartbeat; weakness, drowsiness, headache; dry mouth, or a metallic taste in your mouth; or muscle or bone pain. https://www.drugs.com/mtm/os-cal-calcium-d3.html</p> <p>WaMS ISP - KEPPRA can cause serious side effects. Call your healthcare provider right away if you have any of these symptoms: Mood and behavior changes such as aggression, agitation, anger, anxiety, apathy, mood swings, depression, hostility, and irritability. A few people may get psychotic symptoms such as hallucinations (seeing or hearing things that are really not there), delusions (false or strange thoughts or beliefs) and unusual behavior; Extreme sleepiness, tiredness, and weakness problems with muscle coordination (problems walking and moving); Allergic reactions such as swelling of the face, lips, eyes, tongue, and throat, trouble swallowing or breathing, and hives; A skin rash. Serious skin rashes can happen after you start taking KEPPRA. There is no way to tell if a mild rash will become a serious reaction. The most common side effects seen in people who take KEPPRA include: sleepiness,</p>
Keppra	

Medication name	Location of side effect information
	weakness, infection, dizziness https://dailymed.nlm.nih.gov/dailymed/drugInfo.cfm?setid=3ca9df05-a506-4ec8-a4fe-320f1219ab21
Acetaminophen	Medication Administration Record (MAR)
Acephen	Medication Administration Record (MAR)
Fosamax Plus D	Electronic Health Record (EHR)
Miralax	<p>WaMS ISP - WARNINGS: Allergy alert Do not use if you are allergic to polyethylene glycol. Do not use if you have kidney disease, except under the advice and supervision of a doctor. Ask a doctor before use if you have nausea, vomiting or abdominal pain a sudden change in bowel habits that lasts over 2 weeks or irritable bowel syndrome. (https://dailymed.nlm.nih.gov/dailymed/drugInfo.cfm?setid=d69ce3d4-7ca4-4fe3-b49e-6655e48d6963)</p>

Physical and Health Conditions

History of health complications ☒ Yes ☐ No

(medical or mental health), injuries, and/or past hospitalizations? *

If yes, describe*

Mary has been treated for several fractures and bone breaks due to osteoporosis. In 1997, she wore a cast on her left leg for two months following a break. Her mother stated that in childhood medical care was frequently provided, but could not recall reasons or dates. Seizures reported from birth. Hospital admission in 2005 due to dehydration and aspiration pneumonia resulted in Mary receiving a g-tube to supplement her nutritional needs. Mary had two hospital admissions this year. The first admission was due to a break of the right fibula that occurred during a two person transfer. This admission required surgery. Mary has since healed. The second admission was following a four minute seizure and during the hospital stay Mary was diagnosed with pneumonia. This admission lasted almost three weeks.

List current/chronic medical and mental health diagnoses and when diagnosed (if known).*

Osteoporosis (1997), cerebral palsy (at birth), dysphagia (2005), seizure disorder

Describe any current and previous health-related interventions and their outcomes.*

Nutrition and Hydration Protocol - No concerns with current protocol. Transfer Protocol and Use of DME items - Transfer protocol added after break following two person transfer. No further injuries since this protocol was introduced. Seizure Protocol - Seizure medications increased after last year's hospitalization. No admissions since that time. Seating Protocol - Not currently in use. To be developed by nursing staff and implemented this planning year. ROM - No change Repositioning Protocol - Not currently in use. To be developed by nursing staff and implemented this planning year.

Current health-related limitations or restrictions? ☒ Yes ☐ No

If yes, describe*

Mary does have a g-tube but can eat pureed food by mouth.

Communicable diseases? ☐ Yes ☒ No

Serious illnesses and/or chronic conditions of parents, siblings, and/or significant others in the same household? ☒ Yes ☐ No

If yes, describe*

There is a family history of diabetes, cancer and high blood pressure.

Special diet or nutritional needs? ☒ Yes ☐ No

If yes, describe*

Mary eats a puree' diet and receives nutrition by g-tube. Meal preparation details are described on her medication administration record.

Last Exam Dates

Date of my last complete physical exam* 06/30/2020

Estimated/Approximate Date ☐ Yes ☒ No

Examination Results (Physical Exam)

No significant changes in status reported.

Date of my last complete dental exam* 05/27/2020

Estimated/Approximate Date ☐ Yes ☒ No

Examination Results (Dental Exam)

No concerns noted.

Allergies

Allergies	Reactions
None Known	

Social, Developmental, Behavioral and Family History

Describe my relevant social, developmental, behavioral, and family history*

Mary lived most of her life at home with her parents, until she moved to her current group home in 2013. Mary's parents each completed some college; mother is a homemaker and father was a plumber. Mary has one younger brother and one foster brother. Mary was found incapacitated by the Avalon court system in 1980 and her parents were given guardianship at that time. Mary's father passed away from cancer in February 2007. Mary was reported to cry frequently following the loss of her father. After that loss, Mary became very close with her brothers, which helped her address her grief. Mary now keeps pictures of her dad in her bedroom, and she smiles when she looks at them. Mary's family relationships are very important to her. She has monthly dinners with her brother, Frank, monthly visits with her mom, Peach, and weekly video chats with her brother Brian, who lives in Seattle. Mary grew up attending church with her family, and while her faith is very important to her, she often finds religious services to be too solemn. Mary receives SSI. Mary has a long history of putting her hand in her mouth and needs reminders to stop to prevent skin breakdown. She has had a seizure disorder from birth, and is currently diagnosed with osteoporosis and dysphagia. Mary does not have any behavioral support needs.

History of abuse, neglect, sexual or domestic violence, or trauma including psychological trauma?* ☐ Yes ☒ No

Provide a summary of my current and past living arrangements*

Lived with family until moving into current home in 2013.

Communication, Assistive Technology and Modifications

Are there any needs requiring support for communication including language?* ☒ Yes ☐ No

If yes, please describe supports needed for communication.*

Mary does not use words to communicate. Mary relies on those who know her best to understand what she is communicating and to express her desires to others. Mary and her mother have asked to be linked with a speech and language pathologist to find ways to better support Mary to communicate.

Are any adaptive equipment or assistive technology supports used?* ☒ Yes ☐ No

Describe any adaptive equipment or assistive technology supports used and describe who is responsible for maintaining

the equipment/device.*

Hoyer lift, wheelchair, bath chair, commode chair, bed rails, communication device (once obtained) - Residential

Would a professional evaluation related to adaptive equipment, assistive technology or other modifications be beneficial?*

☒ Yes ☐ No

If yes, describe*

Continued evaluation from RN to assure effective protocols are in place for transfer, use of commode chair, nutrition and hydration, etc., would be beneficial. Speech and language pathologist for augmentative communication device.

Any concerns with accessing needed services or supports including transportation?*

☒ Yes ☐ No

If yes, describe*

Mary has significant medical and personal care needs. These extensive support needs have created barriers to accessing more integrated services. Mary requires the use of a wheelchair accessible vehicle for all transportation. This has been an additional challenge to overcome in supporting Mary to participate in more integrated services.

Education

Highest level of education completed* High School

Describe my educational history*

Mary graduated from BlueRidge High School in 2007 when she was 22.

Employment

Employment status* Check all that apply

☒ not previously employed, not looking or child

Indicate all of the current barriers to employment* Check all that apply

- ☐ None
- ☐ Impact to benefits
- ☐ Transportation
- ☒ Safety
- ☒ Lack of awareness
- ☐ Other - describe

Services that could help address barriers* Check all that apply

- ☐ Benefits Planning
- ☐ Employment and Community Transportation
- ☐ Workplace Assistance
- ☐ Therapeutic Consultation
- ☒ Community Engagement/Coaching for education
- ☐ Other

Summarize employment conversation and how barriers will be addressed as applicable.*

SC spoke to mom and Mary about exploring employment. Mary's mother said she would be interested in learning more about how people with complex support needs have been successfully supported to obtain employment in Virginia. She said with this information she may consider exploring this as an option. SC shall link Mary's mother with resources regarding employment success stories and if possible other families who have had loved ones with similar support needs successfully obtain employment. SC shall reach out to the DBHDS Employment Specialist.

Volunteer status* previously volunteered, looking

Community involvement occurring in the following ways.* Check all that apply

- ☐ Natural Supports
- ☒ Community Engagement
- ☐ Community Coaching
- ☐ Group Day
- ☒ Residentially-based services
- ☐ Other

Indicate all of the current barriers to community involvement.* Check all that apply

- ☐ None
- ☐ Lack of awareness
- ☒ Medical
- ☐ Behavior
- ☒ Other - describe

If other, please specify*

Personal care needs and lack of community locations or assistive technology to support these needs.

Services that could help address barriers* Check all that apply

- ☐ Community Engagement
- ☐ Community Coaching
- ☒ Nursing
- ☐ Employment and Community Transportation
- ☐ Residentially-based services
- ☒ Therapeutic Consultation
- ☐ Other - describe

Future Plans

Describe plan for future living arrangements*

Mary and her mother would like for her to explore a home with less people. Mary and her mother might consider looking at a sponsored setting, a group home with live in staff, living with family, shared living or a situation with a live-in caregiver in an apartment leased by Mary. Brian (brother) is considering moving back to the area and would like to explore the possibility of Mary living with him.

Describe supports needed to transition to more inclusive settings*

Mary would require wrap around supports with support staff who could address her complex medical needs. She would need to live in close proximity to a hospital and have access to reliable transportation, natural supports and nursing care in the home.

Review of Most Integrated Settings

Current primary living situation* Group Home

Current primary employment or day setting* Check all that apply

- ☒ Community Coaching
- ☐ Community Engagement
- ☐ Employment Group
- ☐ Employment Individual
- ☐ Group Day Services

- ☒ Residential
☐ Self-Employed
☐ Unemployed
☐ Other

Has the individual and/or substitute decision maker identified an interest in pursuing one or more of these integrated housing options?*

Check all that apply

- ☒ No interest expressed after a discussion of these integrated housing options
☐ Housing Choice Vouchers
☐ Local tenant-based rent assistance
☐ Low Income Housing Tax Credit properties
☐ Private federally assisted Section 8 housing
☐ Project Based Vouchers
☐ Rental Affordable Dwelling Units
☐ Rural Development 515 properties
☐ Other options

Has the individual and/or substitute decision maker identified an interest in pursuing one or more of these integrated waiver service options?*

Check all that apply

- ☒ No interest expressed after discussion of these integrated waiver service options
☐ Community Coaching
☐ Community Engagement
☐ Consumer-Directed Supports
☐ Electronic Home-Based services
☐ Independent Living Supports
☐ In-home Support Services
☐ Shared Living
☐ Supported Employment
☐ Supported Living
☐ Workplace Assistance Services
☐ Other options

Additional Comments

Additional Comments

Part III. Shared Planning

No.	Life Area	Desired Outcome	Key steps and services to get there	Types of Support	Supporter Names/Providers	Other Supporters	Start date	End Date	Status
1	Employment	Mary has activities that match her interests in order to identify skills or interests that could be	Expand community presence by discovering preferred locations (CE,	Eligibility-based	RESIDENTIAL SERVICES OF AVALON, NURSES WITH SKILL,	Support Coordinator	10/01/2020	04/30/2021	In Progress

No.	Life Area	Desired Outcome	Key steps and services to get there	Types of Support	Supporter Names/Providers	Other Supporters	Start date	End Date	Status
		transferred to a job skill/task.	GH), explore volunteer opportunities (CE), develop personal care plan for community settings (SN, CE, GH), explore AT/DME for overcoming barriers to accessing the community (SN, CE, SC), explore new activities to learn new interests (GH), link Mary and mother with employment resources (SC).		ENGAGING AVALON				
2	Meaningful Day	Mary is understood.	Link with SLP (SC), obtain AT recommended by SLP (SC), work with SLP to implement device into Mary's daily routine (GH, CE, SN), provide opportunities for choices and decision making throughout the day (GH, CE).	Eligibility-based	RESIDENTIAL SERVICES OF AVALON, NURSES WITH SKILL, ENGAGING AVALON	Support Coordinator	10/01/2020	04/30/2021	In Progress
3	Community Living	Mary lives with fewer people.	Explore what supports are needed to reside in a more integrated setting, make referrals and arrange visits (SC)	Community-based	Support Coordinator		10/01/2020	04/30/2021	In Progress
4	Community Living	Mary's hair and nails are done monthly.	Go to Z-Spa (GH).	Eligibility-based	RESIDENTIAL SERVICES OF AVALON		10/01/2020	09/30/2021	In Progress
5	Healthy Living	Mary is free from hospitalizations.	Develop transfer, seating and repositioning protocol (SN) Follow transfer, seating and repositioning protocols (GH,	Eligibility-based	RESIDENTIAL SERVICES OF AVALON, NURSES WITH SKILL		10/01/2020	09/30/2021	In Progress

No.	Life Area	Desired Outcome	Key steps and services to get there	Types of Support	Supporter Names/Providers	Other Supporters	Start date	End Date	Status
6	Healthy Living	Mary eats preferred foods in order to remain free from choking/aspiration.	CE) develop pain protocol (SN), follow pain protocol (GH, CE), follow seizure protocol (SN, GH, CE), provide training and oversight (SN). Follow nutrition and hydration protocol (GH, SN), follow g-tube care protocol (GH, SN), provide options each day for food by mouth (GH), provide training and oversight (SN).	Eligibility-based	ENGAGING AVALON		10/01/2020	09/30/2021	In Progress
7	Healthy Living	Mary has smooth healthy and fragrant skin.	Follow ROM protocol (GH), provide training and oversight (SN).	Eligibility-based	RESIDENTIAL SERVICES OF AVALON, NURSES WITH SKILL		10/01/2020	09/30/2021	In Progress
8	Healthy Living	Mary is healthy, safe, and a valued member of her community.	Follow daily routines (GH), identify changes in status (CE, SN, GH), maintaining a healthy and safe home and community environment (GH, CE), receiving routine supports and assessments to keep Mary healthy and safe (GH, SN).	Eligibility-based	RESIDENTIAL SERVICES OF AVALON, NURSES WITH SKILL, ENGAGING AVALON		10/01/2020	09/30/2021	In Progress
9	Social & Spirituality	Mary is an active member of a faith community which incorporates lots of music.	Research then visit places of worship with music integrated into the service, revisit preferred locations, attend location of choice at least weekly. (GH)	Eligibility-based	RESIDENTIAL SERVICES OF AVALON		10/01/2020	09/30/2021	In Progress

No.	Life Area	Desired Outcome	Key steps and services to get there	Types of Support	Supporter Names/Providers	Other Supporters	Start date	End Date	Status
10	Social & Spirituality	Mary spends time with her family.	Has dinner with Frank at least monthly (Frank-brother), visit mom overnight at least once a month (Frank-brother), video chat with Brian weekly (GH, Brian-brother).	Eligibility-based	RESIDENTIAL SERVICES OF AVALON	Frank (brother), Brian (brother)	10/01/2020	09/30/2021	In Progress
11	Social & Spirituality	Mary receives her supports as agreed upon in her plan.	Receive enhanced CM, monitor supports, identify change in status, link with additional supports/services as needed, complete annual ISP (SC)	Community-based	Support Coordinator		10/01/2020	09/30/2021	In Progress

Part IV. Agreements

Individual Questions

- Does this plan move me closer to the life I want? * ☒ Yes ☐ No
- Have I had the opportunity to plan for personal topics apart from the full team? * ☒ Yes ☐ No
- I was supported to direct and participate in my planning process as described in Part II: Personal Profile? * ☒ Yes ☐ No
- Have I chosen all of the providers and services I receive having been informed about the benefits and risks? * ☒ Yes ☐ No
- Have I chosen or had input into where I live? * ☒ Yes ☐ No
- Have I chosen or had input into who lives with me? * ☒ Yes ☐ No
- Do I choose or have input into my daily schedule? * ☒ Yes ☐ No

Team Questions

- Does any team member have an objection to any outcomes in my plan? * ☐ Yes ☒ No
- Are there any restrictions that require review or agreement? * ☐ Yes ☒ No
- Do I need financial planning or benefits counseling in order to maintain or maximize resources? * ☐ Yes ☒ No

Is there any IMPORTANT TO or
IMPORTANT FOR information
elsewhere that is not addressed in my
plan? *

☐ Yes ☒ No

Are supports or services needed that
are not available *

☐ Yes ☒ No

Signatures

Signer Type	Provider	Signature Type	Signature	Print Name	Relationship / Service	Date Signed	Organization Unit Name
Person		Written	No Signature Uploaded	Mary Mallon	Signature on File	08/14/2020	AVALON CSB
Substitute Decision Maker		Written	No Signature Uploaded	Peach Mallon	Signature on File	08/14/2020	AVALON CSB
Provider	ENGAGING AVALON	Written	No Signature Uploaded	Francine Wallis	Signature on File	08/14/2020	AVALON CSB
Provider	RESIDENTIAL SERVICES OF AVALON	Written	No Signature Uploaded	Sam Monroe	Signature of File	08/14/2020	AVALON CSB
Provider	NURSES WITH SKILL	Written	No Signature Uploaded	Lorne Bates	Signature on File	08/14/2020	AVALON CSB
SC/CM		Written	No Signature Uploaded	Jen Bushe	Signature on File	08/14/2020	AVALON CSB
Family		Written	No Signature Uploaded	Frank Mallon	Signature on File	08/14/2020	AVALON CSB

Person-Centered Review Dates

1st Quarter Date* 01/01/2021
 2nd Quarter Date* 04/01/2021
 3rd Quarter Date* 07/01/2021
 4th Quarter Date* 10/01/2021

Attachment

Create Date	Document Name	Category	Description	Uploaded By
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Form Notes

Content	Created By	Create Date	Actions
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