

**BAY-ARENAC BEHAVIORAL HEALTH AUTHORITY  
POLICIES AND PROCEDURES MANUAL**

<b>Chapter: 4</b>	<b>Care and Treatment Services</b>		
<b>Section: 5</b>	<b>Person Centered Planning</b>		
<b>Topic: 4</b>	<b>PCP Meeting Scheduling</b>		
<b>Page: 1 of 4</b>	<b>Supersedes:</b> <b>Pol: 3-18-04</b> <b>Proc: 6-1-23, 11-5-18, 10-1-13, 9-16-10, 9-30-06, 2-17-04, 7-28-98</b>	<b>Approval Date:</b> <b>Pol: 9-16-10</b> <b>Proc: 10-1-2024</b>	  <i>Board Chairperson Signature</i>    <i>Chief Executive Officer Signature</i>
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**Policy**

It is the policy of Bay Arenac Behavioral Health Authority (BABHA) that a Person-Centered Planning meeting will be scheduled for individuals who meet eligibility requirements for this service.

**Purpose**

This policy and procedure were developed to describe the Person-Centered Planning (PCP) scheduling process including independent facilitators for the purposes of developing the plan of service (POS). Pre-planning is for the individual to gather all of the information and resources necessary for effective person centered planning and set the agenda for the process. Each individual (except those individuals who receive short-term outpatient therapy only, medication only, or those who are incarcerated) is entitled to use pre-planning to ensure successful PCP with the outcome of developing a comprehensive POS. Pre-planning is used anytime the PCP process is used.

**Education Applies to**

- All BABHA Staff
- Selected BABHA Staff, as follows: All Clinical and Clinical Management
- All Contracted Providers:  Policy Only  Policy and Procedure
- Selected Contracted Providers, as follows: Primary Providers
  - Policy Only  Policy and Procedure
- Other:

**Definitions**

**Independent Facilitators:** An independent person who facilitates the Person-Centered Planning process in collaboration with the individual. The Independent Facilitator gets to know the

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individual and focuses on the likes, dislikes, personal preferences, goals, methods, etc. The Independent Facilitator helps the individual with all pre-planning activities, choosing the planning tool, facilitates the meeting and assures the individual is heard and understood.

**Procedure**

PCP meeting pre-plan discussions are held and documented prior to the PCP meeting with sufficient time to take all necessary/preferred actions (i.e. invite desired participants).

- Pre-planning with the individual receiving services must occur prior to their PCP meeting. The pre-planning meeting should be scheduled with enough time to arrange for other participants and/or an Independent Facilitator and/or advocate to be in attendance of the PCP meeting. Typically, this would be at the session prior to the PCP meeting. Individuals that are their own guardian or who can speak for themselves will be asked pre-planning information by the primary case holder in a face-to-face contact. If there is a guardian or extenuating circumstances, there is an option to conduct the pre-planning via a telephone conversation, but should be an exception, not the normal practice. This must be clearly indicated on the Pre-plan document.
- The individual at the pre-planning meeting will determine when and where the PCP meeting will be held, who will be invited, what will be discussed and not discussed, what accommodations the individual may need, any potential conflicts of interest or potential disagreements that may arise, who will facilitate the meeting and who will record what is discussed at the meeting.
- At the time of pre-planning, a brochure giving an overview of Independent Facilitation and names or agencies who provide independent facilitation will be included in the information given to the individual/guardian. If Independent Facilitation is requested, Per request of the individual receiving services and/or guardian, the primary case holder will schedule complete the referral form for the Independent Facilitator at this time with the appropriate service provider. If the individual/guardian declines Independent Facilitation, then their choice for the PCP meeting facilitation will be clearly indicated on the Pre-plan document.
- A brochure for choosing a PCP tool is also shared with the individual/guardian.

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**Attachments**

<N:\G:drive\BABH\Clinical Services\Master Clinical Files\Referral Forms\The ARC Referral for Independent Facilitator A>

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**Related Forms**

Person Centered Planning Scheduling Form (G:\BABH\Clinical Services\Master Clinical Files)  
 Person Centered Planning Scheduling Letter (G:\BABH\Clinical Services\Master Clinical Files)  
[The ARC Referral for Independent Facilitator \(G:\BABH\Clinical Services\Master Clinical Files\Referral Forms](The ARC Referral for Independent Facilitator (G:\BABH\Clinical Services\Master Clinical Files\Referral Forms)

**Related Materials**

Choosing a Person-Centered Planning Tool  
 Independent Facilitation Brochure

**References/Legal Authority**

MDHHS/BHDDA Person Centered Planning Policy and Practice Guideline June 5, 2017

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<b>SUBMISSION FORM</b>				
<b>AUTHOR/ REVIEWER</b>	<b>APPROVING BODY/COMMITTEE/ SUPERVISOR</b>	<b>APPROVAL /REVIEW DATE</b>	<b>ACTION (Deletion, New, No Changes, Replacement or Revision)</b>	<b>REASON FOR ACTION - If replacement list policy to be replaced</b>
G. Lesley	G. Lesley	07/02/10	Revision	Updated policy statement to specify individuals must meet eligibility requirements and update procedure to current practices.
K. Withrow M. Corrion	PNLT	10/01/13	Revision	Triennial review: Updated procedure to match current practice and updated with Person First language.
K. Amon	Leadership/SLT	8/29/18 11/5/18	Revision	Triennial Review-Updated language throughout procedure.
K. Amon	K. Amon`	11/27/19	No changes	Policy and Triennial Review-Early to begin a new Review cycle.
H. Beson	H. Beson	6/1/23	Revision	Changed "primary" case holder to "assigned." Added primary providers to education.
H. Beson	H. Beson	7/12/2023	revision	Changed assigned case holder back to Primary case holder
<u>H. Beson</u>	<u>H. Beson</u>	<u>10/1/24</u>	<u>Revision</u>	<u>Triennial Review-indicated how to refer to Independent Facilitation</u>