

TECHNICAL BULLETIN

Number: 2

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Information for community agencies, individuals and families

Anniversary Date and Fiscal Intermediary

As many of you know, the Department has established a policy of one individualized support plan per individual in order to promote coordinated care. This means that if an individual receives services from two different agencies, then the agencies must work together to develop a comprehensive plan for that individual. At this time, the plan submitted should include the cover sheet, executed Interim Individualized Support Plan (IISP) and Purchase Orders.

We understand that the plan documentation for a fiscal intermediary (FI) and IISP requires different signatures. Therefore, until June 30, 2012 if an individual utilizes a fiscal intermediary and receives services from an agency, then the fiscal intermediary will submit the FI plan and the IISP along with purchase orders to the Department. It is our intent to streamline this process by June 30, 2012. Note that this only applies to individuals who utilize both and FI and receive services directly from an agency. All individuals who only receive services from agencies **MUST** submit one comprehensive plan with appropriate agency signatures.

There has been some confusion as to when the plan is due to the Department. Per the regulations, the plan is due 45 days prior to the individual's anniversary date. If an individual receives services from two different agencies, the following rules apply:

1. If any service is provided through a fiscal intermediary, then the fiscal intermediary chooses the anniversary date.
2. Otherwise, the agency with the authorization for support coordination chooses the anniversary date.

Within the two weeks, each coordinating agency will receive a list of individuals for whom they are responsible for submitting the Interim Individualized Service Plan, Purchase Order and cover sheet. This list will include the individual's name, all other agencies that the individual receives services from and the anniversary date on file at the Department. We will be requesting corrections to anniversary dates. Once we receive corrected dates, we will send a list to all agencies of all of the individuals that they serve, who the coordinating agency is, anniversary date and all other agencies providing services.

Each agency must identify one person at the agency who will facilitate support coordination questions. Please send the name of the individual along with email and phone contact information to Monica Pacheco at mpacheco@bhddh.ri.gov.