

REQUEST FOR CLARIFICATION/INTERPRETATION

TO:	Name and Title: Jannis Conselyea	FROM:	Name and Title: Cindy Eleson
	Organizational Unit: Bureau Chief, Program Support		Organizational Unit: Richland Opportunities, INC.
	Address: 111 Sanders, Helena, Mt		Address: 1100 Silurian Lane, Sidney, MT 59270

1. TYPE OF REQUEST: **9** Follow-up to Verbal Request - Date of Verbal Request: _____ **9X** Written Request

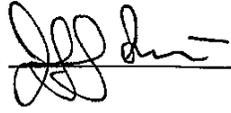
2. STATEMENT OF QUESTION OR ISSUE: Do quarterly reports have to be attached to the PSP and in that format. THERAP is being used for the PSP action's data and tracking and quarterly reports are generated using this software. May agencies use THERAP's quarterly reports for case management and Quality Improvement Specialist reporting?

References:

3. ANSWER: In reviewing Administrative Rule 37.34.1108 Personal Support Plan: Quarterly Reports, the rule requires (1) a provider complete a Quarterly Report for each action statement. (2.a) Providers must submit Quarterly Reports every three months after the actual date of the initial PSP meeting; or January, April, July and October, if the provider is on a calendar year schedule. (3) Providers must prepare the Quarterly Report in the fourth quarter for review at the annual PSP meeting. (4) Providers must submit the Quarterly Report in the data management system approved by the department.

Quarterly Reports are not required to be attached to the PSP, Action Plans are but not Quarterly Reports. The February 1, 2013 Personal Support Planning Policy requires "For each person receiving services, a quarterly report is provided on the **Outcome Page** in the data management system and includes the following: (1) A summary of the progress toward the attainment of the Action Statements listed in the plan. (2) The need for or the follow up made to assure progress." Agencies may not use THERAP'S quarterly reporting software, policy requires the use of the Personal Support Outcome Page.

References:

Approved and Issued by: 
Date: 8/1/13

STATE USE ONLY	4: DISTRIBUTION: One Copy: _____ One Copy: _____ One Copy: _____ Additional Copies: 9 _____ <div style="text-align: right;">Requestor Manual Coordinator Division Files</div>	5: FOLLOW-UP: 9 To be issued as Bulletin to: _____ <div style="text-align: right;">(Division Administrator)</div> Manual. Expected Date of Issuance: _____ 9 A.R.M. Change 9 State Plan Change
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