



Date Issued	12/11/2018	Owner	Dana James
Last Approved Date	8/23/2022	Policy Area	Wraparound (Wrap, REACH, youth CCS)-Care Cord.
Effective	9/1/2022		
Last Revised Date	8/23/2022		
Next Review	12/31/2024		

#076: Team and Plan of Care Meeting Facilitation

I. POLICY

It is the Policy of Children's Community Mental Health Services and Wraparound Milwaukee (hereby referenced as Wraparound Milwaukee) that a Team or Plan of Care (POC) meeting be held for every youth and family enrolled.

NOTE: This policy utilizes the term "Care Coordinator", which applies to Wraparound, REACH, CCS, and Youth Connect Care Coordinators and FISS Case Managers. The term "Youth" is used in this policy and applies to the enrollee in the program, whether a child, adolescent, or young adult. It also uses the term "Child and Family Team" - which applies to any group of people that may be working with a family or youth. "Plan of Care Meeting" also applies to any meeting that may occur to address the needs, strengths, progress, etc., of a family and "Plan of Care" - which also applies to the Service Plan for FISS or Care Plan for Youth Connect.

- A. The initial POC meeting must be held within 30 days of enrollment.
- B. Subsequent POC meetings must be held at a minimum of every 90 days.
- C. **Wraparound, REACH, and CORE:** every month a Child and Family Team must hold a Team or POC meeting.
- D. **Youth CCS:** at minimum every 90 days, a Child and Family Team must hold a POC meeting.
- E. **FISS:** Initial Family Meeting must be conducted within five (5) business days of initial contact and the Service Plan is to be developed. At minimum the Service Plan must be updated every thirty (30) days.
- F. **Youth Connect:** The Care Plan must be updated monthly.
- G. **MINIMUM STANDARD:** The enrollee, legal guardian, Care Coordinator (CC) and at least one

informal or formal team member must be present in order for a Team or POC meeting to be facilitated. Attending CC Supervisors or Leads and Wraparound Milwaukee staff are not considered team members.

Note: For initial POCs only, it is required to have the youth, parent/guardian, and Care Coordinator present; no additional team members are required to be present if despite efforts the Care Coordinator is not able to facilitate their attendance. However, if there is a system partner involved (Divison of Milwaukee Child Protective Services (DMCPS) or Children, Youth, and Family Services (CYFS)), then their presence is required for initial POCs.

- H. If the youth and/or legal guardian do not attend, the Team must reschedule the meeting. When a youth or legal guardian may not be able to be in attendance, for extenuating circumstances, due diligent attempts to invite and incorporate that individual in the meeting must be documented within the Progress or Provider Notes. If there are concerns that a youth or legal guardian cannot or should not attend, Program Managers must know ahead of the meeting and they will review for due diligence at that time. Program Managers then will provide feedback or suggestions about holding the meeting or further efforts to be made. If it is a POC meeting, due diligent efforts must be documented within the Notes to also review the POC with that individual and obtain the individual's signature.
- I. For those team members, outside of the youth and legal guardian, that are unable to attend, the CC will receive an update from the team member prior to the meeting to focus on the strategies, intervention outcomes, proposed plans and any other relevant information. For those team members that did not show-up as scheduled, the CC needs to have a discussion with those team members about the meeting, review that team member's specific strategies, discuss intervention outcomes and proposed plans and any other relevant information. The CC must inform the team member of the date, time (and location if known) of the next Team or POC meeting. All new information that was shared by the team members must be discussed and agreed upon by the youth and guardian prior to the POC document being submitted for approval. These conversations must be documented in the CC's Notes.

NOTE: For any formal team members that are not able to attend the meeting, no action step may be included in the POC without this discussion occurring.

- J. Team and POC meetings must be held face-to-face. Youth or legal guardian participation through video conferencing or teleconferencing is only permissible as a last resort and after all efforts have been exhausted to ensure the youth and legal guardian are present. Meetings cannot be conducted by the CC solely from a remote location via phone or video conferencing. If the youth, legal guardian, or another team member participate via phone or video conferencing as a last resort for a POC meeting, the CC must make all efforts to obtain the signature of that person and those attempts must be documented in Notes.

Note: During the COVID-19 Public Health Emergency, Team and POC meetings may be held in a virtual setting, if the youth and family would prefer versus face-to-face.

- K. All team members must be given, at minimum, a 2-week notice and receive a reminder call or email of all scheduled Team and POC meetings. The notification to team members of each meeting must be documented in CC's Notes.

II. PROCEDURE

- A. An agenda must be created and utilized for each meeting. The CC is responsible to gather agenda items from all team members, state specific outcomes of the meeting (i.e. decisions to be made, plans to be created), include potential guidelines, etc. The agenda is to be reviewed and approved by the youth and family prior to the meeting.
- B. Meetings must begin with introductions, a welcoming tone and direction, an ice breaker, clear purpose of the meeting, strengths, and identified outcomes needed from the meeting.
- C. Facilitation of the meeting engages youth, family, and all team members and should be done in a creative/fun/unique way.
- D. Meeting facilitation is conducted using family friendly language and avoids jargon.
- E. The family/youth (if over age 17) vision is reviewed and agreed upon during each meeting.
- F. Planning and discussion is community-based and/or discusses task-shifting toward community-based planning.
- G. Meetings are facilitated as planning sessions focused on identified Needs, Goals, and Action Steps. Updates are to be given to team members prior to, not at, the Team and POC meeting. Other business (such as evaluation tools) are to be completed outside of the Team or POC Meeting.
- H. During the POC Meeting, Needs are ranked on a scale of 1 to 5, with feedback from the youth, family, and team members. The ranking would be agreed upon by the Child and Family Team. (Not applicable to FISS and Youth Connect)
- I. If needed, CC facilitates conflict resolution and re-directs conversations to strength-based discussion and planning.
- J. Crisis Plan is reviewed during every Team and POC meeting.
- K. Domain Review is required to be completed for the initial POC. Domain Review is not required for subsequent POC meetings, but should be used to help guide areas of focus for the Child and Family Team. (Not applicable to FISS and Youth Connect)
- L. At the end of the meeting, a summary and closure are given to the meeting. The Child and Family Team should schedule the next Team or POC Meeting before leaving.

Approval Signatures

Step Description	Approver	Date
	Michael Lappen: BHD Administrator	8/23/2022
	Brian McBride: ExDir2 – Program Administrator	8/23/2022

Dana James: Integrated
Services Manager- Quality
Assurance

8/18/2022

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Services Manager- Quality
Assurance

8/18/2022

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