

Service Plan Review Guide & Checklist

A repeat-use review companion for checking whether the current plan still matches the person, the evidence, the supports, and the work that needs to happen next.

REVIEW LENS: PERSON → GOALS → SUPPORTS → EVIDENCE → CHANGES → FOLLOW-UP

Start with the person, not the paperwork

Before reviewing goals, ask what matters now, what has changed, what is going well, and what the person no longer wants or finds useful. The written plan should be compared with current life - not treated as automatically correct because it is already on paper.

- What matters most to the person right now?
- What has changed since the last review?
- What is going well or becoming easier?
- What is frustrating, not working, or no longer wanted?
- Are there new strengths, preferences, routines, relationships, or priorities that should change the plan?

Goal-by-goal review

CHECK	QUESTION	DECISION
■	Is the goal still meaningful to the person?	Keep / Adjust / End / Clarify
■	What evidence shows progress, difficulty, or no meaningful change?	Document evidence, not assumptions
■	Is the approach helping, or is the barrier actually elsewhere?	Keep / change the approach
■	Has the person gained skills that should reduce or change support?	Adjust support thoughtfully
■	Is the goal still too broad, vague, or disconnected from real life?	Clarify / rewrite through official process

DO NOT CONFUSE ACTIVITY WITH PROGRESS. A service happening on schedule does not automatically mean the goal is still useful or moving in the direction the person wants.

Supports, services & accommodations

- The support is still wanted by the person.
- The amount and frequency still match current need.
- The support is actually being delivered as planned.
- Staff/provider responsibilities are clear.
- Natural supports, technology, accessibility supports, and accommodations are reflected where appropriate.
- There is a workable backup when the usual support is unavailable.
- The person knows how to ask for help, changes, privacy, or accommodations.
- Documentation matches what is actually happening day to day.

Whole-plan mismatch check

- Goals still reflect current priorities.
- Health, communication, mobility, sensory, regulation, or accessibility needs have changed.
- Housing, employment/education, relationships, transportation, benefits, or community participation have changed.
- New skills or strengths should change the amount or type of support.
- Support is happening that is not clearly reflected in the plan.
- Information, contacts, routines, providers, or instructions are outdated.
- There are repeated no-shows, service gaps, waiting lists, or access barriers.
- The person is receiving more help than needed in some areas.
- The person is not receiving enough help in some areas.
- There are unresolved rights, privacy, choice, or restriction questions.
- There are upcoming renewals, authorizations, deadlines, or transitions.
- Team members appear to be working from different assumptions or plan versions.

RIGHTS & SAFETY: If the review uncovers immediate danger, suspected abuse/neglect/exploitation, a rights restriction, or another issue requiring urgent action, use the required reporting, supervisory, emergency, or protective process rather than waiting for a routine review.

Questions worth bringing to the review

- What is the person telling us that the current plan does not show?
- What support is working well enough that we should protect it?
- Where are we relying on staff habit instead of the written plan?
- Where is the person doing more than the plan gives them credit for?
- Where are we doing too much for the person instead of supporting participation?
- Which concern needs a clearer owner or follow-up date?
- What will be different after this review if we make the right changes?

Turn the review into decisions

A useful review ends with clear decisions, owners, and review points. Use this page during or immediately after the meeting.

ITEM / ISSUE	DECISION	OWNER	DUE / REVIEW
	Keep / Adjust / Add / Remove / Clarify		
	Keep / Adjust / Add / Remove / Clarify		
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	Keep / Adjust / Add / Remove / Clarify		
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Before you close the review

- The person's priorities and concerns are represented.
- Each goal has a clear keep / adjust / end decision or a question to resolve.
- Current supports match what is actually happening and what is authorized.
- Follow-up actions have an owner and due/review point.
- Unresolved safety, rights, health, or service-access concerns have been routed appropriately.
- The official plan and required records will be updated through the correct process.

FINAL QUESTION: If a new staff member read the updated official plan tomorrow, would it help them understand what matters to this person and how support should actually happen?

What should stay exactly as it is?

What must be confirmed after the review?

Scope note

Hunters Helpers provides educational and organizational tools. This guide does not replace the official person-centered plan, required assessments, agency policy, payer or waiver requirements, legal requirements, clinical guidance, or required review and approval processes. Requirements vary by program and jurisdiction. Use the official plan and authorized records as the source of truth, and route urgent safety, rights, abuse/neglect/exploitation, medication, or medical concerns through the appropriate required process.