90 Day Review Template Tip Sheet

- The 90 day review template is designed to help organize the information gathered during the 90 day review. It includes specific action steps and follow-up identified during the review. The goal of the 90 day review is to review and update the treatment care/service plan and/or review diagnosis(es). Reviews should be completed every 90 days for the length of the participant's time in the program.

- Ensure that all individuals involved in the 90 day review are included in completing the review as agreed upon with the participant. Prior to beginning the review, clarify with the participant whether there are individuals not present at the meeting with whom the participant would like to share the information reviewed after the review is completed.

- Encourage the participant to choose what they would like to review during the 90 day review meeting (treatment/care/service plan and update and/or diagnosis(es) and document the participant's decision. Support the participant and their family members/supports in problem solving differences in preference about what information will be covered during the review (if differences arise) while centering the participant's voice and preferences.

- Team members begin the review by asking for feedback, highlighting successes, and sharing appreciations. Then move into reviewing and updating the treatment/care/service plan and/or diagnosis(es) to align to the person's current goals, values, and needs.

- To ensure clear understanding and agreement, consider reading back the information aloud after each area of the template is completed and/or having the participant and family/supports read what is written on the template. Revise what is written as needed based on feedback prior to the end of the meeting. If more time is needed, schedule another meeting to finish the review to ensure this process is not rushed.

- Ensure that the action steps for follow-up after the review are specific and detailed: include who will be involved, what information will be covered, when each step will be completed, etc. With participant permission share the completed template with other team members and individuals identified by the participant. Scan the completed template into the participant's electronic health record.