

FY2026 Support Coordination Quality Review

DBHDS Case Management Steering Committee

September 22, 2026

Introduction

The Support Coordination Quality Review (SCQR) process was established to assess and improve the quality of support coordination (also referred to as “case management”) provided by Community Service Boards (CSBs) to individuals with developmental disabilities (DD) who are receiving one of the home- and community-based services waivers (HCBS Waivers). The results of the SCQR are intended to inform improvements to the system overall.

Support coordination supervisors review records and report the results in an online survey form, and the Ofce of Community Quality Improvement (OCQI) reviews a subset of these records so that reliability can be measured. All CSBs receive feedback and technical assistance from OCQI and the Ofce of Provider Network Supports (OPNS).

This report covers the FY2026 SCQR methodology and results.

Methodology

Timeline

The CSBs have consistently reported that the SCQR is most valuable when reviews cover records completed recently, using the most current versions of forms and requirements. In response to this feedback, the CMSC revised the timeline for the FY2025 SCQR (the previous year) to cover only records with the most recent ISP, and to shorten the review period.

CSB feedback about the FY2025 cycle was positive. The CSBs appreciated receiving more timely and relevant feedback, despite the tradeoff of having less time to conduct reviews. The SCQR timeline for FY2026 was designed with this feedback in mind.

CSBs reviewed records with an ISP effective date between March 16, 2025, and December 31, 2025. The reviews were due on May 15, 2026, so that technical assistance (TA) visits could begin earlier in the year. Additionally, CSBs that finished their reviews early had the option of receiving a site visit with TA before the deadline. Nine CSBs elected to have early TA.

Sampling

A total of 400 records were sampled to achieve statistical significance (95% confidence) at the statewide level with a minimum of five records per CSB.

A sampling frame of eligible individuals was constructed using Waiver Management System (WaMS) data. In order to be eligible, an individual must have met the following criteria:

- Adults and children (all ages included)
- Enrolled in one of the three DD waivers on January 1, 2025, in active, hold, or pending appeal status

- With an authorization for least one DD waiver service on January 1, 2025, AND that individual was still enrolled as of the date (less one day or D-1) of the data pull with an authorization for at least one DD waiver service on D-1.
- ISP effective date between March 16, 2025, and December 31, 2025

After receiving the population, the Quality Research Specialist in the Ofce of Quality Assurance and Healthcare Compliance (QAHC) pulled a stratified random sample to ensure that CSBs serving fewer individuals were included with a minimum of five records.

CSBs were asked to review records for the period beginning March 16, 2025, and ending December 31, 2025. As in previous years, CSBs submitted their reviews in Qualtrics, a survey platform that allows for complex display logic and data validation.

Look Behind and Interrater Reliability Methodology

A minimum of two records per CSB were sampled for the Look Behind, with twenty additional reviews distributed by waiver population for 100 total retrospective reviews. The five OCQI specialists each completed ten interrater reviews, for a total of 50 interrater reviews. These were not required to be specific records; OCQI specialists arranged travel to neighboring regions as convenient.

For each question and overall indicator of compliance, the percent agreement was calculated for the Look Behind (comparing OCQI and the CSBs) and the interrater analysis (comparing OCQI raters with each other). In addition to percent agreement, Maxwell's random error coefficient (RE) was calculated to adjust for agreement expected by chance alone.¹ Since Maxwell's RE is for binary outcomes only, an extension proposed by Janes (1979) was used for questions with three or more possible outcomes.² Another common interrater reliability statistic, Cohen's kappa, was not used because the kappa coefficient is reduced when one of the outcomes is highly prevalent.³

Compliance Indicators

The SCQR assesses compliance with ten indicators. While question wording has changed, most of the indicators have remained the same over the years. Exceptions are noted in the table; these changes should be kept in mind when observing trends over time.

Table 1: SCQR Indicators FY2021-FY2026

Indicator	FY2021	FY2022	FY2023-FY2026
Indicator 1	Signed choice form	Signed choice form	Signed choice form and choice of Support Coordinator
Indicator 2	Individual offered a choice of SC and DD Waiver providers	Individual offered a choice of SC and DD Waiver providers	Signed choice form and choice of DD Waiver providers
Indicator 3	Specific and measurable outcomes	Specific and measurable outcomes, meaningful employment discussion, employment facilitation	Same as previous
Indicator 4	Participation in the development of Part IV of PC ISP	Same as previous	Same as previous

¹Maxwell, A. E. (1977) Coefficients of agreement between observers and their interpretation. *British Journal of Psychiatry* **130**, 79-83.

²Janes, C. L. (1979) An extension of the random error coefficient of agreement to NxN tables. *British Journal of Psychiatry* **134**, 617-19.

³Feng, G. C. (2013) Factors affecting intercoder reliability: a Monte Carlo experiment. *Quality & Quantity* **47**, 2959–2982.

Table 1: SCQR Indicators FY2021-FY2026 (continued)

Indicator	FY2021	FY2022	FY2023-FY2026
Indicator 5	Disagreement and resolution in Part IV of PC ISP	Same as previous	Same as previous
Indicator 6	PC ISP addresses risks, needs, and preferences	Same as previous	Same as previous
Indicator 7	Risk awareness and risk mediation plan	Same as previous	Same as previous
Indicator 8	Linkages, referrals, and service authorizations	Same as previous	Same as previous
Indicator 9	Services implemented appropriately	Same as previous	Same as previous
Indicator 10	Change in status and ISP revision	Same as previous	Same as previous

Records in Compliance

A record is considered to be in compliance if at least nine out of ten indicators are met. Table 2 displays the percentage of records in compliance by year.

Table 2: Percentage of Records Meeting at Least Nine Indicators

FY2021	FY2022	FY2023	FY2024	FY2025	FY2026
42%	53%	64%	72%	80%	78%

While the percentage of records reported as compliant dipped slightly from the previous year, this data point should be considered in the context of improving interrater reliability, which will be discussed later in the report.

Table 3 shows the number of records meeting 9 of 10 indicators by CSB.

Table 3. Percentage of Records Meeting at Least Nine Indicators by CSB

CSB	Percentage of Records
Alexandria Community Services Board	67%
Allegheny Highlands Community Services Board	100%
Arlington County Community Services Board	71%
Blue Ridge Behavioral Healthcare	9%
Chesapeake Integrated Behavioral Healthcare	50%
Chesterfeld Community Services Board	50%
Colonial Behavioral Health	88%
Crossroads Community Services Board	100%
Cumberland Mountain Community Services	100%
Danville-Pittsylvania Community Services	67%
Dickenson County Behavioral Health Services	100%
Eastern Shore Community Services Board	100%
Encompass Community Supports	100%

Table 3. Percentage of Records Meeting at Least Nine Indicators by CSB (*continued*)

CSB	Percentage of Records
Fairfax- Falls Church Community Services Board	96%
Goochland-Powhatan Community Services	100%
Greater Reach	50%
Hampton-Newport News Community Services Board	92%
Hanover County Community Services Board	100%
Harrisonburg-Rockingham Community Services Board	100%
Henrico Area Mental Health and Developmental Services	93%
Highlands Community Services	71%
Horizon Behavioral Health	100%
Loudoun County Department of MH, SA and Developmental Services	82%
Middle Peninsula-Northern Neck Community Services Board	89%
Mount Rogers Community Services Board	70%
New River Valley Community Services	100%
Norfolk Community Services Board	54%
Northwestern Community Services	82%
Piedmont Community Services	78%
Planning District One Behavioral Health Services	86%
Portsmouth Department of Behavioral Healthcare Services	100%
Prince William County Community Services Board	67%
Rappahannock Area Community Services Board	80%
Region Ten Community Services Board	90%
Richmond Behavioral Health Authority	50%
Rockbridge Area Community Services	67%
Southside Community Services Board	86%
Valley Community Services Board	88%
Virginia Beach Community Services Board	73%
Western Tidewater Community Services Board	44%

In FY2026, 21 CSBs reported at least 86% of records met at least nine indicators, down slightly from 24 in FY2025.

Indicator Trend

Indicator results for FY2021-FY2026 are displayed in Table 4.⁴

Table 4: Indicator Results for FY2021-FY2026.

Indicators	FY2021	FY2022	FY202	FY202	FY202	FY2026
Old Indicator 1: Signed choice form	88.0%	91.8%	NA	NA	NA	NA
Old Indicator 2: Choice of SC and DD Waiver providers	77.5%	77.8%	NA	NA	NA	NA

⁴The results that were reported for Indicator 1 and Indicator 2 in FY2021 and FY2022 are included in the first two rows ("Old Indicator 1" and "Old Indicator 2"). The questions from FY2021 and FY2022 that correspond with the current indicators are included in rows 4 and 5 for comparison purposes.

Table 4: Indicator Results for FY2021-FY2026. (continued)

Indicators	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026
Old Indicator 3: Specific and measurable outcomes	82.5%	NA	NA	NA	NA	NA
Indicator 1: Signed choice form and individual offered a choice of support coordinator	78.0%	79.1%	82.7%	87.0%	89.5%	95.3%
Indicator 2: Signed choice form and individual offered a choice of DD Waiver providers	86.0%	90.0%	92.9%	96.8%	96.0%	95.3%
Indicator 3: Specific and measurable outcomes, meaningful employment discussion, employment facilitation	NA	40.3%	54.3%	68.5%	81.8%	82.5%
Indicator 4: Participation in the development of Part IV of PC ISP	85.0%	82.0%	87.9%	90.0%	88.8%	90.3%
Indicator 5: Disagreement and resolution in Part IV of PC ISP	99.5%	100.0%	100.0%	100.0%	100.0%	100.0%
Indicator 6: PC ISP addresses risks, needs, and preferences	69.3%	86.8%	84.3%	89.8%	87.0%	85.0%
Indicator 7: Risk awareness and risk mediation plan	92.0%	84.0%	88.5%	93.8%	93.0%	91.0%
Indicator 8: Linkages, referrals, and service authorizations	93.0%	97.5%	98.5%	99.0%	91.8%	94.5%
Indicator 9: Services implemented appropriately	50.3%	84.5%	83.7%	89.3%	94.0%	92.5%
Indicator 10: Change in status and ISP revision	74.8%	83.5%	84.1%	90.0%	93.5%	90.8%

Because the two components of Indicator 3 are different, the CMSC splits the indicator into two parts when reviewing results. Table 5 displays the results for Indicator 3a and Indicator 3b.

Table 5: Indicators 3a and 3b

Component	FY2024	FY2025	FY2026
Indicator 3a. Specific and measurable outcomes	99.8%	100.0%	100.0%
Indicator 3b. Employment discussion and facilitation	68.8%	81.8%	82.5%

Reported compliance for Indicator 3a remained very high. There was an improvement in reported compliance for Indicator 3b; however, the percentage was below the target of 86%. More information will appear below in the Indicator Detail section.

Look Behind and OCQI Interrater Results

The Maxwell RE coefficient ranges from -1 (perfect disagreement) to 0 (no agreement beyond what is expected by chance) to 1 (perfect agreement). Scores in between those values can be interpreted on a spectrum; cutoff scores are arbitrary, as there is no consequential difference between a value of 0.599 and 0.600, for example. However, for easier interpretation, scores were coded with the following color scheme:

Category	Range
No agreement	< 0
Weak agreement	0.00 to 0.39
Moderate agreement	0.40 to 0.59
Substantial agreement	0.60 to 1

The coefficient is related to percent agreement, but also depends on the number of choices available for each item. Therefore, two items may have identical percent agreement scores but different Maxwell RE values.

Some indicators are composed of multiple items, meaning that an indicator could have been scored as “met” for different reasons. For example, on Indicator 5, one reviewer might say there were no disagreements, while the other might say a disagreement had been resolved successfully.

OCQI Interrater Results

The interrater results for the 50 records scored by two OCQI reviewers are displayed in Table 6.

Table 6: OCQI Interrater Results for FY2021-FY2026

Indicators	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026
Old Indicator 1: Signed choice form	0.96	0.94	NA	NA	NA	NA
Old Indicator 2: Choice of SC and DD Waiver providers	0.84	0.97	NA	NA	NA	NA
Old Indicator 3: Specific and measurable outcomes	0.44	NA	NA	NA	NA	NA
Indicator 1: Signed choice form and individual offered a choice of support coordinator	0.88	0.94	1.00	1.00	1.00	1.00
Indicator 2: Signed choice form and individual offered a choice of DD Waiver providers	0.96	0.92	1.00	1.00	0.96	1.00
Indicator 3: Specific and measurable outcomes, meaningful employment discussion, employment facilitation	NA	0.82	0.64	0.80	0.72	0.88
Indicator 4: Participation in the development of Part IV of PC ISP	0.56	0.85	0.52	0.88	0.84	1.00
Indicator 5: Disagreement and resolution in Part IV of PC ISP	0.88	0.96	1.00	1.00	1.00	1.00
Indicator 6: PC ISP addresses risks, needs, and preferences	0.88	0.88	0.80	0.72	0.52	0.92
Indicator 7: Risk awareness and risk mediation plan	0.64	0.82	0.80	0.64	0.48	0.76
Indicator 8: Linkages, referrals, and service authorizations	0.96	0.97	0.92	0.96	0.92	1.00
Indicator 9: Services implemented appropriately	0.52	0.91	1.00	0.80	0.84	1.00
Indicator 10: Change in status and ISP revision	0.60	0.85	0.96	0.68	0.96	0.88

Look Behind Results

The Look Behind compares OCQI scores with the self-reported CSB scores. Table 7 shows the results of the Look Behind.

Table 7: Look Behind Results for FY2021-FY2026.

Indicators	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026
Old Indicator 1: Signed choice form	0.84	0.78	NA	NA	NA	NA
Old Indicator 2: Choice of SC and DD	0.64	0.58	NA	NA	NA	NA
Waiver providers						
Old Indicator 3: Specific and measurable outcomes	-0.08	NA				
Indicator 1: Signed choice form and individual offered a choice of support coordinator	0.72	0.64	0.68	0.86	0.88	0.92
Indicator 2: Signed choice form and individual offered a choice of DD	0.84	0.81	0.78	0.90	0.90	0.88
Waiver providers						
Indicator 3: Specific and measurable outcomes, meaningful employment discussion, employment facilitation	NA	0.38	0.60	0.72	0.68	0.72
Indicator 4: Participation in the development of Part IV of PC ISP	0.58	0.70	0.48	0.86	0.72	0.74
Indicator 5: Disagreement and resolution in Part IV of PC ISP	0.90	1.00	1.00	1.00	1.00	1.00
Indicator 6: PC ISP addresses risks, needs, and preferences	0.50	0.52	0.38	0.28	0.38	0.46
Indicator 7: Risk awareness and risk mediation plan	0.50	0.44	0.46	0.28	0.40	0.60
Indicator 8: Linkages, referrals, and service authorizations	0.76	0.94	0.94	0.94	0.78	0.96
Indicator 9: Services implemented appropriately	0.26	0.68	0.66	0.62	0.78	0.88
Indicator 10: Change in status and ISP revision	0.52	0.64	0.68	0.52	0.92	0.84

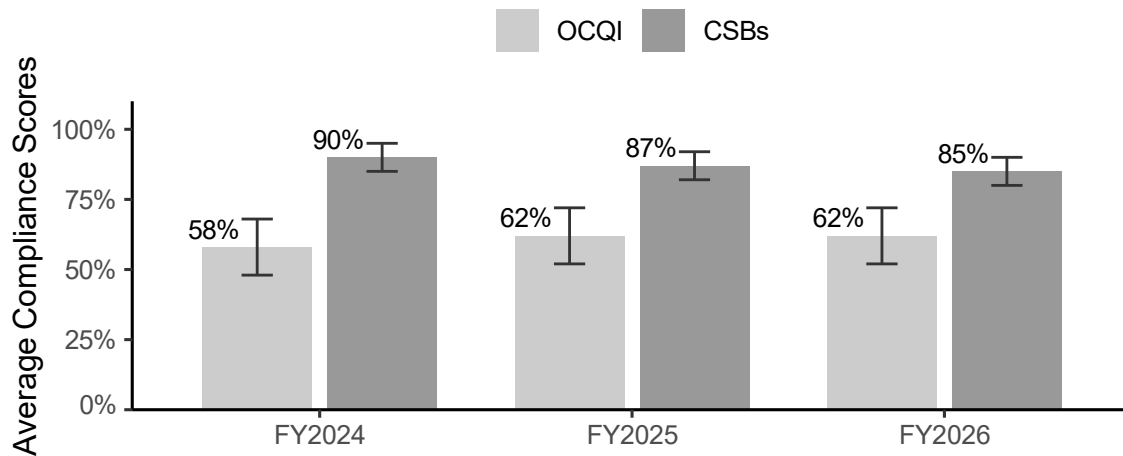
Interpreting the Look Behind Results

While CSB-reported compliance declined slightly in FY2026, the improvement in the Look Behind suggests that this trend does not reflect a decline in the quality of records.

Instead, the dip in CSB-reported compliance is the result of CSB reviewers and OCQI specialists moving toward alignment on when certain indicators should be scored as met.

The trajectory of the Indicator 6 results demonstrates this trend. Figure 1 shows average compliance found in the 100 records reviewed by OCQI, compared with compliance reported by CSBs. The error bars are wider for the Look Behind because the sub-sample reviewed by OCQI is smaller than the main sample of 400.

Figure 1. Indicator 6: Average Scores

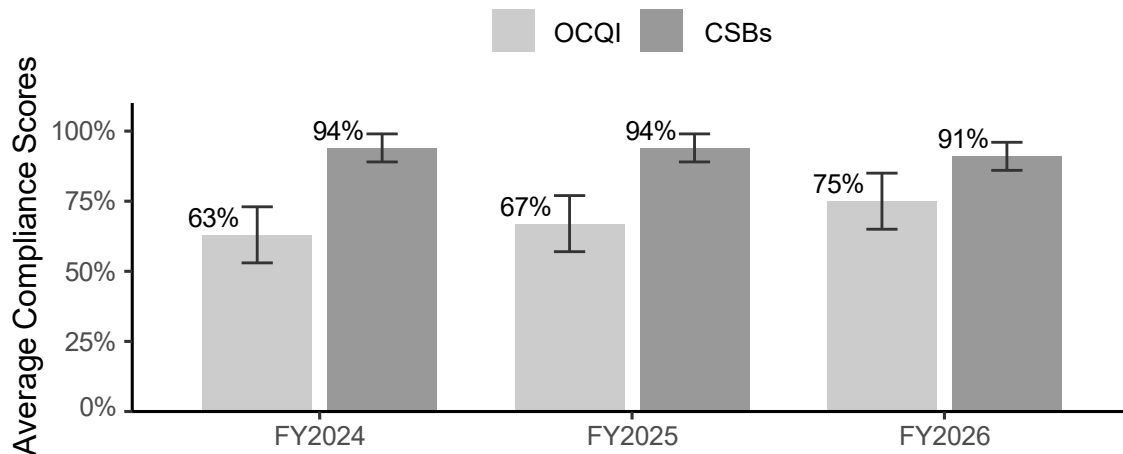


The figure shows that as the average compliance reported by CSBs has decreased, it has moved closer to the average score found by OCQI.

Last year's level of compliance reported by CSBs was above the target of 86%, but the indicator was not reliable. In FY2026, the indicator reached the level of "moderate" agreement and moved closer to the average score found by OCQI, meaning that the results are more meaningful this year.

Indicator 7 shows a similar trend:

Figure 2. Indicator 7: Average Scores



While remaining above 86%, compliance scores have declined slightly. However, average compliance found by OCQI has risen by over ten percentage points in the past three years, and this indicator reached the "substantial" level of agreement for the first time in FY2026.

Improvement Plans

The CMSC requested Improvement Plans from CSBs that reported two or more indicators below 65% compliance, excluding indicators that do not achieve substantial or moderate agreement between CSBs and OCQI. This year, all ten indicators achieved these agreement levels, and all indicators were included.

CSBs Meeting Criteria for Improvement Plans

CSB

Blue Ridge Behavioral Healthcare

Greater Reach

Norfolk Community Services Board

Richmond Behavioral Health Authority

Indicator Detail

Indicator 1



Question	CSB Responses	Look Behind	OCQI Agreement
Q19. Is there a signed Virginia Informed Choice (VIC) DMAS 460 form for the current PC ISP?	NO 11 (3%) YES 389 (97%)	Agreement 97% Maxwell RE 0.94	Agreement 100% Maxwell RE 1
Q21. Does the completed VIC confirm that the individual was offered a choice of.....support coordinator (named)?	NO 11 (3%) No to Q19 5 (1%) YES 384 (96%)	Agreement 93% Maxwell RE 0.9	Agreement 100% Maxwell RE 1
Indicator 1	Met 381 (95%) Not met 19 (5%)	Agreement 96% Maxwell RE 0.92	Agreement 100% Maxwell RE 1

Indicator 1: Look Behind

	CSB met	CSB not met
OCQI met	93	1
OCQI not met	3	3

Indicator 1 requires the CSB to respond “Yes” for both Q19 (signed form) and the first part of Q21 (choice of Support Coordinator). Agreement was in the substantial range for both items. When OCQI disagreed that the indicator was met, it was because the SC name either could not be located (1 record), the agency name was listed rather than the SC (1 record), or the SC was named for the following ISP year but not the current one (1 record).

Indicator 2



Question	CSB Responses	Look Behind	OCQI Agreement
Q19. Is there a signed Virginia Informed Choice (VIC) DMAS 460 form for the current PC ISP?	NO 11 (3%) YES 389 (97%)	Agreement 97% Maxwell RE 0.94	Agreement 100% Maxwell RE 1
Q21. Does the completed VIC confirm that the individual was offered a choice of.....DD Waiver providers?	NO 11 (3%) No to Q19 5 (1%) YES 384 (96%)	Agreement 93% Maxwell RE 0.9	Agreement 100% Maxwell RE 1
Indicator 2	Met 381 (95%) Not met 19 (5%)	Agreement 94% Maxwell RE 0.88	Agreement 100% Maxwell RE 1

Indicator 2: Look Behind

	CSB met	CSB not met
OCQI met	93	4
OCQI not met	2	1

Indicator 2 requires the CSB to respond “Yes” for both Q19 (signed form) and the second part of Q21 (choice of DD waiver providers). Agreement was high for both items. When disagreement did occur, it was more likely to be because OCQI marked that it was met, while the CSB had marked it as not met (4 records).

Indicator 3



Question	CSB Responses	Look Behind	OCQI Agreement
Individuals aged 14-64: Q28. Indicate which of the following elements of a meaningful discussion regarding employment were evident within the PC ISP Essential Information section. - Employment interests	In ISP-EI Section 332 (83%) No evidence 17 (4%) Not in age range 51 (13%)	Agreement 97% Maxwell RE 0.96	Agreement 100% Maxwell RE 1
Individuals aged 14-64: Q28. Indicate which of the following elements of a meaningful discussion regarding employment were evident within the PC ISP Essential Information section. - Available employment options	In ISP-EI Section 319 (80%) No evidence 30 (8%) Not in age range 51 (13%)	Agreement 94% Maxwell RE 0.91	Agreement 100% Maxwell RE 1

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
Q28b - Satisfaction or dissatisfaction with current EMPLOYMENT services, as applicable	In ISP-EI Section 171 (43%) N/A 166 (42%) No evidence 12 (3%) Not in age range 51 (13%)	Agreement 62% Maxwell RE 0.49	Agreement 78% Maxwell RE 0.71
. - Potential barriers related to pursuing employment options	In ISP-EI Section 321 (80%) No evidence 28 (7%) Not in age range 51 (13%)	Agreement 97% Maxwell RE 0.96	Agreement 100% Maxwell RE 1
Q28d - Addressing of barriers, as applicable	In ISP-EI Section 265 (66%) N/A 66 (16%) No evidence 18 (4%) Not in age range 51 (13%)	Agreement 89% Maxwell RE 0.85	Agreement 94% Maxwell RE 0.92
. - Timeline for reviewing options in the future (at least annually)	In ISP-EI Section 332 (83%) No evidence 17 (4%) Not in age range 51 (13%)	Agreement 98% Maxwell RE 0.97	Agreement 100% Maxwell RE 1
Q28f - Any future actions related to employment	In ISP-EI Section 231 (58%) N/A 94 (24%) No evidence 24 (6%) Not in age range 51 (13%)	Agreement 74% Maxwell RE 0.65	Agreement 90% Maxwell RE 0.87
AGES 14-17 only: Q30: Indicate which of the following elements of a meaningful discussion regarding employment were evident within the PC ISP Essential Information section. - Activities the individual is working on at home/school that may lead to employment	In EI Section 10 (2%) NO evidence 3 (1%) Not in age range 387 (97%)	Agreement 99% Maxwell RE 0.98	Agreement 100% Maxwell RE 1

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
AGES 14-17 only: Q30: Indicate which of the following elements of a meaningful discussion regarding employment were evident within the PC ISP Essential Information section. - Alternative Funding Sources	In EI Section 9 (2%) NO evidence 4 (1%) Not in age range 387 (97%)	Agreement 99% Maxwell RE 0.98	Agreement 100% Maxwell RE 1
AGES 18-64 ONLY: IF YES to any Q28 element: Q32. Is there evidence that the SC/CM facilitated access to employment by developing an outcome with related key steps in the current ISP?	NO 11 (3%) Not Applicable: Individual/SDM is not interested in pursuing employment through a formal outcome or service 246 (62%) Not in age range 69 (17%) YES 74 (18%)	Agreement 92% Maxwell RE 0.89	Agreement 88% Maxwell RE 0.84
Q48. Do the shared outcomes in the PC ISP Part III include key steps to achieve each outcome and a target date by which to achieve each outcome?	YES 400 (100%)	Agreement 99% Maxwell RE 0.98	Agreement 100% Maxwell RE 1
Indicator 3	Met 330 (82%) Not met 70 (18%)	Agreement 86% Maxwell RE 0.72	Agreement 94% Maxwell RE 0.88

Indicator 3: Look Behind

	CSB met	CSB not met
OCQI met	79	11
OCQI not met	3	7

For Indicator 3 to be met, Q48 must be “Yes” for all individuals. The requirements for employment discussion and facilitation depend on the age of the individual.

For individuals age 14-64, Q28 must be “Yes” for “Available employment options”, “Potential barriers related to pursuing employment options”, and “Timeline for reviewing options in the future, at least annually.” Q28 must be either “Yes” or “Not applicable” for “Satisfaction or dissatisfaction with current employment services”, “Addressing of barriers”, and “Any further actions related to employment.”

For individuals age 14-17, both parts of Q30 must be “Yes.”

For individuals age 18-64, Q32 (facilitation) must be either “Yes” or “Not applicable.”

Agreement for Indicator 3 was in the substantial range, with most of the disagreement occurring in the direction of CSBs scoring Not met, while OCQI marked the indicator met. For these records, the most common reasons for CSBs to score the indicator as not met were related to how to document the conversation when the individual is not interested in employment.

Indicator 4

90%			10%	Met
				Not met
Question	CSB Responses	Look Behind	OCQI Agreement	
Q27. Does the individual have a substitute decision maker (SDM) identified in the current person-centered Individual Support Plan (PC ISP) Part II-Representation?	NO 134 (34%) YES 266 (66%)	Agreement 91% Maxwell RE 0.82	Agreement 82% Maxwell RE 0.64	
Q54. Which of the following professionals and nonprofessionals who are important to the individual being served aided in the development of the current PC ISP? (Select all that apply.) - Individual	NO 17 (4%) YES 383 (96%)	Agreement 96% Maxwell RE 0.92	Agreement 100% Maxwell RE 1	
. - Substitute Decision Maker	N/A 127 (32%) NO 8 (2%) YES 265 (66%)	Agreement 89% Maxwell RE 0.84	Agreement 82% Maxwell RE 0.64	
. - Support Coordinator	YES 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1	
. - Service Providers	N/A 38 (10%) NO 16 (4%) YES 346 (86%)	Agreement 85% Maxwell RE 0.78	Agreement 92% Maxwell RE 0.84	
Indicator 4	Met 361 (90%) Not met 39 (10%)	Agreement 87% Maxwell RE 0.74	Agreement 100% Maxwell RE 1	

Indicator 4: Look Behind

	CSB met	CSB not met
OCQI met	85	11
OCQI not met	2	2

Indicator 4 requires the individual and Support Coordinator to participate in the PC ISP. If the individual has a substitute decision maker (SDM) indicated in Q27, and/or service providers, they are also required to participate.

Agreement for this indicator was in the substantial range. Most of the disagreement occurred when CSBs marked the indicator as not met, and OCQI marked it as met (11 records). There were only two instances of the CSB marking the indicator met with OCQI disagreeing. The reasons for disagreement were varied and included missing signatures and one or more providers not attending the meeting.

Indicator 5

100%	Met
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Question	CSB Responses	Look Behind	OCQI Agreement
Q50. Is there indication in Part IV of the current PC ISP that any objections occurred while developing and/or revising the PC ISP?	NO 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
IF YES to Q50: Q51. Is there documentation in Part IV of the PC ISP indicating that the SC/CM had a plan to address the objection?	NA 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
Indicator 5	Met 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1

Indicator 5: Look Behind

CSB met	
OCQI met	100

Indicator 5 is considered met if the reviewer indicates that no disagreements occurred (Q50), or that all disagreements were either addressed, or could not be resolved (Q51). All records were scored as meeting this indicator, and there was perfect agreement between OCQI and CSBs.

Indicator 6

85%	15%	Met	Not met
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Question	CSB Responses	Look Behind	OCQI Agreement
Q62. PC ISP includes/addresses the following: - ALL outcomes/supports to address the individual's identified risks indicated on the SIS or Part 2 Essential Information are found in the Part 3 Outcomes or Essential Supports section of the PC ISP	NO 45 (11%) YES 339 (85%) NA 16 (4%)	Agreement 70% Maxwell RE 0.55	Agreement 90% Maxwell RE 0.85
Q62. PC ISP includes/addresses the following: - ALL potential risks and actions to be taken to confirm/address any potential risks	NO 15 (4%) YES 375 (94%) NA 10 (2%)	Agreement 90% Maxwell RE 0.85	Agreement 80% Maxwell RE 0.7
Q62. PC ISP includes/addresses the following: - the individual's behavioral needs	NO 28 (7%) YES 280 (70%) NA 92 (23%)	Agreement 67% Maxwell RE 0.5	Agreement 92% Maxwell RE 0.88
Q62. PC ISP includes/addresses the following: - the individual's medical needs	NO 31 (8%) YES 324 (81%) NA 45 (11%)	Agreement 79% Maxwell RE 0.69	Agreement 84% Maxwell RE 0.76

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
. - the individual's preferences	NO 3 (1%) YES 397 (99%)	Agreement 98% Maxwell RE 0.96	Agreement 98% Maxwell RE 0.96
Indicator 6	Met 340 (85%) Not met 60 (15%)	Agreement 73% Maxwell RE 0.46	Agreement 96% Maxwell RE 0.92

Indicator 6: Look Behind

	CSB met	CSB not met
OCQI met	59	3
OCQI not met	24	14

Indicator 6 requires the reviewer to answer “Yes” or “NA” to all elements of Q62. “NA” is an option for all items except for the individual's preferences.

Agreement was in the moderate range for this indicator, an increase from FY2025 when it was in the weak range. However, OCQI reviewers disagreed that the indicator was met on a number of records (23 records). The reasons for marking the indicator not met were that one or more items were missing from Part III, in particular items from the SIS. Items that were missed included depression, emotional outbursts, property destruction, stealing, UTI, wandering, inappropriate sexual behavior, and self-injury.

Indicator 7



Question	CSB Responses	Look Behind	OCQI Agreement
Q60. Did the SC review and document the individual's identified and potential risks in the PC ISP?	NO 10 (2%) YES 390 (98%)	Agreement 97% Maxwell RE 0.94	Agreement 98% Maxwell RE 0.96
Considering all parts of the ISP (Parts 1-5), were all identified and potential risks addressed?	NO 35 (9%) Not applicable: No risks were identified. 4 (1%) YES 361 (90%)	Agreement 80% Maxwell RE 0.6	Agreement 86% Maxwell RE 0.79
Indicator 7	Met 364 (91%) Not met 36 (9%)	Agreement 80% Maxwell RE 0.6	Agreement 88% Maxwell RE 0.76

Indicator 7: Look Behind

	CSB met	CSB not met
OCQI met	73	2
OCQI not met	18	7

For Indicator 7 to be met, Q60 (Identified and potential risks) must be “Yes,” and Q64 must be either “Yes” or “Not applicable: No risks are identified.” Agreement was in the substantial range for the first time since the question appeared in its current form.

When reviewers disagreed, the reasons were that one or more risks was missing. These were most often behavioral risks identified on the SIS.

Indicator 8

94%			6%	Met	Not met
Question	CSB Responses	Look Behind	OCQI Agreement		
Q69. Is there documentation that the SC/CM made linkages, referrals, and service authorizations, based on shared outcomes, identified in SC progress notes for the PC ISP?	NO 22 (6%) YES 378 (94%)	Agreement 98% Maxwell RE 0.96	Agreement 100% Maxwell RE 1		
Indicator 8	Met 378 (94%) Not met 22 (6%)	Agreement 98% Maxwell RE 0.96	Agreement 100% Maxwell RE 1		

Indicator 8: Look Behind

	CSB met	CSB not met
OCQI met	98	2

Indicator 8 requires Q69 to be “Yes.” Agreement was in the substantial range for this indicator. OCQI reviewers scored all records in the Look Behind as met; the disagreement that did occur came from two of the records being marked as not met by the CSBs.

Indicator 9

92%			8%	Met	Not met
Question	CSB Responses	Look Behind	OCQI Agreement		
Q73. Between 6/1/2025-12/31/2025, was there an OSVT completed at least once quarterly for TCM OR once monthly for ECM?	NO 29 (7%) YES 371 (93%)	Agreement 95% Maxwell RE 0.9	Agreement 100% Maxwell RE 1		
Q82. Was there any indication of a service not being implemented appropriately?	NO 378 (94%) YES 22 (6%)	Agreement 93% Maxwell RE 0.86	Agreement 98% Maxwell RE 0.96		

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
If YES to Q82 Q85 If services are noted as not implemented appropriately, is there information regarding this in the corresponding progress note?	All services implemented appropriately 13 (3%) NO 2 (0%) YES 7 (2%) NA 378 (94%)	Agreement 93% Maxwell RE 0.91	Agreement 96% Maxwell RE 0.94
If YES to Q82 Q86 If services are noted as not being implemented appropriately, was the ISP revised to reflect the change?	All services implemented appropriately 13 (3%) Services not implemented appropriately but no revision needed 8 (2%) YES 1 (0%) NA 378 (94%)	Agreement 93% Maxwell RE 0.91	Agreement 96% Maxwell RE 0.94
Indicator 9	Met 370 (92%) Not met 30 (8%)	Agreement 94% Maxwell RE 0.88	Agreement 100% Maxwell RE 1

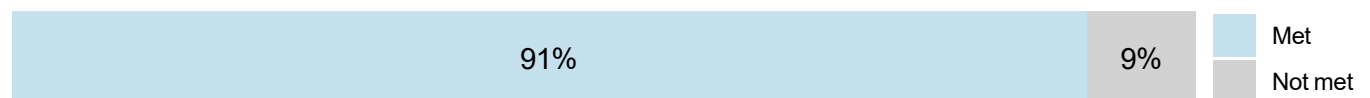
Indicator 9: Look Behind

	CSB met	CSB not met
OCQI met	87	1
OCQI not met	5	7

For Indicator 9, Q73 (OSVT completion) must be Yes. If Q82 (service not implemented appropriately) is Yes, Q85 must not be No, and Q86 must not be No.

Agreement was in the substantial range for Indicator 9. Most of the disagreement that did occur was on Q73, with OCQI reviewers noting that one or more OSVTs was missing.

Indicator 10



Question	CSB Responses	Look Behind	OCQI Agreement
Q73. Between 6/1/2025-12/31/2025, was there an OSVT completed at least once quarterly for TCM OR once monthly for ECM?	NO 29 (7%) YES 371 (93%)	Agreement 95% Maxwell RE 0.9	Agreement 100% Maxwell RE 1

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
Q76. Was there any indication of a change in status taking place on the last two OSVTs?	NO 356 (89%) YES 44 (11%)	Agreement 91% Maxwell RE 0.82	Agreement 94% Maxwell RE 0.88
If YES to Q76: Q79. If there is a change in status indicated on the last two OSVTs, is there information regarding this change in the corresponding progress note?	NO 4 (1%) No change 12 (3%) YES 28 (7%) NA 356 (89%)	Agreement 91% Maxwell RE 0.88	Agreement 90% Maxwell RE 0.87
If YES to Q76: Q80. If there is a change in status indicated on the last two OSVTs, was the ISP revised to reflect the change?	Change noted but no revision needed 19 (5%) NO 8 (2%) No change in status indicated 12 (3%) YES 5 (1%) NA 356 (89%)	Agreement 89% Maxwell RE 0.85	Agreement 90% Maxwell RE 0.87
Indicator 10	Met 363 (91%) Not met 37 (9%)	Agreement 92% Maxwell RE 0.84	Agreement 94% Maxwell RE 0.88

Indicator 10: Look Behind

	CSB met	CSB not met
OCQI met	85	3
OCQI not met	5	7

Indicator 10, like Indicator 9, requires all OSVTs to be present (Q73). If there is a change in status (Q76), it must be addressed in the progress note (Q79), and the ISP must be revised if needed (Q80).

Agreement was in the substantial range for this indicator. When reviewers disagreed, it was primarily because one reviewer did not find all of the OSVTs required for Q73. (These are the same records that contributed to disagreement found for Indicator 9.)

Conclusion

The results to the FY2026 SCQR show that it continues to be an effective tool for quality improvement. While the number of records scored as being in compliance dropped slightly (2 percentage points) from the previous year, the increase in agreement with OCQI reviewers indicates that the slight reduction is actually a positive development. CSBs are scoring more accurately, and for the first time, 9 out of 10 indicators are in the substantial range for interrater reliability. The CMSC will work with CSBs to further improve reliability and compliance in the next cycle.

Appendix

Question	CSB Responses	Look Behind	OCQI Agreement
Between 3/16/2025-12/31/2025, how many SC/CMs have been assigned to provide services to this? (Use the slider below.) - 21	0 1 (0%) 1 255 (64%) 2 118 (30%) 3 22 (6%) 4 4 (1%)	Agreement 71% Maxwell RE 0.61	Agreement 80% Maxwell RE 0.6
Q9. Is documentation supporting a developmental disability diagnosis present?	NO 2 (0%) YES 398 (100%)	Agreement 99% Maxwell RE 0.98	Agreement 100% Maxwell RE 1
Q11. Is there a Virginia Individual Developmental Disability Eligibility Survey (VIDES) in the record that was completed for the current PC ISP?	YES 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
Q13. Is there documentation that the individual was given a choice of institutional care or home- and community-based services?	NO 9 (2%) YES 391 (98%)	Agreement 99% Maxwell RE 0.98	Agreement 98% Maxwell RE 0.96
Q15. Was the Supports Intensity Scale© (SIS©) completed as appropriate for Waiver? - Selected Choice	NO (Please explain) 45 (11%) YES 355 (89%)	Agreement 85% Maxwell RE 0.7	Agreement 90% Maxwell RE 0.8
If NO to Q15: Q16. Was the most recent SIS used to develop or update the plan? - Selected Choice	NO (Please explain) 12 (3%) YES 33 (8%) NA 355 (89%)	Agreement 82% Maxwell RE 0.73	Agreement 90% Maxwell RE 0.85
Q17. If there was a significant change in status evidenced by 6 months of documentation, is there documentation demonstrating that a SIS© update has been requested?	NO 3 (1%) Not applicable: no update was necessary / no change in status 396 (99%) YES 1 (0%)	Agreement 98% Maxwell RE 0.96	Agreement 100% Maxwell RE 1
Q19. Is there a signed Virginia Informed Choice (VIC) DMAS 460 form for the current PC ISP?	NO 11 (3%) YES 389 (97%)	Agreement 97% Maxwell RE 0.94	Agreement 100% Maxwell RE 1
Q21. Does the completed VIC confirm that the individual was offered a choice of.....support coordinator (named)?	NO 11 (3%) No to Q19 5 (1%) YES 384 (96%)	Agreement 93% Maxwell RE 0.9	Agreement 100% Maxwell RE 1
Q21. Does the completed VIC confirm that the individual was offered a choice of.....DD Waiver providers?	NO 11 (3%) No to Q19 5 (1%) YES 384 (96%)	Agreement 93% Maxwell RE 0.9	Agreement 100% Maxwell RE 1

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
Q23. Is there documentation completed within the last 12 months that demonstrates that the individual was informed of their human rights and provided with the name of the local Ofce of Human Rights Advocate, contact information for the OHR, a description of the OHR's role, and information regarding how to file a human rights complaint?	NO 31 (8%) YES 369 (92%)	Agreement 91% Maxwell RE 0.82	Agreement 98% Maxwell RE 0.96
Q25. What is the status of the current PC ISP (Parts I through IV) in WaMS?	ISP Completed 89 (22%) Pending Provider Completion 310 (78%) Pending Support Coordinator Input 1 (0%)	Agreement 93% Maxwell RE 0.9	Agreement 98% Maxwell RE 0.96
Q27. Does the individual have a substitute decision maker (SDM) identified in the current person-centered Individual Support Plan (PC ISP) Part II-Representation?	NO 134 (34%) YES 266 (66%)	Agreement 91% Maxwell RE 0.82	Agreement 82% Maxwell RE 0.64
Individuals aged 14-64: Q28. Indicate which of the following elements of a meaningful discussion regarding employment were evident within the PC ISP Essential Information section. - Employment interests	In ISP-EI Section 332 (83%) No evidence 17 (4%) Not in age range 51 (13%)	Agreement 97% Maxwell RE 0.96	Agreement 100% Maxwell RE 1
Individuals aged 14-64: Q28. Indicate which of the following elements of a meaningful discussion regarding employment were evident within the PC ISP Essential Information section. - Available employment options	In ISP-EI Section 319 (80%) No evidence 30 (8%) Not in age range 51 (13%)	Agreement 94% Maxwell RE 0.91	Agreement 100% Maxwell RE 1
Q28b - Satisfaction or dissatisfaction with current EMPLOYMENT services, as applicable	In ISP-EI Section 171 (43%) N/A 166 (42%) No evidence 12 (3%) Not in age range 51 (13%)	Agreement 62% Maxwell RE 0.49	Agreement 78% Maxwell RE 0.71

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
. - Potential barriers related to pursuing employment options	In ISP-EI Section 321 (80%) No evidence 28 (7%) Not in age range 51 (13%)	Agreement 97% Maxwell RE 0.96	Agreement 100% Maxwell RE 1
Q28d - Addressing of barriers, as applicable	In ISP-EI Section 265 (66%) N/A 66 (16%) No evidence 18 (4%) Not in age range 51 (13%)	Agreement 89% Maxwell RE 0.85	Agreement 94% Maxwell RE 0.92
. - Timeline for reviewing options in the future (at least annually)	In ISP-EI Section 332 (83%) No evidence 17 (4%) Not in age range 51 (13%)	Agreement 98% Maxwell RE 0.97	Agreement 100% Maxwell RE 1
Q28f - Any future actions related to employment	In ISP-EI Section 231 (58%) N/A 94 (24%) No evidence 24 (6%) Not in age range 51 (13%)	Agreement 74% Maxwell RE 0.65	Agreement 90% Maxwell RE 0.87
AGES 14-17 only: Q30: Indicate which of the following elements of a meaningful discussion regarding employment were evident within the PC ISP Essential Information section. - Activities the individual is working on at home/school that may lead to employment	In EI Section 10 (2%) NO evidence 3 (1%) Not in age range 387 (97%)	Agreement 99% Maxwell RE 0.98	Agreement 100% Maxwell RE 1
AGES 14-17 only: Q30: Indicate which of the following elements of a meaningful discussion regarding employment were evident within the PC ISP Essential Information section. - Alternative Funding Sources	In EI Section 9 (2%) NO evidence 4 (1%) Not in age range 387 (97%)	Agreement 99% Maxwell RE 0.98	Agreement 100% Maxwell RE 1

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
AGES 18-64 ONLY: IF YES to any Q28 element: Q32. Is there evidence that the SC/CM facilitated access to employment by developing an outcome with related key steps in the current ISP?	NO 11 (3%) Not Applicable: Individual/SDM is not interested in pursuing employment through a formal outcome or service 246 (62%) Not in age range 69 (17%) YES 74 (18%)	Agreement 92% Maxwell RE 0.89	Agreement 88% Maxwell RE 0.84
IF NA is selected for Q32: Q34. Is the reason the individual is not interested in pursuing employment through a formal goal or service documented as one of the following in the ISP or progress notes? (CHECK ALL THAT APPLY) - Individual is currently employed	Yes 5 (1%) NA 395 (99%)	Agreement 100% Maxwell RE 1	Agreement 98% Maxwell RE 0.96
IF NA is selected for Q32: Q34. Is the reason the individual is not interested in pursuing employment through a formal goal or service documented as one of the following in the ISP or progress notes? (CHECK ALL THAT APPLY) - Individual receives employment services through paid support but does not want/need a formal goal	Yes 5 (1%) NA 395 (99%)	Agreement 97% Maxwell RE 0.94	Agreement 100% Maxwell RE 1
IF NA is selected for Q32: Q34. Is the reason the individual is not interested in pursuing employment through a formal goal or service documented as one of the following in the ISP or progress notes? (CHECK ALL THAT APPLY) - Individual needs regarding employment are met through natural supports	Yes 4 (1%) NA 396 (99%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
IF NA is selected for Q32: Q34. Is the reason the individual is not interested in pursuing employment through a formal goal or service documented as one of the following in the ISP or progress notes? (CHECK ALL THAT APPLY) - The individual was not interested in employment	Yes 234 (58%) NA 166 (42%)	Agreement 92% Maxwell RE 0.84	Agreement 92% Maxwell RE 0.84
IF "The individual was not interested in employment" is selected for Q34: Q35. Is the specific reason the individual is not interested in employment documented in the ISP?	NO 28 (7%) YES 206 (52%) NA 166 (42%)	Agreement 82% Maxwell RE 0.73	Agreement 84% Maxwell RE 0.76
Q36: Indicate which of the following elements of a meaningful discussion regarding integrated community involvement were evident within the PC ISP Essential Information section: - Community involvement interests	In EI Section 388 (97%) No evidence 12 (3%)	Agreement 98% Maxwell RE 0.96	Agreement 100% Maxwell RE 1
Q36: Indicate which of the following elements of a meaningful discussion regarding integrated community involvement were evident within the PC ISP Essential Information section: - Available community involvement options	In EI Section 383 (96%) No evidence 17 (4%)	Agreement 96% Maxwell RE 0.92	Agreement 100% Maxwell RE 1
. - Satisfaction or dissatisfaction with current CI/CE/CC services, as applicable	In EI Section 317 (79%) N/A 74 (18%) No evidence 9 (2%)	Agreement 65% Maxwell RE 0.48	Agreement 72% Maxwell RE 0.58
. - Potential barriers related to pursuing options	In EI Section 378 (94%) No evidence 22 (6%)	Agreement 96% Maxwell RE 0.92	Agreement 98% Maxwell RE 0.96
. - Addressing of barriers, as applicable	In EI Section 299 (75%) N/A 83 (21%) No evidence 18 (4%)	Agreement 88% Maxwell RE 0.82	Agreement 80% Maxwell RE 0.7
. - Timeline for reviewing options in the future (at least annually)	In EI Section 381 (95%) No evidence 19 (5%)	Agreement 97% Maxwell RE 0.94	Agreement 98% Maxwell RE 0.96

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
. - Any further actions related to integrated community involvement	In EI Section 303 (76%) N/A 70 (18%) No evidence 27 (7%)	Agreement 82% Maxwell RE 0.73	Agreement 94% Maxwell RE 0.91
Q38 Is there evidence in the record that the SC/CM facilitated access to integrated community involvement by developing an outcome with related key steps in the current ISP?	NO 38 (10%) Not Applicable: Individual/SDM is not interested in pursuing integrated community involvement through a formal outcome or service 54 (14%) YES 303 (76%) NA 5 (1%)	Agreement 79% Maxwell RE 0.72	Agreement 88% Maxwell RE 0.84
IF NO to Q38: Q39. Was there an outcome listed under a different life area, such as Community Living, that appeared to be appropriate for Integrated Community Involvement based on the activity and the ratio of staff to people supported?	NO 1 (0%) YES 37 (9%) NA 362 (90%)	Agreement 87% Maxwell RE 0.8	Agreement 88% Maxwell RE 0.82
If NA is selected for Q38: Q40: Is the reason the individual is not interested in pursuing integrated community involvement through a formal outcome or service documented as one of the following in the ISP or progress notes? (CHECK ALL THAT APPLY) - Individual currently employed in the community	Yes 6 (2%) NA 394 (98%)	Agreement 99% Maxwell RE 0.98	Agreement 100% Maxwell RE 1
If NA is selected for Q38: Q40: Is the reason the individual is not interested in pursuing integrated community involvement through a formal outcome or service documented as one of the following in the ISP or progress notes? (CHECK ALL THAT APPLY) - Individual participates in integrated community involvement either independently or through natural supports	Yes 26 (6%) NA 374 (94%)	Agreement 92% Maxwell RE 0.84	Agreement 94% Maxwell RE 0.88

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
If NA is selected for Q38: Q40: Is the reason the individual is not interested in pursuing integrated community involvement through a formal outcome or service documented as one of the following in the ISP or progress notes? (CHECK ALL THAT APPLY) - Individual participates in integrated community involvement through paid supports but without a formal outcome or service	Yes 27 (7%) NA 373 (93%)	Agreement 90% Maxwell RE 0.8	Agreement 98% Maxwell RE 0.96
If NA is selected for Q38: Q40: Is the reason the individual is not interested in pursuing integrated community involvement through a formal outcome or service documented as one of the following in the ISP or progress notes? (CHECK ALL THAT APPLY) - NONE OF THE ABOVE	Yes 2 (0%) NA 398 (100%)	Agreement 98% Maxwell RE 0.96	Agreement 98% Maxwell RE 0.96
Q42. Is it evident in the PC ISP that the SC/CM discussed relationships and interactions with people other than paid program staf?	NO 24 (6%) YES 376 (94%)	Agreement 97% Maxwell RE 0.94	Agreement 100% Maxwell RE 1
If YES to Q42: Q43. Is there evidence in the record that the SC/CM facilitated relationships and interactions with people other than paid program staf by developing an outcome or key steps in the current ISP?	NO 2 (0%) Not Applicable: Individual needs in this area are already met through natural supports and no formal outcome is desired 186 (46%) YES 188 (47%) NA 24 (6%)	Agreement 49% Maxwell RE 0.32	Agreement 66% Maxwell RE 0.55
Q45: Is there evidence in the Essential Information section of the PC ISP that the SC/CM discussed options for independent housing?	NO 5 (1%) YES 395 (99%)	Agreement 99% Maxwell RE 0.98	Agreement 98% Maxwell RE 0.96

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
IF YES TO Q45: Q46. Is there evidence that the SC/CM facilitated access to independent housing by developing an outcome or related key steps in the current ISP?	NO 2 (0%) Not applicable: The individual was already living independently. 28 (7%) Not applicable: The individual was not interested in living independently. 357 (89%) YES 8 (2%) NA 5 (1%)	Agreement 93% Maxwell RE 0.91	Agreement 92% Maxwell RE 0.9
Q48. Do the shared outcomes in the PC ISP Part III include key steps to achieve each outcome and a target date by which to achieve each outcome?	YES 400 (100%)	Agreement 99% Maxwell RE 0.98	Agreement 100% Maxwell RE 1
Q50. Is there indication in Part IV of the current PC ISP that any objections occurred while developing and/or revising the PC ISP?	NO 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
IF YES to Q50: Q51. Is there documentation in Part IV of the PC ISP indicating that the SC/CM had a plan to address the objection?	NA 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
Q54. Which of the following professionals and nonprofessionals who are important to the individual being served aided in the development of the current PC ISP? (Select all that apply.) - Individual	NO 17 (4%) YES 383 (96%)	Agreement 96% Maxwell RE 0.92	Agreement 100% Maxwell RE 1
. - Substitute Decision Maker	N/A 127 (32%) NO 8 (2%) YES 265 (66%)	Agreement 89% Maxwell RE 0.84	Agreement 82% Maxwell RE 0.64
. - Support Coordinator	YES 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
. - Service Providers	N/A 38 (10%) NO 16 (4%) YES 346 (86%)	Agreement 85% Maxwell RE 0.78	Agreement 92% Maxwell RE 0.84
. - Service Facilitator	N/A 278 (70%) NO 34 (8%) YES 88 (22%)	Agreement 63% Maxwell RE 0.44	Agreement 68% Maxwell RE 0.52

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
. - Other people important to the individual	N/A 263 (66%) NO 2 (0%) YES 135 (34%)	Agreement 62% Maxwell RE 0.24	Agreement 82% Maxwell RE 0.64
Q57. Are the following documents current and signed by the individual, and as applicable, a SDM? - PC ISP	NO 34 (8%) YES 366 (92%)	Agreement 94% Maxwell RE 0.88	Agreement 96% Maxwell RE 0.92
Q57. Are the following documents current and signed by the individual, and as applicable, a SDM? - SC/CM Part V	NO 37 (9%) YES 363 (91%)	Agreement 94% Maxwell RE 0.88	Agreement 98% Maxwell RE 0.96
Q58. Is there a SC/CM's signature present on the current ISP signature page? - PC ISP	NO 14 (4%) YES 386 (96%)	Agreement 98% Maxwell RE 0.96	Agreement 98% Maxwell RE 0.96
Q58. Is there a SC/CM's signature present on the current ISP signature page? - SC/CM Part V	NO 10 (2%) YES 390 (98%)	Agreement 97% Maxwell RE 0.94	Agreement 96% Maxwell RE 0.92
Q60. Did the SC review and document the individual's identified and potential risks in the PC ISP?	NO 10 (2%) YES 390 (98%)	Agreement 97% Maxwell RE 0.94	Agreement 98% Maxwell RE 0.96
Q62. PC ISP includes/addresses the following: - ALL outcomes/supports to address the individual's identified risks indicated on the SIS or Part 2 Essential Information are found in the Part 3 Outcomes or Essential Supports section of the PC ISP	NO 45 (11%) YES 339 (85%) NA 16 (4%)	Agreement 70% Maxwell RE 0.55	Agreement 90% Maxwell RE 0.85
Q62. PC ISP includes/addresses the following: - ALL potential risks and actions to be taken to confirm/address any potential risks	NO 15 (4%) YES 375 (94%) NA 10 (2%)	Agreement 90% Maxwell RE 0.85	Agreement 80% Maxwell RE 0.7
Q62. PC ISP includes/addresses the following: - the individual's behavioral needs	NO 28 (7%) YES 280 (70%) NA 92 (23%)	Agreement 67% Maxwell RE 0.5	Agreement 92% Maxwell RE 0.88
Q62. PC ISP includes/addresses the following: - the individual's medical needs	NO 31 (8%) YES 324 (81%) NA 45 (11%)	Agreement 79% Maxwell RE 0.69	Agreement 84% Maxwell RE 0.76
. - the individual's preferences	NO 3 (1%) YES 397 (99%)	Agreement 98% Maxwell RE 0.96	Agreement 98% Maxwell RE 0.96
Considering all parts of the ISP (Parts 1-5), were all identified and potential risks addressed?	NO 35 (9%) Not applicable: No risks were identified. 4 (1%) YES 361 (90%)	Agreement 80% Maxwell RE 0.6	Agreement 86% Maxwell RE 0.79
Q66. Did the individual meet Regional Support Team (RST) criteria at any point during the review period?	NO 398 (100%) YES 2 (0%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
IF YES to Q66: Q67. Did the SC/CM submit a RST referral to a CRC within the required time frame?	YES 2 (0%) NA 398 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
Q69. Is there documentation that the SC/CM made linkages, referrals, and service authorizations, based on shared outcomes, identified in SC progress notes for the PC ISP?	NO 22 (6%) YES 378 (94%)	Agreement 98% Maxwell RE 0.96	Agreement 100% Maxwell RE 1
Q71. Were the FOUR person-centered reviews completed prior to December 31, 2025, completed in a timely manner as required by Medicaid?	NO 65 (16%) YES 335 (84%)	Agreement 82% Maxwell RE 0.64	Agreement 92% Maxwell RE 0.84
Q73. Between 6/1/2025-12/31/2025, was there an OSVT completed at least once quarterly for TCM OR once monthly for ECM?	NO 29 (7%) YES 371 (93%)	Agreement 95% Maxwell RE 0.9	Agreement 100% Maxwell RE 1
Q75. Were all sections of the last TWO OSVTs, completed 1/1/25-12/31/25, complete? (No blanks except for questions that are not applicable.)	NO 11 (3%) YES 389 (97%)	Agreement 90% Maxwell RE 0.8	Agreement 94% Maxwell RE 0.88
Q76. Was there any indication of a change in status taking place on the last two OSVTs?	NO 356 (89%) YES 44 (11%)	Agreement 91% Maxwell RE 0.82	Agreement 94% Maxwell RE 0.88
Q77. Is the "Change in Status Determination" question (Q6) on the last two OSVTs completed accurately?	NO 10 (2%) YES 390 (98%)	Agreement 93% Maxwell RE 0.86	Agreement 94% Maxwell RE 0.88
If YES to Q76: Q79. If there is a change in status indicated on the last two OSVTs, is there information regarding this change in the corresponding progress note?	NO 4 (1%) No change 12 (3%) YES 28 (7%) NA 356 (89%)	Agreement 91% Maxwell RE 0.88	Agreement 90% Maxwell RE 0.87
If YES to Q76: Q80. If there is a change in status indicated on the last two OSVTs, was the ISP revised to reflect the change?	Change noted but no revision needed 19 (5%) NO 8 (2%) No change in status indicated 12 (3%) YES 5 (1%) NA 356 (89%)	Agreement 89% Maxwell RE 0.85	Agreement 90% Maxwell RE 0.87
Q82. Was there any indication of a service not being implemented appropriately?	NO 378 (94%) YES 22 (6%)	Agreement 93% Maxwell RE 0.86	Agreement 98% Maxwell RE 0.96

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
Q83. Is the "Summary of Services Implemented Appropriately" (Q14) completed accurately?	NO 17 (4%) YES 383 (96%)	Agreement 91% Maxwell RE 0.82	Agreement 96% Maxwell RE 0.92
If YES to Q82 Q85 If services are noted as not implemented appropriately, is there information regarding this in the corresponding progress note?	All services implemented appropriately 13 (3%) NO 2 (0%) YES 7 (2%) NA 378 (94%)	Agreement 93% Maxwell RE 0.91	Agreement 96% Maxwell RE 0.94
If YES to Q82 Q86 If services are noted as not being implemented appropriately, was the ISP revised to reflect the change?	All services implemented appropriately 13 (3%) Services not implemented appropriately but no revision needed 8 (2%) YES 1 (0%) NA 378 (94%)	Agreement 93% Maxwell RE 0.91	Agreement 96% Maxwell RE 0.94
Q88. Was a need for reporting indicated on the OSVTs?	NO 390 (98%) YES 10 (2%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
Q89. Was the need for reporting indicated correctly on the OSVT? - Selected Choice	NO (Please explain) 17 (4%) YES 383 (96%)	Agreement 95% Maxwell RE 0.9	Agreement 98% Maxwell RE 0.96
If YES to Q88 Q90. If a need for reporting was identified, is there information regarding this reporting need in the corresponding progress note including who is to be contacted?	NO 1 (0%) YES 9 (2%) NA 390 (98%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
Q92. For all items on the last two OSVTs, if there are additional actions noted as needing to be taken, did follow-up occur regarding these actions after that date?	NO 3 (1%) No additional actions needed 382 (96%) YES 15 (4%)	Agreement 96% Maxwell RE 0.94	Agreement 96% Maxwell RE 0.94
Q94. You selected [QID7-ChoiceGroup-SelectedChoices] as the individual's CSB/BHA. Is this correct?	Yes 400 (100%)	Agreement 99% Maxwell RE 0.98	Agreement 98% Maxwell RE 0.96

(continued)

Question	CSB Responses	Look Behind	OCQI Agreement
Do you want to send the submission confirmation to [QID2-ChoiceTextEntryValue]?	No 19 (5%) Yes 377 (94%) NA 4 (1%)	Agreement 72% Maxwell RE 0.58	Agreement 70% Maxwell RE 0.55
Indicator 1	Met 381 (95%) Not met 19 (5%)	Agreement 96% Maxwell RE 0.92	Agreement 100% Maxwell RE 1
Indicator 2	Met 381 (95%) Not met 19 (5%)	Agreement 94% Maxwell RE 0.88	Agreement 100% Maxwell RE 1
Indicator 3	Met 330 (82%) Not met 70 (18%)	Agreement 86% Maxwell RE 0.72	Agreement 94% Maxwell RE 0.88
Indicator 4	Met 361 (90%) Not met 39 (10%)	Agreement 87% Maxwell RE 0.74	Agreement 100% Maxwell RE 1
Indicator 5	Met 400 (100%)	Agreement 100% Maxwell RE 1	Agreement 100% Maxwell RE 1
Indicator 6	Met 340 (85%) Not met 60 (15%)	Agreement 73% Maxwell RE 0.46	Agreement 96% Maxwell RE 0.92
Indicator 7	Met 364 (91%) Not met 36 (9%)	Agreement 80% Maxwell RE 0.6	Agreement 88% Maxwell RE 0.76
Indicator 8	Met 378 (94%) Not met 22 (6%)	Agreement 98% Maxwell RE 0.96	Agreement 100% Maxwell RE 1
Indicator 9	Met 370 (92%) Not met 30 (8%)	Agreement 94% Maxwell RE 0.88	Agreement 100% Maxwell RE 1
Indicator 10	Met 363 (91%) Not met 37 (9%)	Agreement 92% Maxwell RE 0.84	Agreement 94% Maxwell RE 0.88