

# NC Tailored Plan Assessment & Reassessment Protocol

This resource aligns with North Carolina Tailored Plan requirements for initial assessments and reassessments. It provides structured guidance to ensure timely, comprehensive care planning and documentation across behavioral health, physical health, and social determinants of health.

## Initial Assessment Requirements

- Must be completed within 60–90 days of enrollment into Tailored Plan care management.
- Incorporates behavioral health, physical health, and social determinants of health.
- Identifies member strengths, preferences, risks, and unmet needs.
- Involves interdisciplinary team input: RN Care Manager, Peer Specialist, PCP, Behavioral Health Clinician, and Community Liaison.
- Documentation should include SMART goals and clearly defined interventions.

## Reassessment Requirements

- Full reassessment is required whenever there are unplanned care transitions (e.g., hospital discharge, crisis stabilization, foster placement, or change in functional status).
- Reassessment also required if member experiences a significant life event impacting health, behavioral health, or social needs.
- Document updated goals, interventions, and responsible parties.
- Ensure timely communication and updates to all care team members.

## Workflow Checklist

Confirm enrollment date and track 60–90 day assessment deadline.

Conduct interdisciplinary assessment covering physical, behavioral, and social needs.

Record strengths, preferences, risks, and initial SMART goals.

Document interventions, responsibilities, and timelines in care plan.

Schedule reassessments based on unplanned care transitions or status changes.

Communicate updates to all providers and ensure shared care plan access.

Audit documentation for compliance with NC DHHS standards.

## Best Practices for Alignment

- Use standardized templates to ensure completeness and quality.
- Incorporate SMART goals in every care plan.
- Clearly delineate interventions and responsibilities by discipline.
- Integrate EHR systems for shared documentation and real-time updates.
- Establish feedback loops and quality checks for ongoing compliance.