

**CENTER FOR MEDICARE**

---

**DATE:** June 25, 2010

**TO:** PACE Organizations and PACE State Administering Agencies

**FROM:** Danielle R. Moon, J.D., M.P.A.  
Director, Medicare Drug & Health Plan Contract Administration Group

**SUBJECT:** PACE Care Planning Guidance

The purpose of this memorandum is to further clarify implementation guidance to PACE organizations and PACE State Administering Agencies on the care planning process including the development, monitoring, and revision of care plans for PACE participants. Care planning for PACE organizations is a unique process in which an interdisciplinary team (IDT) assesses participant needs, develops a comprehensive plan of care, and holistically manages the care of frail elderly individuals. Interdisciplinary care planning is a cornerstone of the PACE model of care.

Over the past several years, CMS has analyzed and trended PACE audit findings. This analysis identified common deficits of knowledge about the care planning process and frequent difficulty with constructing a care plan that had measurable outcomes to assess participants' achievement of care goals. The enclosed implementation guidance discusses the roles and responsibilities of the IDT to:

- Assess participant health care needs,
- Manage participant care,
- Collaborate with care providers, participants and caregivers to document a comprehensive plan of care that is continually revised in response to participants' health status, and
- Retain responsibility for participants' care whether services are delivered by PACE staff or contractors.

During the winter of 2009, CMS circulated a draft Care Planning Guidance document and solicited feedback. We appreciate all of the feedback received and worked diligently to incorporate many of these comments in the final product.

CMS issues this final Care Planning Guidance document with an effective date of September 1, 2010. We will highlight the salient care planning concepts contained in the guidance during the August PACE User Group Call. We encourage all interested parties to join this call. Your participation is critical and valued. Although we are issuing this document in final CMS welcomes comments that could be used for updates in the future.