

Maryland State Department of Education
Division of Rehabilitation Services
Annual Plan Review Instructions

Reference: [RSM 2, Section 600](#)

Note: The Annual Plan Review is to be completed in partnership with the consumer.

Required:

- Review current IPE with consumer.
- Discuss progress towards the employment goal.
- Review services provided during the year.
- Consider the need for additional or new services.
- Review **Authorizations** for services provided and/or completed.
- Update [Request for Confidential Information \(RS-2a\)](#), [Consent to Release Confidential Information \(RS-2b\)](#) and [Consent to Disclose to Service Providers \(RS-2f\)](#) forms and obtain required signatures.
- Discuss status of technology and/or other equipment purchased by DORS.
- Complete **New Plan Review** page in AWARE™.

If the counselor is unable to contact consumer to complete the Annual Review, and the counselor has made a variety of attempts on multiple occasions to contact the consumer (e.g., phone, email, letter), then the counselor will send an AWARE™ **Lost Contact Letter** to the consumer's last known address and document this on the Plan Review page.

Other Considerations:

- If a consumer is unable to actively participate in services at this time, discuss **Service Interrupted** status.
- Are **Tech Edits** needed to align estimated costs with actual/anticipated costs?
- Is **Administrative Approval** needed for any service close to or exceeding \$5,000 to date?