

**Department of Developmental Services
Massachusetts Rehabilitation Commission**



Individual Support Plan (ISP) Module Training

Release 7.7 – DDS Staff



**THE COMPUTERWORLD
HONORS PROGRAM**



Introduction

The purpose of today's training session is to provide you with an overview of the enhancements that are being included in the new release of the ISP module, which will go live on **February 8th, 2016**.

Enhancements included in this release will be reviewed in detail throughout today's training and include the following:

- Progress Summary
- Modifications
- Auto-Save for ISP document components
- Additional Functionality



Chapter Plan

- **Chapter 1: Overview of the ISP Module**
- **Chapter 2: Year Selection**
- **Chapter 3: Progress Summaries**
- **Chapter 4: Progress Summary Report**
- **Chapter 5: Area Director Approval of the ISP**
- **Chapter 6: Modifications**
- **Chapter 7: Additional Functionality and Conclusion**



Chapter Plan

- **Chapter 1: Overview of the ISP Module**
 - ISP Workflow
 - Refresher on Recent Enhancements
- **Chapter 2: Year Selection**
 - Year Selection for ISP
- **Chapter 3: Progress Summaries**
 - Overview of Progress Summaries
 - Progress Summary Review Switchboard
 - Scenario: Initiate a Progress Summary
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- **Chapter 4: Progress Summary Report**
 - Accessing a Progress Summary Report
- **Chapter 5: Area Director Approval of the ISP**
 - New Trigger for Locking the ISP In HCSIS
 - Lock Icon on Individual Dashboard
- **Chapter 6: Modifications**
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 - Scenario: Initiating a Modification
 - Scenario: Reviewing a Modification
- **Chapter 7: Additional Functionality and Conclusion**
 - Auto Save Functionality
 - Other Enhancements
 - Training Summary and Conclusion



WebEx: Chat Function

1. Click 'Chat'.

2. Select 'Send to' All Participants.

3. Type your message here.

4. Click 'Send' or use enter on your keyboard.



Confidential Information Protocol

- **No confidential information is used in the presentation.**
 - All images of HCSIS in the presentation are populated with **test data**.
 - All personally identifiable data fields such as addresses have been **blurred out**.
 - All the scenarios in the presentation use an individual with a **fake name**, Bruce Test, to demonstrate the processes.



Test, Bruce
View/Print ISP Document  

ISP Meeting Details
Planned Meeting Date: 12/07/2015
Meeting Time: 10:00 AM

Meeting Location:  

Full Year ISP

Chapter 1: Overview of the ISP Module





Chapter 1 Overview

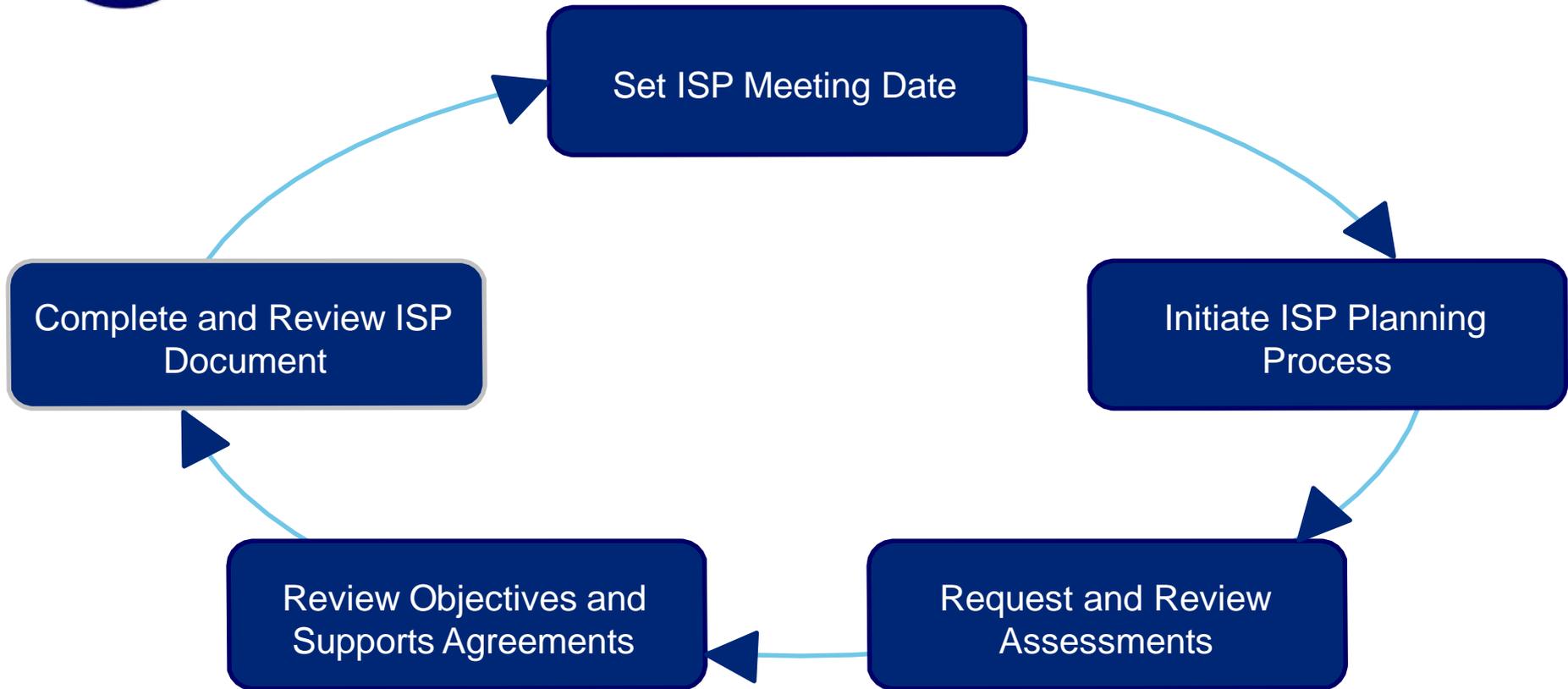
This Chapter will cover:

- ISP Workflow
- Refresher on Recent Enhancements

ISP Workflow



ISP Workflow



The ISP module provides an efficient mechanism for streamlining data entry and enabling efficient information sharing between members of the ISP team.

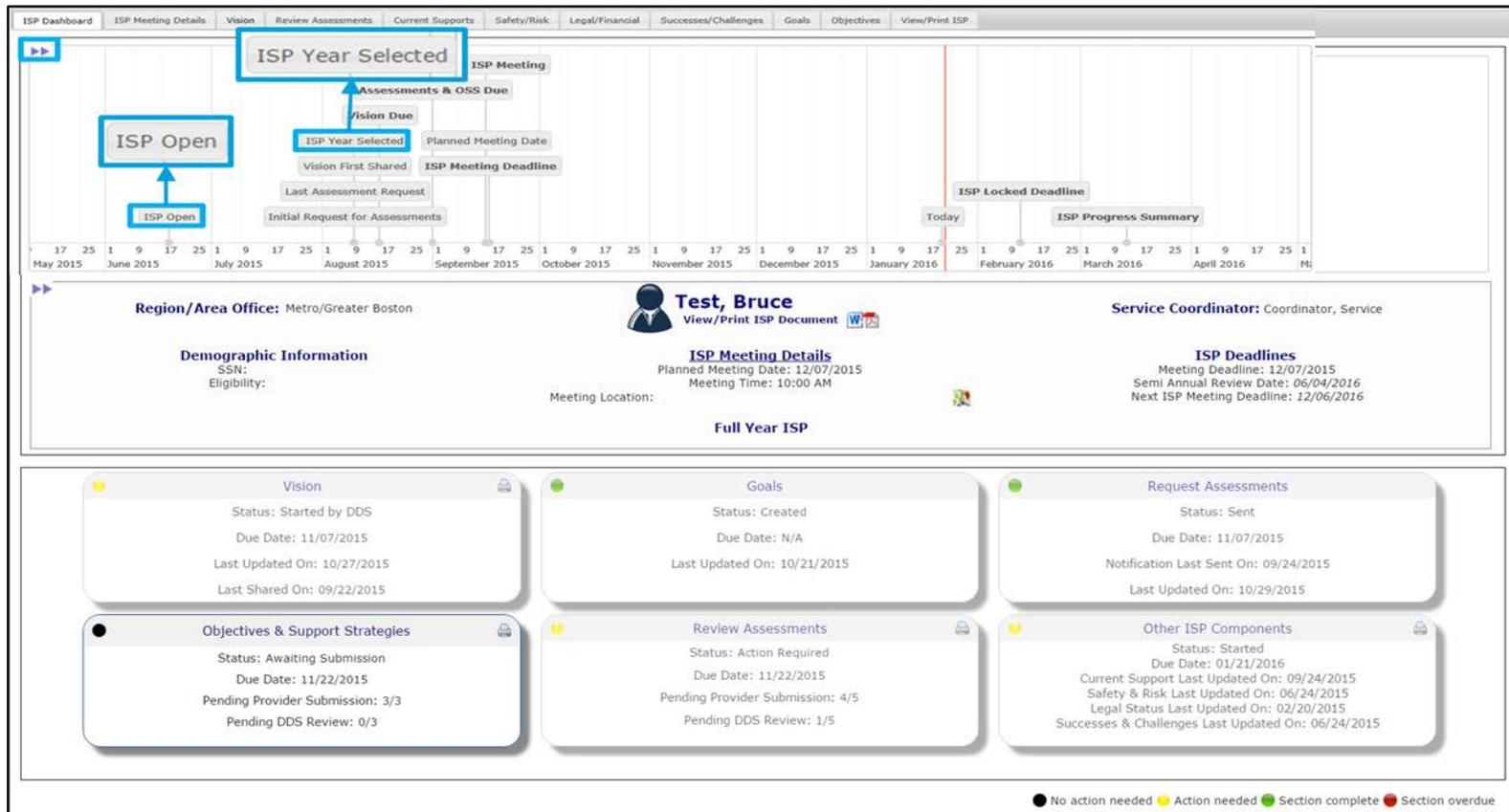
Refresher on Recent Enhancements



Timeline for ISP Plan Type Selection

Above each individual's ISP Dashboard details is a personalized ISP timeline graph for that individual. In order to view the timeline click ►► above the Individual Dashboard.

- The “**ISP Open**” is the date the ISP process was initiated, 90 days prior to the ISP Meeting Date.
- The “**ISP Year Selected**” is the date the plan type selection was made.





Recall Functionality

The following sections will be recalled for an Update Year ISP:

- Vision Statement recorded in the previous year's ISP will be recalled and updated by SCs and shared with Providers.
- Goals recorded in previous ISP will be recalled and can be updated by both SCs and Providers.
- Objectives from the previous ISP will be recalled, updated and submitted by Providers.
- Once requested by the SC, Assessments recorded in the previous year's ISP can be recalled, updated and submitted by Providers.
- Other ISP components will be recalled and updated by SCs.

The following sections will be recalled for a Full Year ISP:

- Vision Statement recorded in the previous year's ISP will be recalled and revised by SCs and shared with Providers.
- Goals recorded in previous ISP will be recalled and can be revised by both SCs and Providers.
- Objectives from the previous ISP will be recalled, revised and submitted by Providers.
- Once requested by the SC, Assessments recorded in the previous year's ISP can be recalled, revised and submitted by Providers.
- Other ISP components will be recalled and revised by SCs.

The same sections are recalled in both an Update Year or Full Year. However, in an update year recalled information can be updated versus in a full year the recalled information should be revised to reflect a completely new plan.



Historical ISP Materials

On the View / Print ISP tab, click View Historical ISP Materials to view historical ISP Documents, Assessments, Goals, and Objectives.

View Historical ISP Materials

View/Print ISP

The screenshot shows the 'View/Print ISP Materials' interface. At the top, there is a navigation bar with tabs: 'ISP Dashboard', 'ISP Meeting Details', 'Vision', 'Request Assessments', 'Review Assessments', 'Current Supports', 'Safety/Risk', 'Legal/Financial', 'Successes/Challenges', 'Goals', 'Objectives', 'Modifications', 'View/Print ISP', and 'View Historical ISP Material'. The 'View/Print ISP' tab is selected and highlighted with a blue box. Below the navigation bar, the main content area is titled 'View/Print ISP Materials' and 'View/Print ISP Document'. It lists various sections of the ISP with their respective status icons and dropdown menus. A legend at the bottom right explains the status icons: black circle for 'No action needed', yellow circle for 'Action needed', green circle for 'Section complete', and red circle for 'Section overdue'.

Section	Status
Vision	Status: Started by DDS
Current Supports	Status: Started
Safety/Risk	Status: Started
Legal/Benefit/Financial Status	Status: Started
Successes/Positive Events, Challenges, Emerging Issues and Unmet Needs	Status: Started
Goals and Objectives	Status: Awaiting Submission
Assessments	Status: Action Required

● No action needed ● Action needed ● Section complete ● Section overdue



Historical ISP Materials

The system will display the Historical ISP Materials pop-up. There are separate tabs for ISP Documents, Assessments and Goals and Objectives. To view and / or print any of the documents, click the PDF icon.

The screenshot shows the 'Historical Assessments' interface. At the top, there are three tabs: 'ISP Documents', 'Assessments', and 'Goals and Objectives'. A 'PDF icon' is highlighted with a blue box and an arrow pointing to it. Below the tabs, the 'Actual Meeting Date: 02/19/2014' is displayed. The main content area is divided into sections: 'Health and Dental', 'Financial', 'Safety', and 'Additional Assessment'. Each section contains a list of items, such as 'Health and Dental' with '- DDS Review Started'. A 'PDF icon' is highlighted with a blue box and an arrow pointing to it. The right sidebar contains a 'Service Coordinator' section with various dropdown menus and buttons.

Section	Item	Action
Health and Dental	- DDS Review Started	PDF icon
	- DDS Review Started	PDF icon
Financial	- DDS Review Started	PDF icon
	- DDS Review Started	PDF icon
Safety	- DDS Review Started	PDF icon
	- DDS Review Started	PDF icon
Additional Assessment	No Additional Assessments are available.	



Summary Report

The Summary Report is a reporting tool for DDS and Provider staff to review the timeliness of actions that occurred leading up to the ISP Meeting for each individual. Only the initial submission of assessments and objectives is considered for this report. For an individual to appear, the actual meeting date must have been entered in MEDITECH.

The screenshot displays the 'Summary Report' interface. At the top, there are two date input fields: 'ISP From Date: *' and 'ISP To Date: *', both with calendar icons and information symbols. Below these is a navigation bar with 'Reports' highlighted. A 'Search Criteria' dialog box is open, containing the same date fields and several filters: 'Area Office' (set to 'Newton/South Norfolk'), 'Service/Activity code' (a dropdown), 'Provider' (a dropdown), 'Document Status' (a dropdown), 'Report Display Option' (set to 'Collapse All'), and 'Group Results By' (set to 'Area Office'). 'View Report' and 'Reset' buttons are at the bottom of the dialog.

Additional enhancements made to the Summary Report in the August release:

- 1) Historical ISPs can be seen in the Summary Report. If the date range entered spans across more than one Actual Meeting Date for an individual, all plans of the individual between the selected Actual Meeting Dates will be included in separate lines of the report.
- 2) The column “No. of Revisions Requested” is now included in the report.
- 3) Additional filters are available to narrow search results. Those filters that were added are in bold:

- Area Office
- Provider
- Document Status
- **Report Display Option**
- **Service/Activity Code**
- **Group Results By**



Update Year Status for Goals and Objectives

The column **Update Year Status** appears for Goals and Objectives in an update year ISP. The table below further describes how to use the five statuses available for Goals and Objectives.

Update Year Status	Description
Met	Used to describe a goal or objective that has been achieved by the individual and no longer remains a goal or objective for the Update Year ISP.
Discontinued	Used to identify a goal or objective that is no longer relevant for the individual or has ended. *Goals or Objectives should not be discontinued if there is a minor change. In this case, the status should be changed to updated*
Current	Used to identify a goal or objective from the previous year's ISP that has not changed and continues into the update year ISP. *All recalled goals and objectives will be defaulted to current* *If a current goal or objective is updated, the status should be changed to updated*
Updated	Used to identify a goal or objective from the previous year's ISP that has been changed for the update year ISP.
New	Used to identify a newly added goal or objective. *Newly added goals or objectives will be defaulted to new*

ISP Dashboard | ISP Meeting Details | Vision | Request Assessments | Review Assessments | Current Supports | Safety/Risk | Legal/Financial | Successes/Challenges | Goals | Objectives | Modifications | View/Print ISP

Objectives and Support Strategies Review Switchboard

Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
Community Involvement					
Bruce will serve meals once a week at		Started		View Document History	Current
Money Management					
Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Started		View Document History	Current
Personal Growth & Accomplishments--					
Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved		View Document History	Current



Chapter 1 Summary

This Chapter covered:

- ISP Workflow
- Refresher on Recent Enhancements

Chapter 2: Year Selection





Chapter 2 Overview

This Chapter will cover:

- Year Selection for ISP

Year Selection for ISP



Year Selection for ISP

Previous Functionality

- Service Coordinators are required to manually make the year selection (i.e. Full-Year, Update Year) for individuals in HCSIS. Data Entry Users and Provider Supervisors are only able to access an individual's plan after the Service Coordinator has completed this task and made the plan type selection.

New Functionality

- The year selection process has been partially automated. If the plan type for the most recently completed plan is an update year, the system will automatically choose full year for the subsequent plan. If, on the other hand, the plan type for the most recently completed plan is a full year, the Service Coordinator is still required to manually make the year selection. Provider staff continue to receive access to an individual's plan after the plan type selection has been made.

New Pop-Up Box for Year Selection for ISP:

ISP Plan Year selection

Either the previous ISP for this individual was a Full Year ISP, or there were no previous ISP's completed in HCSIS for this individual. You may choose either an Update Year Plan or Full Year Plan.

ISP Update Year

ISP Full Year

Save Cancel



Chapter 2 Summary

This Chapter covered:

- Year Selection for ISP