

**Department of Developmental Services
Massachusetts Rehabilitation Commission**



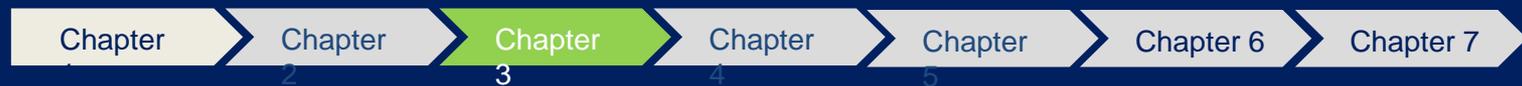
Individual Support Plan (ISP) Module Training

Release 7.7 – DDS Staff



**THE COMPUTERWORLD
HONORS PROGRAM**

Chapter 3: Progress Summaries





Chapter 3 Overview

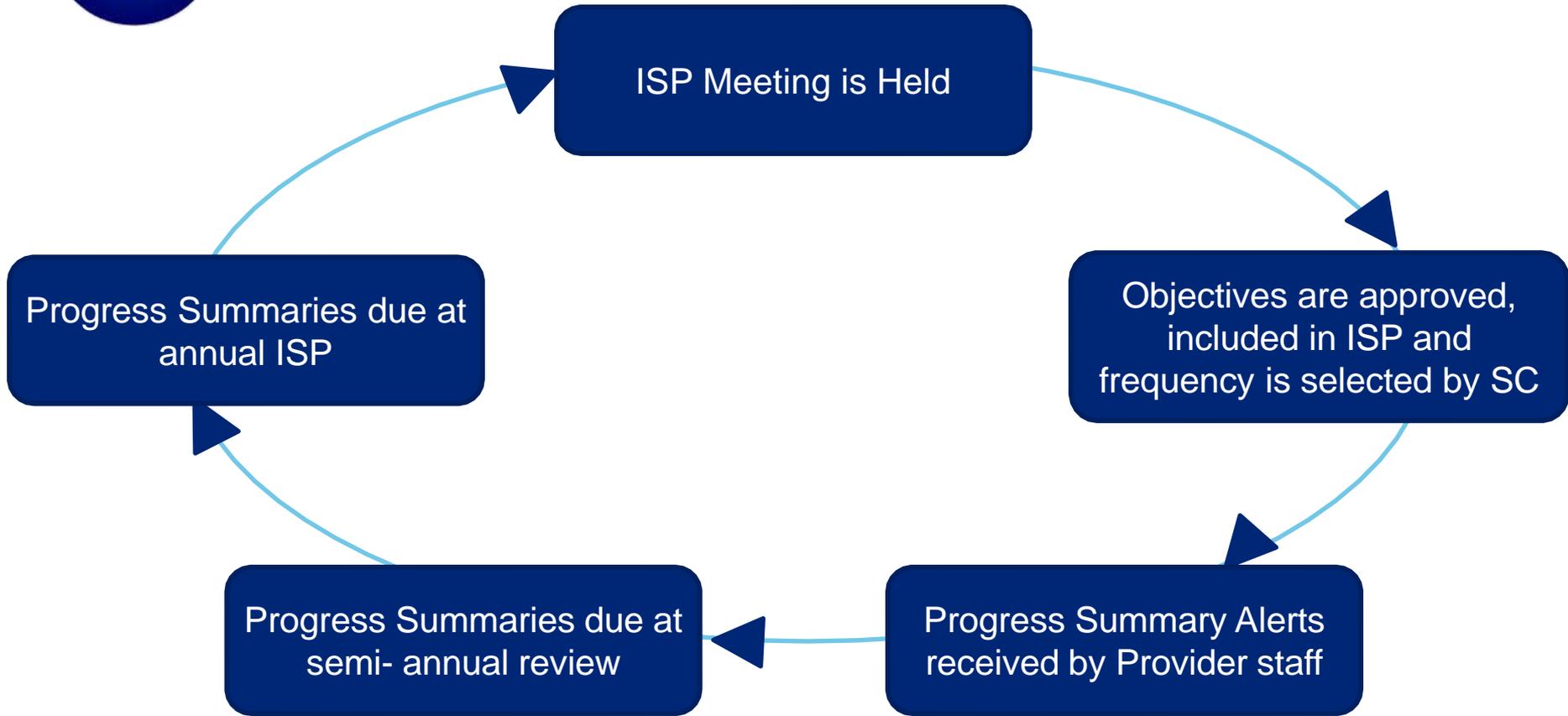
This Chapter will cover:

- Overview of Progress Summaries
- Progress Summary Review Switchboard
- Scenario: Initiate a Progress Summary
- Scenario: Review a Progress Summary

Overview of Progress Summaries



Progress Summary Workflow



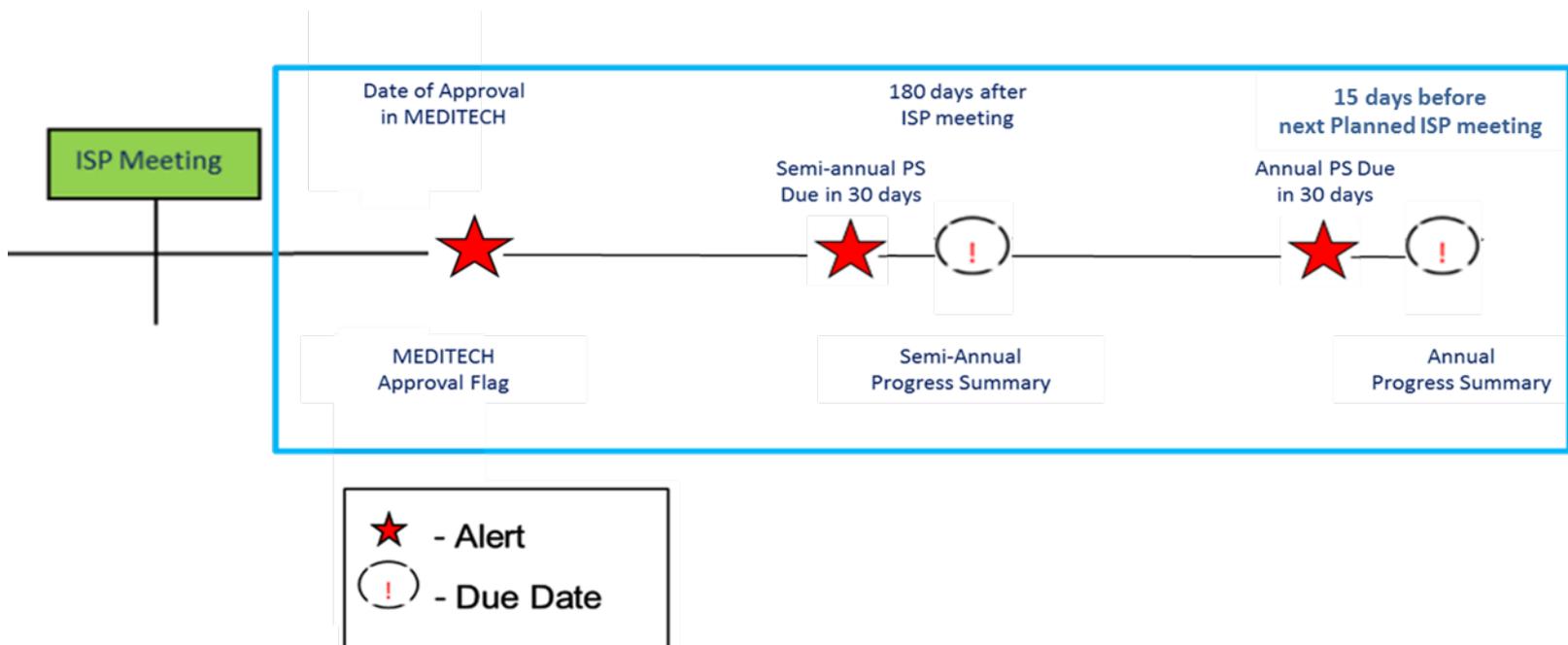
Per DDS Regulation 115 CMR 6.21.5 J and Regulation 115 CMR 6.21.6, semi-annual and annual Progress Summaries are required as part of the ISP process. The ISP module provides an efficient mechanism for streamlining the submission process. The SC has the option, after conferring with the provider agency, of requesting quarterly Progress Summaries.



Timeline for Completion of Progress Summary

Semi-Annual

- The default frequency for Progress Summary is semi-annual. The due dates for Progress Summary are as follows:
 - Semi Annual Progress Summary – 180 days after the ISP Meeting
 - Annual Progress Summary – 15 days prior to the next planned meeting date or the deadline
- When the due date for an Progress Summary is within 30 days, Service Coordinators and Provider Data Entry Users will receive an Alert indicating that the provider is able to complete the Progress Summaries.

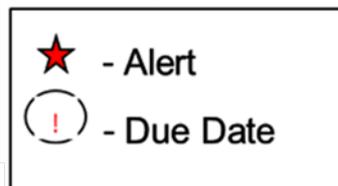
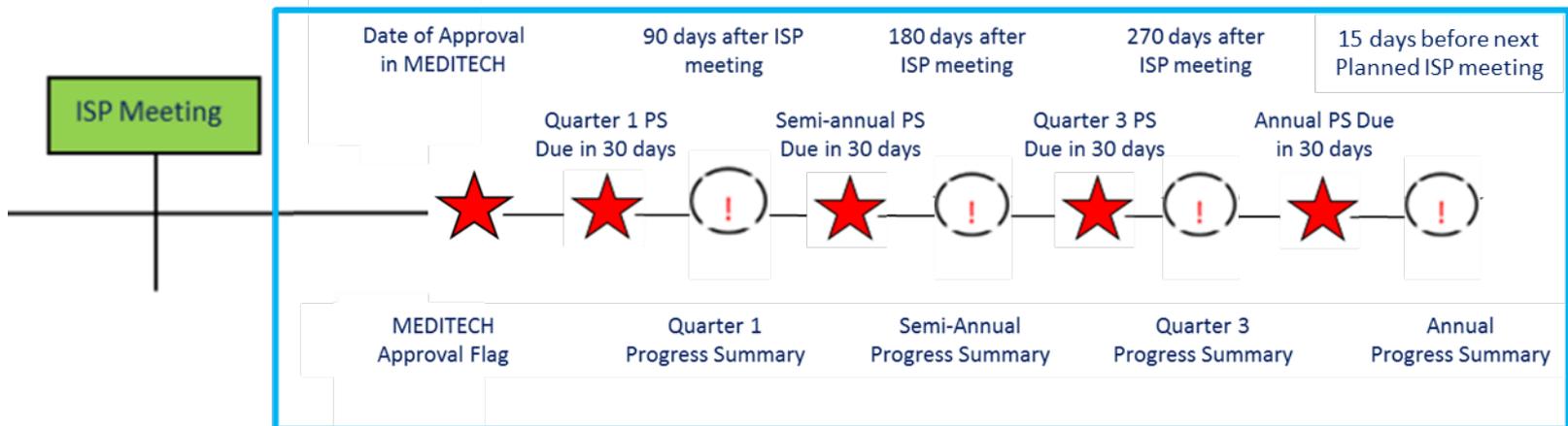




Timeline for Completion of Progress Summary

Quarterly

- If the Service Coordinator selects the frequency of the Progress Summary as quarterly, the due dates for Progress Summaries are as follows:
 - Quarter 1 – 90 days after the ISP meeting
 - Semi-Annual – 180 days after the ISP meeting
 - Quarter 3 – 270 days after the ISP meeting
 - Annual – 15 days before the next planned meeting date or the deadline
- When the due date for ISP Progress Summaries is within 30 days, Service Coordinators and Provider Data Entry Users will receive an Alert indicating that the provider is able to complete the Progress Summaries.





Timeline for Completion of Progress Summary

- The due date for the annual Progress Summary is calculated differently from the other deadlines.
 - Quarter 1 = Actual Meeting Date + 90 Days
 - Semi-Annual = Actual Meeting Date + 180 Days
 - Quarter 3 ISP = Actual Meeting Date + 270 Days
 - **Annual = Next Planned Meeting Date (or ISP Meeting Deadline) – 15 Days**

Actual Meeting Date: 06/03/2014 (Full Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Quarter 1	01/04/2014		Approved	View Document History	
Semi Annual	04/04/2014		Approved	View Document History	
Quarter 3	07/03/2014		Approved	View Document History	
Annual	10/06/2014		Approved	View Document History	
● Bruce will increase his rate of pay by 30%, for the next 12 months.					
Semi Annual	04/04/2014		Approved	View Document History	
● Bruce will serve meals once a week at					
Semi Annual	04/04/2014		Approved	View Document History	
Annual				View Document History	

The Annual Progress Summary is due 15 days before the deadline date for the next year's plan, which is 350 days after the last Actual Meeting date. However, once the next plan is opened (90 days prior to the Planned Meeting Date/Deadline Date), the due date will update and appear as 15 days prior to the new Planned Meeting Date. If there is no Planned Meeting Date entered, the due date will remain as 15 days prior to the deadline date.

Actual Meeting Date: 06/03/2014 (Full Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Semi Annual	09/01/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	
● Bruce will increase his rate of pay by 30%, for the next 12 months.					
Quarter 1	06/03/2015		Not Started	View Document History	
Semi Annual	09/01/2015		Not Started	View Document History	
Quarter 3	11/30/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	
● ** Bruce will serve meals once a week at					
Quarter 1	06/03/2015		Not Started	View Document History	
Semi Annual	09/01/2015		Not Started	View Document History	
Quarter 3	11/30/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	

Progress Summary Review Switchboard



Navigate to the PS Review Switchboard

There are two ways to navigate to the Progress Summary Review Switchboard.

Option 1

It is possible to navigate to the Progress Summary Review Switchboard from the Individual Dashboard. Above the Individual Dashboard, click the third-level menu item, "Progress Summary ."

Progress Summary

The screenshot shows the 'Health and Human Services' Individual Dashboard. At the top, there is a navigation bar with tabs for HOME, QM, PAM, ISP, ADMIN, and TOOLS. Below this, a breadcrumb trail reads: Individual Search > Review Process Management > Reports > References > Search Results > ISP Dashboard > Progress Summary. The 'Progress Summary' link is highlighted with a blue box, and a blue arrow points from this box to the 'Progress Summary' text in the block above. Below the breadcrumb trail is a secondary navigation bar with various menu items: ISP Dashboard, ISP Meeting Details, Vision, Request Assessments, Review Assessments, Current Supports, Safety/Risk, Legal/Financial, Successes/Challenges, Goals, Objectives, Modifications, and View/Print ISP. The main content area displays information for 'Test, Bruce', including his role as 'Service Coordinator', 'ISP Meeting Details' (Planned Meeting Date: 12/07/2015, Meeting Time: 10:00 AM), and 'ISP Deadlines' (Meeting Deadline: 12/07/2015, Semi Annual Review Date: 06/04/2016, Next ISP Meeting Deadline: 12/06/2016). The text 'Full Year ISP' is also visible at the bottom of the main content area.



Navigate to the PS Review Switchboard

There are two ways to navigate to the Progress Summary Review Switchboard.

Option 2

Alternatively, it is possible to navigate to the Progress Summary Review Switchboard from the Individual Search.

View the new Progress Summary column and click the “View Progress Summary ” link.

[View Progress Summary](#)

Health and Human Services

HOME QM PAM ISP ADMIN TOOLS

Individual Search | Review Process Management | Reports | References

Search Results

ISP > Individual Search

Individual Search

Last Name: First Name:

Identifier Type: Eligibility Number Identifier:

Region: Area Office:

ISP Due In:

Search Reset

Showing 1 to 1 of 1 entries

Export to Excel

Show 25 Entries

Individual ^	Planned Meeting Date ⇅	Actual Meeting Date ⇅	SSN ⇅	Eligibility # ⇅	Region ⇅	Area Office ⇅	Progress Summary ⇅
Test, Bruce	12/07/2015				Metro	Greater Boston	View Progress Summary

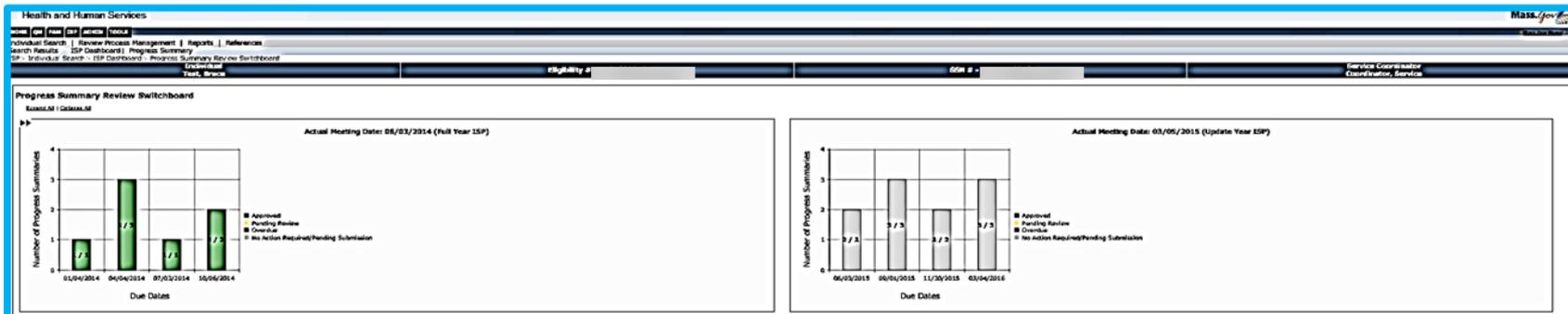


PS Review Switchboard

Progress Summary Review Switchboard

- The Progress Summary Review Switchboard is composed of two sections.

1 Progress Summary Bar Graph



2 Progress Summary Details

Actual Meeting Date:	08/03/2014 (Full Year ISP)	03/05/2015 (Update Year ISP)			
Progress Summary	Due Date	Provider	Status	Document History	Print Document
<ul style="list-style-type: none"> Bruce will serve extra once a week at Semi Annual Annual 	04/04/2014 10/06/2014		Approved Approved	View Document History View Document History	Print Print
<ul style="list-style-type: none"> Bruce will find a big activity for around due to do at the beginning of each quarter. We will then a Quarter 1 Semi Annual Quarter 2 Annual 	01/04/2014 04/04/2014 07/03/2014 10/06/2014		Approved Approved Approved Approved	View Document History View Document History View Document History View Document History	Print Print Print Print
<ul style="list-style-type: none"> Bruce will increase his rate of pay by 10%, for the next 12 months. Semi Annual 	04/04/2014		Approved	View Document History	Print
Actual Meeting Date:	03/05/2015 (Update Year ISP)				
<ul style="list-style-type: none"> Bruce will find a big activity for around due to do at the beginning of each quarter. We will then a Quarter 1 Semi Annual Quarter 2 Annual 	09/01/2015 03/04/2016		Not Started Not Started	View Document History View Document History	Print Print
<ul style="list-style-type: none"> Bruce will serve extra once a week at Quarter 1 Semi Annual Quarter 2 Annual 	06/01/2015 09/01/2015 12/30/2015 03/04/2016		Not Started Not Started Not Started Not Started	View Document History View Document History View Document History View Document History	Print Print Print Print
<ul style="list-style-type: none"> Bruce will increase his rate of pay by 10%, for the next 12 months. Quarter 1 Semi Annual Quarter 2 Annual 	06/03/2015 09/01/2015 12/30/2015 03/04/2016		Not Started Not Started Not Started Not Started	View Document History View Document History View Document History View Document History	Print Print Print Print

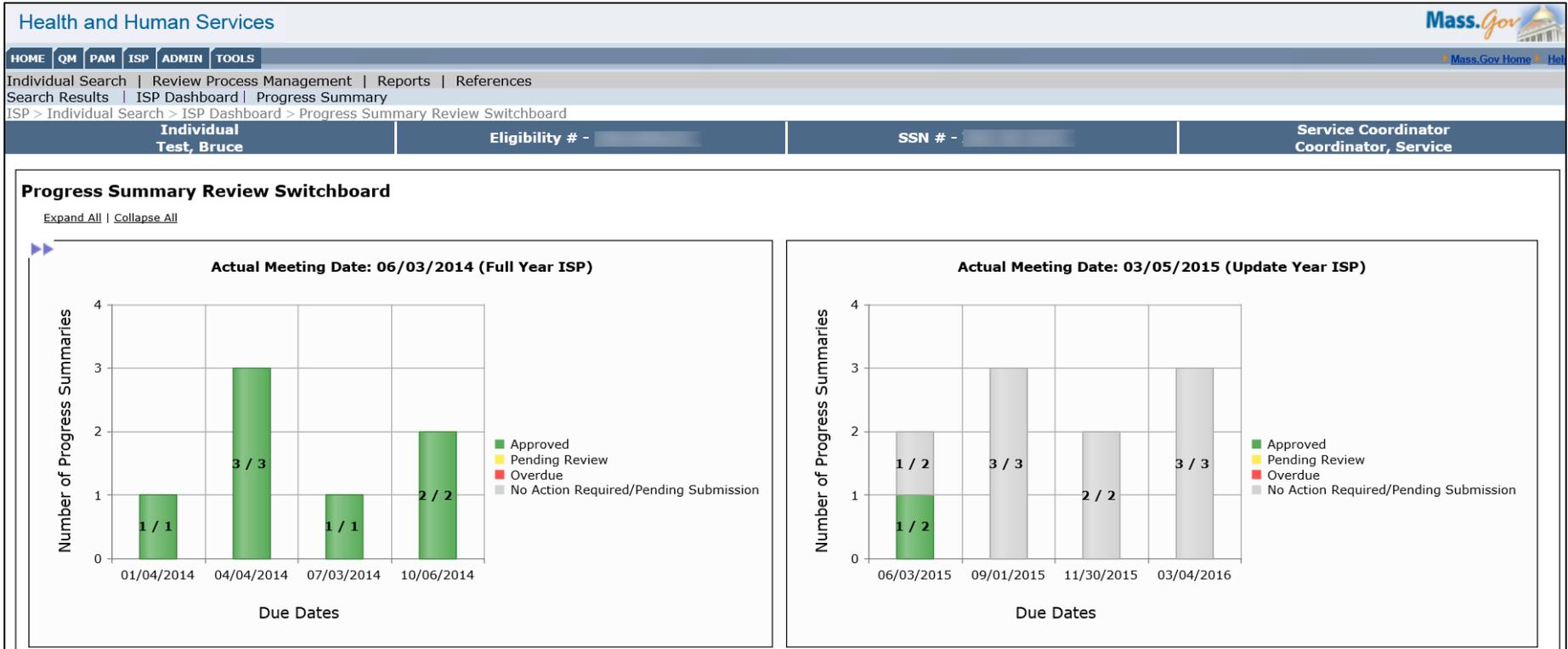


Features of the PS Review Switchboard

Progress Summary Bar Graph

This section contains information for both previous and current ISP.

- The graph provides a visual of the status of all the Progress Summaries included in the previous and current ISP.





Features of the PS Review Switchboard

Progress Summary Details

- Displays all Progress Summaries associated with the Actual Meeting Date for the two most recent years :
 - All Progress Summaries required for the prior year.
 - All Progress Summaries required for the current year – not just those that are approaching their due date.

Actual Meeting Date: 06/03/2014 (Full Year ISP)

Actual Meeting Date: 06/03/2014 (Full Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Since will serve meals once a week at					
Semi Annual	04/04/2014		Approved	View Document History	
Annual	03/04/2014		Approved	View Document History	
● Since will find a big activity he would like to do at the beginning of each quarter. He will have a					
Quarter 1	03/04/2014		Approved	View Document History	
Semi Annual	04/04/2014		Approved	View Document History	
Annual	04/04/2014		Approved	View Document History	
Semi Annual	04/04/2014		Approved	View Document History	

Actual Meeting Date: 03/05/2015 (Update Year ISP)

Actual Meeting Date: 03/05/2015 (Update Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Since will find a big activity he would like to do at the beginning of each quarter. He will have a					
Semi Annual	05/03/2015		Not Started	View Document History	
Annual	03/04/2015		Not Started	View Document History	
● Since will serve meals once a week at					
Quarter 1	04/03/2015		Not Started	View Document History	
Semi Annual	05/03/2015		Not Started	View Document History	
Quarter 2	11/06/2015		Not Started	View Document History	
Annual	03/04/2015		Not Started	View Document History	
● Since will increase his rate of pay by 20%, for the next 12 months.					
Quarter 1	04/03/2015		Not Started	View Document History	
Semi Annual	05/03/2015		Not Started	View Document History	
Quarter 2	11/06/2015		Not Started	View Document History	
Annual	03/04/2015		Not Started	View Document History	

● No Action Required ● Pending Submission/Pending Review ● Approved ● Overdue



Features of the PS Review Switchboard

Progress Summary Details

- Progress Summary
 - The Progress Summary column displays which Progress Summary (e.g. quarter 1, annual).
- Due Date
 - The Due Date column displays the due date for the Progress Summary .
- Provider
 - The Provider column displays which Provider is required to complete the Progress Summary

Actual Meeting Date: 06/03/2014 (Full Year ISP)					
Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Quarter 1	01/04/2014		Approved	View Document History	
Semi Annual	04/04/2014		Approved	View Document History	
Quarter 3	07/03/2014		Approved	View Document History	
Annual	10/06/2014		Approved	View Document History	
● Bruce will increase his rate of pay by 30%, for the next 12 months.					
Semi Annual	04/04/2014		Approved	View Document History	
● Bruce will serve meals once a week at					
Semi Annual	04/04/2014		Approved	View Document History	
Annual	10/06/2014		Approved	View Document History	
Actual Meeting Date: 03/05/2015 (Update Year ISP)					
Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Semi Annual	09/01/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	
● Bruce will increase his rate of pay by 30%, for the next 12 months.					
Quarter 1	06/03/2015		Not Started	View Document History	
Semi Annual	09/01/2015		Not Started	View Document History	
Quarter 3	11/30/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	
● ** Bruce will serve meals once a week at					
Quarter 1	06/03/2015		Not Started	View Document History	
Semi Annual	09/01/2015		Not Started	View Document History	
Quarter 3	11/30/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	



Features of the PS Review Switchboard

Progress Summary Details

- Status
 - To view a Progress Summary , click the link in the Status column.

Actual Meeting Date: 06/03/2014 (Full Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Quarter 1	01/04/2014		Approved	View Document History	
Semi Annual	04/04/2014		Approved	View Document History	
Quarter 3	07/03/2014		Approved	View Document History	
Annual	10/06/2014		Approved	View Document History	
● Bruce will increase his rate of pay by 30%, for the next 12 months.					
Semi Annual	04/04/2014		Approved	View Document History	
● Bruce will serve meals once a week at					
Semi Annual	04/04/2014		Approved	View Document History	
Annual	10/06/2014		Approved	View Document History	

Actual Meeting Date: 03/05/2015 (Update Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Semi Annual	09/01/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	
● Bruce will increase his rate of pay by 30%, for the next 12 months.					
Quarter 1	06/03/2015		Not Started	View Document History	
Semi Annual	09/01/2015		Not Started	View Document History	
Quarter 3	11/30/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	
● ** Bruce will serve meals once a week at					
Quarter 1	06/03/2015		Not Started	View Document History	
Semi Annual	09/01/2015		Not Started	View Document History	
Quarter 3	11/30/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	



Features of the PS Review Switchboard

Progress Summary Details

- Print Document
 - Click either the Word or PDF Icon to print a Progress Summary .
 - Until the Service Coordinator approves the Progress Summary, it will print with a draft watermark.
- Document History
 - To view the Document History of a Progress Summary , select the View Document History link in the Document History column.

Actual Meeting Date: 06/03/2014 (Full Year ISP)					
Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Quarter 1	01/04/2014		Approved	View Document History	
Semi Annual	04/04/2014		Approved	View Document History	
Quarter 3	07/03/2014		Approved	View Document History	
Annual	10/06/2014		Approved	View Document History	
● Bruce will increase his rate of pay by 30%, for the next 12 months.					
Semi Annual	04/04/2014		Approved	View Document History	
● Bruce will serve meals once a week at					
Semi Annual	04/04/2014		Approved	View Document History	
Annual	10/06/2014		Approved	View Document History	
Actual Meeting Date: 03/05/2015 (Update Year ISP)					
Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Semi Annual	09/01/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	
● Bruce will increase his rate of pay by 30%, for the next 12 months.					
Quarter 1	06/03/2015		Not Started	View Document History	
Semi Annual	09/01/2015		Not Started	View Document History	
Quarter 3	11/30/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	
● ** Bruce will serve meals once a week at					
Quarter 1	06/03/2015		Not Started	View Document History	
Semi Annual	09/01/2015		Not Started	View Document History	
Quarter 3	11/30/2015		Not Started	View Document History	
Annual	03/04/2016		Not Started	View Document History	



Features of the PS Review Switchboard

Progress Summary Details

- Document History
 - To view document history of a Progress Summary , select the View Document History link in the Document History column.

The screenshot displays the PS Review Switchboard interface. A pop-up window titled "Document History" is open, showing details for a document. The document is for "Test, Bruce" with a due date of 9/1/2015. The objective is "Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s". The progress summary is "Semi Annual" and the agency is blank. A table shows the document's status history:

Status	Updated On	Updated By
Requested	09/02/2015	
Started	09/02/2015	
Submitted For Internal Review	11/10/2015	
Internal Revision Requested	11/10/2015	
Submitted For Internal Review	01/11/2016	

At the bottom of the interface, a legend indicates the status of elements: No Action Required (black dot), Pending Submission/Pending Review (yellow dot), Approved (green dot), and Overdue (red dot).



View / Print ISP Tab

Progress Summary Details

- Historical Documents
 - All Progress Summaries that are older than two years are viewable in Historical ISP Materials section.
 - To access Historical ISP Materials, click the “View / Print ISP” tab and then click the “View Historical ISP Materials” button.

View/Print ISP

View Historical ISP Materials

The screenshot shows the 'Health and Human Services' web application. At the top, there is a navigation bar with tabs: HOME, QM, PAM, ISP, ADMIN, TOOLS. Below this is a breadcrumb trail: Individual Search > Review Process Management | Reports | References | Search Results | ISP Dashboard | Progress Summary | ISP > Individual Search > ISP Dashboard > View/Print ISP. The main content area is titled 'View/Print ISP Materials' and includes a 'View/Print ISP Document' button. A list of sections is displayed, each with a status indicator and a dropdown menu. The sections are: Vision (Status: Shared), Current Supports (Status: Started (Overdue)), Safety/Risk (Status: Started (Overdue)), Legal/Benefit/Financial Status (Status: Started (Overdue)), Successes/Positive Events, Challenges, Emerging Issues and Unmet Needs (Status: Started (Overdue)), Goals and Objectives (Status: Approved), Assessments (Status: Approved), and Modifications (Status: Action Required). A legend at the bottom right explains the status indicators: No action needed (black dot), Action needed (yellow dot), Section complete (green dot), and Section overdue (red dot). Two blue boxes with arrows highlight the 'View/Print ISP' tab and the 'View Historical ISP Materials' button.

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Region - Metro Area Office - Greater Boston	Service Coordinator Coordinator, Service								
ISP Dashboard	ISP Meeting Details	Vision	Request Assessments	Review Assessments	Current Supports	Safety/Risk	Legal/Financial	Successes/Challenges	Goals	Objectives	Modifications	View/Print ISP	View Historical ISP Materials

View/Print ISP Materials

Expand All | Collapse All

View/Print ISP Document

Vision	Status: Shared
Current Supports	Status: Started (Overdue)
Safety/Risk	Status: Started (Overdue)
Legal/Benefit/Financial Status	Status: Started (Overdue)
Successes/Positive Events, Challenges, Emerging Issues and Unmet Needs	Status: Started (Overdue)
Goals and Objectives	Status: Approved
Assessments	Status: Approved
Modifications	Status: Action Required

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



View / Print ISP Tab

Progress Summary Details

- Historical Documents
 - Historical Progress Summaries are located on the “Goals and Objectives Tab.”
 - Click the PDF icon next to the desired Progress Summary to view and print.

 Progress Summary

Goals and Objectives

Health and Human Services

HOME | QM | PAM | ISP | ADMIN | TOOLS

Individual Search | Review Process Management | Reports | References

Search Results | ISP Dashboard | Progress Summary

ISP > Individual Search > ISP Dashboard > View / Print ISP

Individual	Eligibility	Planned Meeting Date	ISP Meeting Deadline	Region - Metro	Service Coordinator
Test, Bruce	SSN #	03/04/2015	03/04/2015	Area Office - Greater Boston	Coordinator, Service

ISP Dashboard | ISP Meeting Details

View/Print ISP Materials

Expand All | Collapse All

ISP Documents | Assessment | **Goals and Objectives**

Test, Bruce

Historical Goals and Objectives

Actual Meeting Date: 06/03/2014

- Money Management
 - Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s - Approved
 - Progress Summary
 - Quarter 1 - Approved
 - Semi Annual - Approved
 - Quarter 3 - Approved
 - Annual - Approved
- Personal Growth & Accomplishments
 - Bruce will increase his rate of pay by 30%, for the next 12 months. - Approved
 - Progress Summary
 - Semi Annual - Approved

User ID:
You are currently logged in as a user f

View Historical ISP Materials

Update Year ISP

Status: Shared

Status: Started (Overdue)

Status: Approved

Status: Approved

Status: Action Required

Section complete Section overdue

Scenario: Initiate a Progress Summary

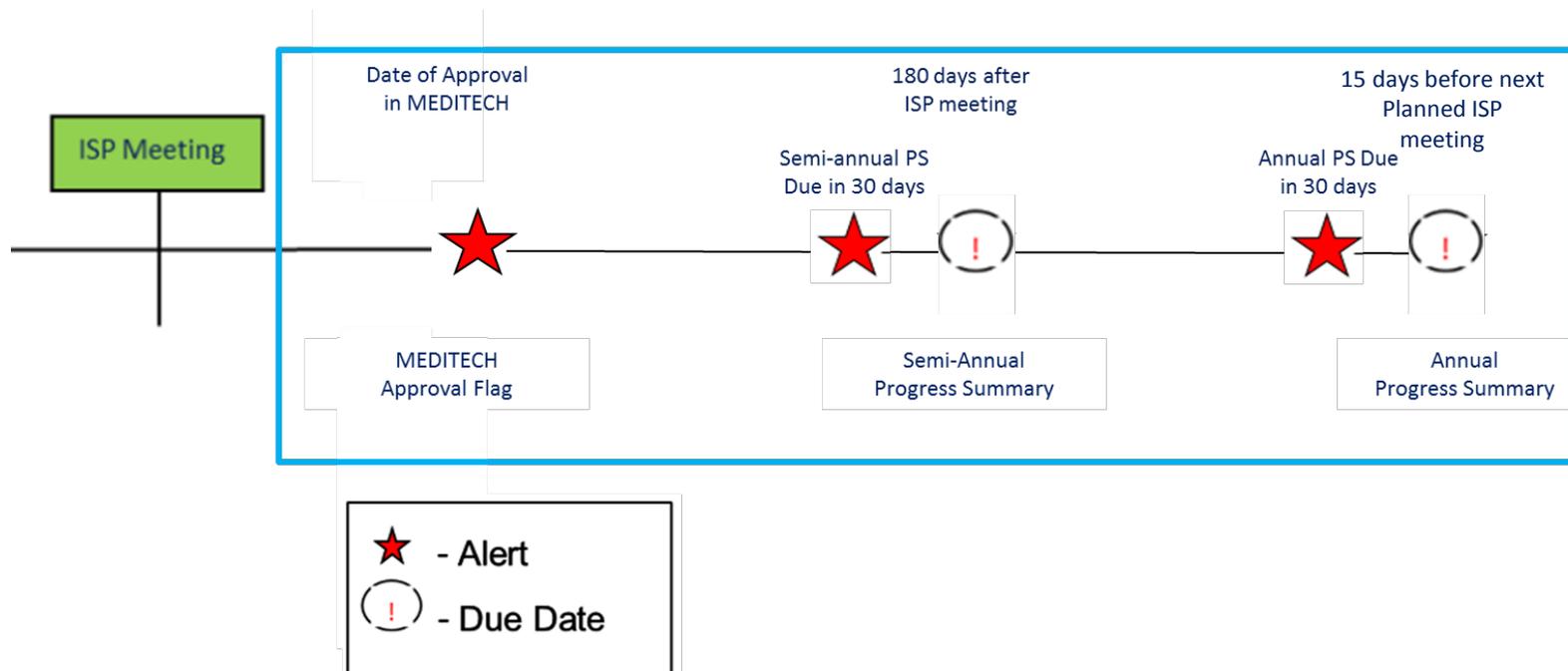


Scenario: Initiate a Progress Summary

Description: The Progress Summary process is now included in the HCSIS system. These Progress Summaries, which track the progress of Objectives following the ISP Meeting, were previously completed outside of the system. With the implementation of Progress Summaries within HCSIS, once an Actual Meeting Date has been entered in MEDITECH, DDS staff are able to initiate the Progress Summary process by adding approved Objectives for inclusion in the ISP Document. Until Progress Summaries have been initiated by the DDS user, Providers will be unable to access and complete the forms.

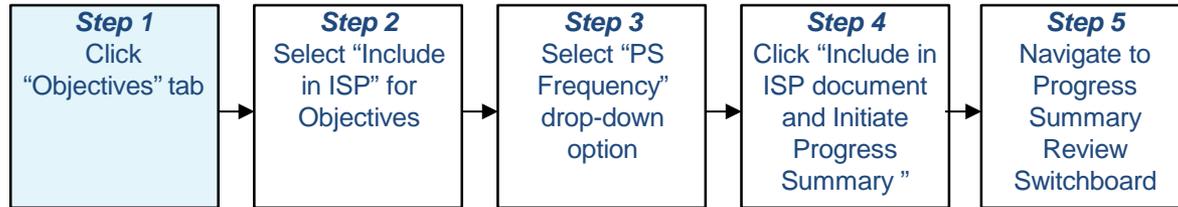
Roles and Responsibilities:

- **Service Coordinator:** Initiate an Progress Summary
- **Service Coordinator Supervisor:** Initiate an Progress Summary





Scenario: Initiate a Progress Summary



Step 1: Click "Objectives Tab"

Navigate to the Individual Dashboard. Click "Objectives."

The screenshot shows the Individual Dashboard for Bruce Test, Service Coordinator. The 'Objectives' tab is highlighted in the top navigation bar. The dashboard displays various sections including Demographic Information, Meeting Details, Deadlines, and several progress cards for Vision, Goals, Request Assessments, Objectives & Support Strategies, Review Assessments, and Other ISP Components. A legend at the bottom indicates the status of each section: No action needed (black dot), Action needed (yellow dot), Section complete (green dot), and Section overdue (red dot).

Objectives

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

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

Test, Bruce
View/Print ISP Document

Service Coordinator: Coordinator, Service

Demographic Information
SSN: [redacted]
Eligibility: [redacted]

ISP Meeting Details
Planned Meeting Date: 12/07/2015
Meeting Time: 10:00 AM
Meeting Location: [redacted]

ISP Deadlines
Meeting Deadline: 12/07/2015
Semi Annual Review Date: 06/04/2016
Next ISP Meeting Deadline: 12/06/2016

Full Year ISP

Vision
Status: Shared
Due Date: 11/07/2015
Last Updated On: 09/22/2015
Last Shared On: 09/22/2015

Goals
Status: Created
Due Date: N/A
Last Updated On: 10/21/2015

Request Assessments
Status: Sent
Due Date: 11/07/2015
Notification Last Sent On: 09/24/2015
Last Updated On: 09/24/2015

Objectives & Support Strategies
Status: Awaiting Submission
Due Date: 11/22/2015
Pending Provider Submission: 3/3
Pending DDS Review: 0/3

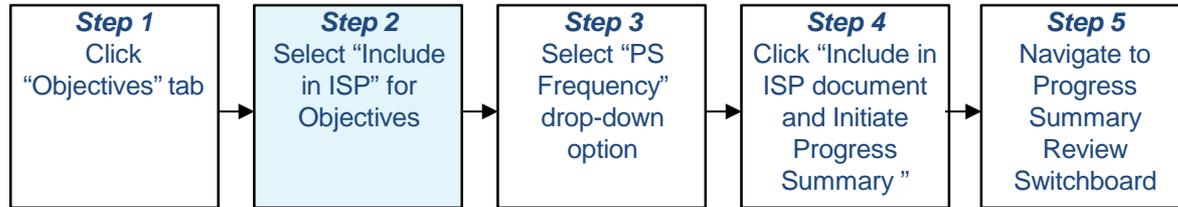
Review Assessments
Status: Awaiting Submission
Due Date: 11/22/2015
Pending Provider Submission: 5/5
Pending DDS Review: 0/5

Other ISP Components
Status: Started
Due Date: 01/21/2016
Current Support Last Updated On: 09/24/2015
Safety & Risk Last Updated On: 06/24/2015
Legal Status Last Updated On: 02/20/2015
Successes & Challenges Last Updated On: 06/24/2015

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



Scenario: Initiate a Progress Summary



Step 2: Select “Include in ISP” for Objectives

On the objectives switchboard, select the objectives that you would like to include in the ISP Document.

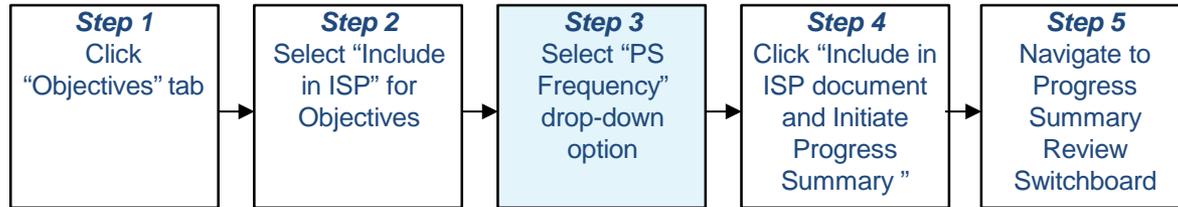
Only Approved objectives can be included in the ISP document once the Actual Meeting Date for the plan is available.

The screenshot shows the 'Objectives Review Switchboard' interface. A blue callout box with a checkmark icon and the text 'Include in ISP Doc?' points to the 'Include in ISP Doc?' checkbox in the first column of the table. Another blue callout box with a checkmark icon and the text 'Include in ISP Doc?' points to the 'Include in ISP Doc?' checkbox in the second row of the table. The table has the following columns: 'Include in ISP Doc?', 'Objective(s)', 'Created By', 'Status', 'PS Frequency', 'Document History', and 'Update Year Status'. The table contains several rows of objectives, including 'Community Involvement', 'Money Management', and 'Personal Growth & Accomplishments'. A button at the bottom right of the table reads 'Include in ISP document and Initiate Progress Summary'.

Include in ISP Doc?	Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
<input checked="" type="checkbox"/>	Community Involvement					
<input checked="" type="checkbox"/>	Bruce will increase his participation in community activities		Approved	Semi-Annual	View Document History	New
<input checked="" type="checkbox"/>	Bruce will serve meals once a week at		Approved	Semi-Annual	View Document History	Current
<input checked="" type="checkbox"/>	Money Management					
<input checked="" type="checkbox"/>	Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved	Semi-Annual	View Document History	Current
<input checked="" type="checkbox"/>	Personal Growth & Accomplishments-					
<input checked="" type="checkbox"/>	By November 2015, Bruce will participate in 10 job exploration activities.		Approved	Semi-Annual	View Document History	New
<input checked="" type="checkbox"/>	Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved	Semi-Annual	View Document History	Current



Scenario: Initiate a Progress Summary



Step 3: In the PS Frequency column, use the drop-down to set frequency

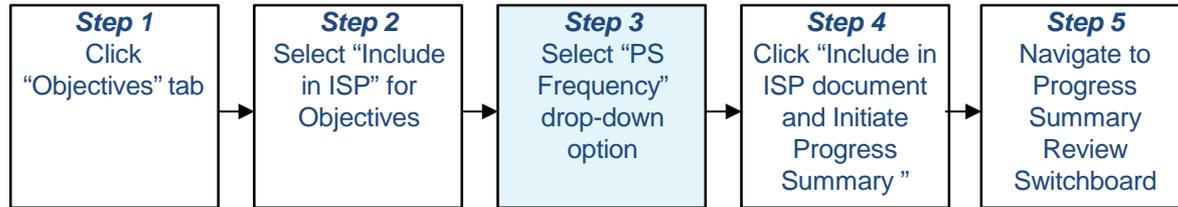
The two options in the “PS Frequency” column are “Semi-annual” or “Quarterly.”

- The system defaults to “Semi-Annual.”
- If Semi-Annual is selected, Providers will be required to complete two Progress Summaries—a semi annual Progress Summary and an annual Progress Summary .

<input checked="" type="checkbox"/> Include in ISP Doc?	Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
<input checked="" type="checkbox"/>	Community Involvement					
<input checked="" type="checkbox"/>	Bruce will increase his participation in community activities		Approved	<input type="text" value="Semi-Annual Quarterly"/>	View Document History	New
<input checked="" type="checkbox"/>	Bruce will serve meals once a week at		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current
<input checked="" type="checkbox"/>	Money Management					
<input checked="" type="checkbox"/>	Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current
<input checked="" type="checkbox"/>	Personal Growth & Accomplishments--					
<input checked="" type="checkbox"/>	By November 2015, Bruce will participate in 10 job exploration activities.		Approved	<input type="text" value="Semi-Annual"/>	View Document History	New
<input checked="" type="checkbox"/>	Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current



Scenario: Initiate a Progress Summary



Step 3: In the PS Frequency column, use the drop-down to set frequency

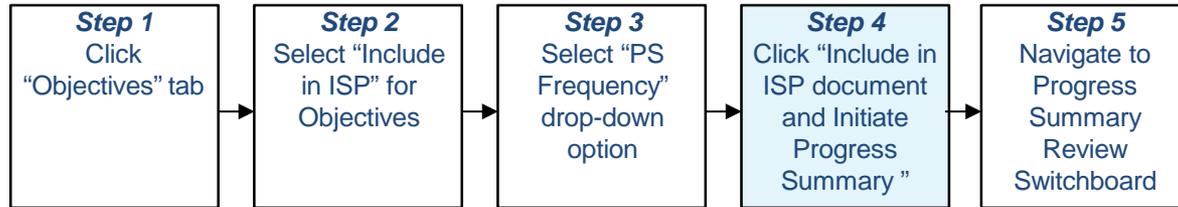
The two options in the “PS Frequency” column are “Semi-annual” or “Quarterly.”

- If Quarterly is selected, Providers will be required to complete four Progress Summaries throughout the year: – Quarter 1, Semi-Annual, Quarter 3 and Annual

Include in ISP Doc?	Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
<input checked="" type="checkbox"/>	Community Involvement					
<input checked="" type="checkbox"/>	Bruce will increase his participation in community activities		Approved	<input type="text" value="Semi-Annual Quarterly"/>	View Document History	New
<input checked="" type="checkbox"/>	Bruce will serve meals once a week at		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current
<input checked="" type="checkbox"/>	Money Management					
<input checked="" type="checkbox"/>	Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current
<input checked="" type="checkbox"/>	Personal Growth & Accomplishments--					
<input checked="" type="checkbox"/>	By November 2015, Bruce will participate in 10 job exploration activities.		Approved	<input type="text" value="Semi-Annual"/>	View Document History	New
<input checked="" type="checkbox"/>	Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current



Scenario: Initiate a Progress Summary



Step 4: Click “Include in ISP document and Initiate Progress Summary ”

Click “Include in ISP document and Initiate Progress Summary .” The system will display an “Operation Successful Message.”

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

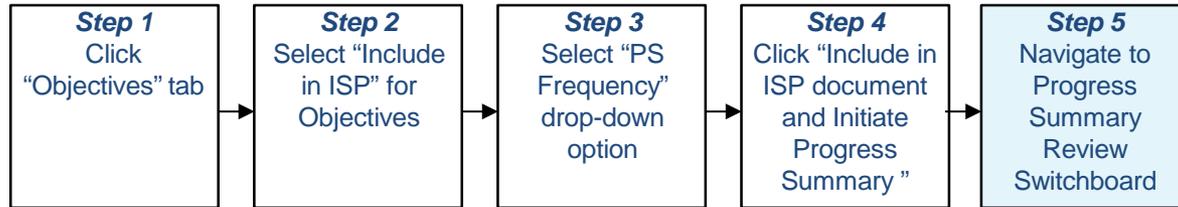
Objectives and Support Strategies Review Switchboard Update Year ISP

<input checked="" type="checkbox"/> Include in ISP Doc?	Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
<input checked="" type="checkbox"/>	Community Involvement					
<input checked="" type="checkbox"/>	Bruce will increase his participation in community activities					
<input checked="" type="checkbox"/>	Bruce will serve meals once a week at		Approved	Semi-Annual	View Document History	Current
<input checked="" type="checkbox"/>	Money Management					
<input checked="" type="checkbox"/>	Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved	Semi-Annual	View Document History	Current
<input checked="" type="checkbox"/>	Personal Growth & Accomplishments					
<input checked="" type="checkbox"/>	By November 2015, Bruce will participate in 10 job exploration activities.		Approved	Semi-Annual	View Document History	New
<input checked="" type="checkbox"/>	Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved	Semi-Annual	View Document History	Current

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Scenario: Initiate a Progress Summary



Step 5: Navigate to Progress Summary Review Switchboard

Click the "Progress Summary" third menu tab.

Progress Summary

Health and Human Services

HOME | QM | PAM | **ISP** | ADMIN | TOOLS

Individual Search | Review Process Management | Reports | References

Search Results | ISP Dashboard | **Progress Summary**

ISP > Individual Search > ISP Dashboard > Objectives Review Switchboard

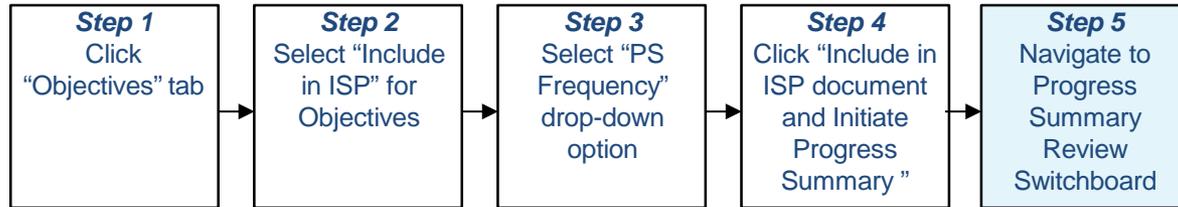
Individual	Eligibility # - : SSN # - :	Planned Meeting Date	ISP Meeting Deadline 05/13/2015	Region - Southeast Area Office - Cape Cod & Islands	Service Coordinator							
ISP Dashboard	ISP Meeting Details	Vision	Request Assessments	Review Assessments	Current Supports	Safety/Risk	Legal/Financial	Successes/Challenges	Goals	Objectives	Modifications	View/Print ISP

Objectives and Support Strategies Review Switchboard

<input checked="" type="checkbox"/>	Objective(s)	Created By	Status	PS Frequency	Document History
<input checked="" type="checkbox"/>	CBDS				
<input checked="" type="checkbox"/>	By 2017, [redacted] will exhibit appropriate communication skills while in groups or in community setting	[redacted]	Approved	Semi-Annual	View Document History
<input checked="" type="checkbox"/>	Vocational				
<input checked="" type="checkbox"/>	By 2017, when [redacted] is vending, he will place all varieties of chips facing in the right direction i	[redacted]	Approved	Semi-Annual	View Document History

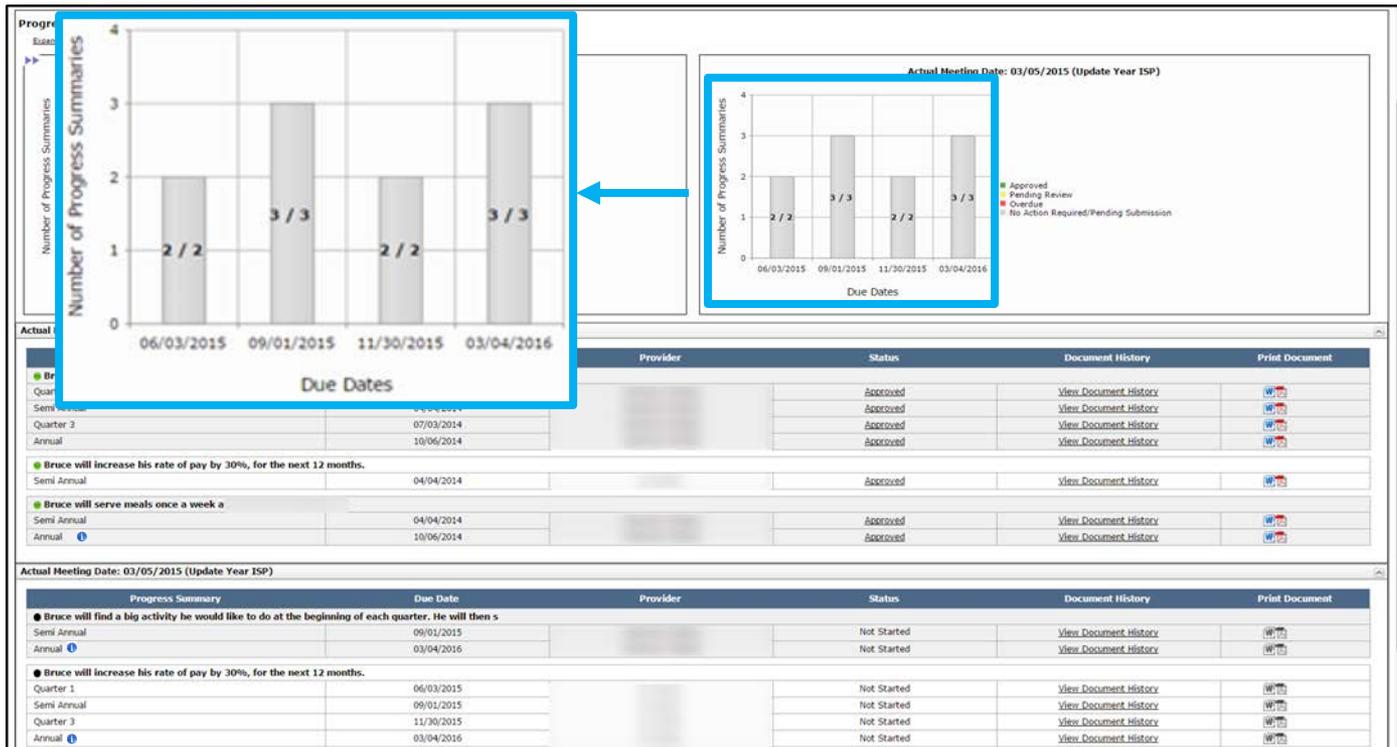


Scenario: Initiate a Progress Summary



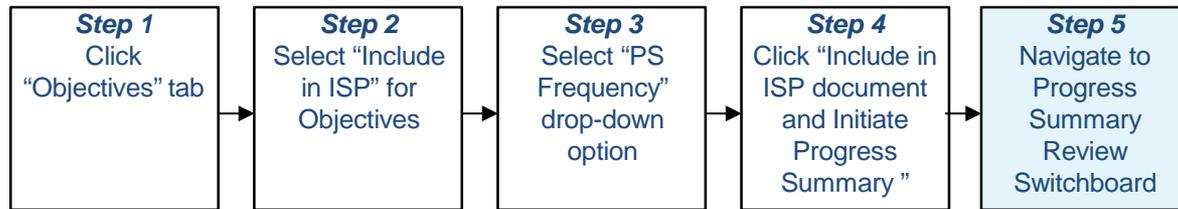
Step 5: Navigate to Progress Summary Review Switchboard

The system will display the Progress Summary Review Switchboard. The graph will now populate and the links to the Progress Summaries will display in "Not Started" status.





Scenario: Initiate a Progress Summary



Step 5: Navigate to Progress Summary Review Switchboard

The system will display the Progress Summary Review Switchboard. The graph will now populate and the links to the Progress Summaries will display in "Not Started" status.

Actual Meeting Date: 06/03/2014 (Full Year ISP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
01/04/2014	1	0	0	0
04/04/2014	3	0	0	0
07/03/2014	1	0	0	0
10/06/2014	2	0	0	0

Actual Meeting Date: 03/05/2015 (Update Year ISP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
06/03/2015	2	0	0	0
09/01/2015	3	0	0	0
11/30/2015	2	0	0	0
03/04/2016	3	0	0	0

Actual Meeting Date: 06/03/2014 (Full Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s					
Quarter 1	01/04/2014		Approved	View Document History	Print
Semi Annual	04/04/2014		Approved	View Document History	Print
Quarter 3	07/03/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print
Bruce			Not Started		
Semi An			Not Started	View Document History	Print
Bruce			Not Started		
Semi An			Approved	View Document History	Print
Annual			Approved	View Document History	Print

Actual Meeting Date: 03/04/2016

Progress Summary	Due Date	Provider	Status	Document History	Print Document
Bruce			Not Started		
Semi An			Not Started	View Document History	Print
Annual			Not Started	View Document History	Print
Bruce			Not Started	View Document History	Print
Semi An			Not Started	View Document History	Print
Quarter			Not Started	View Document History	Print
Annual			Not Started	View Document History	Print



Next Steps and Notes

Next Steps

- The Progress Summary Review Switchboard will display Progress Summaries for the objectives included in the ISP document.
- The status of all newly requested Progress Summaries is in “Not Started” status.
- Providers can access the Progress Summary in not started status and complete, but they cannot submit to a Service Coordinator until it is 30 days prior to the due date.

Alerts

- SCs and Providers will both receive an Alert 30 days prior to the due date of the Progress Summary.
- On Tuesdays / Fridays, SCs will receive alerts for each Progress Summary submitted by Providers.
- On Tuesdays / Fridays, SCs will receive an Alert indicating if the due date for any Progress Summary has passed without provider submission.

HOME QM PAM ISP ADMIN TOOLS

Reports | Alerts | Misc | IM Utilities | DPPC | Data Extracts | DR Utilities | IN Utilities | MT Utilities | SC Supervisor Tool

Pending Alerts

Tools > Alerts > Pending Alerts > Pending Alerts

Please be aware alerts will be automatically deleted depending on the alert message (between 7 to 60 days). Consult the Process Management screens and Reports to manage all outstanding tasks.

ALERT SEARCH CRITERIA

Module: Individual Supports Plan

Recipient User:

Subject: Provider has submitted Progress Summaries

Progress Summaries submitted for review by:

Search: Show 10 entries

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	09/16/2015	Provider has submitted Progress Summaries	Progress Summaries submitted for review by: Provider: 1 /2015; Progress Summaries evaluation due by: 07/09/2015;



Next Steps and Notes

Progress Summary Frequency

- Service Coordinators can change the frequency of a Progress Summary prior to the point the plan is locked. If the Progress Summary Frequency is changed, only those Progress Summaries due going forward will be required.

ISP Dashboard | ISP Meeting Details | Vision | Request Assessments | Review Assessments | Current Supports | Safety/Risk | Legal/Financial | Successes/Challenges | Objectives | Update Year ISP

Objectives and Support Strategies Review Switchboard

<input checked="" type="checkbox"/> Include in ISP Doc?	Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
<input checked="" type="checkbox"/>	Community Involvement					
<input checked="" type="checkbox"/>	Bruce will increase his participation in community activities		Approved	<input type="text" value="Semi-Annual Quarterly"/>	View Document History	New
<input checked="" type="checkbox"/>	Bruce will serve meals once a week at		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current
<input checked="" type="checkbox"/>	Money Management					
<input checked="" type="checkbox"/>	Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current
<input checked="" type="checkbox"/>	Personal Growth & Accomplishments--					
<input checked="" type="checkbox"/>	By November 2015, Bruce will participate in 10 job exploration activities.		Approved	<input type="text" value="Semi-Annual"/>	View Document History	New
<input checked="" type="checkbox"/>	Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved	<input type="text" value="Semi-Annual"/>	View Document History	Current

If there is a need to change the frequency of progress summaries for an objective after a plan is locked, Area Office Directors are able to manually unlock the plan.



Next Steps and Notes

Objectives Included in Error

- Once the provider has begun work on a Progress Summary, Service Coordinators cannot unselect the associated objective and remove it from the ISP document. If the objective was included in error, however, Service Coordinators can call the helpdesk to have the “Started” Progress Summary deleted prior to unselecting the objective from inclusion in ISP document.

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 Update Year ISP

<input checked="" type="checkbox"/> Include in ISP Doc?	Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
<input checked="" type="checkbox"/>	Community Involvement					
<input checked="" type="checkbox"/>	Bruce will increase his participation in community activities		Approved	Semi-Annual	View Document History	New
<input checked="" type="checkbox"/>	Bruce will serve meals once a week at		Approved	Semi-Annual	View Document History	Current
<input checked="" type="checkbox"/>	Money Management					
<input checked="" type="checkbox"/>	Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved	Semi-Annual	View Document History	Current
<input checked="" type="checkbox"/>	Personal Growth & Accomplishments--					
<input checked="" type="checkbox"/>	By November 2015, Bruce will participate in 10 job exploration activities.		Approved	Semi-Annual	View Document History	New
<input checked="" type="checkbox"/>	Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved	Semi-Annual	View Document History	Current

Progress Summaries for Ended Services

- If a service has ended prior to the ISP meeting, and a Progress Summary has not yet been completed, the Progress Summary must be completed off-line on paper. The ending of a service removes the ability for the provider to enter this information in HCSIS. However, the Progress Summary is still required. We will address this issue in a future release.

Scenario: Review a Progress Summary

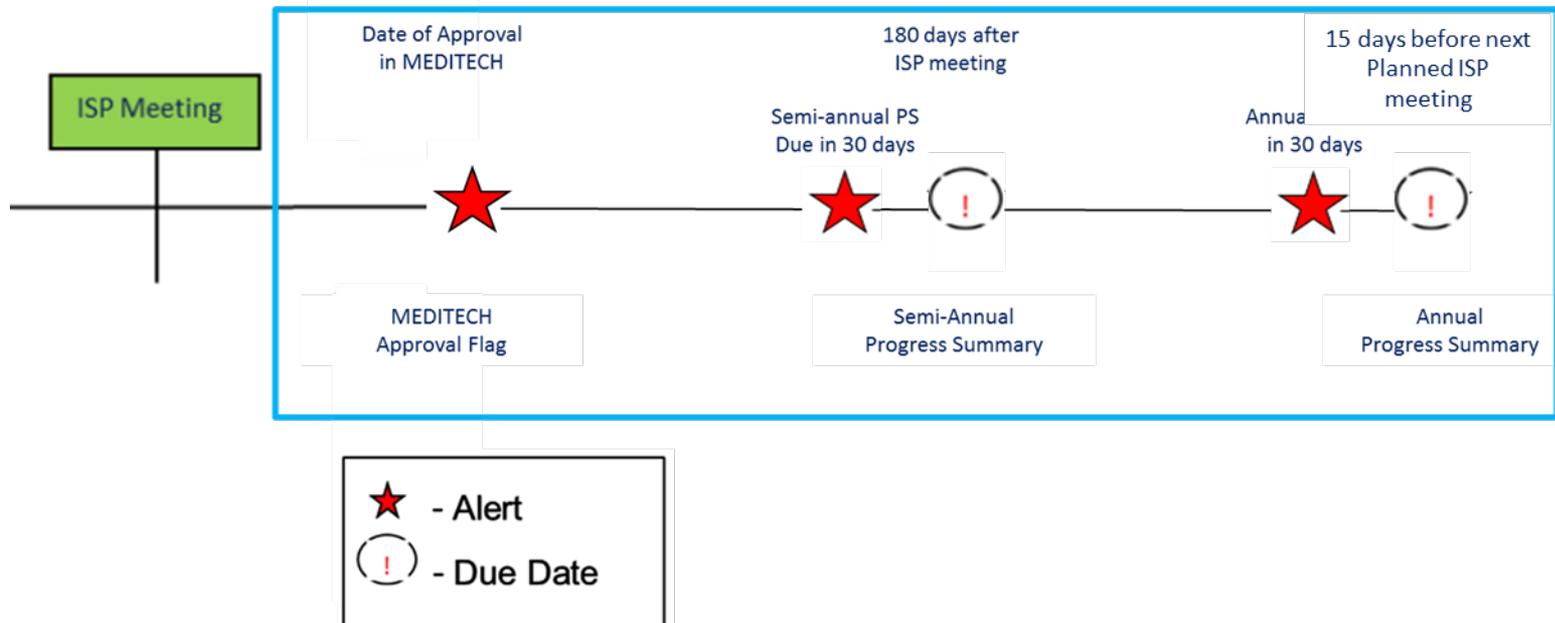


Scenario: Review a Progress Summary

Description: Once DDS has initiated a Progress Summary and the due date for the Progress Summary is within 30 days, Provider Data Entry Users are required to complete and submit the form. Providers are able to access the form to begin work prior to 30 days before the due date, however will not be able to submit until 30 days before the deadline. Provider Data Entry Users complete the form and submit it for internal review to Provider Supervisors, who can request internal revision or submit the form to DDS for review. Once a provider has submitted a Progress Summary, DDS Staff are responsible for reviewing the form and determining whether the form meets the acceptance criteria or requires revisions.

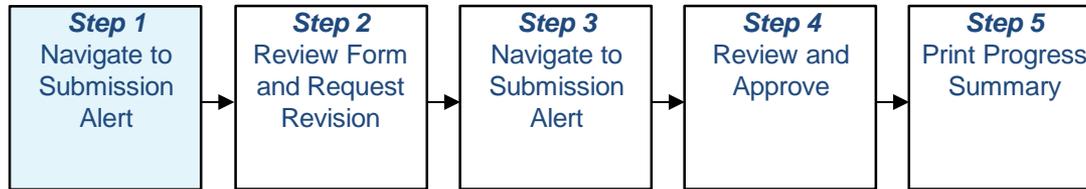
Roles and Responsibilities:

- **Service Coordinators:** Review Form, Request Revision, Approve
- **Service Coordinator Supervisor:** Review Form, Request Revision, Approve





Scenario: Review a Progress Summary



Step 1: Navigate to the Progress Summary from the Submission Alert

Service Coordinators will receive alerts on Tuesdays and Fridays indicating that Progress Summaries have been submitted by Provider agencies for an individual.

Click on the Alert message “Progress Summaries submitted for review.”

Progress Summaries submitted for review by:

HOME | QM | PAM | ISP | ADMIN | TOOLS

Reports | Alerts | Misc | IM Utilities | DPPC | Data Extracts | DR Utilities | IN Utilities | MT Utilities | SC Supervisor Tool

Pending Alerts

Tools > Alerts > Pending Alerts > Pending Alerts

Please be aware alerts will be automatically deleted depending on the alert message (between 7 to 60 days). Consult the Process Management screens and Reports to manage all outstanding tasks.

ALERT SEARCH CRITERIA

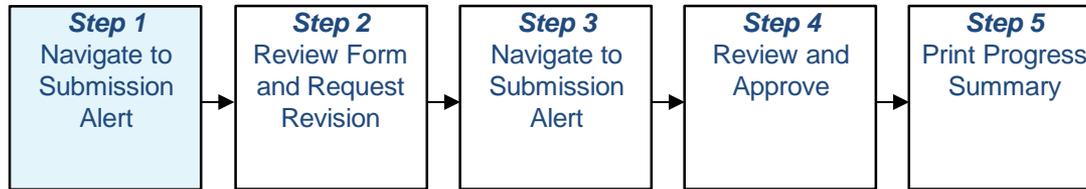
Module: Individual Supports Plan
Subject: Provider has submitted Progress Summaries
Recipient User: [dropdown]
[Search] [Reset]

Search: [input] Show 10 entries

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	09/16/2015	Provider has submitted Progress Summaries	Progress Summaries submitted for review by: [text]; Progress Summaries evaluation due by: 07/09/2015;



Scenario: Review a Progress Summary



Step 1: Navigate to the Progress Summary from the Submission Alert

The system will redirect to the Progress Summary Review Switchboard. Click on the “Submitted for DDS Review” link.

Submitted for DDS Review

Progress Summary Review Switchboard

Actual Meeting Dates 06/03/2014 (Full Year ISP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
01/04/2014	1	0	0	0
04/04/2014	3	0	0	0
07/03/2014	1	0	0	0
10/06/2014	2	0	0	0

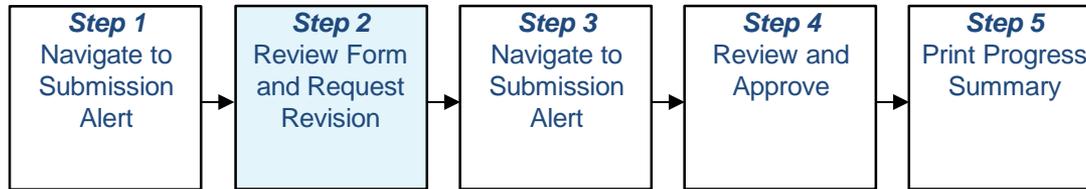
Actual Meeting Dates 03/05/2015 (Update Year ISP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
06/05/2015	1	1	0	0
09/12/2015	3	0	0	0
11/7/2015	2	0	0	0
03/04/2016	3	0	0	0

Progress Summary	Due Date	Provider	Status	Document History	Print Document
Draco will find a big activity he would like to do at the beginning of each quarter. He will then s					
Quarter 1	01/04/2014		Approved	View Document History	Print
Semi Annual	04/04/2014		Approved	View Document History	Print
Quarter 3	07/03/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print
Draco will increase his rate of pay by 30%, for the next 12 months.					
Semi Annual	04/04/2014		Approved	View Document History	Print
Draco will serve meals once a week at					
Semi Annual	04/04/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print
Actual Meeting Dates 03/05/2015 (Update Year ISP)					
Draco will find a big activity he would like to do at the beginning of each quarter. He will then s					
Semi Annual	09/01/2015		Not Started	View Document History	Print
Annual	02/04/2016		Not Started	View Document History	Print
Draco will increase his rate of pay by 30%, for the next 12 months.					
Quarter 1	06/03/2015		Submitted for DDS Review	View Document History	Print
Semi Annual	09/01/2015		Not Started	View Document History	Print
Quarter 3	11/30/2015		Not Started	View Document History	Print
Annual	02/04/2016		Not Started	View Document History	Print



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

The system will display the Progress Summary Form. The “Goal”, “Objective” and “Support Strategy” for the identified objective are available for reference.

Progress Summary Form

Goal Goal

Goal Title: Personal Growth & Accomplishments

Updated Information: No Change

Goal: Bruce will increase his rate of pay.

Date Goal Identified: 08/18/2014

Goal Identified By: Provider

Update Year Status: Current

Objective Objective

Related Objective:
Bruce will increase his rate of pay by 30%, for the next 12 months.

Updated Information:
No Change

Setting and Learning Environment:
Setting: Workshop Learning Environment: Verbal cues/praise Modeling Encouragement Consistency

Updated Information:
No Change

Responsible Party:

Updated Information:
No Change

Update Year Status:

Support Strategy Support Strategy

Teaching Method and Skills to be Developed:
Bruce possesses excellent work skills and is very motivated by money. He also understands the connection of earning money and saving that money to make purchases of things he wants. Although Bruce works every day, he is capable of making more money than he currently is. Over the past year, Bruce has made an average of \$9.81 per month. Staff will encourage Bruce to complete as much work as he can while he is in the workshop. As Bruce increases his production rate, he will increase his rate of pay and receive a larger pay check. As Bruce is working, staff will praise him and remind him of how much money he will make. If Bruce is unable to increase his rate, staff will encourage him to do so the next day.

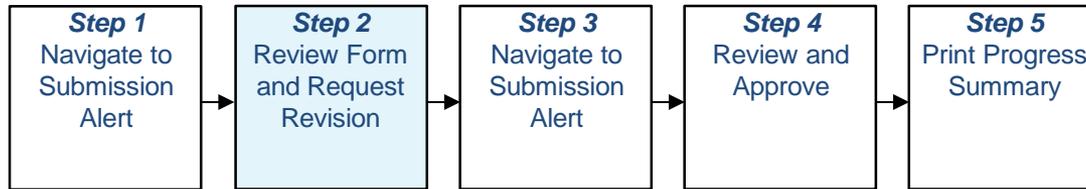
Updated Information:
No Change

Criteria for Evaluating Success:
Monthly data will be compiled and monthly progress notes will be written.

Updated Information:
No Change



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

For your reference, the Progress Summary displays previous Progress Summaries completed for this objective associated to the same ISP year.

Progress Summary → **Previous Progress Summaries**

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status: Partially Met

Describe what progress has been made towards meeting this Objective:
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objective:
No recommended changes at this time.

Acceptance Criteria

Progress Summary Frequency: Quarterly

All Acceptance Criteria Met:

Individualized: Yes

Includes Relevant Strengths and Needs: Yes

Identifies Opportunity for Development: No

Current: Yes

Complete: Yes

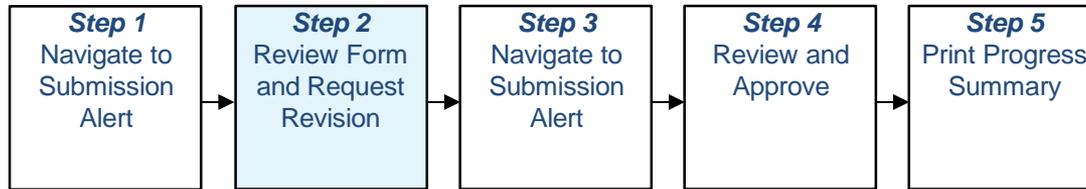
Comments:

Spell Check | Reset | Save

Request Revision | Approve



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

Review the content that the Provider Data Entry User has written.

Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status*

Describe what progress has been made towards meeting this Objective:*
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. I

Are there any recommended changes in strategies, resources or supports to aid in achievement of t

Acceptance Criteria

Progress Summary Frequency

All Acceptance Criteria Met

Individualized

Includes Relevant Strengths and Needs

Identifies Opportunity for Development

Current

Complete

Comments:

Describe what progress has been made towards meeting this Objective:*
Bruce is in the process of searching for a different job placement.

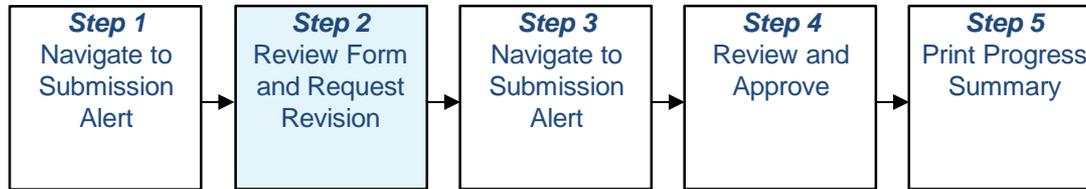
Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objective:*
No recommended changes at this time.

Spell Check Reset Save

Request Revision Approve



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

Fill in the Acceptance Criteria Section.

Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status* Partially Met

Describe what progress has been made towards meeting this Objective*
Bruce is in the process of searching for a different job placement. He has applied for several positions and is currently interviewing. He is also working on increasing his rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or support?
No recommended changes at this time.

Acceptance Criteria

Progress Summary Frequency

All Acceptance Criteria Met

Individualized

Includes Relevant Strengths and Needs

Identifies Opportunity for Development

Current

Complete

Comments:

Quarterly

Yes

Yes

No

Yes

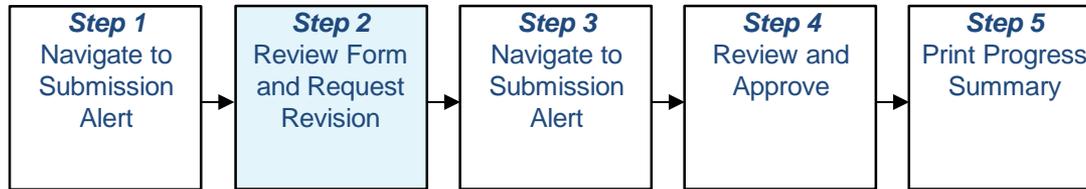
Yes

Spell Check Reset Save

Request Revision Approve



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

If there is a need to return a form for revision, at least one acceptance criteria must not be met and reflect a status of “No”. Select the “No” dropdown for the category that requires revision.

Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status: Partially Met

Describe what progress has been made towards meeting this Objective:*
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in pay. His job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objectives?*
No recommended changes at this time.

Acceptance Criteria

Progress Summary Frequency: Quarterly

All Acceptance Criteria Met

Individualized: Yes

Includes Relevant Strengths and Needs: Yes

Identifies Opportunity for Development: No

Current: Yes

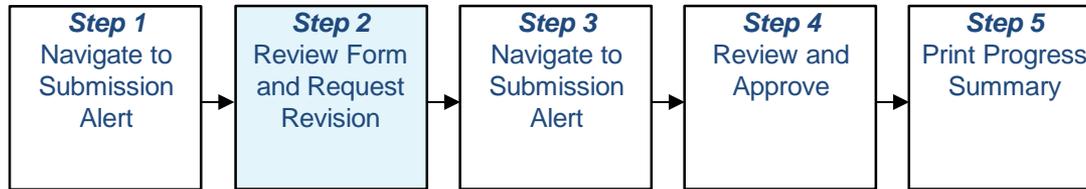
Complete: Yes

Comments:

Spell Check Reset Save Request Revision Approve



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

Insert text in the Comments text box to explain why the acceptance criteria was not met.

Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status* Partially Met

Describe what progress has been made towards meeting this Objective*
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objective*
No recommended changes at this time.

Acceptance Criteria

Comments:

Includes relevant Strengths and Needs

Identifies opportunity for Development

Current

Complete

Comments:

The progress summary does not adequately identify opportunities for development

Quarterly

Yes

Yes

No

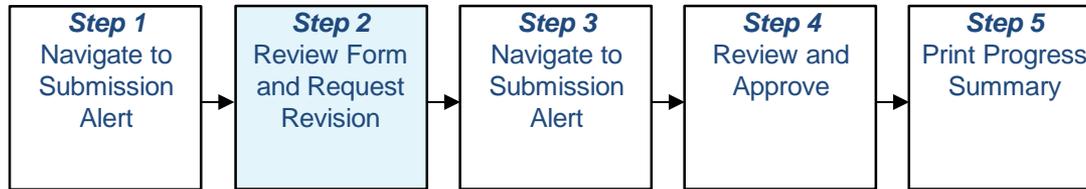
Yes

Yes

Request Revision Approve



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

If desired, use the drop down to change the Progress Summary Frequency. If you opt to change the frequency, this will modify the Progress Summaries displayed in the switchboard.



Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status* Partially Met

Describe what progress has been made towards meeting this Objective*
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objectives*
No recommended changes at this time.

Acceptance Criteria

Progress Summary Frequency

All Acceptance Criteria Met

Individualized Yes

Includes Relevant Strengths and Needs Yes

Identifies Opportunity for Development No

Current Yes

Complete Yes

Comments:

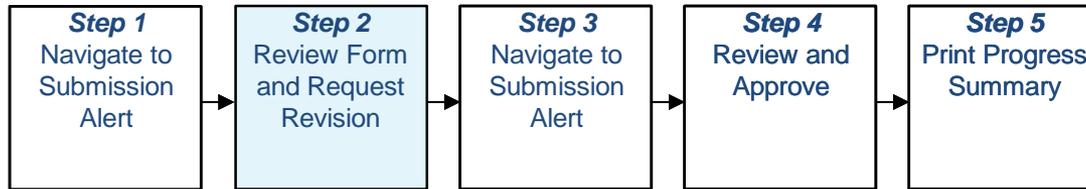
The progress summary does not adequately identify opportunities for development

Spell Check Reset Save

Request Revision Approve



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

Click “Request Revision.”

Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status* Partially Met

Describe what progress has been made towards meeting this Objective*
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objectives*
No recommended changes at this time.

Acceptance Criteria

Progress Summary Frequency: Quarterly

All Acceptance Criteria Met:

Individualized: Yes

Includes Relevant Strengths and Needs: Yes

Identifies Opportunity for Development: No

Current: Yes

Complete: Yes

Comments:

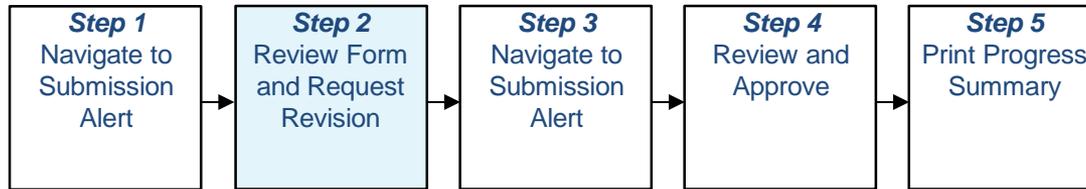
The progress summary does not adequately identify opportunities for development

Request Revision

Request Revision Approve



Scenario: Review a Progress Summary



Step 2: Review Progress Summary and Request Revision

The system will redirect to the Progress Summary Review Switchboard. The status of the form will change to “Revision Requested.”

Revision Requested

Progress Summary Review Switchboard
Kester, A. | Colson, M.

Actual Meeting Date: 06/03/2014 (Full Year ISIP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
01/04/2014	1	0	0	0
04/04/2014	3	0	0	0
07/03/2014	1	0	0	0
10/06/2014	2	0	0	0

Actual Meeting Date: 03/05/2015 (Update Year ISIP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
06/03/2015	2	0	0	0
09/01/2015	3	0	0	0
11/30/2015	2	0	0	0
03/04/2016	3	0	0	0

Actual Meeting Date: 06/03/2014 (Full Year ISIP)

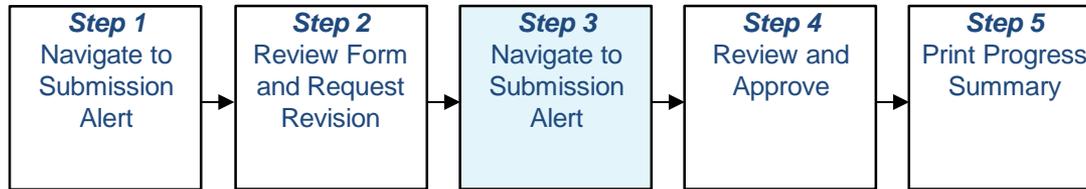
Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s	01/04/2014		Approved	View Document History	Print
Sevi Annual	04/04/2014		Approved	View Document History	Print
Quarter 3	07/03/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print
● Bruce will increase his rate of pay by 30%, for the next 12 months.	04/04/2014		Approved	View Document History	Print
Sevi Annual	04/04/2014		Approved	View Document History	Print
● Bruce will serve meals once a week at	04/04/2014		Approved	View Document History	Print
Sevi Annual	04/04/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print

Actual Meeting Date: 03/05/2015 (Update Year ISIP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s	01/01/2015		Not Started	View Document History	Print
Sevi Annual	05/01/2015		Not Started	View Document History	Print
Annual	03/04/2016		Not Started	View Document History	Print
● Bruce will increase his rate of pay by 30%, for the next 12 months.	06/03/2015		Revision Requested	View Document History	Print
Quarter 1	09/01/2015		Not Started	View Document History	Print
Sevi Annual	09/01/2015		Not Started	View Document History	Print
Quarter 3	11/30/2015		Not Started	View Document History	Print
Annual	03/04/2016		Not Started	View Document History	Print



Scenario: Review a Progress Summary



Step 3: Navigate to Form from Re-Submission Alert

Once the Provider revises the Progress Summary and re-submits it to DDS, you will receive an Alert.

Click “Progress Summaries submitted for review.”

Progress Summaries submitted for review by:

HOME QM PAM ISP ADMIN TOOLS

Reports | Alerts | Misc | IM Utilities | DPPC | Data Extracts | DR Utilities | IN Utilities | MT Utilities | SC Supervisor Tool

Pending Alerts

Tools > Alerts > Pending Alerts > Pending Alerts

Please be aware alerts will be automatically deleted depending on the alert message (between 7 to 60 days). Consult the Process Management screens and Reports to manage all outstanding tasks.

ALERT SEARCH CRITERIA

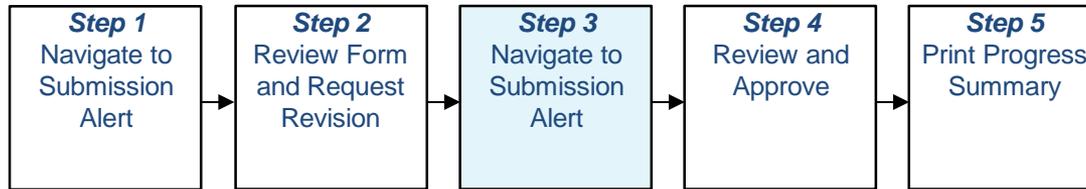
Module: Individual Supports Plan
Subject: Provider has submitted Progress Summaries
Recipient User: [dropdown]
[Search] [Reset]

Search: [input] Show 10 entries

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	09/16/2015	Provider has submitted Progress Summaries	Progress Summaries submitted for review by: [highlighted]; Progress Summaries evaluation due by: 07/09/2015;



Scenario: Review a Progress Summary



Step 3: Navigate to Form from Re-Submission Alert

The system will redirect to the Progress Summary Review Switchboard. Click “Submitted for DDS Review.”

Submitted for DDS Review

Actual Meeting Dates: 06/03/2014 (Full Year ISP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
03/04/2014	1	0	0	0
04/04/2014	3	0	0	0
07/03/2014	1	0	0	0
10/06/2014	2	0	0	0

Actual Meeting Dates: 03/05/2015 (Update Year ISP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
06/05/2015	1	1	0	0
09/01/2015	3	0	0	0
11/30/2015	2	0	0	0
03/04/2016	3	0	0	0

Progress Summary	Due Date	Provider	Status	Document History	Print Document
Reece will find a big activity he would like to do at the beginning of each quarter. He will then s	03/04/2014		Approved	View Document History	Print
Stens Annual	04/04/2014		Approved	View Document History	Print
Quarter 3	07/03/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print
Reece will increase his rate of pay by .30%, for the next 12 months.	04/04/2014		Approved	View Document History	Print
Stens Annual	04/04/2014		Approved	View Document History	Print
Reece will serve meals once a week	04/04/2014		Approved	View Document History	Print
Stens Annual	04/04/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print

Progress Summary	Due Date	Provider	Status	Document History	Print Document
Reece will find a big activity he would like to do at the beginning of each quarter. He will then s	09/01/2015		Not Started	View Document History	Print
Stens Annual	09/01/2015		Not Started	View Document History	Print
Annual	02/04/2016		Not Started	View Document History	Print
Reece will increase his rate of pay by .30%, for the next 12 months.	06/03/2015		Submitted for DDS Review	View Document History	Print
Stens Annual	09/01/2015		Not Started	View Document History	Print
Quarter 3	11/30/2015		Not Started	View Document History	Print
Annual	02/04/2016		Not Started	View Document History	Print



Scenario: Review a Progress Summary



Step 4: Review and Approve

The system will display the Progress Summary which the Provider revised and submitted. Review the form to validate that the requested revisions have been made.

Progress Summary

Previous Progress Summaries

- Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay.
- Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay.

Selected Progress Summary (Due Date: 06/06/2014)

Objective Status: Partially Met

Describe what progress has been made towards meeting this Objective:*

Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.]

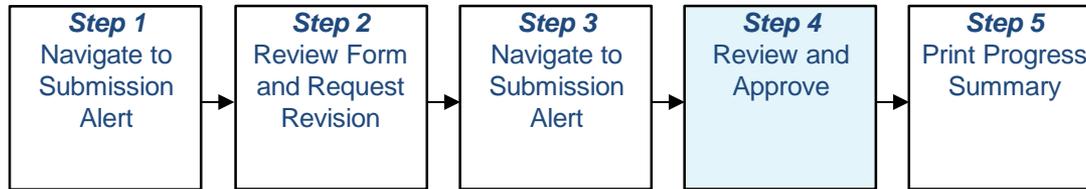
Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objective:*

No recommended changes at this time.

Spell Check Reset Save Request Revision Approve



Scenario: Review a Progress Summary



Step 4: Review and Approve

If all revisions have been applied, click the “All Acceptance Criteria Met.” This will change all of the drop-down fields to “Yes.”

Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

All Acceptance Criteria Met /2015) Partially Met

Describe what progress has been made towards meeting this Objective:*
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in pay. A decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objective:*
The job placement search is in itself a development opportunity for Bruce. If he is unsuccessful in his pursuit, additional supports will be provided to aid him.

Acceptance Criteria

All Acceptance Criteria Met

Individualized Yes

Includes Relevant Strengths and Needs Yes

Identifies Opportunity for Development Yes

Current Yes

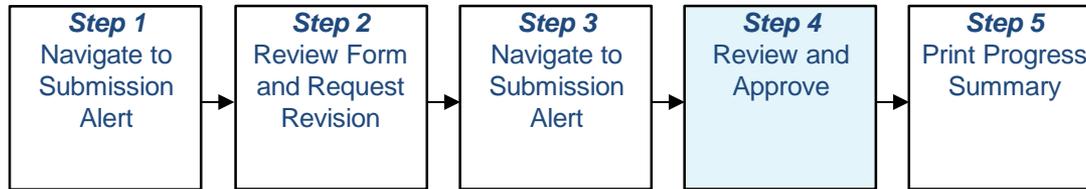
Complete Yes

Comments:
The submitted progress summary form does not identify opportunities for development

Spell Check Reset Save Request Revision Approve



Scenario: Review a Progress Summary



Step 4: Review and Approve

If no longer applicable, delete or revise the notes in the “Comments” the text box.

Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status:* Partially Met

Describe what progress has been made towards meeting this Objective:*
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objectives*
The job placement search is in itself a development opportunity for Bruce. If he is unsuccessful in his pursuit, additional supports will be provided to aid him.

Acceptance Criteria

Comments:

Includes Relevant Strengths and Needs

Identifies opportunity for Development

Current

Comments:

Quarterly

Yes

Yes

Yes

Yes

Yes

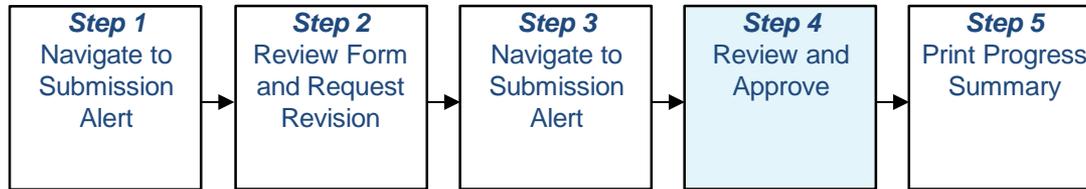
Yes

Spell Check Reset Save

Request Revision Approve



Scenario: Review a Progress Summary



Step 4: Review and Approve

Click “Approve.”



Progress Summary

Previous Progress Summaries

Progress till 04/04/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Progress till 10/06/2014 (Approved)
Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.

Selected Progress Summary (Due Date: 06/03/2015)

Objective Status:* Partially Met

Describe what progress has been made towards meeting this Objective:*
Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.

Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objectives?*
The job placement search is in itself a development opportunity for Bruce. If he is unsuccessful in his pursuit, additional supports will be provided to aid him.

Acceptance Criteria

Progress Summary Frequency: Quarterly

All Acceptance Criteria Met:

Individualized: Yes

Includes Relevant Strengths and Needs: Yes

Identifies Opportunity for Development: Yes

Current: Yes

Complete: Yes

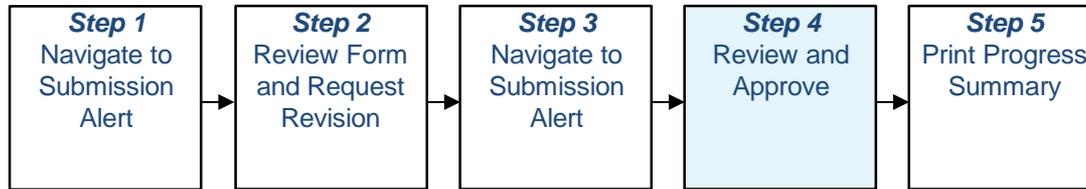
Comments:

Spell Check Reset Save

Request Revision Approve



Scenario: Review a Progress Summary



Step 4: Review and Approve

The system will redirect to the Progress Summary Review Switchboard. The status of the Progress Summary will change to “Approved.”

Approved

Progress Summary Review Switchboard
Extent: All | Column: All

Actual Meeting Date: 06/03/2014 (Full Year ISF)

Due Date	Approved	Pending Review	Overdue	No Action Required/Pending Submission
01/04/2014	1	1	0	0
04/04/2014	3	0	0	0
07/03/2014	1	0	0	0
10/06/2014	2	0	0	0

Actual Meeting Date: 03/05/2015 (Update Year ISF)

Due Date	Approved	Pending Review	Overdue	No Action Required/Pending Submission
06/03/2015	1	1	0	0
09/01/2015	3	0	0	0
11/30/2015	2	0	0	0
03/04/2016	3	0	0	0

Actual Meeting Date: 06/03/2014 (Full Year ISF)

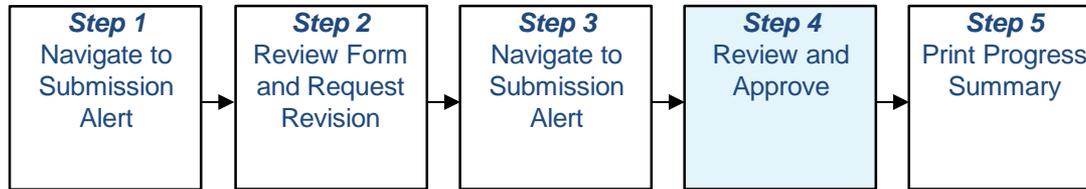
Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s	01/04/2014		Approved	View Document History	Print
Semi Annual	04/04/2014		Approved	View Document History	Print
Quarter 3	07/03/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print
● Bruce will increase his rate of pay by 30%, for the next 12 months.	04/04/2014		Approved	View Document History	Print
Semi Annual					
● Bruce will serve meals once a week	04/04/2014		Approved	View Document History	Print
Semi Annual	04/04/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print

Actual Meeting Date: 03/05/2015 (Update Year ISF)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s	03/01/2015		Stated	View Document History	Print
Semi Annual	09/01/2015		Not Started	View Document History	Print
Annual	03/04/2016		Not Started	View Document History	Print
● Bruce will increase his rate of pay by 30%, for the next 12 months.	06/03/2015		Approved	View Document History	Print
Quarter 1	09/01/2015		Not Started	View Document History	Print
Semi Annual	03/01/2015		Not Started	View Document History	Print
Quarter 3	11/30/2015		Not Started	View Document History	Print
Annual	03/04/2016		Not Started	View Document History	Print



Scenario: Review a Progress Summary



Step 4: Review and Approve

Please note that the Progress Summary Bar Graph will update to reflect the change in status.

Progress Summary Review Switchboard
Total: All | Edit: All

Actual Meeting Date: 06/03/2014 (Full Year ISP)

Due Date	Number of Progress Summaries	Status
01/04/2014	1	Approved
04/04/2014	3	Pending Review
07/03/2014	1	Overdue
10/06/2014	2	No Action Required/Pending Submission

Actual Meeting Date: 03/05/2015 (Update Year ISP)

Due Date	Number of Progress Summaries	Status
06/03/2015	1	Approved
09/01/2015	3	Pending Review
11/30/2015	2	Overdue
03/04/2016	3	No Action Required/Pending Submission

Actual Meeting Date: 03/05/2015 (Update Year ISP)

Due Date	Number of Progress Summaries	Status
06/03/2015	1	Approved
09/01/2015	3	Pending Review
11/30/2015	2	Overdue
03/04/2016	3	No Action Required/Pending Submission

Actual Meeting Date: 06/03/2014 (Full Year ISP)

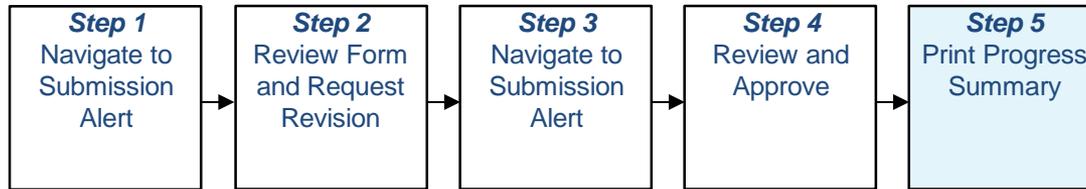
Progress Summary	Due Date	Provider	Status	Document History
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s	01/04/2014		Approved	View Document History
Semi Annual	04/04/2014		Approved	View Document History
Quarter 3	07/03/2014		Approved	View Document History
Annual	10/06/2014		Approved	View Document History
● Bruce will increase his rate of pay by 30%, for the next 12 months.	04/04/2014		Approved	View Document History
Semi Annual	04/04/2014		Approved	View Document History
● Bruce will serve meals once a w	04/04/2014		Approved	View Document History
Semi Annual	04/04/2014		Approved	View Document History
Annual	10/06/2014		Approved	View Document History

Actual Meeting Date: 03/05/2015 (Update Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s	09/01/2015		Started	View Document History	Print Document
Semi Annual	03/04/2016		Not Started	View Document History	Print Document
Annual	03/04/2016		Not Started	View Document History	Print Document
● Bruce will increase his rate of pay by 30%, for the next 12 months.	06/03/2015		Approved	View Document History	Print Document
Quarter 1	09/01/2015		Not Started	View Document History	Print Document
Semi Annual	11/30/2015		Not Started	View Document History	Print Document
Quarter 3	03/04/2016		Not Started	View Document History	Print Document
Annual	03/04/2016		Not Started	View Document History	Print Document



Scenario: Review a Progress Summary



Step 5: Print Progress Summary

To Print, click either the Word or PDF icon for that Progress Summary .

Until a Progress Summary has been approved, it will print with a Draft Watermark.

Progress Summary Review Switchboard
Total: All | Edit: All

Actual Meeting Dates: 06/03/2014 (Full Year ISP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
01/04/2014	1 / 2	0	0	0
04/04/2014	3 / 3	0	0	0
07/03/2014	1 / 1	0	0	0
10/04/2014	2 / 2	0	0	0

Actual Meeting Dates: 03/05/2015 (Update Year ISP)

Due Dates	Approved	Pending Review	Overdue	No Action Required/Pending Submission
06/03/2015	1 / 2	0	0	0
09/01/2015	3 / 3	0	0	0
11/30/2015	2 / 2	0	0	0
03/04/2016	3 / 3	0	0	0

Actual Meeting Dates: 06/03/2014 (Full Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s	01/04/2014		Approved	View Document History	Print
Semi Annual	04/04/2014		Approved	View Document History	Print
Quarter 3	07/03/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print
● Bruce will increase his rate of pay by 30%, for the next 12 months.	04/04/2014		Approved	View Document History	Print
Semi Annual	04/04/2014		Approved	View Document History	Print
● Bruce will serve meals once a w	04/04/2014		Approved	View Document History	Print
Semi Annual	04/04/2014		Approved	View Document History	Print
Annual	10/06/2014		Approved	View Document History	Print

Actual Meeting Dates: 03/05/2015 (Update Year ISP)

Progress Summary	Due Date	Provider	Status	Document History	Print Document
● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s	09/01/2015		Not Started	View Document History	Print
Semi Annual	09/01/2015		Not Started	View Document History	Print
Annual	03/04/2016		Not Started	View Document History	Print
● Bruce will increase his rate of pay by 30%, for the next 12 months.	06/03/2015		Approved	View Document History	Print
Quarter 1	06/03/2015		Approved	View Document History	Print
Semi Annual	09/01/2015		Not Started	View Document History	Print
Quarter 3	11/30/2015		Not Started	View Document History	Print
Annual	03/04/2016		Not Started	View Document History	Print



Next Steps and Notes

Next Steps

- If DDS approve a Progress Summary, Providers will receive an Alert
- Service Coordinators or Service Coordinator Supervisors can continue reviewing other Progress Summaries.
- An objective that is met or discontinued in the Progress Summary will still be recalled in an ISP update year.

Notes

- Contact the Help Desk in the following situations for assistance:
 - If a Service Coordinator mistakenly includes an objective in the ISP document and the Provider initiates work on the Progress Summary, the objective cannot be unselected. In this scenario, the Progress Summary must be deleted by the Help Desk. Once the Progress summary is deleted, the SC can then unselect the objective.
 - If a service ends, a Service Coordinator needs to contact help desk to request deletion of the Progress Summary. In this scenario, because providers lose access to that individual when a service ends, providers are required to complete next Progress Summary off-line.



Next Steps and Notes

- If an objective is determined to be met or discontinued as a part of a Semi-Annual Progress Summary, subsequent Progress Summaries for that objective will not be required unless that objective is included again as part of the ISP.
 - In the scenario below, the quarter 3 and annual Progress Summaries are no longer required because the objective is deemed to be met in the Semi-Annual Progress Summary .

● Bruce will increase his rate of pay by 30%, for the next 12 months.						
Quarter 1	06/03/2015			Approved	View Document History	
Semi Annual	09/01/2015			Submitted for DDS Review	View Document History	
Quarter 3	11/30/2015			Not Started	View Document History	
Annual	03/04/2016			Not Started	View Document History	



● Bruce will increase his rate of pay by 30%, for the next 12 months.						
Quarter 1	06/03/2015			Approved	View Document History	
Semi Annual	09/01/2015			Approved	View Document History	

Quarter 3 and Annual Forms No Longer Display

Regardless of whether the objective has been deemed to be met or discontinued the objective will still be recalled and require update in an ISP update year



Next Steps and Notes

Action	End User	Regulations	Alert?
Consult with Guardian and Individual on required Assessments, Vision, and Goals	Service Coordinator	45-60 days prior to the ISP meeting	No
Notification of ISP meeting and request for Assessments	Service Coordinator	30 days prior to the ISP meeting	Yes
Create and enter proposed Goals for the individual	Providers and DDS Staff	N/A	No
Assessments and Proposed Objectives & Support Strategies submitted to Service Coordinator	Providers	15 days prior to the ISP meeting	Yes
Annual Progress Summary Due	Service Coordinators and Providers	15 days prior to the ISP meeting	Yes
Review and approval or request for revision of submitted documents	Service Coordinator	7 days prior to the ISP meeting	Yes
Print documents for ISP meeting	Providers and DDS staff	N/A	No
Revise ISP documents if required	Providers and DDS staff	Up to 45 days after the ISP meeting	Depends on the type of revision
ISP Mailed to ISP Team	Service Coordinator	45 Days after the ISP meeting	No
Semi-Annual Progress Summary Due	Service Coordinators and Providers	180 Days after the ISP Meeting	Yes



Chapter 3 Summary

This Chapter covered:

- Overview of Progress Summary
- Progress Summary Review Switchboard
- Scenario: Initiate a Progress Summary
- Scenario: Review a Progress Summary

Chapter 4: Progress Summary Report





Chapter 4 Overview

This Chapter will cover:

- Scenario: Accessing the Progress Summary Report

Scenario: Accessing the Progress Summary Report

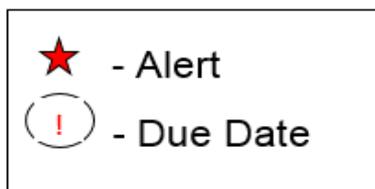
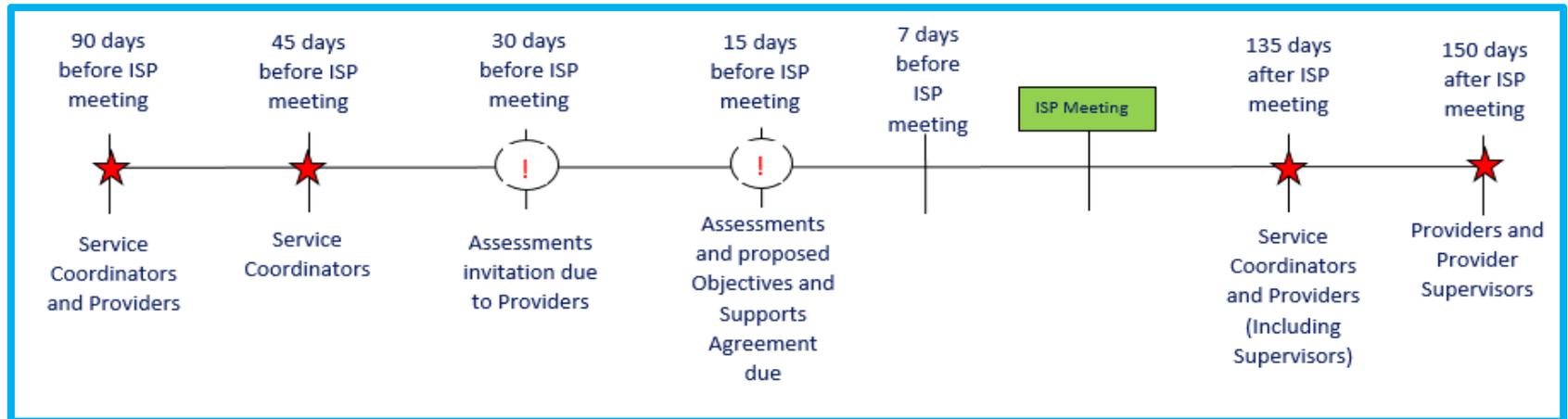


Scenario: Accessing the Progress Summary Report

Description: The Progress Summary Report displays information about actions associated with the Progress Summary submission, review and approval process. It displays information related to Progress Summaries completed in HCSIS based on the due dates specified on the report.

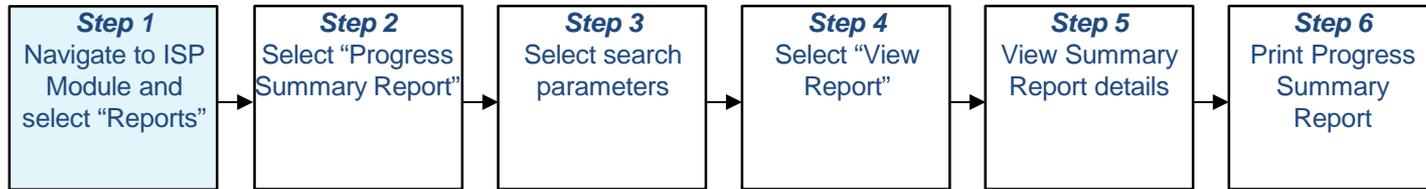
Roles and Responsibilities:

- **Service Coordinators:** Generate and view a report
- **Service Coordinator Supervisors:** Generate and view a report





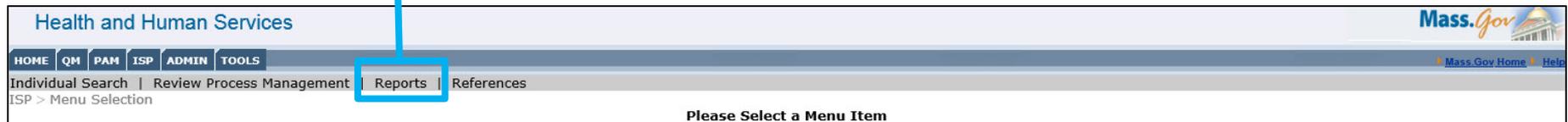
Scenario: Accessing the Progress Summary Report



Step 1: Navigate to ISP Module and Select “Reports”

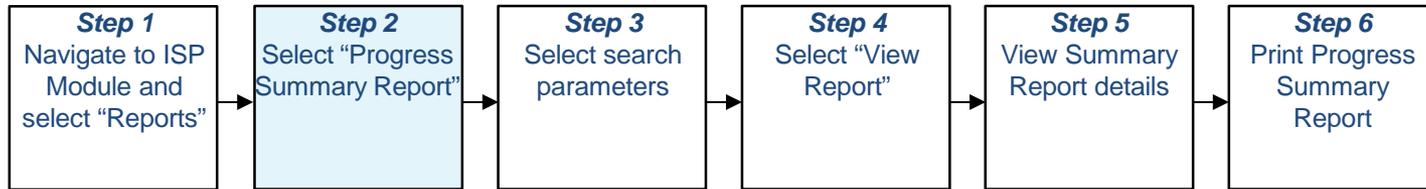
Click on the Reports link in the second level menu. The system navigates to the Reports page.

Reports





Scenario: Accessing the Progress Summary Report



Step 2: Select "Progress Summary Report"

The system navigates to the Progress Summary Report. Click the Progress Summary Report link.

Progress Summary Report

Health and Human Services Mass.gov

HOME QM PAM ISP ADMIN TOOLS Mass Gov Home Help

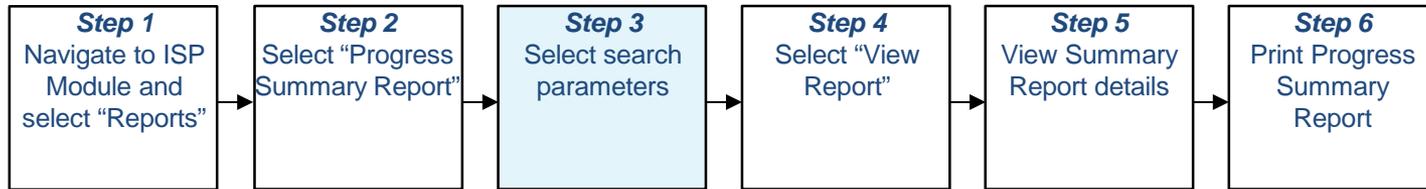
Individual Search | Review Process Management | Reports | References

ISP > Reports List

Reports List	
Summary reports	
Reports	Description
ISP Summary Report	Displays information for actions leading up to the ISP meeting for plans with an Actual Meeting Date
Progress Summary Report	Displays information related to Progress Summaries completed in HCSIS based on the due dates specified on the report



Scenario: Accessing the Progress Summary Report



Step 3: Select Search Parameters

Select the date from the calendar dropdown next to the "From ISP Date" and "To ISP Date" fields. The "From ISP Date" and "To ISP Date" are based on the Progress Summary due date.

From Date: *   To Date: *  

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Individual Search | Review Process Management | Reports | References

ISP > Reports List > Progress Summary Report

Report Filters

From Date: *   To Date: *  

Area Office:  Group Results By: 

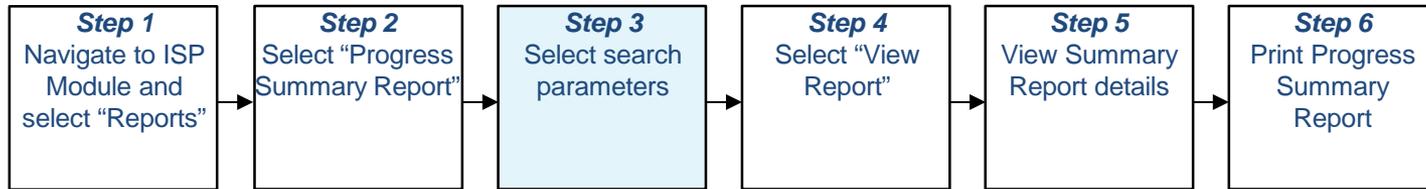
Provider:

Objective Status: Document Status: 

Report Display Option: 



Scenario: Accessing the Progress Summary Report



Step 3: Select Search Parameters

Additional filters are available to narrow search results. Those filters are as follows:

- Area Office
- Provider
- Objective Status
- Report Display Option
- Group Results By
- Document Status

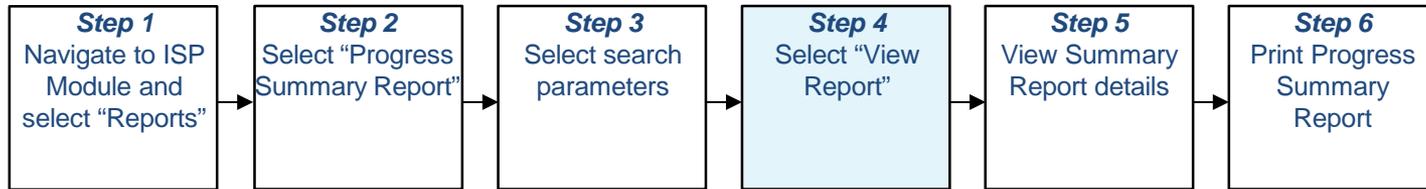
The screenshot displays the 'Report Filters' section of a web application. The filters are organized into two columns:

- Left Column:**
 - Area Office:
 - Provider:
 - Objective Status:
 - Report Display Option:
- Right Column:**
 - Group Results By:
 - Document Status:

Below these filters, there are date selection fields: 'From Date: * 10/04/2015' and 'To Date: * 11/28/2015'. At the bottom of the filter section are 'View Report' and 'Reset' buttons. The interface also shows a navigation menu with 'HOME', 'QM', 'PAM', 'ISP', and 'ADM' tabs, and a breadcrumb trail: 'ISP > Reports List > Progress Summary Report'.



Scenario: Accessing the Progress Summary Report



Step 4: Select "View Report"

Click "View Report."

View Report

Health and Human Services Mass.gov

HOME QM PAM ISP ADMIN TOOLS Mass.Gov Home Help

Individual Search | Review Process Management | Reports | References

ISP > Reports List > Progress Summary Report

Report Filters

From Date: * 10/04/2015	To Date: * 11/28/2015
Area Office: <input type="text" value="Newton/South Norfolk"/>	Group Results By: <input type="text" value="Area Office"/>
Provider: <input type="text" value="Select Provider"/>	Document Status: <input type="text" value=""/>
Objective Status: <input type="text" value="Select Objective Status"/>	
Report Display Option: <input type="text" value="Collapse All"/>	



Scenario: Accessing the Progress Summary Report



Step 5: View Summary Report Details

The system displays all the individuals satisfying the search criteria.

 *The Commonwealth of Massachusetts*
 Department of Developmental Services

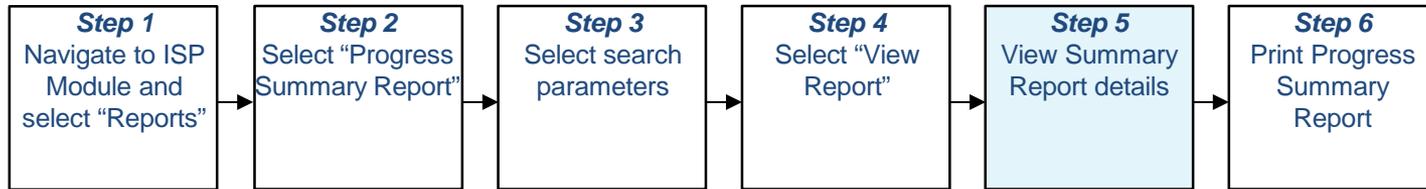
Run Date: 01/12/2016
Run Time: 02:58 PM

SEARCH CRITERIA:

Individual Name	Eligibility #	SC Name	SC Supervisor Name	Actual Meeting	Next Planned Meeting Date	Next ISP Deadline	ISP Year	Overall Total	
Provider:		Objective Status:						All	
Document Status:		All							
Individual Name	Eligibility #	SC Name	SC Supervisor Name	Actual Meeting	Next Planned Meeting Date	Next ISP Deadline	ISP Year	Overall Total	
<input type="checkbox"/>		Coordinator, Service		08/30/2014	11/24/2015	11/24/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>		Coordinator, Service		08/30/2013	11/24/2015	11/24/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>		Coordinator, Service		06/03/2014	11/28/2015	11/28/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>		Coordinator, Service		08/30/2014	11/28/2015	11/28/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>	Test, Bruce	Coordinator, Service		08/30/2014	11/28/2015	11/28/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	



Scenario: Accessing the Progress Summary Report



Step 5: View Summary Report Details

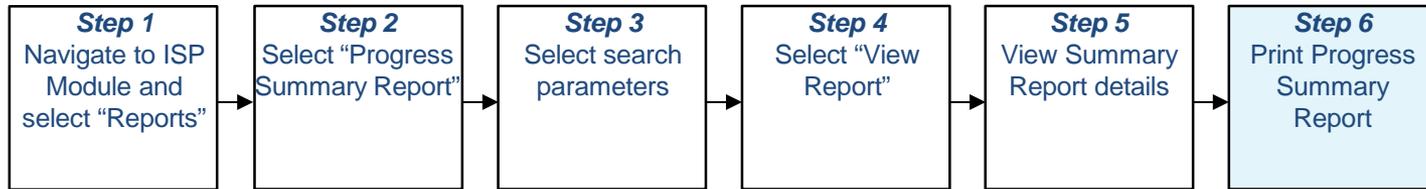
Select the  next to an individual to expand and view Progress Summary details on the Reports page.

American Training								Overall Total	
Individual Name	Eligibility #	SC Name	SC Supervisor Name	Actual Meeting	Next Planned Meeting Date	Next ISP Deadline	ISP Year		
<input type="checkbox"/>		Coordinator, Service		08/30/2014	11/24/2015	11/24/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>		Coordinator, Service		08/30/2013	11/24/2015	11/24/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>		Coordinator, Service		06/03/2014	11/28/2015	11/28/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>		Coordinator, Service		08/30/2014	11/28/2015	11/28/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>		Coordinator, Service		08/30/2014	11/28/2015	11/28/2015	Full Year	Total Objectives: 2 Total Progress Summary: 2	
<input type="checkbox"/>	Test, Bruce			11/12/2014		11/12/2015	-	Total Objectives: 1 Total Progress Summary: 1	
Progress Summary	Request Date	Due Date	Initial Submission Date	Initial SC Response Date	Most Recent Document Status	Date of Last Revision Requested	No. of Revisions Requested	Date Approved	Objective Status
Objective: Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s									
Annual	06/15/2015	10/28/2015			Not Started		0		



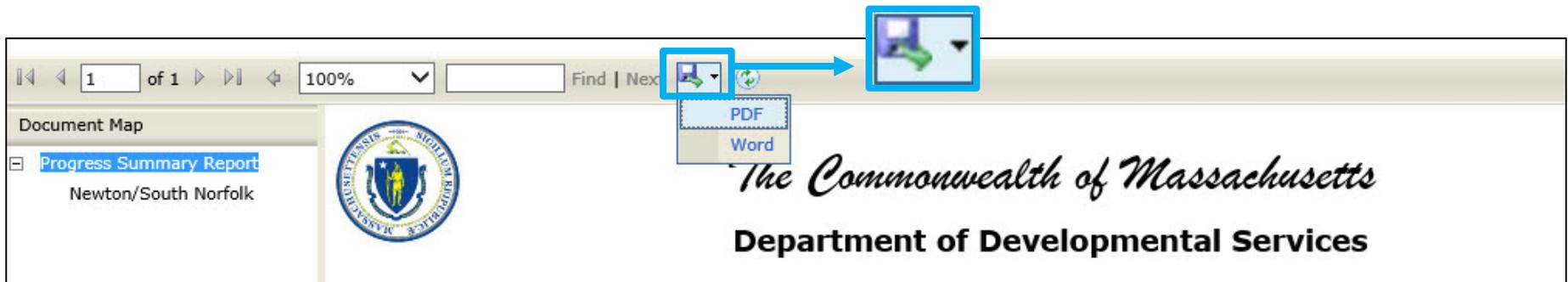


Scenario: Accessing the Progress Summary Report



Step 6: Print Progress Summary Report

To download and print the report, click the save icon and select either "PDF" or "Word."



Please note, the PDF will print the exact image that is displayed on the Reports page. If the Progress Summary Report is shown with the expanded information, that will be printed.



Chapter 4 Summary

This Chapter covered:

- Accessing Progress Summary Report