

**Department of Developmental Services
Massachusetts Rehabilitation Commission**



Individual Support Plan (ISP) Module Training

Release 7.7 – DDS Staff



**THE COMPUTERWORLD
HONORS PROGRAM**

Chapter 5: Area Office Director Approval of the ISP





Chapter 5 Overview

This Chapter will cover:

- New Trigger for Locking the ISP In HCSIS
- Lock Icon on Individual Dashboard

New Trigger for Locking the ISP In HCSIS



New Trigger for Locking the ISP In HCSIS

The approval process for a ISP remains the same but the process by which the system locks the plans in HCSIS has changed. The system now uses an additional trigger to lock the plan.

Previous Functionality

- Once 150 days have passed since the ISP Meeting Date, HCSIS will automatically lock the plan.

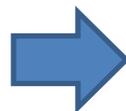
New Functionality

- Once an Area Office Director (AOD) approves an ISP in MEDITECH, HCSIS will lock the plan. Alternatively, if the approval has not been submitted in MEDITECH and 150 days have passed since the ISP Meeting Date, the plan will automatically lock in HCSIS, per current functionality.

MEDITECH

ISP Status	Meeting Date	Next Review Date	Person Participate	Parent/LAR Participate
Closed	10/05/07	10/04/08	Y	N
Closed	10/03/08	10/03/09	Y	N
Closed	09/25/09	09/25/10	Y	N
Closed	09/17/10	09/17/11	Y	N
Closed	09/14/11	09/13/12	Y	N
Closed	09/06/12	09/06/13	Y	N
Closed	08/26/13	08/26/14	Y	N
Closed	08/25/14	08/25/15	Y	N
Current	08/17/15	08/16/16	Y	Y

Participant	Relationship
VSR	
VSR	
VSD	
DMR	
SELF	



HCSIS

Assessments | Current Supports | Safety/Risk | Legal/Financial | Success

Test, Bruce
View/Print ISP Document

ISP Meeting Details

Planned Meeting Date: 03/04/2015
Meeting Time: 10:00 AM

Meeting Location: _____

Actual Meeting Date: 08 / 17 / 15

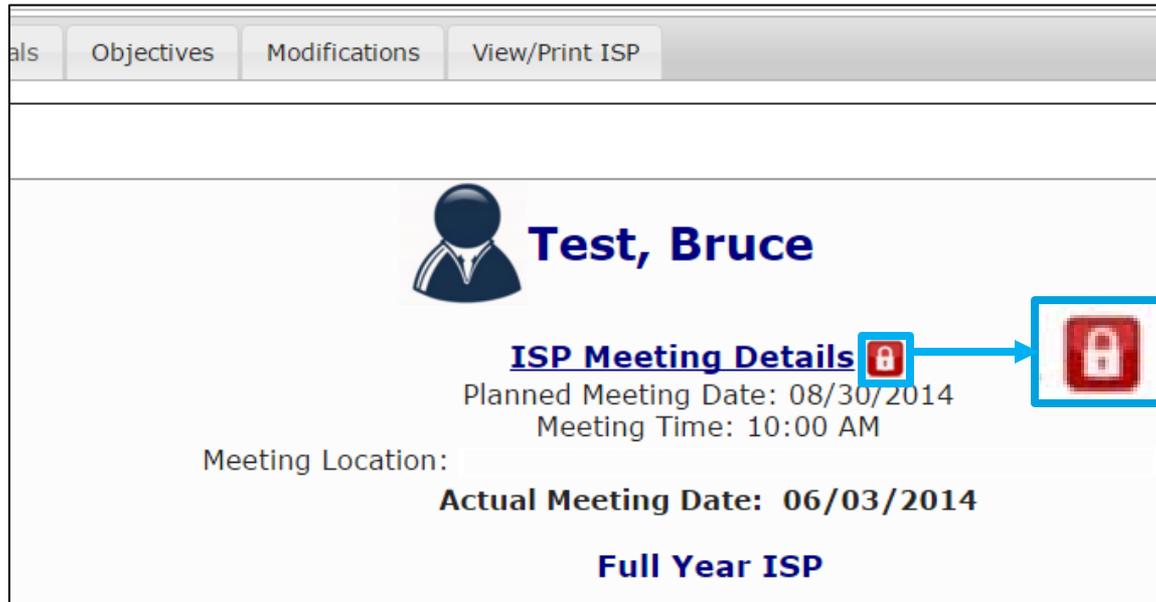
Update Year ISP

Lock Icon on Individual Dashboard



Lock Icon on Individual Dashboard

An ISP Lock Icon will appear on the Individual Dashboard.



This enhancement to show a visual for lock status has been added due to feedback from providers



Notes and Next Steps

New Alerts

“ISP is locked”

- Recipient
 - Service Coordinator, Service Coordinator Supervisor.
- Trigger
 - The system generates an alert when an Area Office Director changes the status of the ISP to current in MEDITECH and an ISP is locked in HCSIS.

“ISP will be locked in 15 days if approval is not entered in MEDITECH”

- Recipient
 - Service Coordinator, Service Coordinator Supervisor, Provider Data Entry User, Provider Supervisor
- Trigger
 - The system generates an alert if 135 Days have passed since the ISP Meeting Due Date and an Area Office Director has not changed the status of the ISP to current in MEDITECH.

Notes

- Area Office Directors and Area Office Director Designees continue to have the ability to manually unlock plans, if needed. Do note, however, that the ISP should only be unlocked to make minor corrections or a correction needed in response to an appeal.
- Service Coordinators, Service Coordinator Supervisors, and Area Office Directors will continue to receive an Alert if a plan that had been unlocked has not been manually relocked within **30 days** of unlocking the plan.



Chapter 5 Summary

This Chapter covered:

- New Trigger for Locking the ISP In HCSIS
- Lock Icon on Individual Dashboard

Chapter 6: Modifications





Chapter 6 Overview

This Chapter will cover:

- Overview of Modifications
- Scenario: Initiating a Modification
- Scenario: Reviewing a Modification

Overview of Modifications



Modifications Process

Modifications are used to make changes to a locked ISP document

- Per DDS Regulation 115 CMR 6.25, a Modification to an ISP may include one or any combination of the following elements all under the same Reason for Modification.
 - Any change in the Goals for an individual
 - Any change in the types of supports or services that will be used to help the individual to attain his or her outcomes or changes in the duration and frequency of such supports
 - A change in the strategies that will be used to meet unmet support needs
 - A change in the priority for services or supports assigned to the individual's needs where such a change will affect the services or supports that are provided and available to the individual
 - Initiation of a behavior Modification plan or Modification of any part of a behavior Modification plan involving the use of an aversive or intrusive technique
 - A change in the location of an individual's home, from a home operated by the Department or a provider certified by the Department to another such home

- NOTE: Changes in an individual's life that would substantially change the ISP content should be considered for a full ISP meeting.



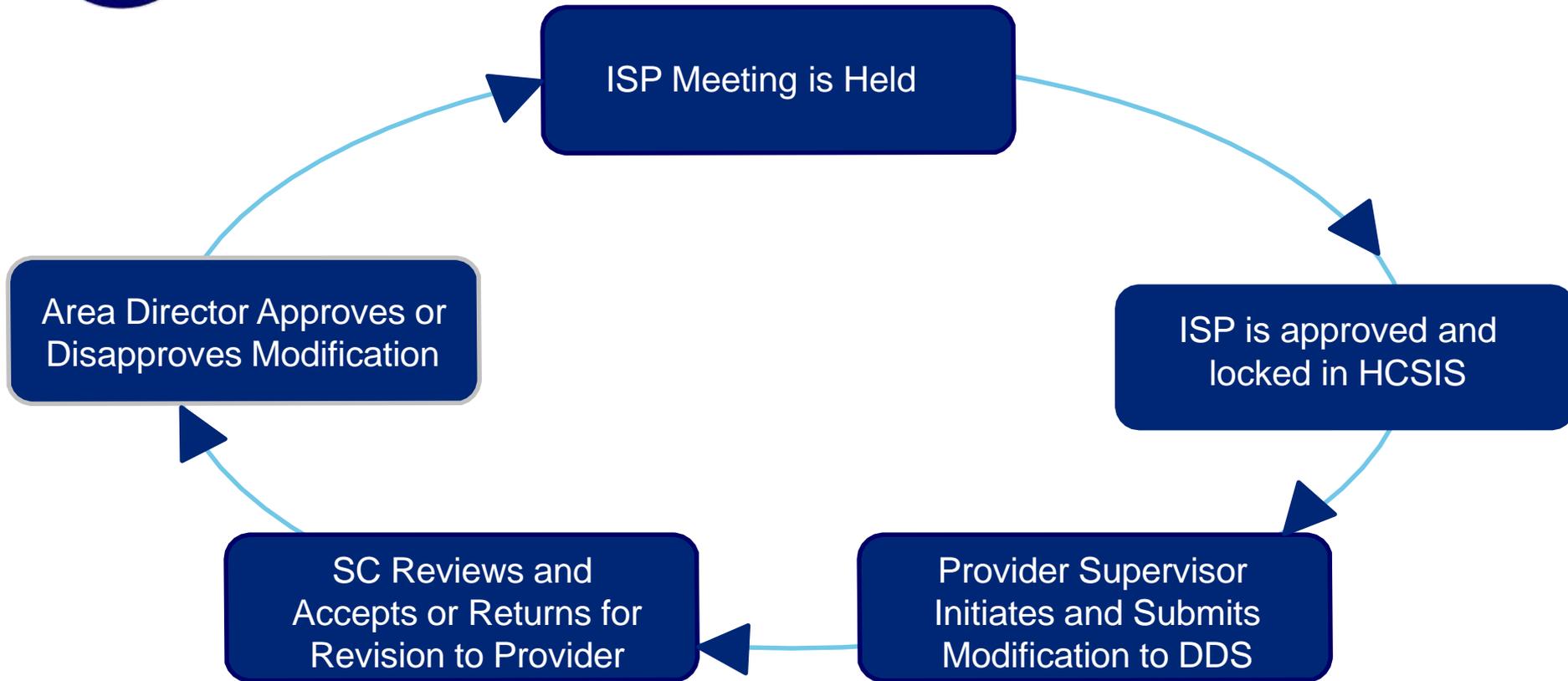
Modifications Process

Modifications are used to make changes to a locked ISP document.

- With this release, HCSIS includes functionality for Service Coordinators and Providers to initiate and submit Modifications to the current ISP document in the system.
- Modifications can be submitted once the current ISP has been locked.
 - As explained in the previous Chapter, the plan will be locked based on the Area Director's approval of the ISP in MEDITECH.
 - If the Area Director does not approve the ISP within 150 days, the plan will be locked per current process in HCSIS.



Modifications Workflow



Per DDS Regulation 115 CMR 6.25, Modifications are used to make changes to a locked ISP document. The ISP module provides an efficient mechanism for streamlining the Modification submission process. It allows Provider and DDS staff to coordinate the review, revision, acceptance and approval of an Modification per DDS regulations.



Modifications Roles and Responsibilities

Responsible Party	Modification Process
Service Coordinator	<ul style="list-style-type: none"> Initiate a Modification Review and Accept a Modification Submitted by a Provider Review and Request Revision of a Modification Submitted by a Provider
Service Coordinator Supervisor	<ul style="list-style-type: none"> Initiate a Modification Review and Accept a Modification Submitted by a Provider Review and Request Revision of a Modification Submitted by a Provider
Area Office Director	<ul style="list-style-type: none"> Review and Approve a Modification Review and Disapprove a Modification

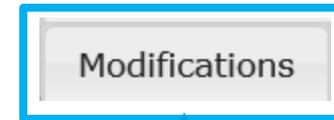
Modification Type	Responsible Party
Goal	<ul style="list-style-type: none"> Service Coordinator Provider Supervisor
Objectives and Support Strategy	<ul style="list-style-type: none"> <i>Provider Supervisor</i>
Residential Support / Other	<ul style="list-style-type: none"> Service Coordinator Provider Supervisor
Behavior Plan	<ul style="list-style-type: none"> <i>Provider Supervisor</i>



Navigating to the Modifications Review Switchboard

Click Modifications Tab above Individual Dashboard

Navigate to the Modifications Review Switchboard from the Individual Dashboard by clicking the "Modifications" tab.



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:
Eligibility:

ISP Meeting Details
Planned Meeting Date: 03/04/2015
Meeting Time: 10:00 AM
Meeting Location:
Actual Meeting Date: 03/05/2015
Update Test ISP

ISP Deadlines
Meeting Deadline: 03/04/2015
Semi Annual Review Date: 09/01/2015
Next ISP Meeting Deadline: 03/04/2016

Vision (Status: Shared)
Due Date: 02/02/2015
Last Updated On: 09/01/2015
Last Shared On: 09/01/2015

Goals (Status: Created)
Due Date: N/A
Last Updated On: 08/21/2014

Request Assessments (Status: Sent)
Due Date: 02/02/2015
Notification Last Sent On: 09/01/2015
Last Updated On: 09/01/2015

Modifications (Status: Action Required)
Last Updated On: 11/16/2015
Pending Provider Submission: 1/2
Pending SC Submission: 0/2
Pending SC Review: 1/2
Pending AOD Review: 0/2

Objectives & Support Strategies (Status: Approved)
Due Date: 02/17/2015
Pending Provider Submission: 0/3
Pending DDS Review: 0/3

Review Assessments (Status: Approved)
Due Date: 02/17/2015
Pending Provider Submission: 0/5
Pending DDS Review: 0/5

Other ISP Components (Status: Started (Overdue))
Due Date: 04/19/2015
Current Support Last Updated On: 06/24/2015
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: SC Initiates a Modification

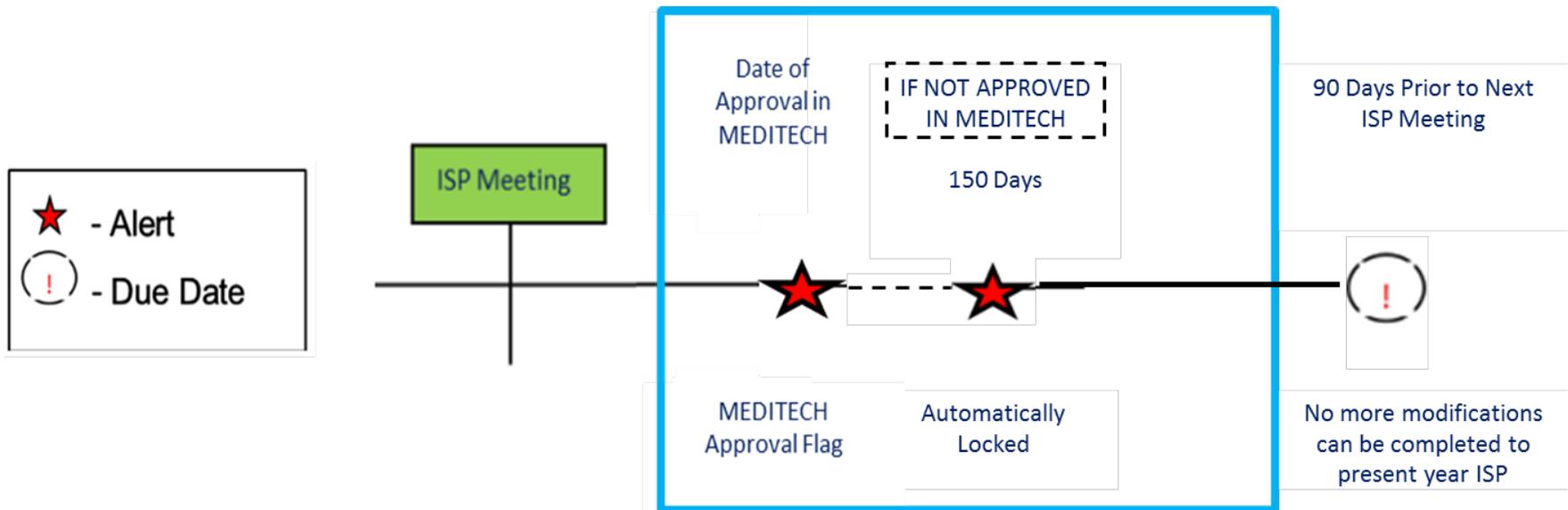


Scenario: SC Initiates a Modification

Description: Service Coordinators can create a Modification once a Full or Update Year ISP has been completed and the approval has been entered in MEDITECH by an Area Director, locking the plan in HCSIS. At this point, DDS Staff can initiate a Modification. A single Modification can include any combination of the following elements: Goals, Residential Support / Other.

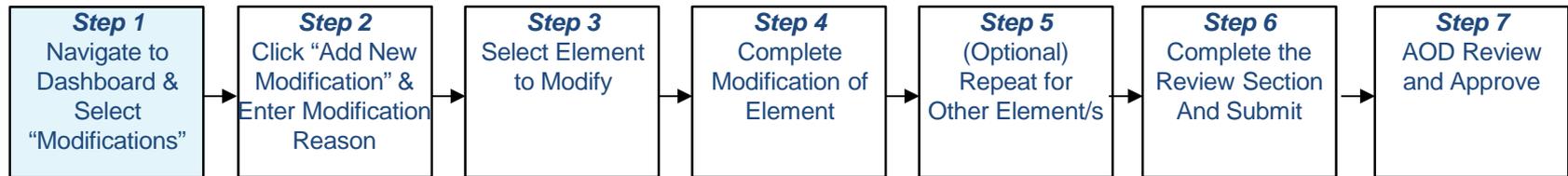
Roles and Responsibilities:

- **Service Coordinators:** Initiate a Modification
- **Service Coordinator Supervisors:** Initiate a Modification
- **Area Office Director:** Review a Modification, Approve a Modification, Disapprove a Modification





Scenario: SC Initiates a Modification



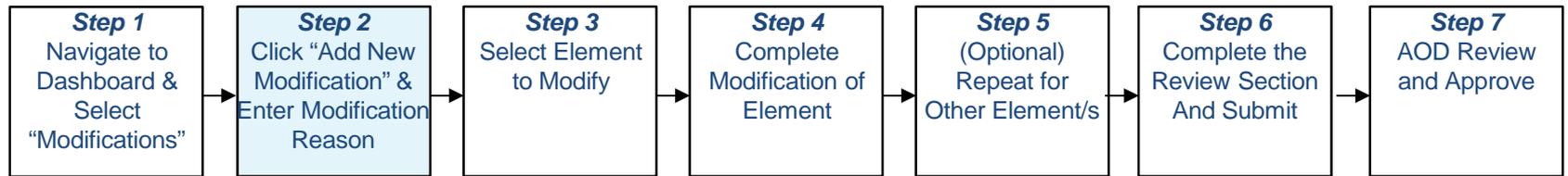
Step 1: Navigate to Individual Dashboard and Select “Modifications”

Navigate to the Individual Dashboard. Select the “Modifications” tab.

The screenshot shows the Individual Dashboard for a user named Bruce Test. The 'Modifications' tab is selected and highlighted with a blue box. The dashboard displays various sections including Demographic Information, ISP Meeting Details, and a grid of status cards for Vision, Goals, Request Assessments, Objectives & Support Strategies, Review Assessments, and Other ISP Components. A legend at the bottom indicates status colors: black for 'No action needed', yellow for 'Action needed', green for 'Section complete', and red for 'Section overdue'.



Scenario: SC Initiates a Modification



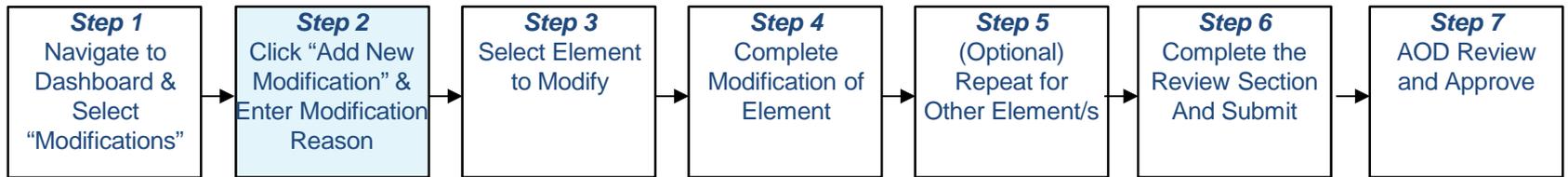
Step 2: Click on “Add New Modification” and Enter Reason for Modification

The system will display the Modifications Review Switchboard. Select “Add New Modification”

The screenshot shows a web application interface with a navigation bar at the top containing 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 is titled 'Modifications Review Switchboard' and includes an 'Update Year ISP' link. Below the title is a table with the following columns: Modification Reason, Modification Type, Created On, Created By, Document History, and Status. The table currently contains the text 'No modification created'. A blue box highlights the 'Add New Modification' button in the top right corner of the main content area. Another blue box highlights the 'Add New Modification' button in the bottom right corner of the main content area. A blue arrow points from the bottom button to the top button.



Scenario: SC Initiates a Modification



Step 2: Click on “Add New Modification” and Enter Reason for Modification

The system will display the Modification Details page.

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

Back to Modifications | Review | Switchboard

Modification Details Expand All | Collapse All Update Year ISP

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

Original Entry	New Entry	Created On	Created By
No modifications for goals created.			

Add Goal Modification | View/Edit Goal Modification | Delete Goal Modification

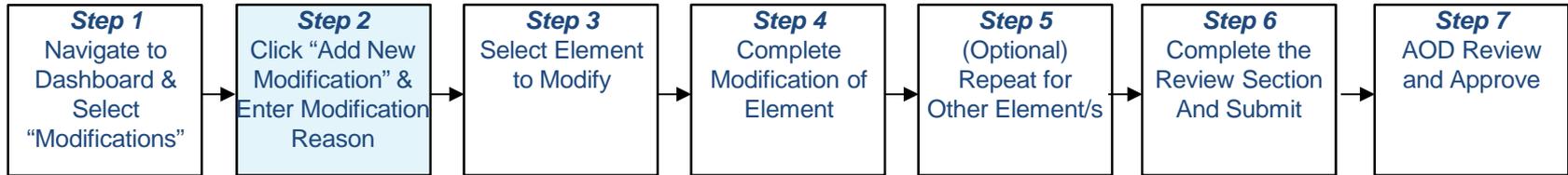
Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

Add Modification | View/Edit Modification | Delete Modification



Scenario: SC Initiates a Modification



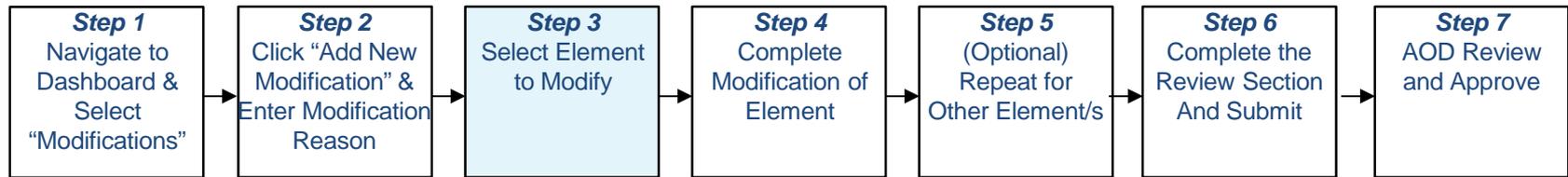
Step 2: Click on “Add New Modification” and Enter Reason for Modification

Insert comments into the Modification Reason text box.

The screenshot shows the 'Modification Details' page in the HCSiS system. The navigation bar at the top includes: 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. Below the navigation bar, there are links for 'Back to Modifications' and 'Review Switchboard'. The main content area is titled 'Modification Details' and includes an 'Update Year ISP' button. The 'Modification Reason' field is highlighted with a blue box and an arrow pointing to the text input area. The text in the input area reads: 'There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.' Below the input area, there are two sections: 'Goals' and 'Residential Support / Other'. Each section has a table with columns for 'Original Entry', 'New Entry', 'Created On', and 'Created By'. The 'Goals' section shows 'No modifications for goals created.' and the 'Residential Support / Other' section shows 'No other modifications created.' At the bottom of each section, there are buttons for 'Add Goal Modification', 'View/Edit Goal Modification', and 'Delete Goal Modification'.



Scenario: SC Initiates a Modification



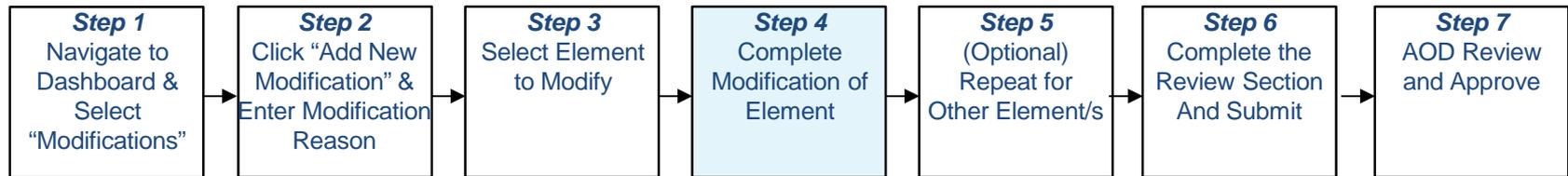
Step 3: Select Elements to Modify

Decide which element you'd like to modify: A.) "Goal" and/or B.) "Residential Support / Other". In this scenario, we will demonstrate how to complete a goal Modification.

The screenshot shows the 'Modifications' section of the HCSiS web application. The navigation bar includes: 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 is titled 'Modification Details' and includes an 'Update Year ISP' button. Below the title, there are links for 'Expand All' and 'Collapse All', and a 'Modification Reason: *' field containing the text: 'There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.' Below this, there are two expandable sections: 'Goals' and 'Residential Support / Other'. Both sections are currently collapsed. The 'Goals' section has a table with columns: Original Entry, New Entry, Created On, and Created By. The 'Residential Support / Other' section has a table with columns: Original Entry, New Entry, Modification Type, Created On, and Created By. At the bottom of the page, there are buttons for 'Add Modification', 'View/Edit Modification', and 'Delete Modification'.



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

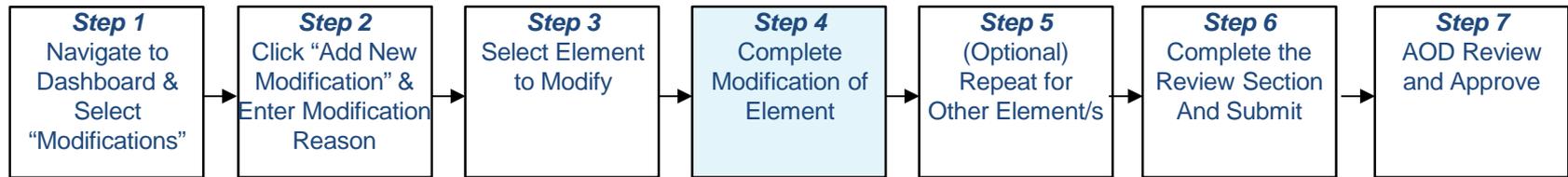
A.) Goals

To initiate a Modification to goals, click “Add Goal Modification” on the Modifications Details screen.

The screenshot shows the 'Modification Details' screen with a navigation bar at the top containing various menu items like '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'. Below the navigation bar, there is a 'Back to Modifications Review Switchboard' link and a 'Update Year ISP' button. The main content area is titled 'Modification Details' and includes a 'Modification Reason' field with a red asterisk indicating a required field. The text in the reason field reads: 'There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.' Below this, there are two expandable sections: 'Goals' and 'Residential Support / Other'. The 'Goals' section has a table with columns 'Original Entry', 'New Entry', 'Created On', and 'Created By', and a message 'No modifications for goals created.' Below the table are three buttons: 'Add Goal Modification', 'View/Edit Goal Modification', and 'Delete Goal Modification'. The 'Residential Support / Other' section has a similar table structure and a message 'No other modifications created.' At the bottom of the screen, there are three buttons: 'Add Modification', 'View/Edit Modification', and 'Delete Modification'. A blue box highlights the 'Add Goal Modification' button in the 'Goals' section, and a blue arrow points from a larger 'Add Goal Modification' button above it to this specific button.



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

The system will display the Goals pop-up screen. The screen displays all of the goals that had been included in the ISP document.



Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date	ISP Meeting Deadline	Service Coordinator
		03/04/2015	03/04/2015	Coordinator, Service

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			Yes	Current

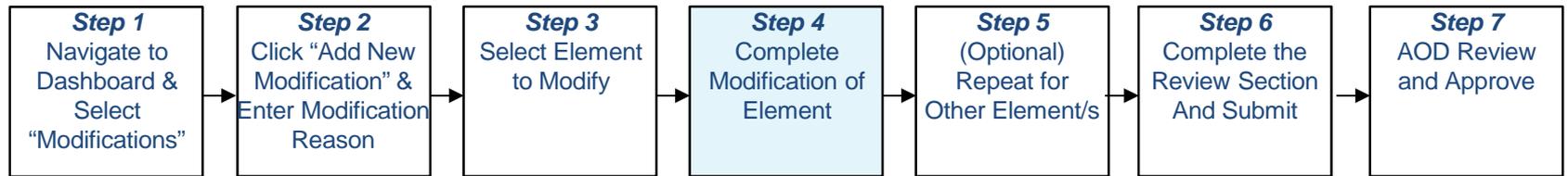
Buttons: View/Edit Goal, Delete Goal, Add Goal

Form fields:
Goal Title: *
Goal: *
Date Goal Identified: *
Goal Identified By: *
Update Year Status: * (New)

Buttons: Spell Check, Reset, Save, Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

At this point, the SC has two options – adding a new goal or modifying an existing goal. We will display the process for both options.

Modify Goals

Individual	Eligibility #	Planned Meeting Date	ISP Meeting Deadline	Service Coordinator
Test, Bruce	SSN #	03/04/2015	03/04/2015	Coordinator, Service

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishment	08/18/2014	Provider			Yes	Current

View/Edit Goal ← **View/Edit Goal** **Delete Goal** **Add Goal** → **Add Goal**

Goal Title:*

Goal:*

Date Goal Identified:*

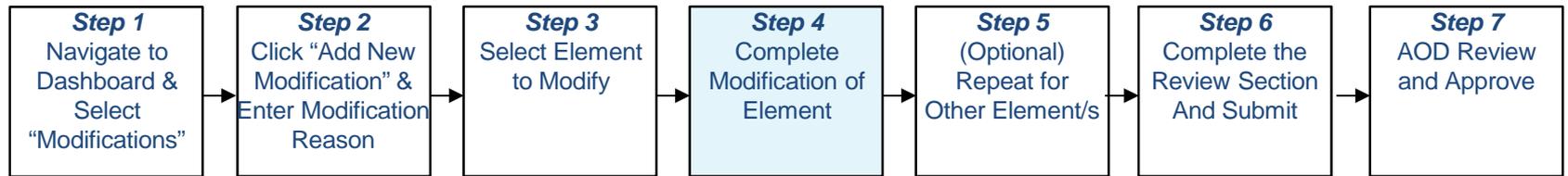
Goal Identified By:*

Update Year Status:*

Spell Check Reset Save Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 1: Adding a New Goal

Enter the title of the goal in the Goal Title text box.

Modify Goals

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
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Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014					
<input type="radio"/> Personal Growth & Accomplishments-	08/18/2014					

View/Edit Goal | Delete Goal | Add Goal

Goal Title: *

Goal: *

Date Goal Identified: *

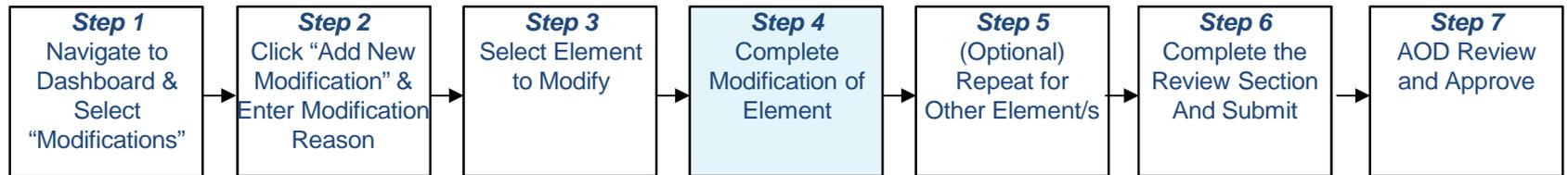
Goal Identified By: *

Update Year Status: *

Spell Check | Reset | Save | Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 1: Adding a New Goal

Enter the goal description in the Goal text box.

Modify Goals

Individual: Test, Bruce | Eligibility #: SSN #

Goals

Goal Title	Date Identified	Identified By
<input type="radio"/> Money Management	08/21/2014	Individual
<input type="radio"/> Community Involvement	08/21/2014	Individual
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider

Goal Title: * Community Membership

Goal: *

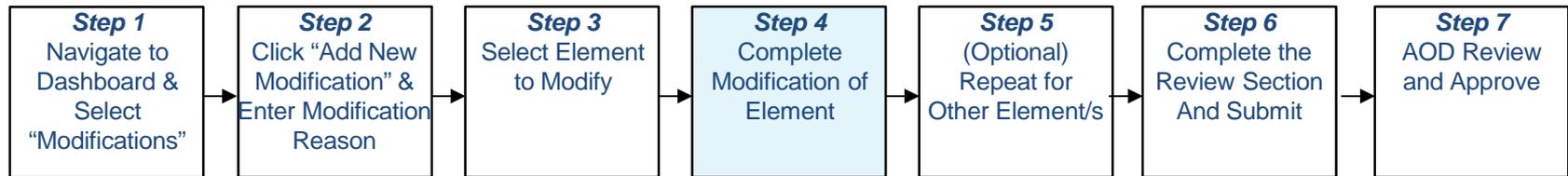
Date Goal Identified: *

Goal Identified By: *

Update Year Status: *



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 1: Adding a New Goal

Select a date in the Date Goal Identified calendar drop down.

Modify Goals

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
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Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current

Goal Title:*

Goal:*

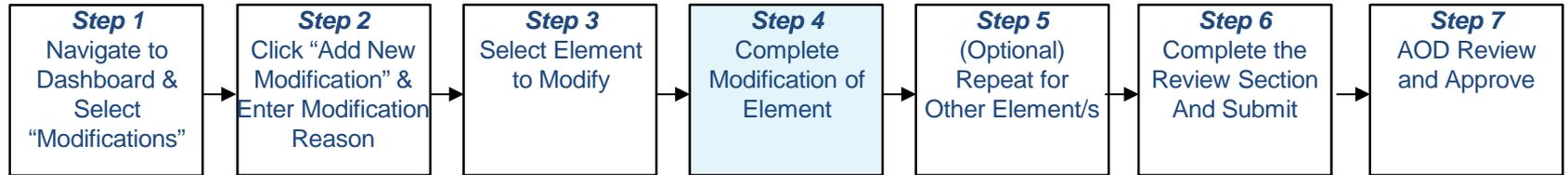
Date Goal Identified:*

Goal Identified By:*

Update Year Status:*



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 1: Adding a New Goal

Select an option from the Goal Identified by drop down.

Individual	Eligibility #	Planned Meeting Date	ISP Meeting Deadline	Service Coordinator
Test, Bruce	SSN #	03/04/2015	03/04/2015	Coordinator, Service

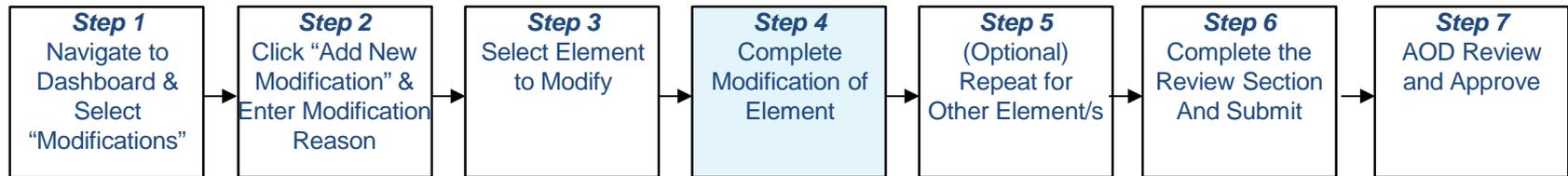
Goal	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money			Yes	Current
Comm			Yes	Current
Person			Yes	Current
Accom				

Goal Title: *
Goal: *
Date Goal Identified: * 09/08/2015
Goal Identified By: *
Update Year Status: *

Buttons: Spell Check, Reset, Save, View/Edit Goal, Delete Goal, Add Goal, Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 1: Adding a New Goal

Click “Save and Close.” Alternatively, to add additional goals, follow this process again on the same screen.

Modify Goals

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
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Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current

Goal Title:*

Goal:*

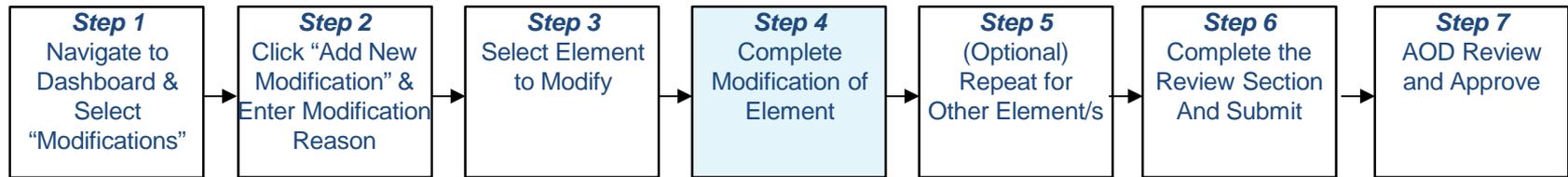
Date Goal Identified:*

Goal Identified By:*

Update Year Status:*



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

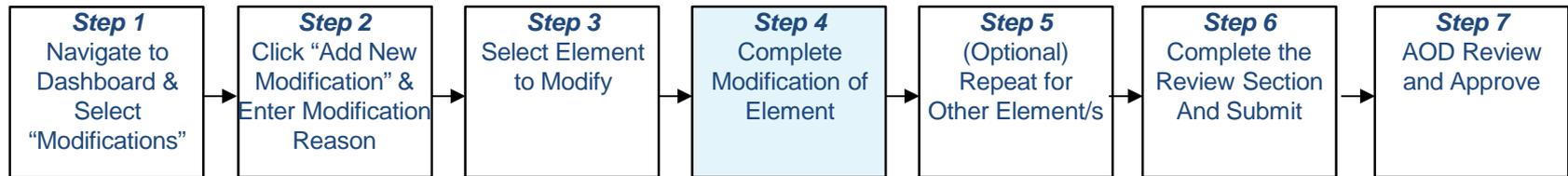
Option 1: Adding a New Goal

The system will return to the Modifications Details screen. The details of the goal Modification will display. The original entry column displays the original goal objective if one exists. In this scenario, the original entry displays N/A because it is a new goal. The new entry column displays the title and description of the newly added goal.

Original Entry	New Entry	Created On	Created By
N/A	Goal Title: Community Membership Goal Description: By February 2016, Bruce will have participated in	10/29/2015	Coordinator, Service



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

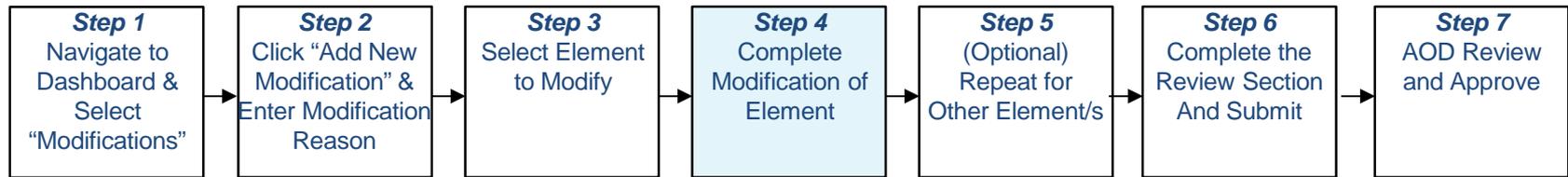
Option 2: Modify an Existing Goal

To initiate a Modification to goals, click “Add Goal Modification” on the Modifications Details screen.

The screenshot shows the 'Modification Details' screen with a navigation bar at the top containing various menu items like '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'. Below the navigation bar, there is a 'Back to Modifications Review Switchboard' link and an 'Update Year ISP' button. The main content area is titled 'Modification Details' and includes a 'Modification Reason' field with a red asterisk. The text in the field reads: 'There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.' Below this, there are two sections: 'Goals' and 'Residential Support / Other'. Each section has a table with columns for 'Original Entry', 'New Entry', 'Modification Type', 'Created On', and 'Created By'. The 'Goals' section currently shows 'No modifications for goals created.' and the 'Residential Support / Other' section shows 'No other modifications created.' At the bottom right, there are three buttons: 'Add Modification', 'View/Edit Modification', and 'Delete Modification'. A blue box highlights the 'Add Goal Modification' button, and an arrow points from it to a larger callout box labeled 'Add Goal Modification'.



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 2: Modify an Existing Goal

Select the radio button next to the desired goal.

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service	
Goals					
<input checked="" type="radio"/>	Money Management	08/21/2014	Individual	Yes	Current
<input type="radio"/>	Community Involvement	08/21/2014	Individual	Yes	Current
<input type="radio"/>	Personal Growth & Accomplishments-	08/18/2014	Provider	Yes	Current

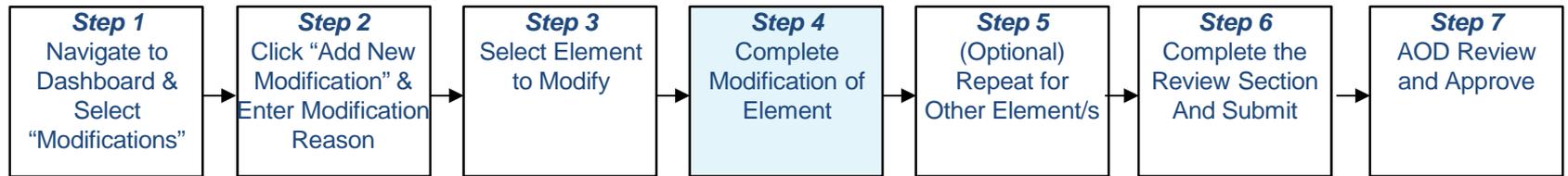
Buttons: View/Edit Goal, Delete Goal, Add Goal

Form fields: Goal Title, Goal, Date Goal Identified, Goal Identified By, Update Year Status (New)

Buttons: Spell Check, Reset, Save, Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 2: Modify an Existing Goal

Click "View/Edit Goal."

Modify Goals

Individual	Eligibility #	Planned Meeting Date	ISP Meeting Deadline	Service Coordinator
Test, Bruce	SSN #	03/04/2015	03/04/2015	Coordinator, Service

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input checked="" type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current

Goal Title: *

Goal: *

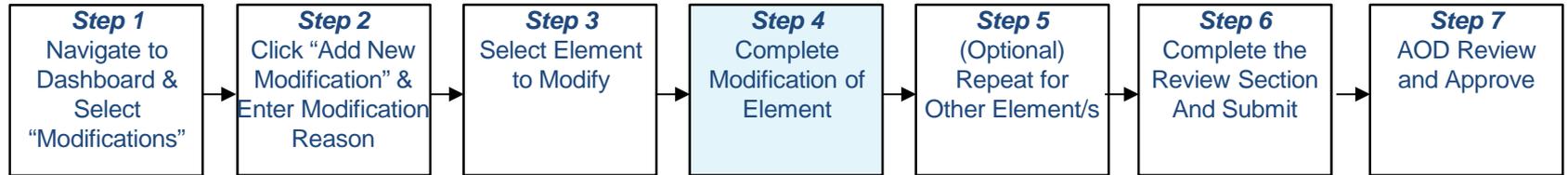
Date Goal Identified: *

Goal Identified By: *

Update Year Status: *



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 2: Modify an Existing Goal

The system will display the existing goal details.

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service	
Goals 1					
Update Year ISP					
Goal Title: *		Created By	Updated By	Included in ISP Doc?	Update Year Status
				Yes	Current
				Yes	Current
				Yes	Current

Goal Title: * Money Management

Goal: Bruce will save up quarterly to do a big event. Each quarter he will identify an event he would like to do. Example: Boston Harbor Cruise, a concert, casino etc

Date Goal Identified: * 08/21/2014

Goal Identified By: * Individual

Changes Approved By Provider: * -

Person Contacted to Approve Change: * -

Update Year Status: * Current

Update Information

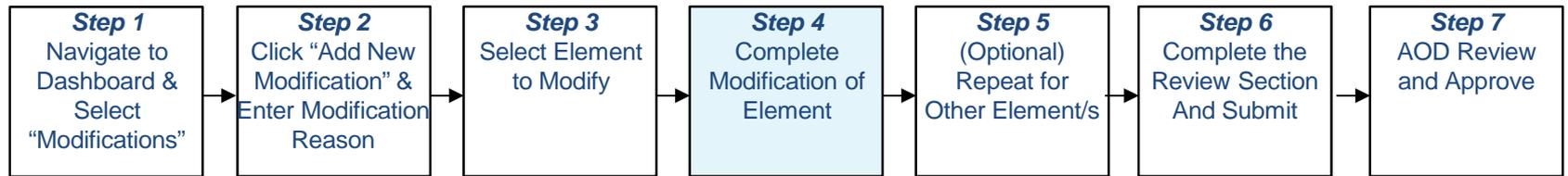
No Change

Modification Information

Spell Check | Reset | Save | Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 2: Modify an Existing Goal

Enter the desired Modification detail in the Modification Information textbox.

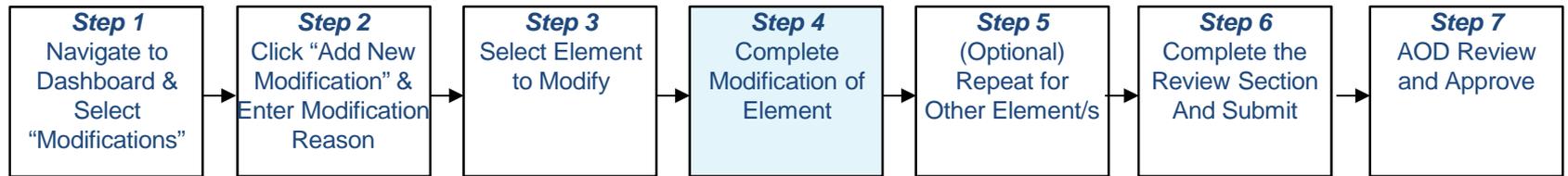
The screenshot shows the 'Modify Goals' application window. At the top, there is a table with the following data:

Individual	Eligibility #	Planned Meeting Date	ISP Meeting Deadline	Service Coordinator
Test, Bruce	SSN #	03/04/2015	03/04/2015	Coordinator, Service

Below the table, the 'Modification Information' field is highlighted with a blue border. The text in this field is: "Bruce is to save up for and attend an event semi-annually rather than quarterly." Below this field, there is a 'Modification Information' section with a smaller text box containing the same text. At the bottom of the window, there are buttons for 'Spell Check', 'Reset', 'Save', and 'Save and Close'.



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 2: Modify an Existing Goal

Select "Save and Close."

Modify Goals

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
------------------------	---------------------	---------------------------------	---------------------------------	--

Goals

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input checked="" type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current

[View/Edit Goal](#) [Delete Goal](#) [Add Goal](#)

Goal Title: * Money Management
Goal: * Bruce will save up quarterly to do a big event. Each quarter he will identify an event he would like to do. Example: Boston Harbor Cruise, a concert, casino etc
Date Goal Identified: * 08/21/2014
Goal Identified By: * Individual
Changes Approved By Provider: * -
Person Contacted to Approve Change: * -
Update Year Status: * Current

Update Information
No Change

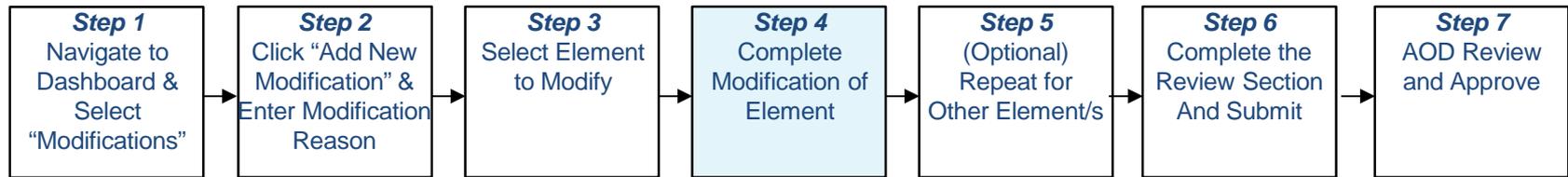
Modification Information

Bruce is to save up for and attend an event semi-annually rather than quarterly.

[Save and Close](#)



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 2: Modify an Existing Goal

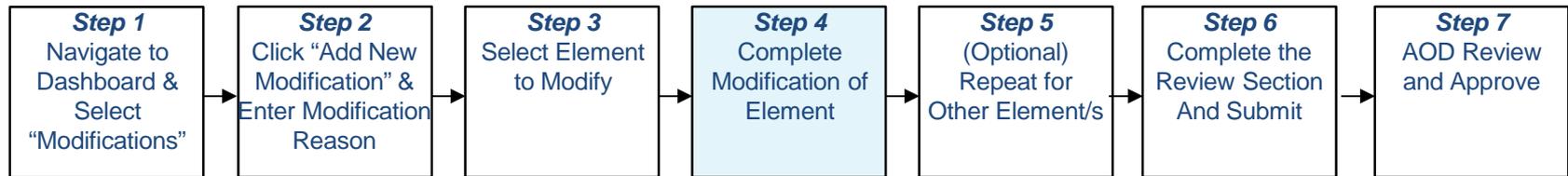
The system will return to the Modifications Details screen. The details of the goal Modification will display.

In this scenario, the Original Entry column displays the original goal description.

The screenshot shows the 'Modification Details' screen. At the top, there is a navigation bar with various menu items. Below the navigation bar, there is a 'Modification Details' section with a 'Back to Modifications Review Dashboard' link and an 'Update Year ISP' button. The main content area is divided into two columns: 'Original Entry' and 'New Entry'. The 'Original Entry' column contains the text 'Bruce will save up quarterly to do a big event. Each'. The 'New Entry' column contains the text 'Bruce is to save up for and attend an event semi-annually rather than quarterly.' Below the columns, there is a table with columns for 'Original Entry', 'New Entry', 'Modification Type', 'Created On', and 'Created By'. The table contains one row with the following data: 'Bruce will save up quarterly to do a big event. Each', 'Bruce is to save up for and attend an event semi-annually rather than quarterly.', '10/29/2015', and 'Coordinator, Service'. There are also buttons for 'Add Goal Modification', 'View/Edit Goal Modification', and 'Delete Goal Modification'.



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

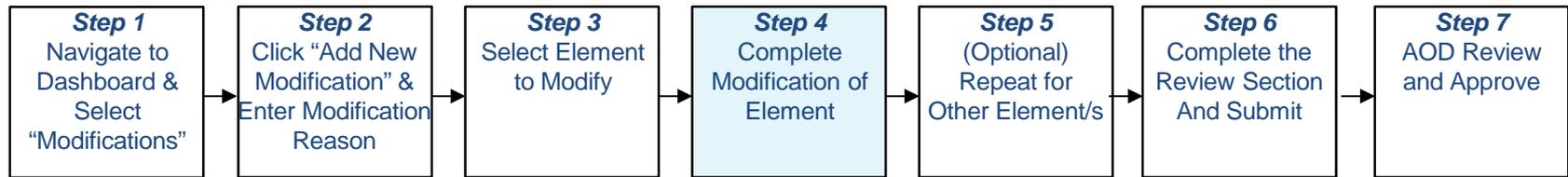
Option 3: Delete Goal

Once a Goal has been added to the Modification, a third option is available. It is possible to use the "Delete Goal" option. The delete function operates differently for newly added goals and existing goals:

- Newly Added Goal
 - Deleting a newly added goal will remove the entire goal from the Modification.
- Modified Existing Goal
 - Deleting an existing goal modified will only remove the modified information. The goal will remain a part of the ISP.
- Unmodified Existing Goal
 - It is not possible to delete an unmodified existing goal. A goal that has been met or discontinued should be marked as such in the upcoming Progress Summary.



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

From the Modify Goals screen, select the radio button for the newly added goal that requires deletion. The element associated with the previous Modification will display with two asterisks.

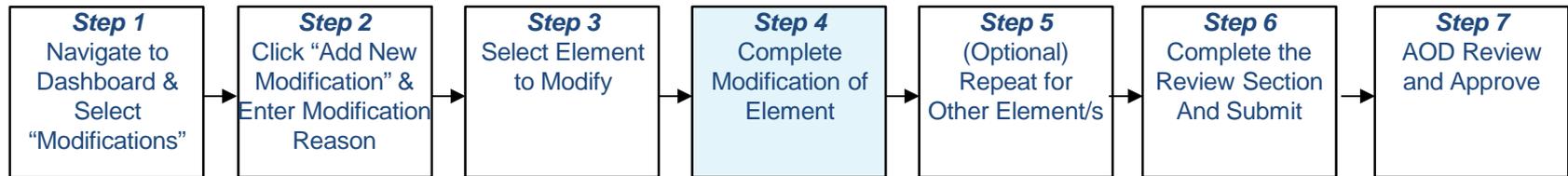
Individual	Eligibility #	Planned Meeting Date	ISP Meeting Deadline	Service Coordinator
Test, Bruce	SSN #	03/04/2015	03/04/2015	Coordinator, Service

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	8/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	8/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments	8/18/2014	Provider			Yes	Current
<input checked="" type="radio"/> ** Community Membership	9/08/2015	Guardian			No	New

<input type="radio"/> Money Management
<input type="radio"/> Community Involvement
<input type="radio"/> Personal Growth & Accomplishments--CLASS
<input checked="" type="radio"/> ** Community Membership



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

Click "Delete Goal."

Modify Goals

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service		
Goals						
Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	8/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	8/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments	8/18/2014	Provider			Yes	Current
<input checked="" type="radio"/> ** Community Membership	9/08/2015	Guardian			No	New

Update Year ISP

View/Edit Goal | **Delete Goal** | Add Goal

Goal Title: *

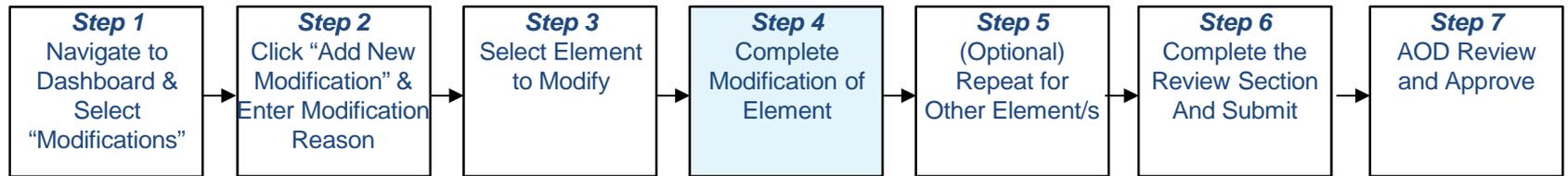
- Money Management
- Community Involvement
- Personal Growth & Accomplishments
- ** Community Membership

Save and Close

Delete Goal



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

The system will display a pop-up Confirmation Message. Click “Yes.”

Personal Growth & Accomplishments:	08/18/2014	Provider	Yes	Current
** Community Membership	09/08/2015	Guardian	No	New

** This element is associated to a Modification

Confirmation Message

The newly added goal added as part of modification will be deleted. Are you sure you want delete the newly added goal?

Yes No

Confirmation Message

The newly added goal added as part of modification will be deleted. Are you sure you want delete the newly added goal?

Yes No

Goal Title:*

Goal:*

Date Goal Identified:*

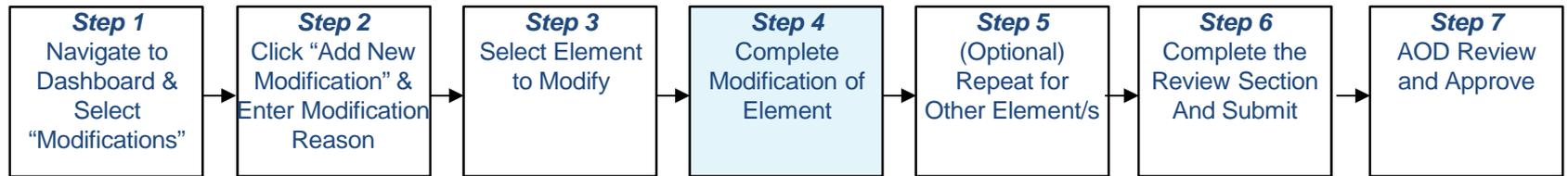
Goal Identified By:*

Update Year Status:*

Spell Check Reset Save Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

The system will return to the Modify Goals screen. The goal will no longer appear.

Modify Goals

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service		
Goals Update Year ISP						
Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			Yes	Current

View/Edit Goal | Delete Goal | Add Goal

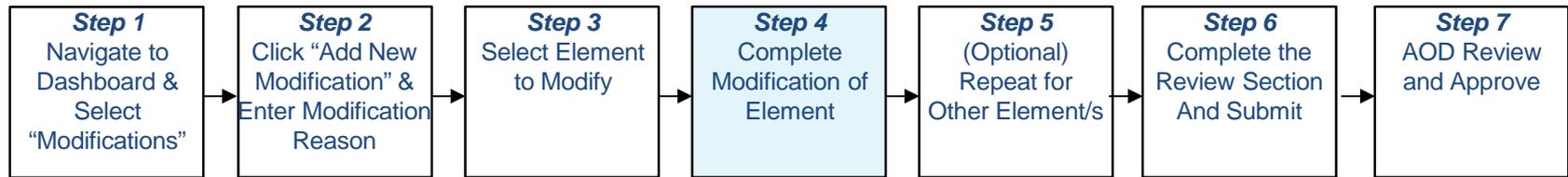
Goal Title:*

- Money Management
- Community Involvement
- Personal Growth & Accomplishments--

Spell Check | Reset | Save | Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

Click "Save and Close."

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service		
Goals						
<input type="radio"/>	Money Management	08/21/2014	Individual		Yes	Current
<input type="radio"/>	Community Involvement	08/21/2014	Individual		Yes	Current
<input type="radio"/>	Personal Growth & Accomplishments--	08/18/2014	Provider		Yes	Current

Buttons: View/Edit Goal, Delete Goal, Add Goal

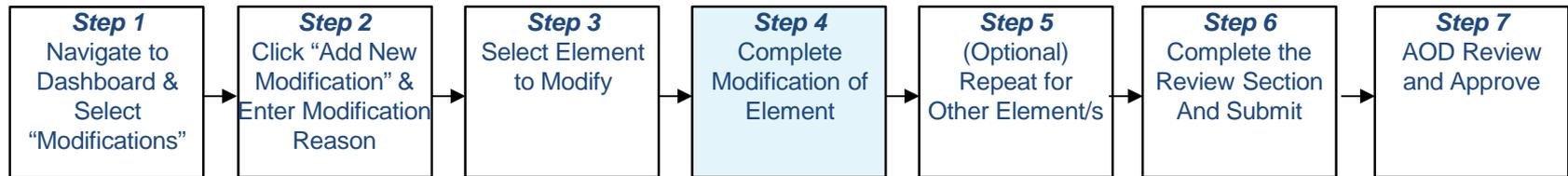
Form fields: Goal Title:*, Goal:*, Date Goal Identified:*, Goal Identified By:*, Update Year Status:*

Buttons: Spell Check, Reset, Save, Save and Close

Save and Close



Scenario: SC Initiates a Modification



Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

The system will return to the Modifications Details Screen.

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

[Back to Modifications Review Switchboard](#)

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

Original Entry	New Entry	Created On	Created By
No modifications for goals created.			

Add Goal Modification | View/Edit Goal Modification | Delete Goal Modification

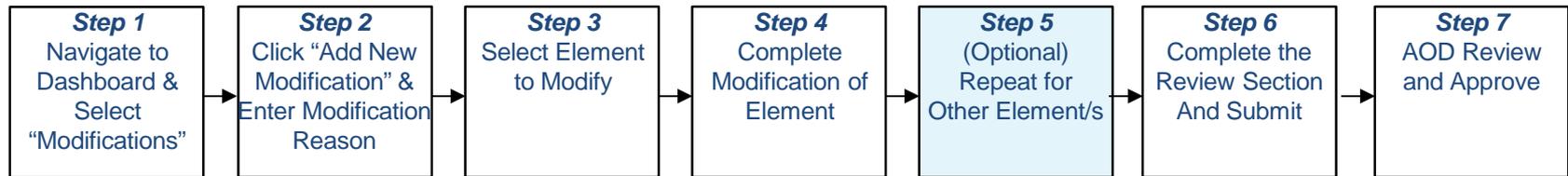
Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

Add Modification | View/Edit Modification | Delete Modification



Scenario: SC Initiates a Modification



Step 5: (Optional) Repeat for Other Element/s

If desired it is possible to complete additional Modifications to “Goals”, or “Residential Support / Other.”

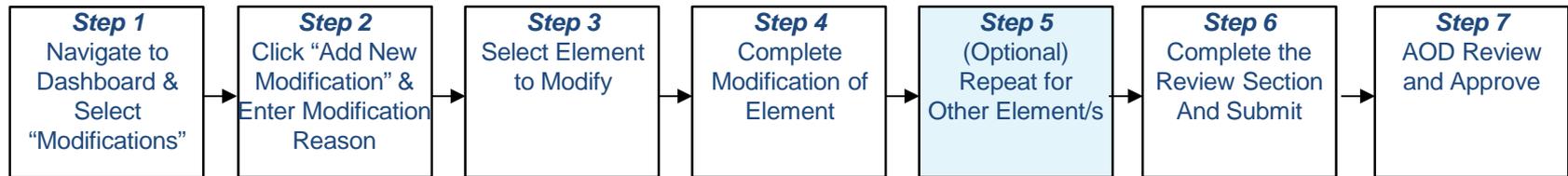
If there are multiple elements that require a Modification and that are required for the same reason, it is best practice to submit a single Modification that includes multiple elements rather than submit multiple Modifications. For example, a medical issue such as a broken leg would require Modification to several elements.

Original Entry	New Entry	Created On	Created By
No modifications for goals created.			

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				



Scenario: SC Initiates a Modification



Step 5: (Optional) Repeat for Other Element/s

Additionally, after a Modification has been completed for an element but prior to submission, it is possible to edit or delete completed elements.

- To edit a Goal Modification, click “View /Edit Goal Modification.
- To delete a Goal Modification, click “Delete Goal Modification

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

Back to Modifications Review Switchboard

Modification Details

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Update Year ISP

Goals

Original Entry	New Entry	Created On	Created By
No modifications for goals created.			

Add Goal Modification | View/Edit Goal Modification | Delete Goal Modification

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

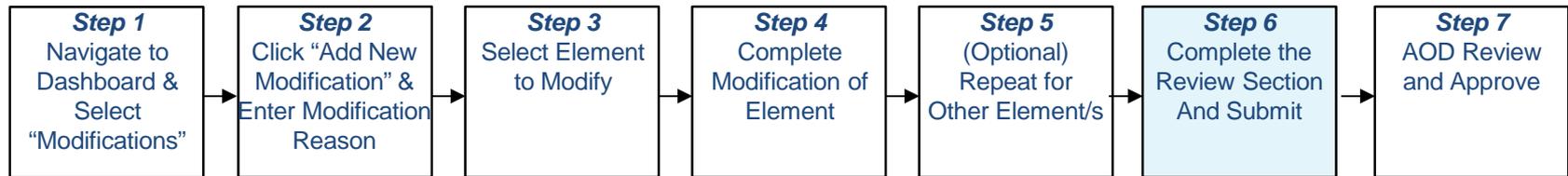
Add Modification | View/Modification

View/Edit Goal Modification

Delete Goal Modification



Scenario: SC Initiates a Modification



Step 6: Complete the Review Section and Submit to AOD for Review

Prior to submitting, it is mandatory to complete the Review Section at the bottom of the Modifications Details Screen. Enter a Proposed Start Date. Optionally, also enter a Proposed Review Date.

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save up for and attend an event semi-annually rather than quarterly.	10/29/2015	Coordinator, Service

Add Goal Modification | View/Edit Goal Modification | Delete Goal Modification

No other modifications created.

Add Modification | View/Edit Modification | Delete Modification

Review Section

Proposed Start Date: *

Proposed Review Date:

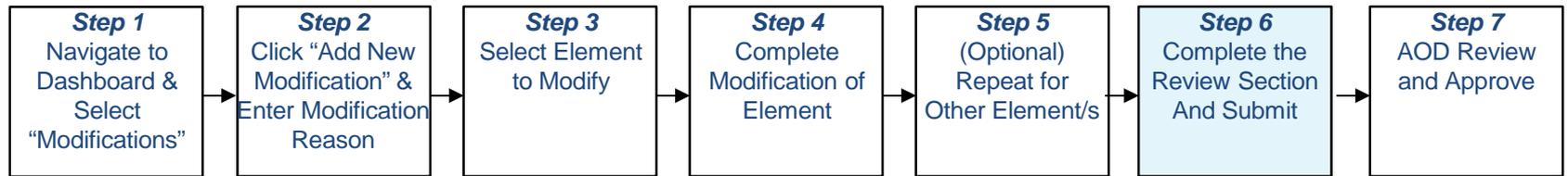
Meeting Waived:

Date of Meeting: *

Spell Check | Reset | Save | Delete | Save and Continue | Submit for AOD Review



Scenario: SC Initiates a Modification



Step 6: Complete the Review Section and Submit to AOD for Review

If the Modification meeting has occurred, select “No” for the prompt Meeting Waived and select the date from the calendar drop down. If the meeting has not occurred, select “Yes” and identify the date the meeting was waived.

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save up for and attend an event semi-annually rather than quarterly.	10/29/2015	Coordinator, Service

Add Goal Modification | View/Edit Goal Modification | Delete Goal Modification

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

View/Edit Modification | Delete Modification

Meeting Waived:

Date Meeting Waived: *

Review Section

Proposed Start Date: *

Proposed Review Date:

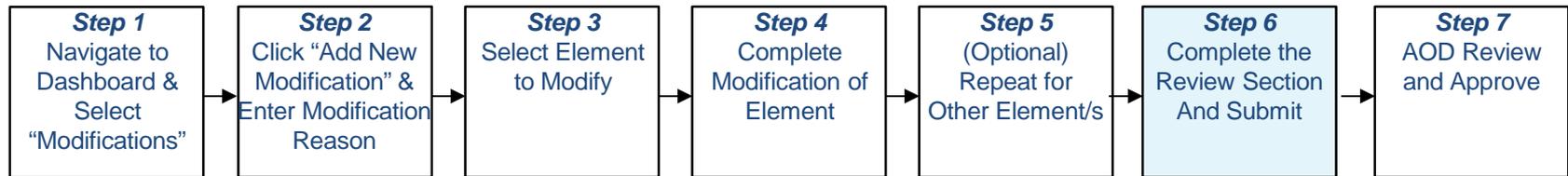
Meeting Waived:

Date of Meeting: *

Spell Check | Reset | Save | Delete Save and Continue | Submit for AOD Review



Scenario: SC Initiates a Modification



Step 6: Complete the Review Section and Submit to AOD for Review

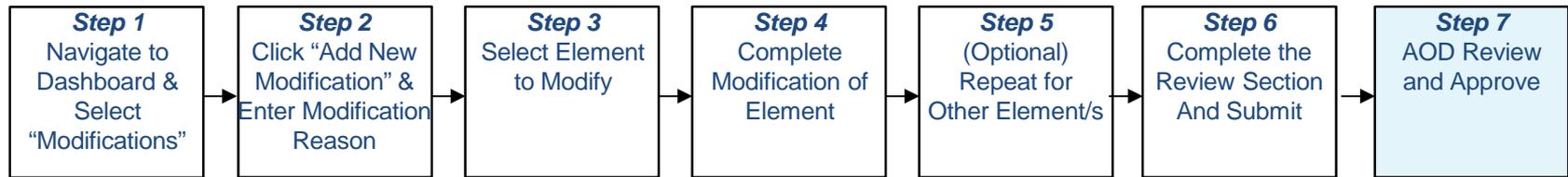
Click "Submit for AOD Review."

The screenshot shows a web application interface with a table at the top containing columns: Original Entry, New Entry, Modification Type, Created On, and Created By. Below the table is a section titled "Review Section" with fields for "Proposed Start Date", "Proposed Review Date", "Meeting Waived" (set to "No"), and "Date of Meeting". At the bottom right of the form, there are buttons for "Save and Continue" and "Submit for AOD Review". A blue box highlights the "Submit for AOD Review" button, and a blue arrow points from the text "Click 'Submit for AOD Review.'" above to this button.

NOTE: SCs retain the ability to edit a submitted Modification until an AOD approves the Modification. SCs retain these editing rights because AODs do not have the ability to edit and can only approve or disapprove. In the scenario that an AOD disapproves of a Modification because it requires revision, the AOD will explain the reason for disapproving in an offline discussion with the SC. The SC will be responsible for making any necessary revisions and resubmitting for AOD review.



Scenario: SC Initiates a Modification



Step 7: AOD Review and Approve

AOD receives Alert indicating that a Modification has been submitted for review.

AOD clicks "A Modification has been accepted for an individual."

A Modification has been accepted for an individual

Health and Human Services

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: Recipient User:

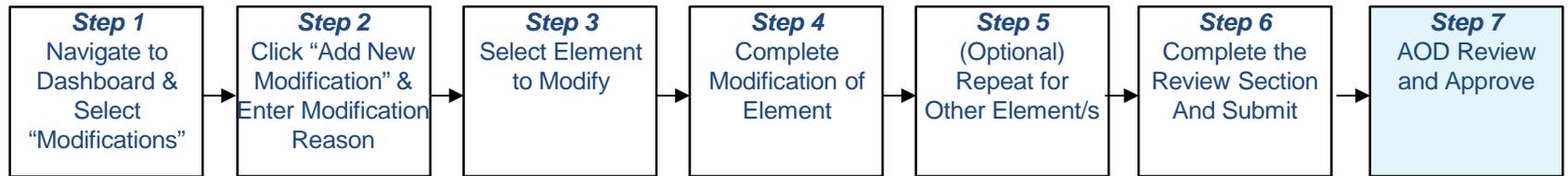
Subject: Click to select items from list

Search:

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	10/29/2015	A Modification has been accepted by SC for an individual	A Modification has been accepted for an individual: Name: Test,Bruce; ISP Meeting Date: 03/04/2015



Scenario: SC Initiates a Modification



Step 7: AOD Review and Approve

The system will redirect to the Modifications Review Switchboard.

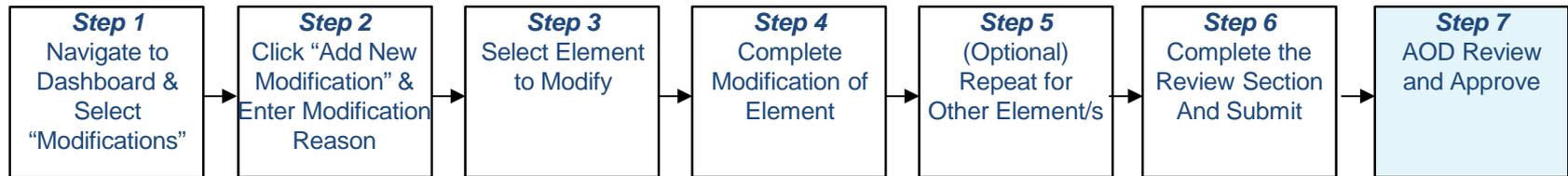
AOD to click “Submitted for AOD Review.”

Submitted For AOD Review

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstance that require his goals and residential support detail	Goal	10/29/2015	Coordinator, Service	View Document History	Submitted For AOD Review



Scenario: SC Initiates a Modification



Step 7: AOD Review and Approve

The system will display the Modifications Detail screen.

AOD to evaluate the Summary and Review section.

Original Entry :
Goal Title:
Money Management
Goal Description:
Bruce will save up quarterly to do a big event. Each quarter he will identify an event he would like to do. Example: Boston Harbor Cruise, a concert, casino etc

New Entry :
Goal Description:
Bruce is to save up for and attend an event semi-annually rather than quarterly.

Summary

Original Entry :
Goal Title:
Money Management
Goal Description:
Bruce will save up quarterly to do a big event. Each quarter he will identify an event he would like to do. Example: Boston Harbor Cruise, a concert, casino etc

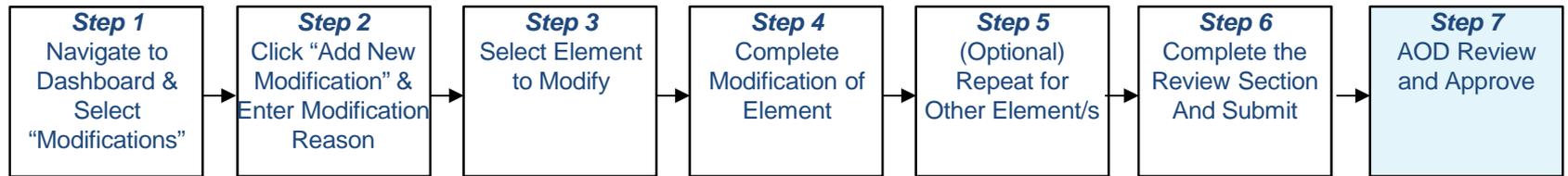
New Entry :
Goal Description:
Bruce is to save up for and attend an event semi-annually rather than quarterly.

Review Section

Proposed Start Date:	11/04/2015	Proposed Review Date:	-
Meeting Waived:	Yes	Date Meeting Waived:	10/29/2015
Submitted For AOD Review On:	10/29/2015		



Scenario: SC Initiates a Modification



Step 7: AOD Review and Approve

Once the review is complete, the AOD has two options - "Approve" or "Disapprove."

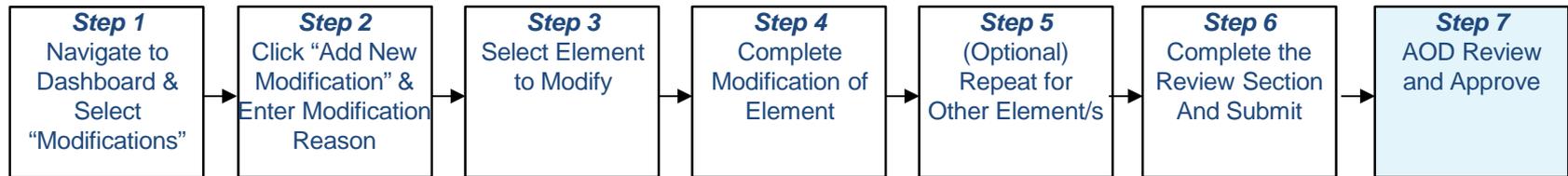
The screenshot shows the 'Modifications Review Dashboard' with a table of modifications. The 'Goals' section contains one entry:

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save up for and attend an event semi-annually rather than quarterly.	10/29/2015	Coordinator, Service

At the bottom of the page, there are two buttons: 'Disapprove' and 'Approve', both highlighted with blue boxes. The 'Disapprove' button is on the left and the 'Approve' button is on the right. Below the 'Disapprove' button is a 'Disapprove' link, and below the 'Approve' button is an 'Approve' link.



Scenario: SC Initiates a Modification



Step 7: AOD Review and Approve

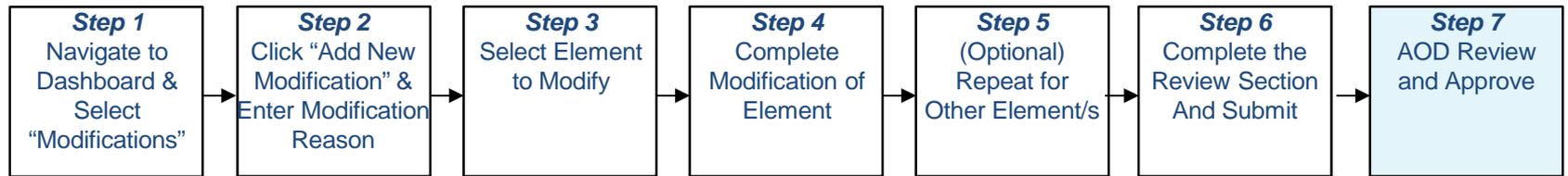
Option 1: Disapprove

In an offline discussion with the SC, the AOD will explain the reason that the Modification has not been approved. The AOD will either indicate that the Modification is not required altogether or that it requires revision. The reason will determine the next steps.

- If the reason is that the Modification is not required altogether, the AOD will **disapprove** the Modification and **no action is required** by the SC.
- If the reason is that revision of the Modification is required, the AOD will **neither disapprove nor approve** the Modification and inform the SC who will **request revisions** from the Provider.



Scenario: SC Initiates a Modification



Step 7: AOD Review and Approve

Option 2: Approve

If AOD selects “Approve,” the system will redirect to the Modifications Review Switchboard. The status of the Modification will change to “Approved by AOD.”

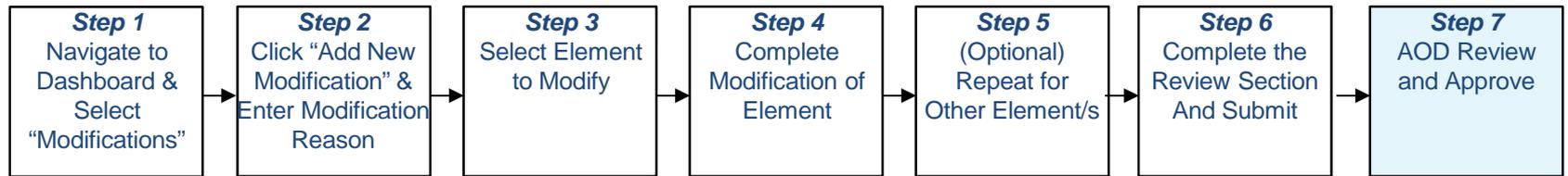
In this scenario, the AOD approves the Modification.

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstance that require his goals and residential support detail	Goal	10/29/2015	Coordinator, Service	View Document History	Approved By AOD

Approved By AOD



Scenario: SC Initiates a Modification



Step 7: AOD Review and Approve

The Modifications Review Switchboard displays summary details for the submitted Modification

The screenshot shows the 'Modifications Review Switchboard' interface. The top navigation bar includes: 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 has a table with the following data:

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstance that require his goals and residential support detail	Goal	10/29/2015	Coordinator, Service	View Document History	Approved By AOD

Callouts with arrows point to the following fields: Modification Reason, Modification Type, Created On, Created By, Document History, and Status. An 'Update Year ISP' button is located in the top right corner of the table area.



Notes and Next Steps

Next Steps:

- If the Area Office Director approves the Modification, the status of Modification changes to approved in the Modifications Review Switchboard and it is possible to print the Modification without a draft watermark.
- If the Area Office Director disapproves the Modification, the status of the Modification changes to disapproved in the Modifications Review Switchboard and no further action is required. The Modification content, however, is not deleted and the Area Office Director has the option of changing the status of the Modification to approved at a later date if circumstances require it.

Important Notes:

- Provider Supervisors are also able to submit Modifications. The next scenario will demonstrate DDS's role in the process when Providers initiate and submit a Modification.
- If a Modification is required, Service Coordinators are able to have a conversation with Providers and determine if it is more appropriate for the Modification to be initiated by the Provider or by DDS. In most circumstances, the Providers will initiate the modification.
- If either a Provider Supervisor or DDS staff initiates a Modification for an element and the Modification is in Started status, it is not possible for another user to initiate a Modification on the same element. It is only possible to initiate a modification for that element after the modification in process has been approved or disapproved by an Area Office Director.
- 90 days prior to the next ISP meeting date, next year's ISP document is generated by the system. After this has happened, it is not possible to submit Modifications to the prior year's ISP. Instead, any change that occurs in that timeframe should be included as part of the upcoming individual's ISP meeting.

Scenario: Reviewing a Modification

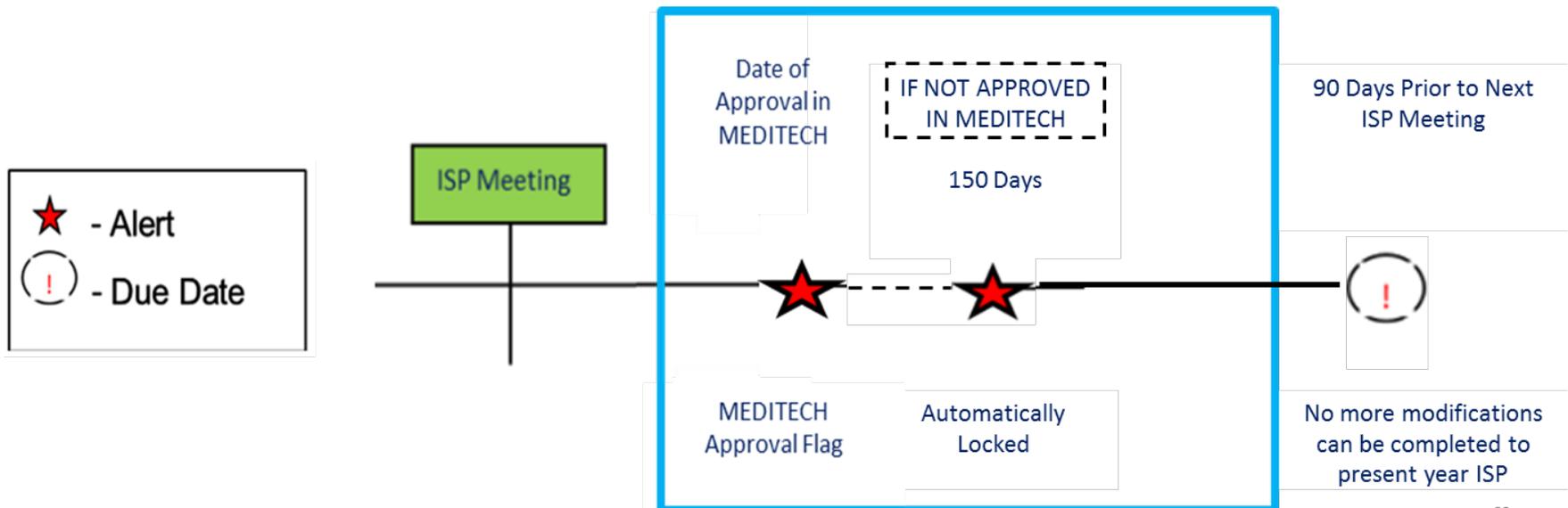


Scenario: Reviewing a Provider Initiated Modification

Description: Service Coordinators or Service Coordinator Supervisors review a Modification once a Provider Supervisor has submitted it to DDS for review. A Provider initiated Modification can include any combination of the following elements: Goals, Objective and Support Strategy, Residential Support / Behavior Plan / Other. The Service Coordinator user can accept, disapprove, or request revision to a provider initiated Modification.

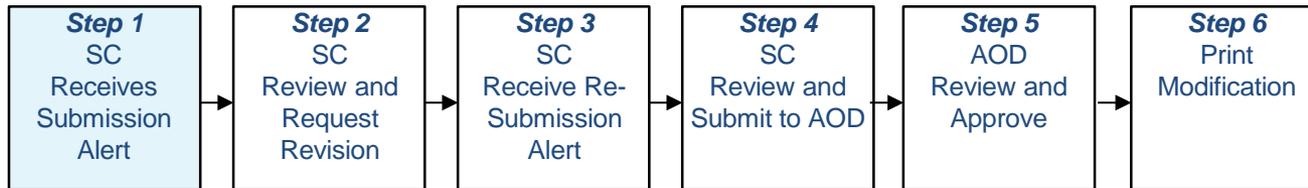
Roles and Responsibilities:

- **Service Coordinators:** Review a Modification, Accept, Request Revision,, Disapprove
- **Service Coordinator Supervisors:** Review a Modification, Accept, Request Revision, Disapprove
- **Area Office Director:** Review a Modification, Approve, Disapprove





Scenario: Reviewing a Provider Initiated Modification



Step 1: Service Coordinator Receives Submission Alert

Service Coordinators will receive an alert indicating that Modifications have been submitted by Provider agencies.

On the Alert Switchboard, click the “Modification submitted by” link.

Modification submitted by:

Health and Human Services

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: Recipient User:

Subject:

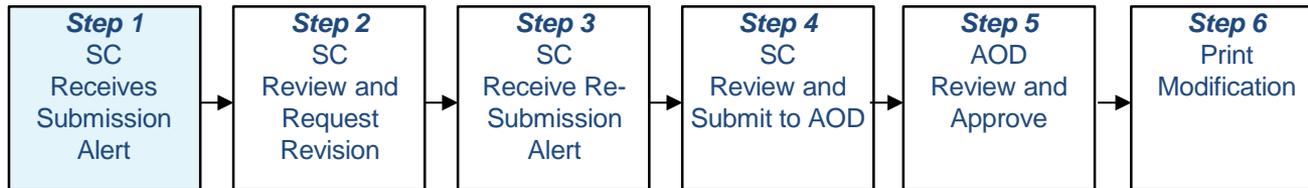
Search Reset

Your search found multiple matches. Please select the desired Alert.

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	10/30/2015	Provider has proposed a Modification	Modification submitted by: Provider: _____ Name: _____ ; ISP Meeting Due Date: 03/04/2015
<input type="checkbox"/>	10/30/2015	Provider has proposed a Modification	Modification submitted by: Provider: _____ Name: _____ ; ISP Meeting Due Date: 03/04/2015



Scenario: Reviewing a Provider Initiated Modification



Step 1: Service Coordinator Receives Submission Alert

The system will redirect to the Modifications Details screen.

Click “Submitted for DDS Review.”

Submitted for DDS Review

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

Modifications Review Switchboard

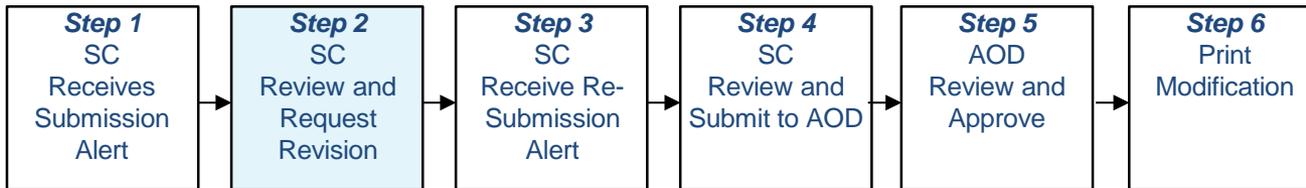
Update Year ISP

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Submitted for DDS Review

[Add New Modification](#)



Scenario: Reviewing a Provider Initiated Modification



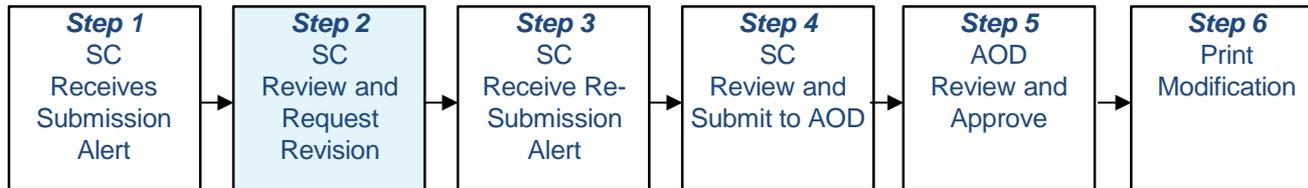
Step 2: SC Review and Request Revision

Review the Modification Details screen.

The screenshot shows the 'Modification Details' screen. At the top, there are two callout boxes: 'Original Entry' and 'New Entry'. The 'Original Entry' box contains: Goal Title: Money Management; Goal Description: Bruce will save up quarterly to do a big event. Each. The 'New Entry' box contains: Goal Description: Bruce is to save for and attend events semi-annually rather than quarterly. Below these, the 'Modification Reason' section states: 'There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies'. The 'Goals' section contains a table with two columns: 'Original Entry' and 'New Entry'. The 'Original Entry' column contains the same text as the 'Original Entry' callout box. The 'New Entry' column contains the same text as the 'New Entry' callout box. Below the 'Goals' section, there are sections for 'Objectives & Support Strategies', 'Residential Support / Other', and 'Summary'. The 'Review Section' at the bottom contains fields for 'Proposed Start Date' (10/30/2015), 'Proposed Review Date', 'Meeting Waived' (No), and 'Date of Meeting'. At the bottom of the screen, there are buttons for 'Spell Check', 'Reset', 'Save', 'Disapprove', 'Save and Continue', 'Request Revision', and 'Submit for AOD Review'.



Scenario: Reviewing a Provider Initiated Modification



Step 2: SC Review and Request Revision

There are three options – 1.) “Submit for AOD Review”, 2.) “Request Revision”, 3.) “Disapprove”

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

Back to Modifications Review Subtab

Modification Details

Update Year ISP

Expand All | Collapse All

Modification Reason:
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events semi-annually rather than quarterly	10/30/2015	

Objectives & Support Strategies

No modifications for objectives created.

Residential Support / Other

No other modifications created.

Summary

Review

Proposed State: **Disapprove**

Proposed Review Date: [Date Picker]

Meeting Waived: No

Date of Meeting: [Date Picker]

Comments:

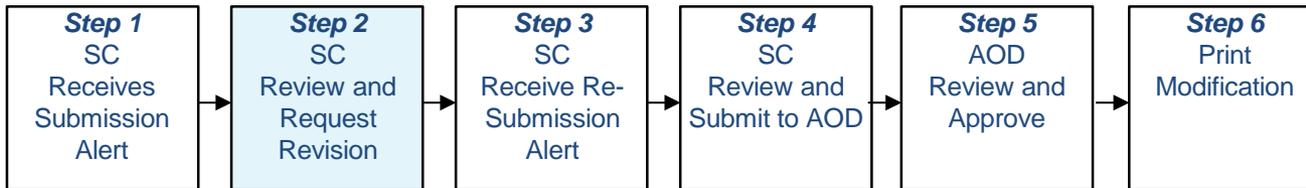
[Text Area]

[Disapprove] [Request Revision] [Submit for AOD Review]

[Spell Check] [Reset] [Save and Continue] [Request Revision] [Submit for AOD Review]



Scenario: Reviewing a Provider Initiated Modification



Step 2: SC Review and Request Revision

If the Modification information is acceptable and ready for AOD review, click “Submit for AOD Review”

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

Back to Modifications Review Subtabboard

Modification Details

Update Year ISP

Expand All | Collapse All

Modification Reason:

There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events semi-annually rather than quarterly	10/30/2015	

Objectives & Support Strategies

No modifications for objectives created.

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

Summary

Review Section

Proposed Start Date: 10/30/2015 | Proposed Review Date: | Meeting Waived: No | Date of Meeting: |

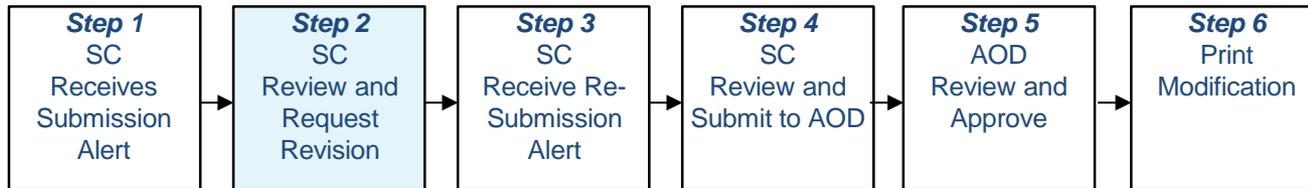
Comments:

Submit for AOD Review

Spell Check | Reset | Save | Disapprove | Save and Continue | Request Revision | Submit for AOD Review



Scenario: Reviewing a Provider Initiated Modification



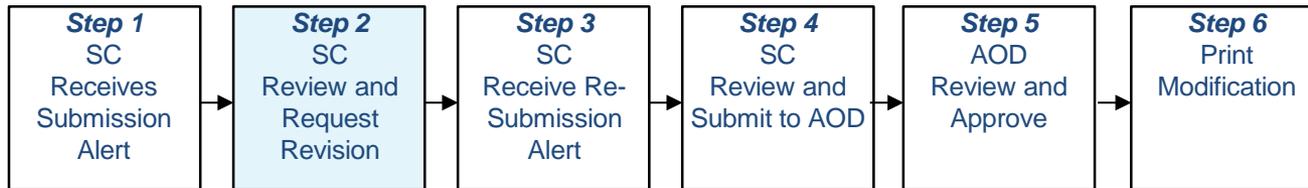
Step 2: SC Review and Request Revision

If this option is chosen, Providers will receive an alert indicating that the modification has been accepted but they still must wait for approval by the AOD.

Provider Alert	Reviewer
“Service Coordinator has accepted proposed Modification”	<ul style="list-style-type: none">• Service Coordinator• Service Coordinator Supervisor
“AOD has approved your proposed Modification”	<ul style="list-style-type: none">• Area Office Director



Scenario: Reviewing a Provider Initiated Modification



Step 2: SC Review and Request Revision

If the Modification was submitted in error or is not required, click “Disapprove” and enter comments to explain why the Modification has been disapproved.

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

Back to Modifications Review Subtab

Modification Details

Update Year ISP

Expand All | Collapse All

Modification Reason:
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events semi-annually rather than quarterly	10/30/2015	

Objectives & Support Strategies

Original Entry	New Entry	Created On	Created By
No modifications for objectives created.			

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

Summary

Review

Proposed State: **Disapprove** Proposed Review Date:

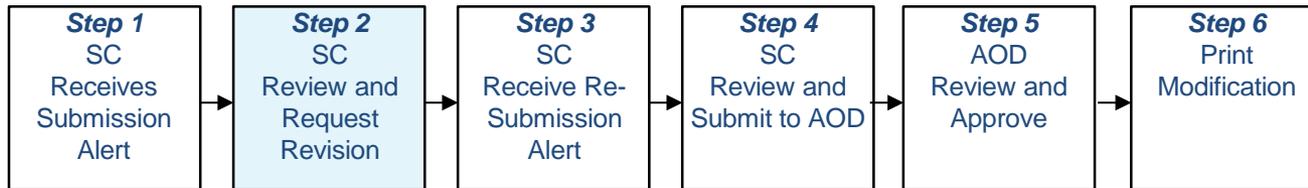
Meeting Waived: Date of Meeting:

Comments:

Spell Check | Reset | Save | **Disapprove** | Save and Continue | Request Revision | Submit for AOD Review



Scenario: Reviewing a Provider Initiated Modification



Step 2: SC Review and Request Revision

If the Modification requires revision, enter explanatory comments and click “Request Revision.” If “Request Revision” is chosen, the Provider Supervisor will receive an alert. In this scenario, this option is chosen.

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

Back to Modifications Review Subtabboard

Modification Details

Update Year ISP

Expand All | Collapse All

Modification Reason:
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events semi-annually rather than quarterly	10/30/2015	

Objectives & Support Strategies

Original Entry	New Entry	Created On	Created By
No modifications for objectives created.			

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

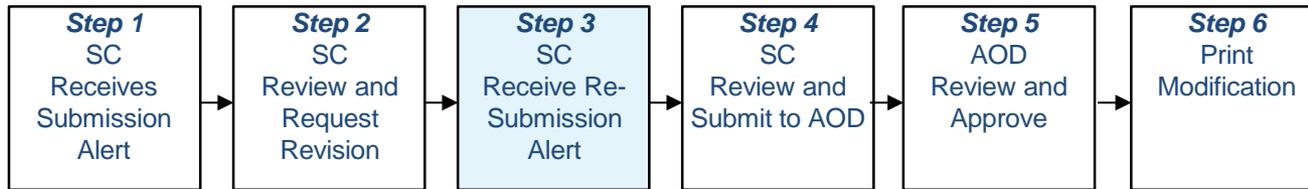
Summary

Review Section

Proposed Start Date: 10/30/2015
Proposed Review Date:
Meeting Waived: No
Date of Meeting:



Scenario: Reviewing a Provider Initiated Modification



Step 3: SC Receive Submission Alert

Once the Provider completes revisions and submits to DDS, the SC receives an Alert.

Click “Modification Submitted by.”

Health and Human Services

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: Recipient User:

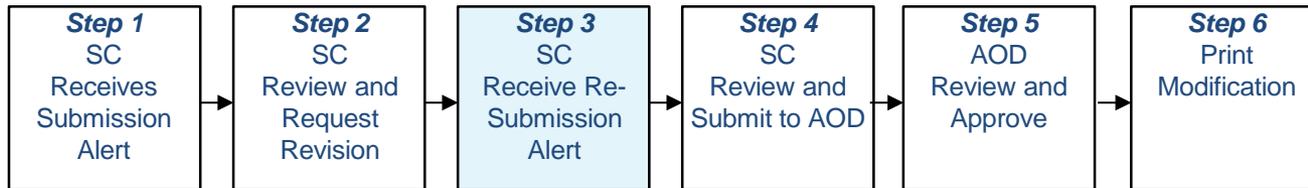
Subject: Click to select items from list

Your search found multiple matches. Please select the desired Alert.

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	10/30/2015	Provider has proposed a Modification	Modification submitted by: Provider: ; Name: ; ISP Meeting Due Date: 03/04/2015
<input type="checkbox"/>	10/30/2015	Provider has proposed a Modification	Modification submitted by: Provider: ; Name: ; ISP Meeting Due Date: 03/04/2015



Scenario: Reviewing a Provider Initiated Modification



Step 3: SC Receive Submission Alert

On the Modifications Review Switchboard, click “Submitted for DDS Review.”

Submitted for DDS Review

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

Modifications Review Switchboard

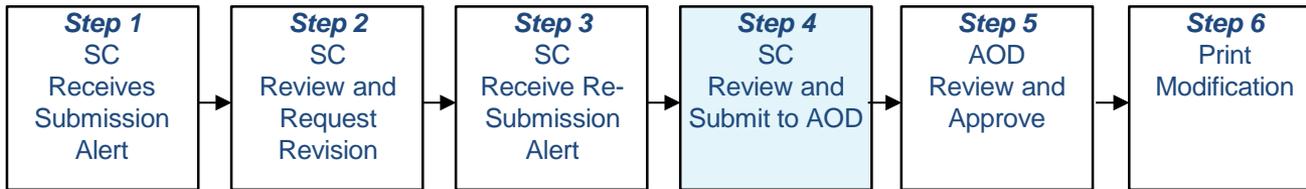
[Update Year ISP](#)

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Submitted for DDS Review

[Add New Modification](#)



Scenario: Reviewing a Provider Initiated Modification



Step 4: SC Review and Accept

Review the revised Modification

Original Entry

Goal Title:
Money Management
Goal Description:
Bruce will save up quarterly to do a big event. Each

New Entry

Goal Description:
Bruce is to save for and attend events three events annually

Update Year ISP

Modification Reason:
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events three events annually	10/30/2015	

Objectives & Support Strategies

Original Entry	New Entry	Created On	Created By
No modifications for objectives created.			

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

Summary

Review Section

Proposed Start Date: 10/30/2015
Proposed Review Date:
Meeting Waived: Yes
Date Meeting Waived: 10/20/2015

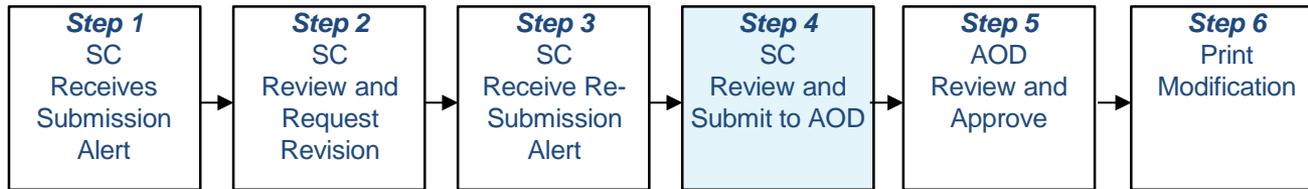
Comments:
Bruce should save up for and attend three events per year.

Spell Check | Reset | Save | Disagree

Save and Continue | Request Revision | Submit for AOD Review



Scenario: Reviewing a Provider Initiated Modification



Step 4: SC Review and Accept

If the revisions are acceptable, click “Submit for AOD Review.”

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

Back to Modifications Review SubPage

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason:
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events three events annually	10/30/2015	

Objectives & Support Strategies

Original Entry	New Entry	Created On	Created By
No modifications for objectives created.			

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

Summary

Review Section

Proposed Start Date: 10/30/2015

Proposed Review Date:

Meeting Waived: Yes

Date Meeting Waived: 10/26/2015

Comments:
Bruce should save up for and attend three events per year.

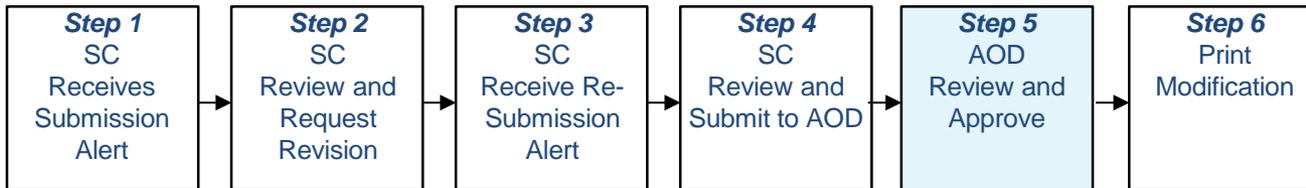
Submit for AOD Review

Spell Check | Reset | Save | Disapprove

Save and Continue | Request Revision | Submit for AOD Review



Scenario: Reviewing a Provider Initiated Modification



Step 5: AOD Review and Approve

AOD receives an alert indicating that an SC has accepted a Modification for an individual.

AOD to click “A Modification has been accepted for an individual.”

A Modification has been accepted for an individual::

Health and Human Services

HOME | QM | PAM | ISP | ADMIN | TOOLS

Reports | Alerts | Misc | IM Utilities | DPPP | 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: Recipient User:

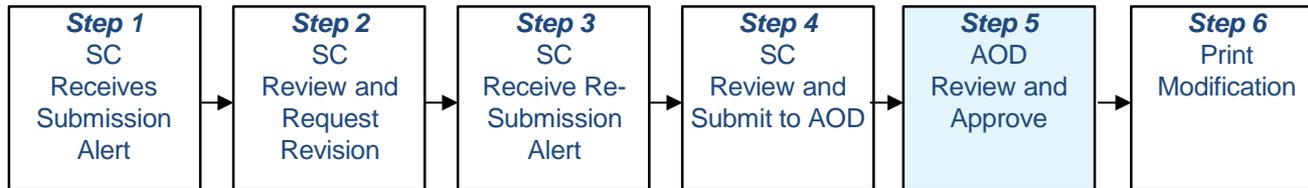
Subject: Click to select items from list

Your search found multiple matches. Please select the desired Alert.

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	10/30/2015	A Modification has been accepted by SC for an individual	A Modification has been accepted for an individual:: Name: Test,Bruce; ISP Meeting Date: 03/04/2015



Scenario: Reviewing a Provider Initiated Modification



Step 5: AOD Review and Approve

The system will redirect to the Modifications Review Switchboard.

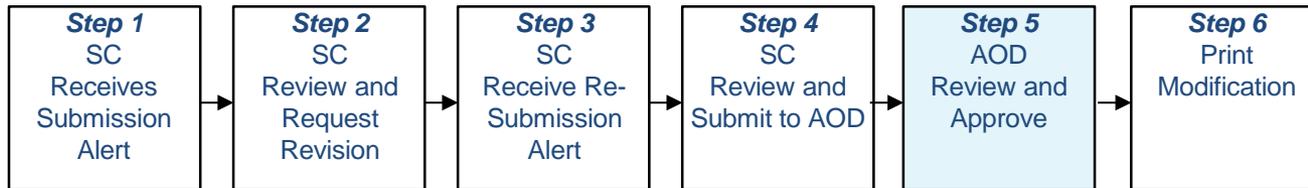
AOD to click “Submitted for AOD Review.”

[Submitted For AOD Review](#)

ISP Dashboard	ISP Meeting Details	Vision	Request Assessments	Review Assessments	Current Supports	Safety/Risk	Legal/Financial	Successes/Challenges	Goals	Objectives	Modifications	View/Print ISP
Modifications Review Switchboard											Update Year ISP	
Modification Reason	Modification Type	Created On	Created By	Document History	Status							
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Submitted For AOD Review							



Scenario: Reviewing a Provider Initiated Modification



Step 5: AOD Review and Approve

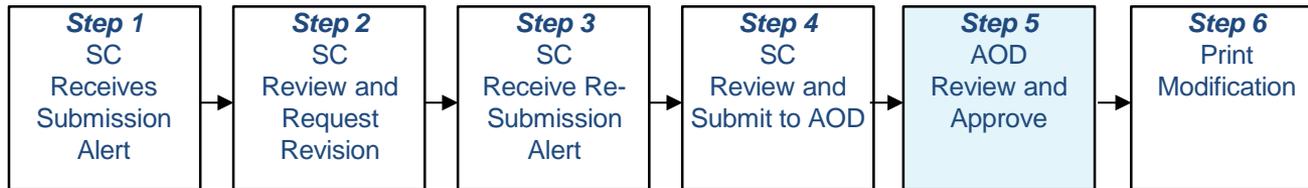
The system will redirect to the Modification Details Screen. AOD to review the content

The screenshot displays the 'Modification Details Screen' with a table comparing 'Original Entry' and 'New Entry' for a goal. The 'Original Entry' has a goal description of 'Bruce will save up quarterly to do a big event. Each', while the 'New Entry' has 'Bruce is to save for and attend events three events annually'. The table also shows the 'Created On' date as 10/30/2015 and the 'Created By' as 'User, Provider Two (American Training)'. Below the table, there are sections for 'Objectives & Support Strategies', 'Residential Support / Other', and a 'Review Section' with a 'Comments' field containing 'Bruce should save up for and attend three events per year'. The 'Submitted For AOD Review On' is 10/30/2015. At the bottom, there are 'Disapprove' and 'Approve | Continue' buttons.

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events three events annually	10/30/2015	User, Provider Two (American Training)



Scenario: Reviewing a Provider Initiated Modification



Step 5: AOD Review and Approve

Once the screen has been reviewed, the AOD has two options - “Approve” or “Disapprove.”

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

Back to Modifications Review Dashboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason:

There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies.

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events three events annually	10/30/2015	User, Provider Two (American Training)

Objectives & Support Strategies

Original Entry	New Entry	Created On	Created By
No modifications for objectives created.			

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
No other modifications created.				

Approve **Disapprove**

Proposed Start Date: 10/30/2015 Proposed Review Date: -
Meeting Waived: Yes Date Meeting Waived: 10/28/2015

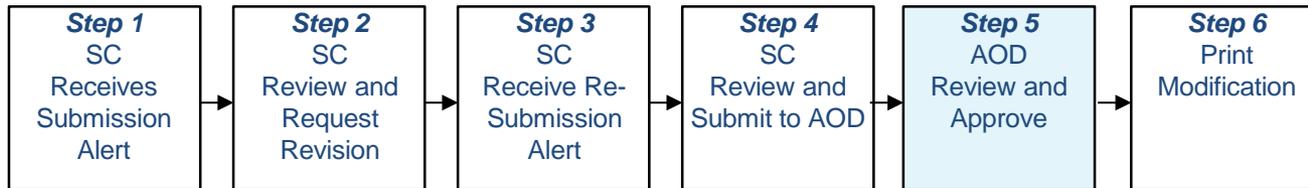
Comments:
Bruce should save up for and attend three events per year.

Submitted For AOD Review On: 10/30/2015

Disapprove **Approve | Continue**



Scenario: Reviewing a Provider Initiated Modification



Step 5: AOD Review and Approve

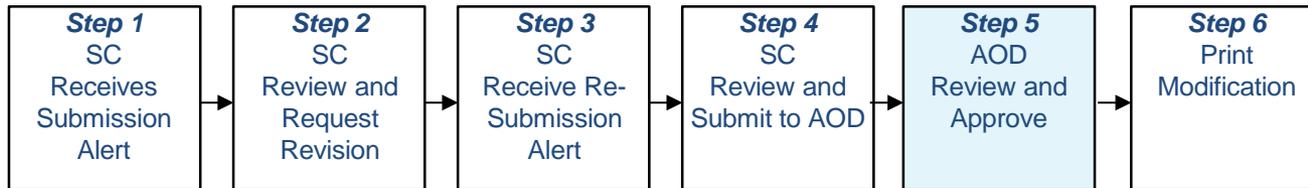
Option 1: Disapprove

In an offline discussion with the SC, the AOD will explain the reason that the Modification has not been approved. The AOD will either indicate that the Modification is not required altogether or that it requires revision. The reason will determine the next steps.

- If the reason is that the Modification is not required altogether, the AOD will **disapprove** the Modification and **no action is required** the SC.
- If the reason is that revision of the Modification is required, the AOD will **neither disapprove nor approve** the Modification and inform the SC who will **request revisions** from the Provider.



Scenario: Reviewing a Provider Initiated Modification



Step 5: AOD Review and Approve

Option 2: Approve

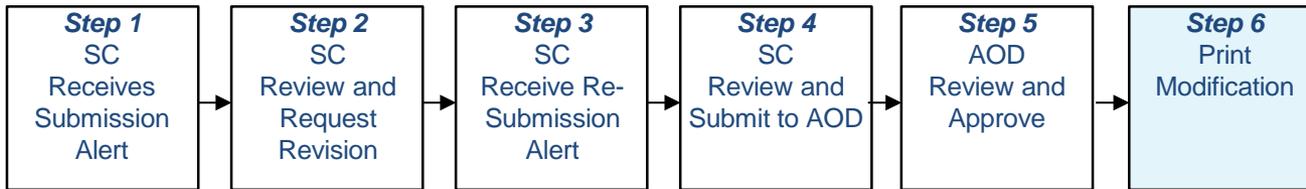
If AOD selects “Approve,” the system will redirect to the Modifications Review Switchboard. The status of the Modification will read “Approved by AOD.”

In this scenario, the AOD approves the Modification.

ISP Dashboard	ISP Meeting Details	Vision	Request Assessments	Review Assessments	Current Supports	Safety/Risk	Legal/Financial	Successes/Challenges	Goals	Objectives	Modifications	View/Print ISP
Modifications Review Switchboard											Update Year ISP	
Modification Reason	Modification Type	Created On	Created By	Document History	Status							
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Approved By AOD							



Scenario: Reviewing a Provider Initiated Modification



Step 6: Print Modification

SC or AOD click “View/Print ISP” tab.

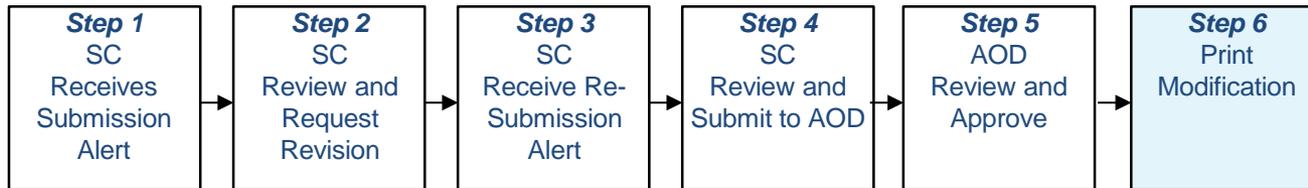
The screenshot shows a navigation bar with the following tabs: ISP Dashboard, ISP Meeting Details, Vision, Request Assessments, Review Assessments, Current Supports, Safety/Risk, Legal/Financial, Successes/Challenges, Goals, Objectives, Modifications, and View/Print ISP. The 'View/Print ISP' tab is highlighted with a blue box and an arrow pointing to a larger callout box labeled 'View/Print ISP'.

Modifications Review Switchboard Update Year ISP

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Approved By AOD



Scenario: Reviewing a Provider Initiated Modification



Step 6: Print Modification

The system will display the View / Print screen. Modifications will appear as an option.

SC or AOD click  next to Modifications to expand.

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/Print ISP Materials [View Historical ISP Materials](#)

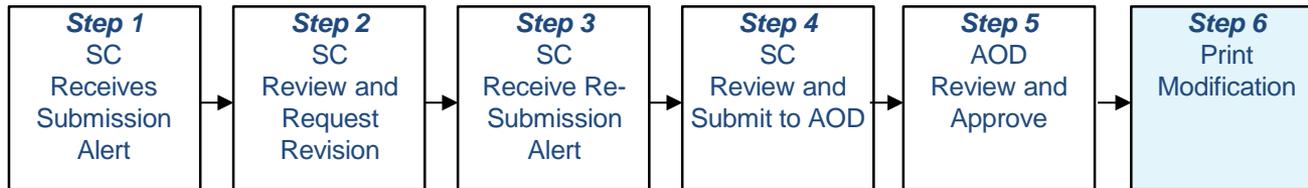
[Expand All](#) | [Collapse All](#) View/Print ISP Document  

Category	Status
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: Completed 

 No action needed  Action needed  Section complete  Section overdue



Scenario: Reviewing a Provider Initiated Modification



Step 6: Print Modification

SC or AOD select either the Word or PDF icon next to the Modification of choice. The document will print with a draft watermark until it has been approved.

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/Print ISP Materials [View Historical ISP Materials](#)

Expand All | Collapse All

View/Print ISP Document

Update Year ISP

- 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: Completed

There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives (Goal) - Approved By AOD

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



Notes and Next Steps

- The Area Office Director is not able to approve part of a modification. If the Area Office Director decides to click “Approve,” the entire Modification is approved, including all the elements included in it.
- Once a Modification has been approved, the modified information will display in the individual’s plan.
- All modified information will display with an asterisk on the system. For example, if an existing goal is modified, an asterisk displays next to the goal on the Goal tab for the individual.
- **NOTE:** An new objective that is added as part of a Modification does not follow the approval process that objectives usually require in a typical ISP year. Rather, the approval of the Modification is recognized as an implicit approval of the objective and its status display as approved. Once approved, the objective will appear on the Objectives and Support Strategies Review Switchboard and, by default, the check mark will be selected in the Include in ISP? Column.
- **NOTE:** Once a Modification for a newly added objective is submitted and approved, Progress Summaries will be triggered for the objective.



Review Process Management

- The Review Process Management table now includes a “Modification” column, which indicates the status of any modifications associated with an individual’s ISP.
- If no modifications have been submitted for an individual, the text in the column will read “Not Applicable.”

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Individual Search | Review Process Management | Reports | ISP Data Extracts | References

Search Results
ISP > Review Process Management

Search Criteria

ISP From Date: * 10/07/2015 ISP To Date: * 12/31/2015

Region: Area Office:

Provider: Security Group:

Showing 1 to 25 of 84 entries Show 25 Entries

Individual^	Planned Meeting Date ⇅	ISP Meeting Deadline ⇅	Notification ⇅	Assessments ⇅	Objectives & Support Strategies ⇅	Modification ⇅	Region ⇅	Area Office ⇅	Service Coordinator ⇅	ISP Year ⇅
<input type="checkbox"/>	11/24/2015	11/24/2015	Not Sent	Not Applicable	Not Applicable	Not Applicable	Metro	Greater Boston	Coordinator, Service	Not Selected
<input type="checkbox"/>	11/24/2015	11/24/2015	Not Sent	Not Applicable	Not Applicable	Not Applicable	Metro	Greater Boston	Coordinator, Service	Not Selected
<input type="checkbox"/>	11/28/2015	11/28/2015	Not Sent	Not Applicable	Not Applicable	Not Applicable	Metro	Greater Boston	Coordinator, Service	Not Selected
<input type="checkbox"/>	11/28/2015	11/28/2015	Not Sent	Not Applicable	Not Applicable	Not Applicable	Metro	Greater Boston	Coordinator, Service	Not Selected
<input type="checkbox"/>	11/28/2015	11/28/2015	Not Sent	Not Applicable	Not Applicable	Not Applicable	Metro	Greater Boston	Coordinator, Service	Not Selected



Chapter 6 Summary

This Chapter covered:

- Overview of Modifications
- Scenario: Initiating a Modification
- Scenario: Reviewing a Modification