

**Department of Developmental Services
Massachusetts Rehabilitation Commission**



Individual Support Plan (ISP) Module – Release 7.7

Training - Provider Staff



**THE COMPUTERWORLD
HONORS PROGRAM**



Introduction

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

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

- Progress Summaries
- Modifications
- Additional Functionality



Chapter Plan

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



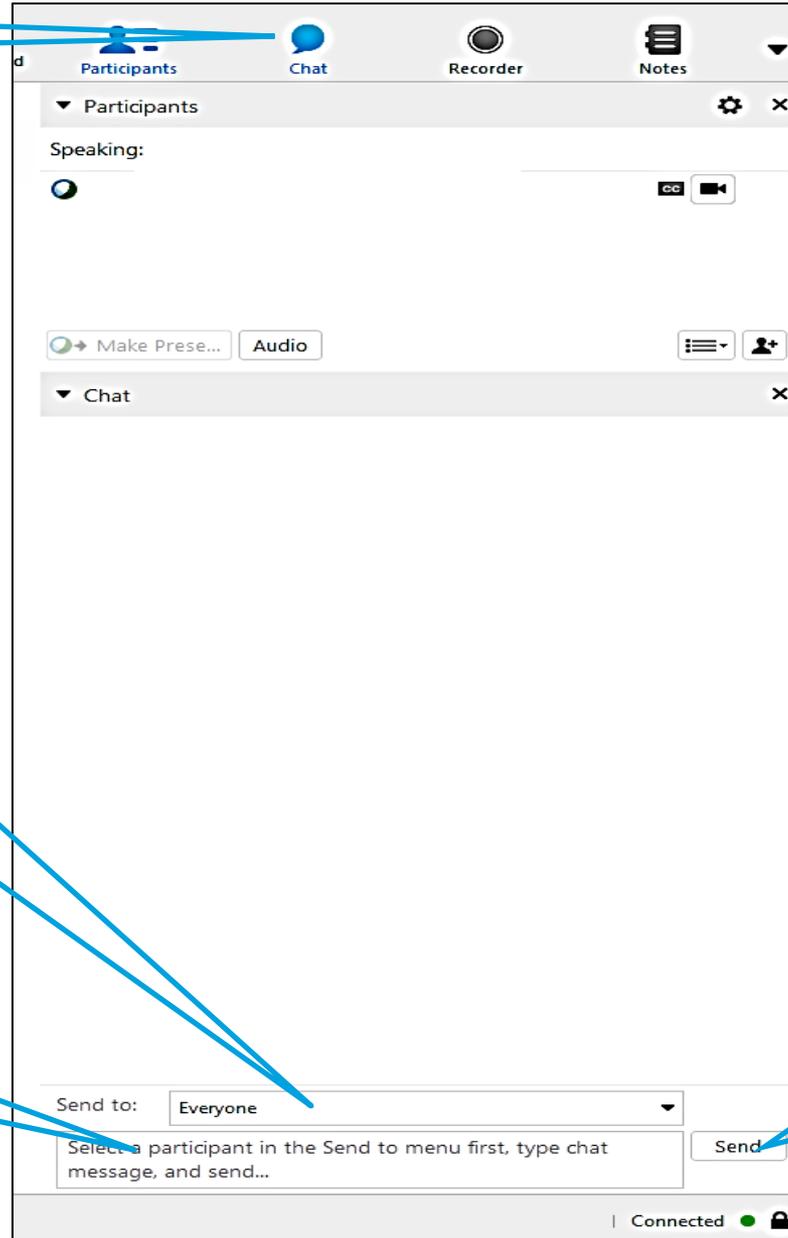
Chapter Plan

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



WebEx: Chat Function

1. Click 'Chat'.



2. Select 'Send to' Everyone.

3. Type your message here.

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



Confidential Information Protocol

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



Test, Bruce

View/Print ISP Document  

ISP Meeting Details

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

Meeting Location:  

Full Year ISP

Chapter 1: Overview of the ISP Module





Chapter 1 Overview

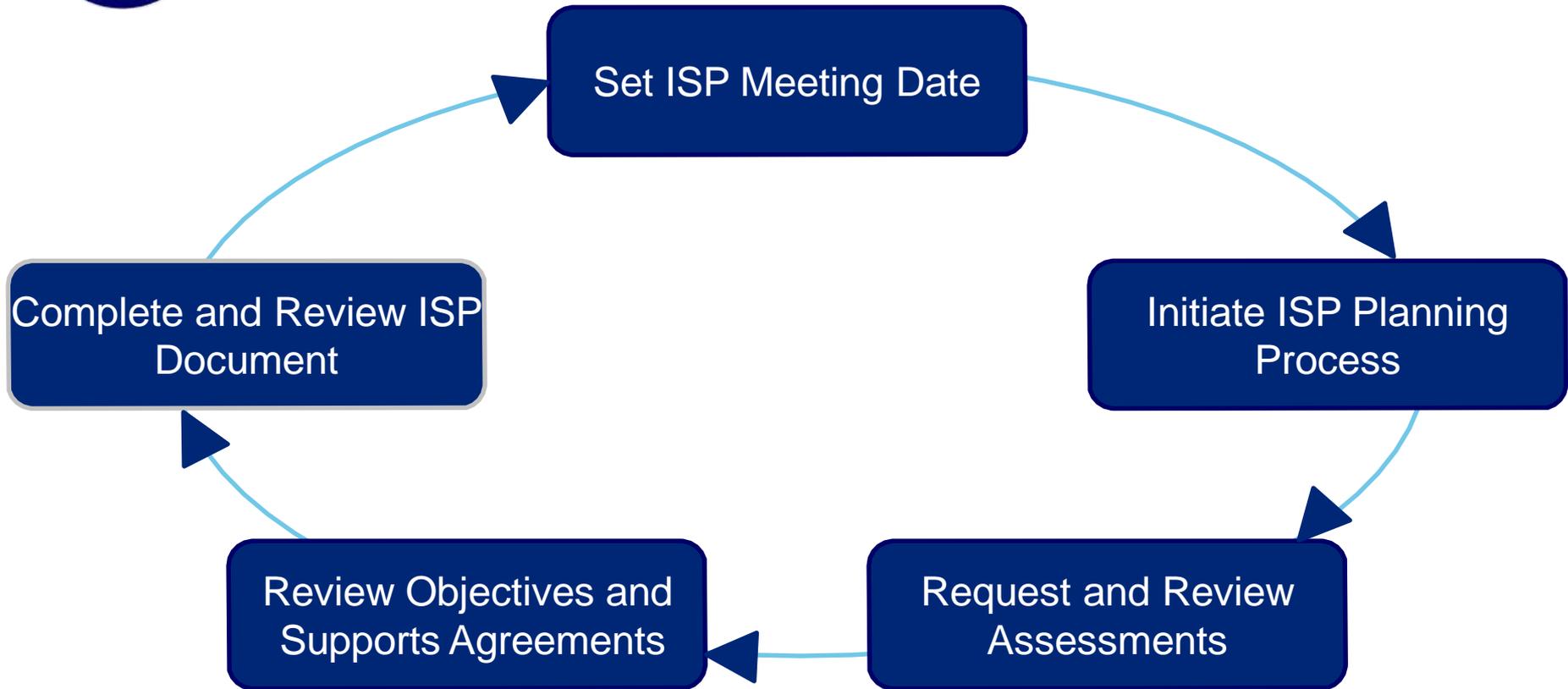
This Chapter will cover:

- ISP Workflow
- Refresher on Recent Enhancements

ISP Workflow



ISP Workflow



The ISP module provides an efficient mechanism for streamlining data entry and enabling efficient information sharing between members of the ISP team. Enhancements have been added in this release that will allow additional tasks to be complete within HCSIS.

Refresher on Recent Enhancements



Timeline for ISP Plan Type Selection

Above each individual's ISP dashboard, there is a personalized ISP timeline graph for that individual. In order to view the timeline click (>>) above the Individual Dashboard.

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





Recall Functionality

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

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

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

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

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



Historical ISP Materials

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

The screenshot shows the 'View/Print ISP' tab selected in a navigation menu. The main content area is titled 'View/Print ISP Materials' and includes a 'Full Year ISP' section. A legend at the bottom indicates the status of different sections: No action needed (black dot), Action needed (yellow dot), Section complete (green dot), and Section overdue (red dot).

Section	Status
Vision	Shared
Goals and Objectives	Approved
Assessments	Action Required (Overdue)
Modifications	Action Required



Summary Report

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

ISP From Date: * ISP To Date: *

HOME QM PAM **Reports** Management Reports References Mass.Gov Home Help

Individual Search
ISP > Reports List

Search Criteria

ISP From Date: * ISP To Date: *

Area Office: Service/Activity code:

Provider: Security Group:

Document Status:

Report Display Option:

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

- 1) Historical ISPs can be seen in the Summary Report. If the date range entered spans across more than one Actual Meeting Date for an individual, all plans between the selected Actual Meeting Dates will be included as separate line items in the report.
- 2) The column “No. of Revisions Requested” is now included in the report
- 3) Additional filters are available to narrow search results. Those filters that are newly added are in bold:
 - Area Office
 - **Report Display Option**
 - Provider
 - **Service/Activity Code**
 - Document Status
 - Security Group



Update Year Status for Goals and Objectives

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

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

ISP Dashboard | ISP Meeting Details | Vision | Assessments | Goals | Objectives | Modifications | View/Print ISP

Objectives and Support Strategies Review Switchboard Update Year ISP

Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
Personal Growth & Accomplishments--					
By November 2015, Bruce will participate in 10 job exploration activities.		Approved	-	View Document History	New
Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved	-	View Document History	Current



Chapter 1 Summary

This Chapter covered:

- ISP Workflow
- Refresher on Recent Enhancements

Chapter 2: Year Selection





Chapter 2 Overview

This Chapter will cover:

- Year Selection for ISP

Year Selection for ISP



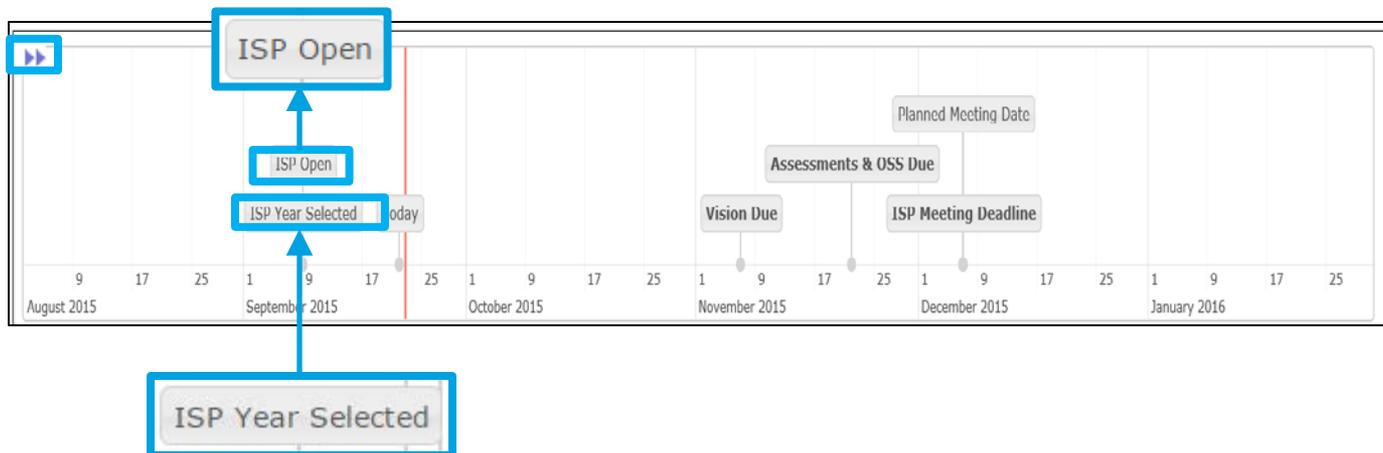
Year Selection for ISP

Previous Functionality

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

New Functionality

- Data Entry User and Provider Supervisor continue to receive access to an individual's plan after the plan type selection has been made. The year selection process, however, has been partially automated.
- If the plan type for the most recently completed plan is a full year, the Service Coordinator is still required to manually make the year selection.
- If the plan type for the most recently completed plan is an update year, however, HCSIS will automatically choose full year for the new plan 90 days before the ISP meeting date. **This will allow Provider staff immediate access to an individual's dashboard in a Full Year.**





Chapter 2 Summary

This Chapter covered:

- Year Selection for ISP