

**Department of Developmental Services
Massachusetts Rehabilitation Commission**



Individual Support Plan (ISP) Module – Release 7.7

Training - Provider Staff



**THE COMPUTERWORLD
HONORS PROGRAM**

Chapter 3: Progress Summary





Chapter 3 Overview

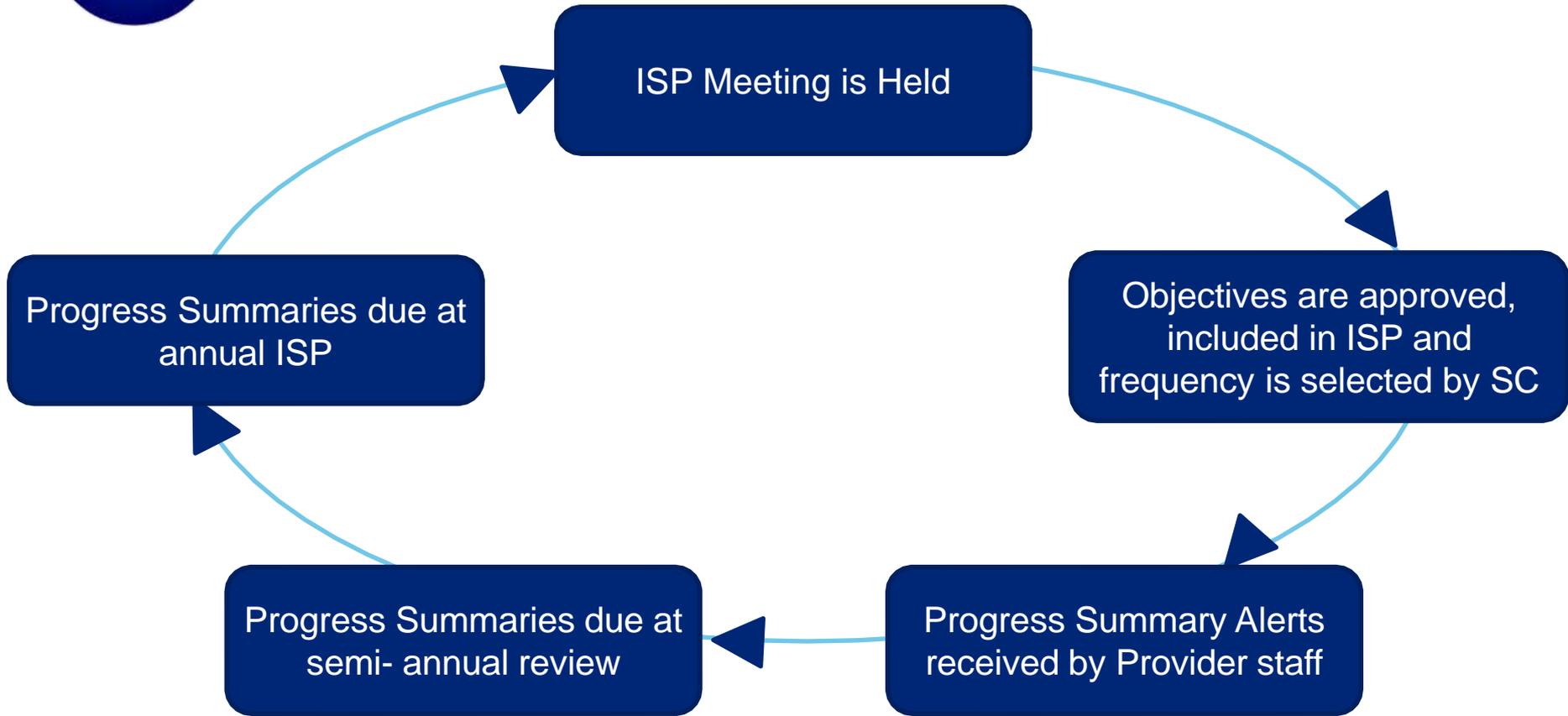
This Chapter will cover:

- Overview of Progress Summaries
- Progress Summary Review Switchboard
- Scenario: Complete a Progress Summary
- Scenario: Revise an Progress Summary

Overview of Progress Summaries



Progress Summary Workflow



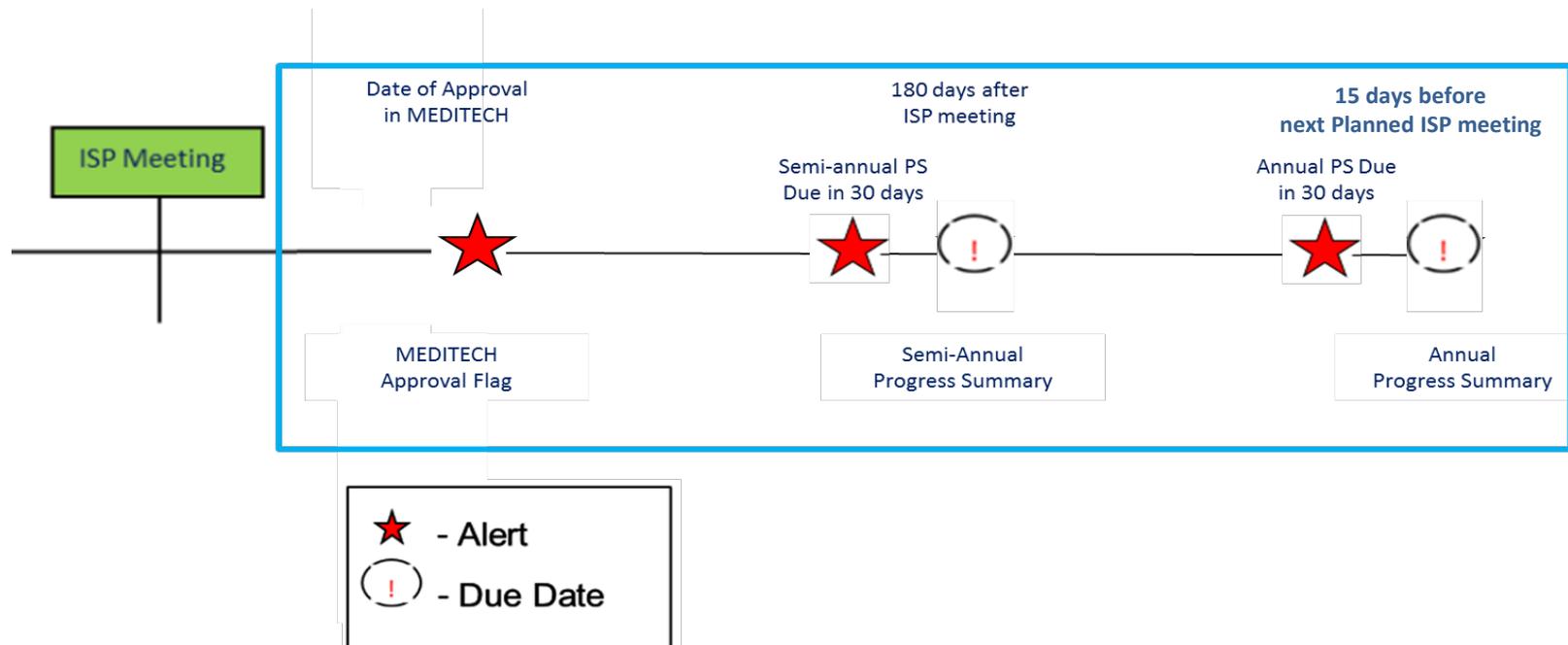
Per DDS Regulation 115 CMR 6.21.5 J and Regulation 115 CMR 6.21.6, semi-annual and annual Progress Summaries are required as part of the ISP process. The ISP module provides an efficient mechanism for streamlining the submission process. The SC has the option, after conferring with the provider agency,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



Timeline for Completion of Progress Summary

Semi-Annual

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

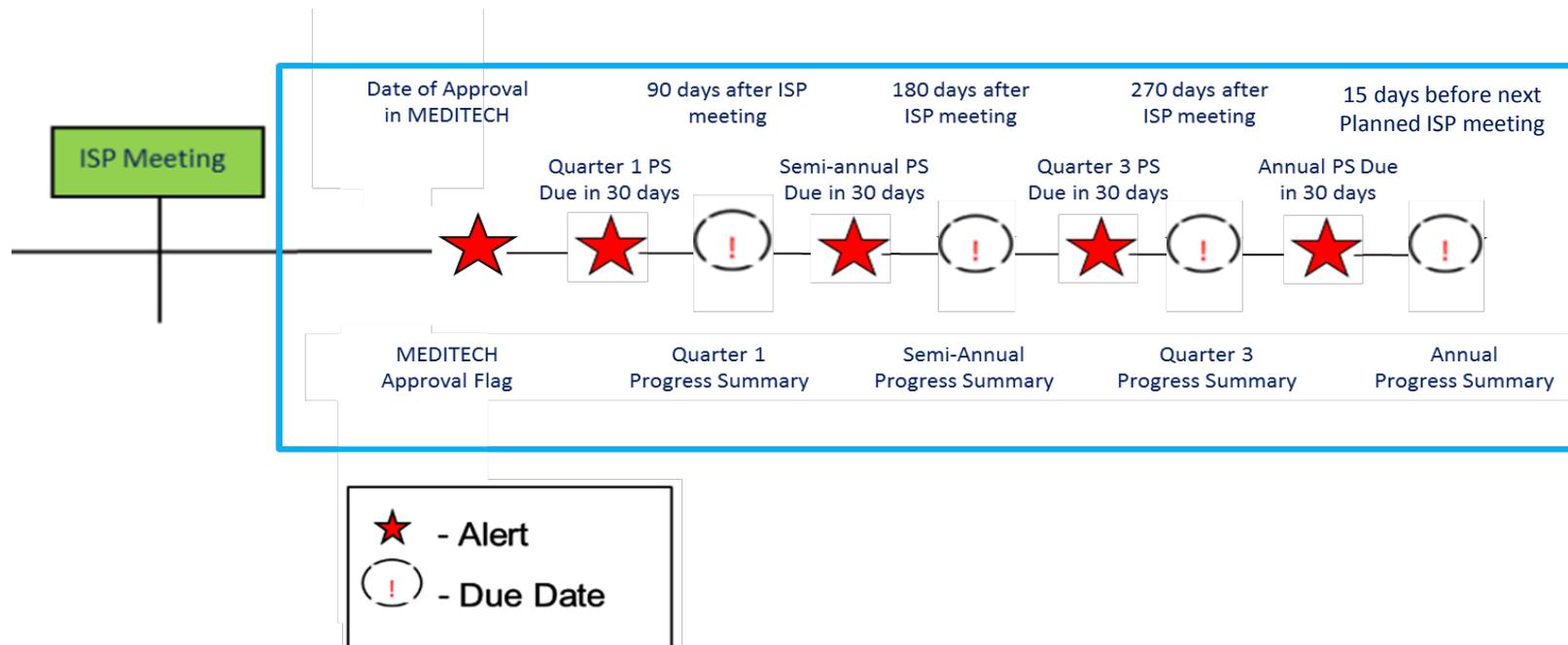




Timeline for Completion of Progress Summary

Quarterly

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





Timeline for Completion of Progress Summary

Due Dates

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

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

The Annual Progress Summary is due 15 days before the deadline date for the next year's plan, which is 390 days after the last Actual Meeting date. However, once the next plan is opened (90 days prior to the Planned Meeting Date/Deadline Date), the due date will update and appear as 15 days prior to the new Planned Meeting Date. If there is no Planned Meeting Date entered, the due date will remain as 15 days prior to the deadline date.



Progress Summary Roles and Responsibilities

Provider Roles and Responsibilities

- **Provider Data Entry User**
 - Submit an Progress Summary for Internal Review
 - Revise an Progress Summary
- **Provider Supervisor**
 - Review an Progress Summary
 - Return an Progress Summary for Internal Revision
 - Submit an Progress Summary to DDS Staff

Progress Summary Review Switchboard



Navigate to the PS Review Switchboard

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

Option 1

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

Progress Summary

Health and Human Services Mass.gov

HOME | QM | PAM | ISP | ADMIN | TOOLS

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

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

ISP > Individual Search > ISP Dashboard

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

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

Test, Bruce

Service Coordinator: Coordinator, Service

Demographic Information

SSN:

Eligibility:

ISP Meeting Details

Planned Meeting Date: 08/30/2014

Meeting Time: 10:00 AM

Meeting Location:

ISP Deadlines

Meeting Deadline: 07/26/2015

Semi Annual Review Date: 11/30/2014

Next ISP Meeting Deadline: 06/03/2015

Full Year ISP



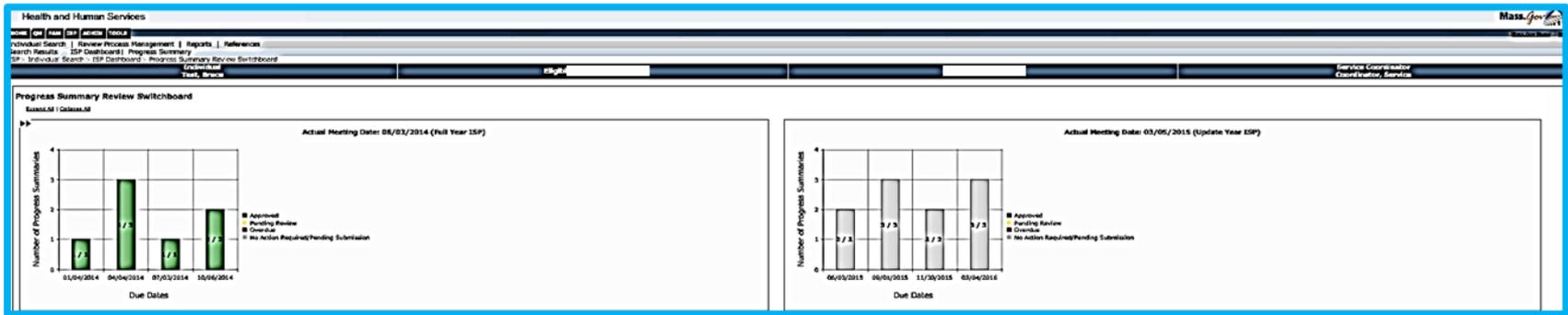
Progress Summary Review Switchboard

Progress Summary Review Switchboard

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

1

Progress Summary Bar Graph



2

Progress Summary Details

| Actual Meeting Date: 05/07/2014 (Full Year 15P) | Progress Summary | Due Date | Provider | Status | Document History | File Document |
|---|------------------|------------|----------|----------|-----------------------|---------------|
| ● Bruce will serve as a coach at | State Annual | 05/07/2014 | | Approved | View Document History | File |
| | Annual | 05/07/2014 | | Approved | View Document History | File |
| ● Bruce will find a big activity for each line to do at the beginning of each quarter. He will then a | Quarter 1 | 05/07/2014 | | Approved | View Document History | File |
| | State Annual | 05/07/2014 | | Approved | View Document History | File |
| Quarter 2 | State Annual | 07/03/2014 | | Approved | View Document History | File |
| | Annual | 07/03/2014 | | Approved | View Document History | File |
| ● Bruce will increase his rate of pay by 30%, for the next 1.5 months. | State Annual | 04/04/2014 | | Approved | View Document History | File |
| | Annual | 04/04/2014 | | Approved | View Document History | File |

| Actual Meeting Date: 03/06/2015 (Update Year 15P) | Progress Summary | Due Date | Provider | Status | Document History | File Document |
|---|------------------|------------|----------|-------------|-----------------------|---------------|
| ● Bruce will find a big activity for each line to do at the beginning of each quarter. He will then a | State Annual | 03/06/2015 | | Not Started | View Document History | File |
| | Annual | 03/06/2015 | | Not Started | View Document History | File |
| ● Bruce will serve as a coach at | Quarter 1 | 03/06/2015 | | Not Started | View Document History | File |
| | State Annual | 03/06/2015 | | Not Started | View Document History | File |
| Quarter 2 | State Annual | 12/31/2015 | | Not Started | View Document History | File |
| | Annual | 03/06/2015 | | Not Started | View Document History | File |
| ● Bruce will increase his rate of pay by 30%, for the next 1.5 months. | Quarter 1 | 03/06/2015 | | Not Started | View Document History | File |
| | State Annual | 03/06/2015 | | Not Started | View Document History | File |
| Quarter 2 | State Annual | 12/31/2015 | | Not Started | View Document History | File |
| | Annual | 03/06/2015 | | Not Started | View Document History | File |

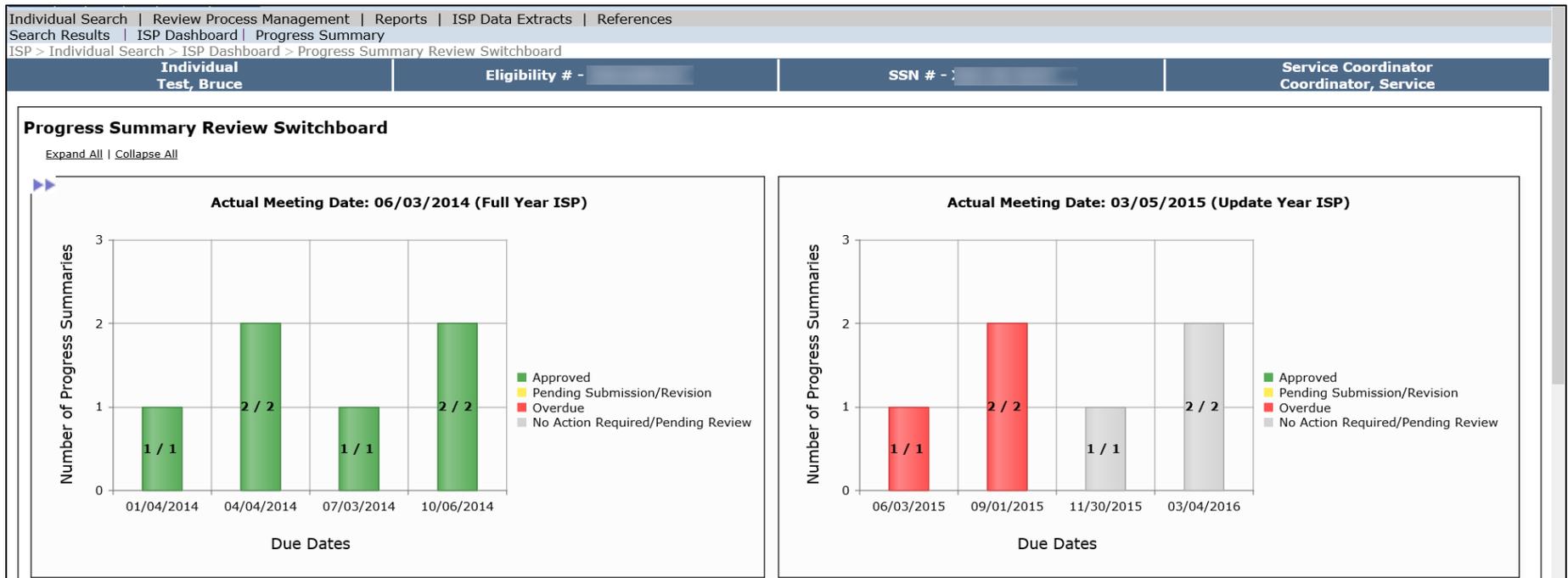


Features of the PS Review Switchboard

Progress Summary Bar Graph

This section contains information for both previous and current ISP.

- The graph provides a visual of the status of all the Progress Summaries required in a given year.





Features of the PS Review Switchboard

Progress Summary Details

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

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

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|-------------|-----------------------|----------------|
| Actual Meeting Date: 06/03/2014 (Full Year ISP) | | | | | |
| ● Since will serve meals once a week at | | | | | |
| Sept Annual | 04/04/2014 | | Approved | View Document History | |
| Annual | 10/04/2014 | | Approved | View Document History | |
| ● Since will find a big activity he would like to do at the beginning of each quarter. He will then | | | | | |
| Quarter 1 | 01/04/2014 | | Approved | View Document History | |
| Sept Annual | 04/04/2014 | | Approved | View Document History | |
| Annual | 04/04/2014 | | Approved | View Document History | |
| Sept Annual | 04/04/2014 | | Approved | View Document History | |
| Actual Meeting Date: 03/05/2015 (Update Year ISP) | | | | | |
| ● Since will find a big activity he would like to do at the beginning of each quarter. He will then | | | | | |
| Sept Annual | 09/01/2015 | | Not Started | View Document History | |
| Annual | 03/04/2016 | | Not Started | View Document History | |
| ● Since will serve meals once a week at | | | | | |
| Quarter 1 | 06/13/2015 | | Not Started | View Document History | |
| Sept Annual | 09/01/2015 | | Not Started | View Document History | |
| Quarter 2 | 11/09/2015 | | Not Started | View Document History | |
| Annual | 03/04/2016 | | Not Started | View Document History | |
| ● Since will increase his rate of pay by 10%, for the next 12 months. | | | | | |
| Quarter 1 | 06/13/2015 | | Not Started | View Document History | |
| Sept Annual | 09/01/2015 | | Not Started | View Document History | |
| Quarter 2 | 11/09/2015 | | Not Started | View Document History | |
| Annual | 03/04/2016 | | Not Started | View Document History | |

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



Features of the PS Review Switchboard

Progress Summary Details

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

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|--|------------|----------|-------------------------------|---------------------------------------|----------------|
| ● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s | | | | | |
| Semi Annual | 09/01/2015 | | Submitted For Internal Review | View Document History | |
| Annual | 02/18/2016 | | Not Started | View Document History | |
| ● ** Bruce will serve meals once a week at | | | | | |
| Quarter 1 | 06/03/2015 | | Not Started | View Document History | |
| Semi Annual | 09/01/2015 | | Not Started | View Document History | |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History | |
| Annual | 02/18/2016 | | Not Started | View Document History | |
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Quarter 1 | 06/03/2015 | | Approved | View Document History | |



Features of the PS Review Switchboard

Progress Summary Details

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

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|--|------------|----------|-------------------------------|---------------------------------------|---|
| ● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s | | | | | |
| Semi Annual | 09/01/2015 | | Submitted For Internal Review | View Document History |   |
| Annual | 02/18/2016 | | Not Started | View Document History |   |
| ● ** Bruce will serve meals once a week at | | | | | |
| Quarter 1 | 06/03/2015 | | Not Started | View Document History |   |
| Semi Annual | 09/01/2015 | | Not Started | View Document History |   |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History |   |
| Annual | 02/18/2016 | | Not Started | View Document History |   |
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Quarter 1 | 06/03/2015 | | Approved | View Document History |   |



Features of the PS Review Switchboard

Progress Summary Details

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

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|--|------------|----------|-------------------------------|---------------------------------------|----------------|
| ● Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s | | | | | |
| Semi Annual | 09/01/2015 | | Submitted For Internal Review | View Document History | |
| Annual | 02/18/2016 | | Not Started | View Document History | |
| ● ** Bruce will serve meals once a week at | | | | | |
| Quarter 1 | 06/03/2015 | | Not Started | View Document History | |
| Semi Annual | 09/01/2015 | | Not Started | View Document History | |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History | |
| Annual | 02/18/2016 | | Not Started | View Document History | |
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Quarter 1 | 06/03/2015 | | Approved | View Document History | |



Features of the PS Review Switchboard

Progress Summary Details

- Document History
 - Upon clicking “View Document History”, the Document History pop-up screen will display.

The screenshot displays the PS Review Switchboard interface. A pop-up window titled "Document History" is centered on the screen. The background interface shows a progress summary for "Bruce will increase his rate of pay by 30%, for the next 12 months." with a "View Document History" button. The pop-up window contains the following information:

Individual Name: Test, Bruce  **Due Date:** 9/1/2015

Objective: Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s

Progress Summary: Semi Annual **Agency:**

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

At the bottom of the interface, a legend indicates: ● No Action Required ● Pending Submission/Pending Review ● Approved ● Overdue



View / Print ISP Tab

Progress Summary Details

- Historical Documents
 - All of the Progress Summaries completed prior to the two most recent plans are viewable in the Historical ISP Materials section.
 - To access Historical ISP Materials, click the “View / Print ISP” tab and then click the “View Historical ISP Materials” button.

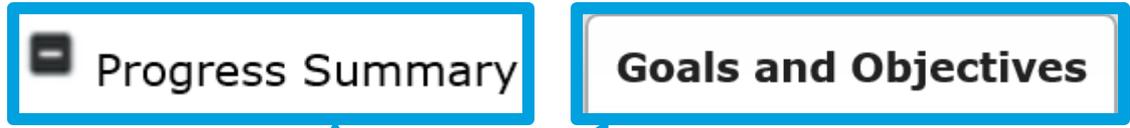
The screenshot shows the 'View/Print ISP Materials' interface. At the top, a navigation bar contains tabs for 'ISP Dashboard', 'ISP Meeting Details', 'Vision', 'Assessments', 'Goals', 'Objectives', 'Modifications', and 'View/Print ISP'. The 'View/Print ISP' tab is highlighted. Below the navigation bar, the main content area is titled 'View/Print ISP Materials' and includes links for 'Expand All' and 'Collapse All'. A legend at the bottom right indicates the status of sections: black circle for 'No action needed', yellow circle for 'Action needed', green circle for 'Section complete', and red circle for 'Section overdue'. The main content area lists three sections: 'Vision' (Status: Shared), 'Goals and Objectives' (Status: Approved), and 'Assessments' (Status: Approved). Two callout boxes with blue borders and arrows point to the 'View/Print ISP' tab and the 'View Historical ISP Materials' button. The 'View Historical ISP Materials' button is located in the top right corner of the main content area.



View / Print ISP Tab

Progress Summary Details

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



Scenario: Complete a Progress Summary

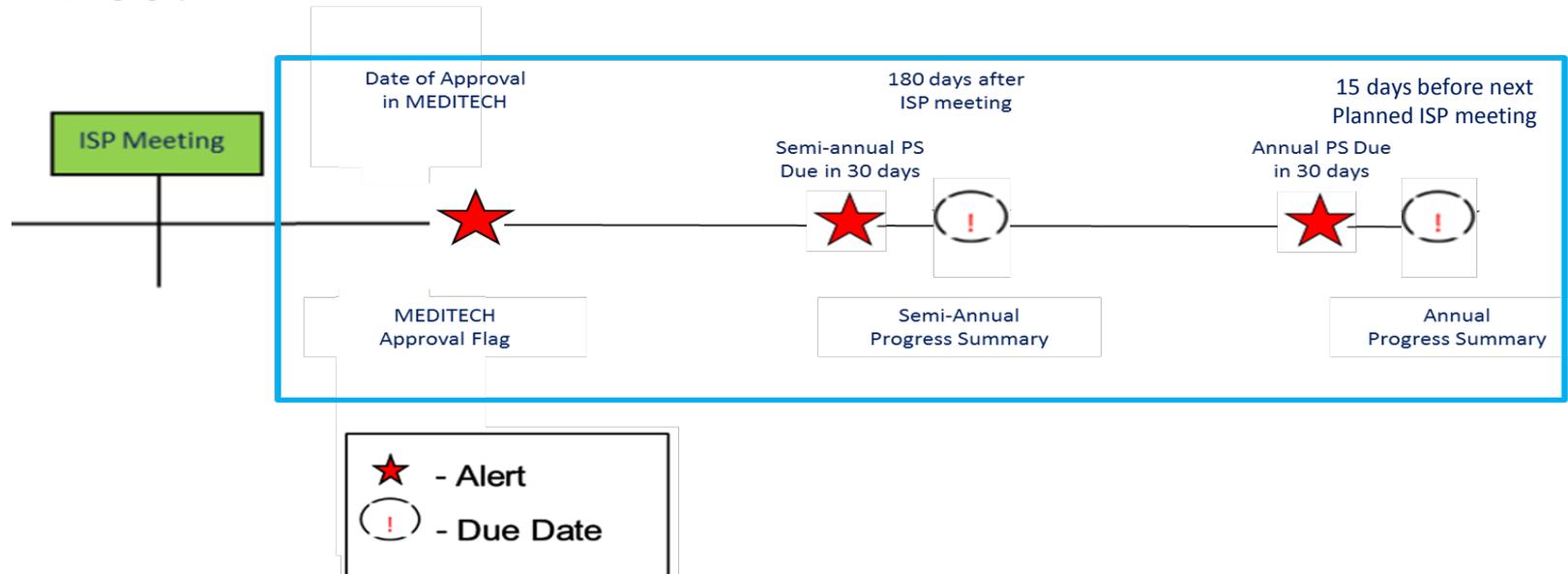


Scenario: Complete a Progress Summary

Description: Once the due date for an Progress Summary is within 30 days, Provider Data Entry Users will receive an alert indicating that they are able to complete and submit Progress Summaries. In order to submit a Progress Summary, Provider Data Entry Users need to submit the form to Provider Supervisors who need to review the document and determine if it is ready to submit to DDS. While both roles can work on these forms prior to 30 days before the due date, as long as the Service Coordinators has initiated the Progress Summary process, they cannot submit until 30 days prior.

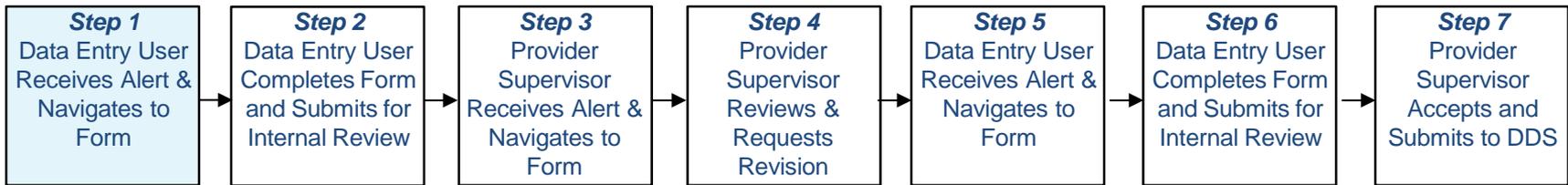
Roles and Responsibilities:

- **Provider Data Entry User:** Submit an Progress Summary for Internal Review
- **Provider Supervisor:** Review an ISP Progress Summary; Submit an Progress Summary to DDS Staff





Scenario: Complete a Progress Summary



Step 1: Data Entry User Receives Alert & Navigates to Form

Data Entry Users will receive an alert 30 days prior to the Progress Summary Due Date.

Click “Progress Summary due.”

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

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: [dropdown] Recipient User: [dropdown]

Subject: [text input: Click to select items from list]

[Search] [Reset]

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

Search: [text input]

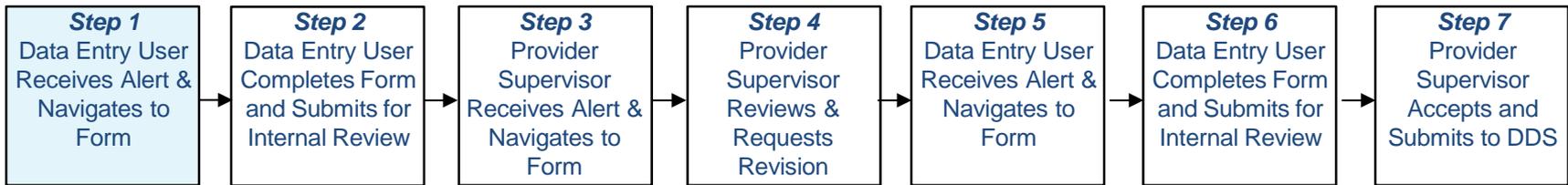
| Select | Date of Alert | Alert Subject | Alert Message |
|--------------------------|---------------|---------------------------------------|---------------|
| <input type="checkbox"/> | 09/16/2015 | [blurred] | [blurred] |
| <input type="checkbox"/> | 09/16/2015 | [blurred] | [blurred] |
| <input type="checkbox"/> | 09/16/2015 | [blurred] | [blurred] |
| <input type="checkbox"/> | 09/16/2015 | [blurred] | [blurred] |
| <input type="checkbox"/> | 09/16/2015 | Progress Summaries due in thirty days | [blurred] |

Show 10 entries

Progress Summary due



Scenario: Complete a Progress Summary



Step 1: Data Entry User Receives Alert & Navigates to Form

The system will redirect to the Progress Summary Review Switchboard.

Progress Summary Review Switchboard

Actual Meeting Dates: 06/30/2014 (Full Year 10P)

| Actual Meeting Dates | Number of Progress Summaries | Status |
|----------------------|------------------------------|----------|
| 06/30/2014 | 1 | Approved |

Actual Meeting Dates: 01/01/2015 (Update Year 10P)

| Actual Meeting Dates | Number of Progress Summaries | Status |
|----------------------|------------------------------|-----------------------------------|
| 01/01/2015 | 1 | Approved |
| 01/01/2015 | 1 | Pending Submissions/Revisions |
| 01/01/2015 | 1 | Overdue |
| 01/01/2015 | 1 | No Action Required/Pending Review |

Actual Meeting Dates: 06/30/2014 (Full Year 10P)

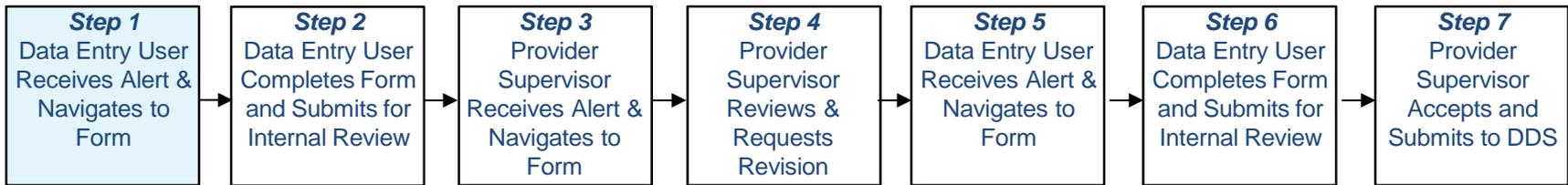
| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|--|------------|----------|----------|-----------------------|----------------|
| ● Brian will increase his rate of pay by 30%, for the next 12 months. | 04/04/2014 | | Approved | View Document History | Print Document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

Actual Meeting Dates: 01/01/2015 (Update Year 10P)

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|-------------|-----------------------|----------------|
| ● Brian will increase his rate of pay by 30%, for the next 12 months. | 06/01/2015 | | Not Started | View Document History | Print Document |
| | 05/01/2015 | | Not Started | View Document History | Print Document |
| | 11/06/2015 | | Not Started | View Document History | Print Document |
| | 05/04/2015 | | Not Started | View Document History | Print Document |



Scenario: Complete a Progress Summary



Step 1: Data Entry User Receives Alert & Navigates to Form

Providers will have access to the switchboard at all times but will not be able to submit the forms until 30 days prior to the Progress Summary Due Date. This is to ensure that the information is recent / up to date.

Progress Summary Review Switchboard

Actual Meeting Dates: 06/30/2014 (Full Year 10P)

| Actual Meeting Dates | Number of Progress Summaries | Status |
|----------------------|------------------------------|----------|
| 06/30/2014 | 1/1 | Approved |

Actual Meeting Dates: 01/01/2015 (Update Year 10P)

| Actual Meeting Dates | Number of Progress Summaries | Status |
|----------------------|------------------------------|-----------------------------------|
| 01/01/2015 | 1/1 | Approved |
| 01/01/2015 | 1/1 | Pending Submissions/Revisions |
| 01/01/2015 | 1/1 | Overdue |
| 01/01/2015 | 1/1 | No Action Required/Pending Review |

Actual Meeting Dates: 06/30/2014 [Full Year 10P]

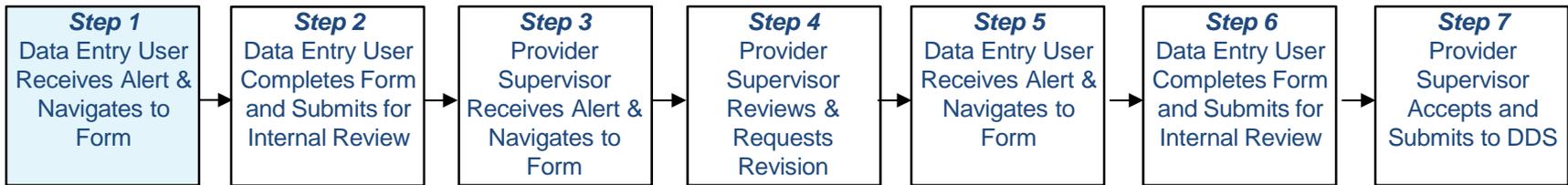
| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|--|------------|----------|----------|-----------------------|----------------|
| ● Since we will increase his rate of pay by 30%, for the next 12 months. | 04/04/2014 | | Approved | View Document History | Print Document |
| ● Since we will find a big activity he would like to do at the beginning of each quarter, we will then a | 01/04/2014 | | Approved | View Document History | Print Document |
| ● Since we will serve meals once a week at | 04/04/2014 | | Approved | View Document History | Print Document |

Actual Meeting Dates: 01/01/2015 [Update Year 10P]

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|--|------------|----------|-------------|-----------------------|----------------|
| ● Since we will increase his rate of pay by 30%, for the next 12 months. | 01/01/2015 | | Not Started | View Document History | Print Document |
| ● Since we will find a big activity he would like to do at the beginning of each quarter, we will then a | 01/01/2015 | | Not Started | View Document History | Print Document |
| ● Since we will serve meals once a week at | 01/01/2015 | | Not Started | View Document History | Print Document |



Scenario: Complete a Progress Summary



Step 1: Data Entry User Receives Alert & Navigates to Form

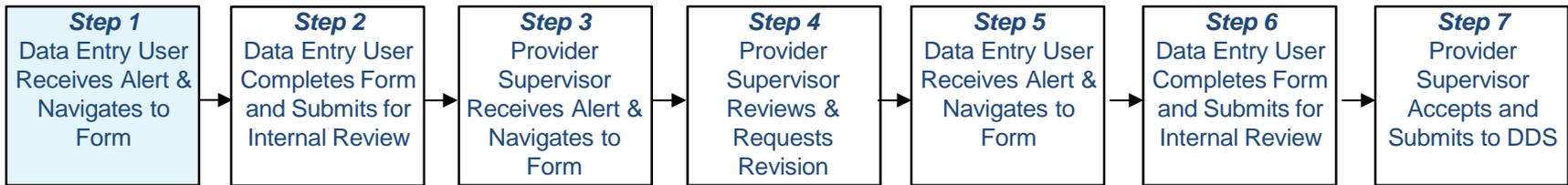
Click on the “Not Started” link to begin the Progress Summary for an objective.

Not Started

| Actual Hearing Dates | Due Dates | Status |
|----------------------|------------|-------------|
| 06/03/2014 | 06/04/2014 | Approved |
| 06/03/2014 | 08/04/2014 | Approved |
| 06/03/2014 | 09/04/2014 | Approved |
| 06/03/2014 | 09/05/2014 | Approved |
| 06/03/2014 | 10/06/2014 | Approved |
| 06/03/2014 | 06/04/2014 | Approved |
| 06/03/2014 | 10/06/2014 | Approved |
| 06/03/2015 | 06/03/2015 | Not Started |
| 06/03/2015 | 09/03/2015 | Not Started |
| 06/03/2015 | 11/06/2015 | Not Started |
| 06/03/2015 | 02/04/2016 | Not Started |



Scenario: Complete a Progress Summary



Step 1: Data Entry User Receives Alert & Navigates to Form

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

Progress Summary Form
Expand All | Collapse All

Goal → **Goal**

| | |
|------------------------------|--|
| Goal Title: | Personal Growth & Accomplishments--CLASS |
| Updated Information: | No Change |
| Goal: | Bruce will increase his rate of pay. |
| Date Goal Identified: | 08/18/2014 |
| Goal Identified By: | Provider |
| Update Year Status: | Current |

Objective → **Objective**

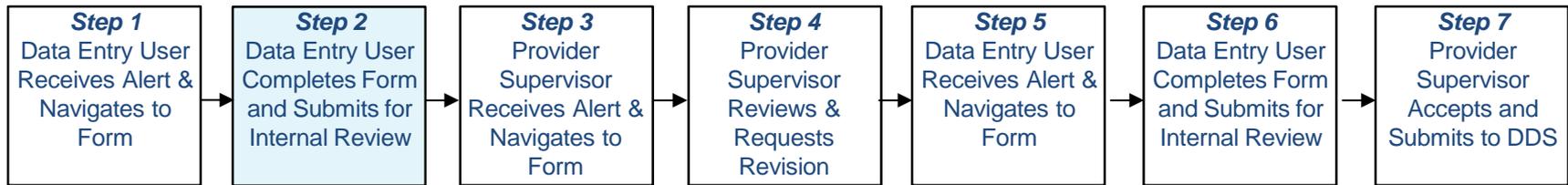
| | |
|--|--|
| Related Objective: | Bruce will increase his rate of pay by 30%, for the next 12 months. |
| Updated Information: | No Change |
| Setting and Learning Environment: | Setting: Workshop Learning Environment:Verbal cues/praise Modeling Encouragement Consistency |
| Updated Information: | No Change |
| Responsible Party: | Marlene Robarts, Case Coordinator |
| Updated Information: | No Change |
| Update Year Status: | Current |

Support Strategy → **Support Strategy**

| | |
|--|---|
| Teaching Method and Skills to be Developed: | Bruce possesses excellent work skills and is very motivated by money. He also understands the connection of earning money and saving that money to make purchases of things he wants. Although Bruce works every day, he is capable of making more money than he currently is. Over the past year, Bruce has made an average of \$9.81 per month. Staff will encourage Bruce to complete as much work as he can while he is in the workshop. As Bruce increases his production rate, he will increase his rate of pay and receive a larger pay check. As Bruce is working, staff will praise him and remind him of how much money he will make. If Bruce is unable to increase his rate, staff will encourage him to so the next day. |
| Updated Information: | No Change |



Scenario: Complete a Progress Summary



Step 2: Data Entry User Completes Form and Submits for Internal Review

Begin filling in the Progress Summary.

⊖ Progress Summary

Previous Progress Summaries

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

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

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

Objective Status:*

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

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

⊕ Provider Supervisor Comments

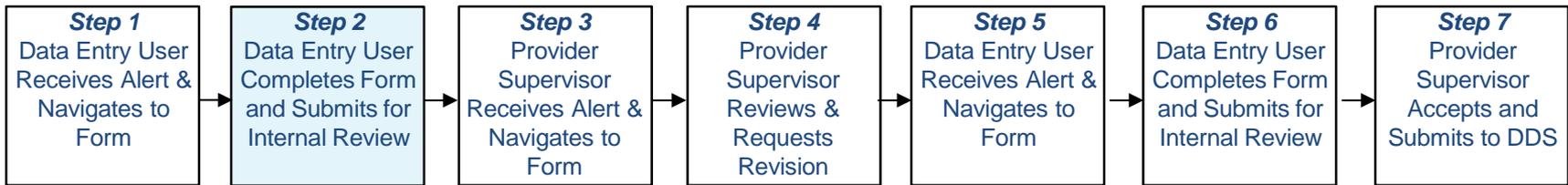
⊕ Acceptance Criteria

Spell Check Reset Save

Submit for Internal Review



Scenario: Complete a Progress Summary



Step 2: Data Entry User Completes Form and Submits for Internal Review

Select the status of the objective from the drop-down list.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status:*

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

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

Provider Supervisor Comments

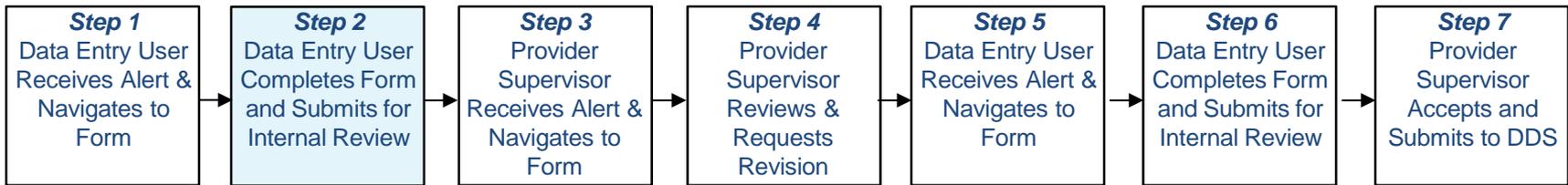
Acceptance Criteria

Spell Check Reset Save

Submit for Internal Review



Scenario: Complete a Progress Summary



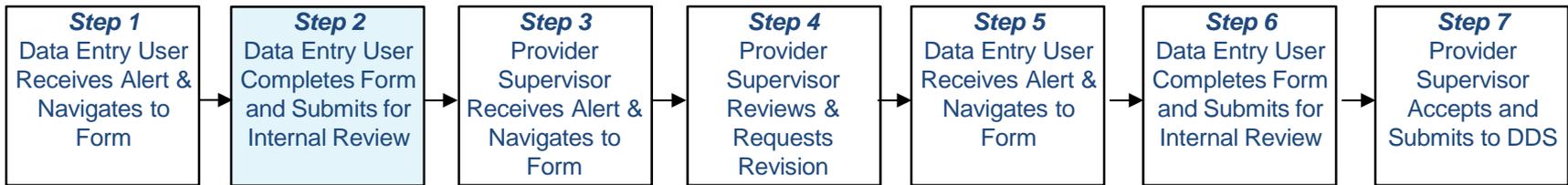
Step 2: Data Entry User Completes Form and Submits for Internal Review

The table below explains the Progress Summary status types.

| Objective Status | Description |
|------------------|---|
| Met | Use to describe an objective that has been achieved by the individual |
| Partially Met | Use to describe an objective that has been partially completed but continues to remain open |
| Discontinued | Use to identify an objective that is no longer relevant for the individual or has ended. |



Scenario: Complete a Progress Summary



Step 2: Data Entry User Completes Form and Submits for Internal Review

Respond to the required questions by entering comments into the text boxes.

⊖ Progress Summary

Previous Progress Summaries

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

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

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

Objective Status:*

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

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

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

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

⊕ Provider Supervisor Comments

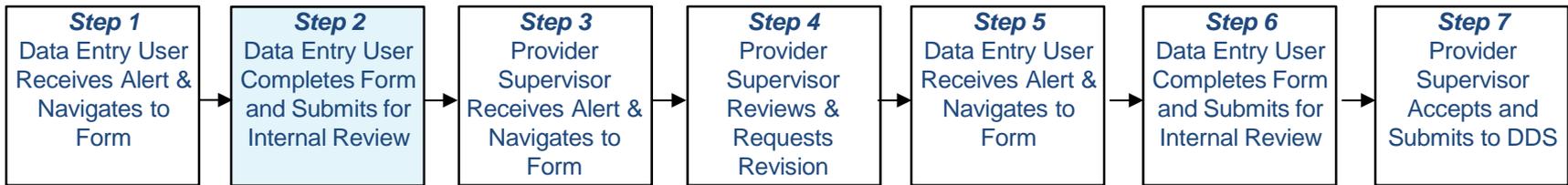
⊕ Acceptance Criteria

Spell Check Reset Save

Submit for Internal Review



Scenario: Complete a Progress Summary



Step 2: Data Entry User Completes Form and Submits for Internal Review

If desired, refer to the Acceptance Criteria section.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status*

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

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

Provider Supervisor Comments

Acceptance Criteria

- Progress Summary Frequency
- Individualized
- Includes Relevant Strengths and Needs
- Identifies Opportunity for Development
- Current
- Complete

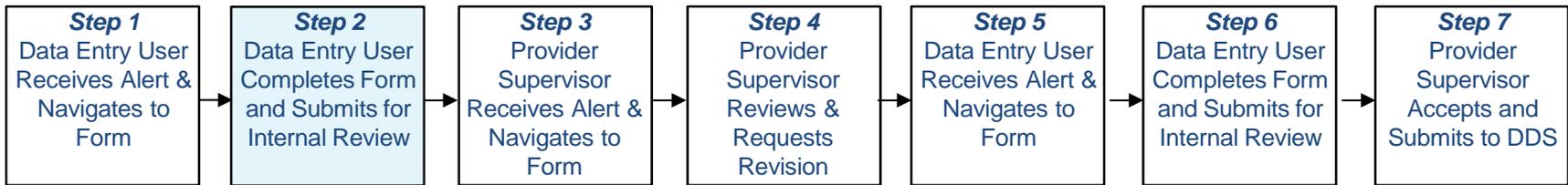
Comments:
The submitted progress summary form does not identify opportunities for development

Spell Check | Reset | Save

Submit for DDS Review | Request Internal Revision



Scenario: Complete a Progress Summary



Step 2: Data Entry User Completes Form and Submits for Internal Review

Once completed, click “Submit for Internal Review.”

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status:* Partially Met

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

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

Provider Supervisor Comments

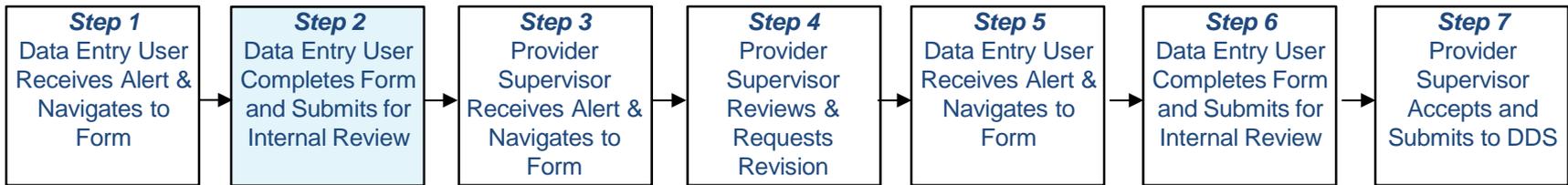
Acceptance Criteria

Spell Check Reset Save

Submit for Internal Review



Scenario: Complete a Progress Summary



Step 2: Data Entry User Completes Form and Submits for Internal Review

The system will navigate back to the Progress Summary Review Switchboard. The status of the Progress Summary will change to “Submitted for Internal Review.”

Submitted For Internal Review

Progress Summary Review Switchboard

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|----------|
| 04/04/2014 | 1 | Approved |

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

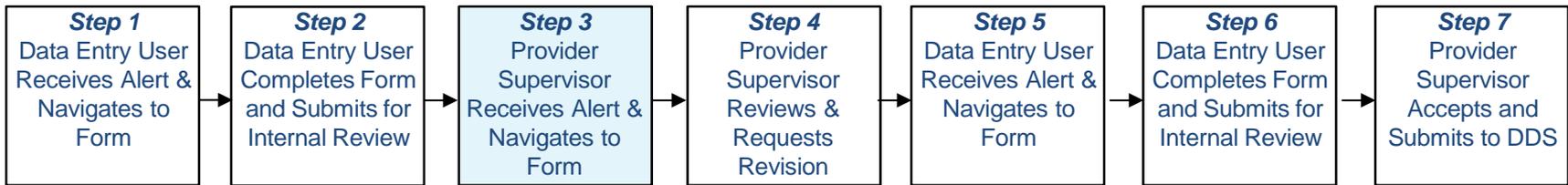
| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|-------------------------------|
| 06/03/2015 | 1 | Approved |
| 09/01/2015 | 1 | Submitted For Internal Review |
| 11/30/2015 | 1 | Approved |
| 03/04/2016 | 1 | Approved |

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|-------------------------------|-----------------------|----------------|
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | 06/03/2015 | | Submitted For Internal Review | View Document History | [Print] |
| Quarter 1 | 09/01/2015 | | Not Started | View Document History | [Print] |
| Semi Annual | 09/01/2015 | | Not Started | View Document History | [Print] |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History | [Print] |
| Annual | 03/04/2016 | | Not Started | View Document History | [Print] |



Scenario: Complete a Progress Summary



Step 3: Provider Supervisor Receives Submission Alert and Navigates to Form

Once the Progress Summary is submitted for internal review, Provider Supervisors will receive an alert.

Click “Progress Summaries Submitted for Internal Review.”

Progress Summaries Submitted for Internal Review:

Health and Human Services

HOME | QM | PAM | ERP | 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:

Subject:

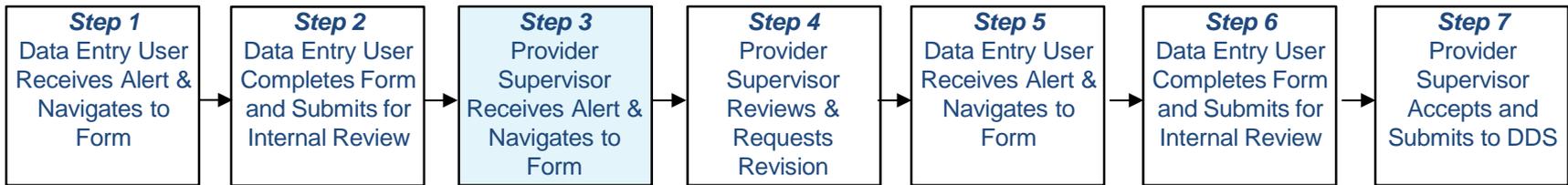
Recipient User:

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

| Select | Date of Alert | Alert Subject | Alert Message |
|--------------------------|---------------|--|---|
| <input type="checkbox"/> | 09/15/2015 | Progress Summaries Submitted for Internal Review | Progress Summaries Submitted for Internal Review: Name: Test,Bruce; Deadline to Submit Progress Summaries to DDS: 06/03/2015; ISP Meeting Date:03/04/2015 |



Scenario: Complete a Progress Summary



Step 3: Provider Supervisor Receives Submission Alert and Navigates to Form

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

Submitted For Internal Review

Progress Summary Review Switchboard
Select All | Filter All

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|----------|
| 04/04/2014 | 1 / 1 | Approved |

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|-----------------------------------|
| 06/03/2015 | 1 / 1 | Pending Submission/Revision |
| 09/01/2015 | 1 / 1 | Pending Submission/Revision |
| 11/30/2015 | 1 / 1 | No Action Required/Pending Review |
| 03/04/2016 | 1 / 1 | No Action Required/Pending Review |

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

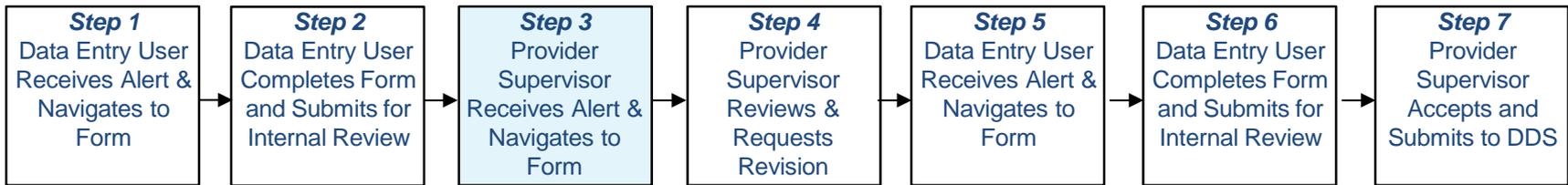
Actual Meeting Date: 03/03/2015 (Update Year ISP)

| Progress Summary | Due Date | Status | Document History | Print Document |
|---|------------|-------------------------------|-----------------------|----------------|
| Bruce will increase his rate of pay by 30%, for the next 12 months. | 06/03/2015 | Submitted For Internal Review | View Document History | Print Document |
| Quarter 1 | 09/01/2015 | Not Started | View Document History | Print Document |
| Semi Annual | 11/30/2015 | Not Started | View Document History | Print Document |
| Quarter 3 | 03/04/2016 | Not Started | View Document History | Print Document |
| Annual | | Not Started | View Document History | Print Document |

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



Scenario: Complete a Progress Summary



Step 3: Provider Supervisor Receives Submission Alert

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

Progress Summary Form

Goal

Goal Title: Money Management
Updated Information: No Change
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

Objective

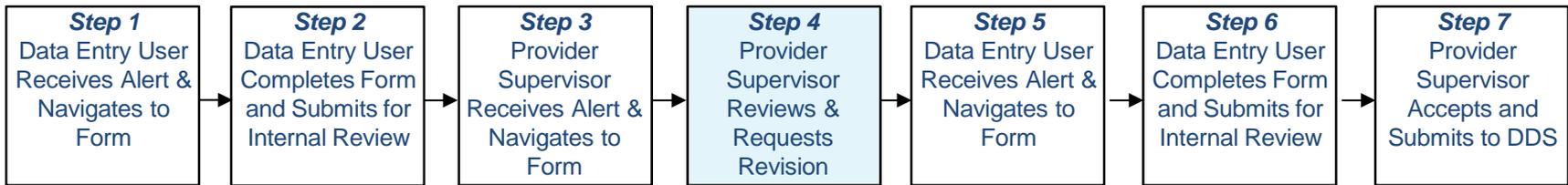
Related Objective: Bruce will find a big activity he would like to do at the beginning of each quarter. He will then save money to do one big event each quarter.
Updated Information: No Change
Setting and Learning Environment: He will meet with Colleagues at his residence to use the internet and search for something he is interested in doing. They will then set up a budget plan to determine how much Bruce needs to save in order to attend the event of his choice.
Updated Information: No Change
Responsible Party:
Updated Information: No Change

Support Strategy

Teaching Method and Skills to be Developed: Bruce will learn internet use, computer use and financial budgeting skills.
Updated Information: No Change
Criteria for Evaluating Success: We will set up budget sheets and help Bruce determine how much to be putting aside to save. Once he saved enough he will be able to attend his event.
Updated Information: No Change
Data Collection Method and Report Frequency: Colleagues and Bruce will identify his goal and post on share point. We will then come up with a budget sheet and track how much needs to be saved and how much he saves each week.
Updated Information: No Change



Scenario: Complete a Progress Summary



Step 4: Provider Supervisor to Review and Request Revision

Review the content that the Data Entry User has written.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status*

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

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

Provider Supervisor Comments

Comments:

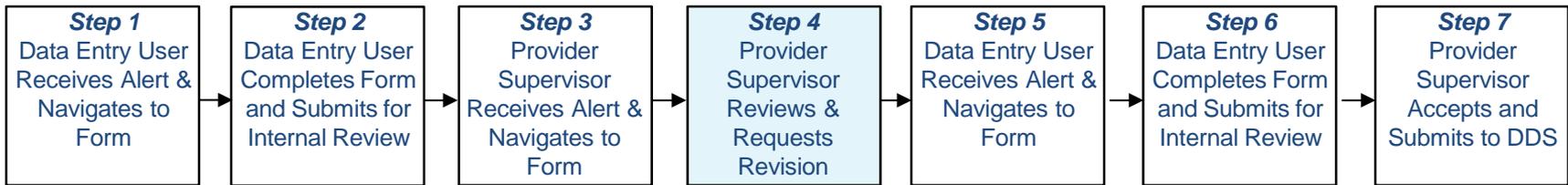
Acceptance Criteria

Spell Check Reset Save

Submit for DDS Review Request Internal Revision



Scenario: Complete a Progress Summary



Step 4: Provider Supervisor to Review and Request Revision

Provider Supervisors have the ability to request internal revisions from Data Entry Users. If any changes are required or information needs to be added, insert text in the Provider Supervisor Comments field to explain the required revisions.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status* Partially Met

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

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

Provider Supervisor Comments

Comments:

Acceptance Criteria

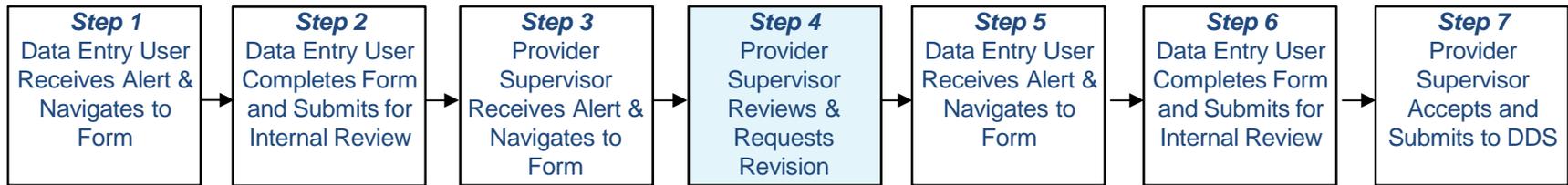
Spell Check | Reset | Save

Submit for DDS Review | Request Internal Revision

NOTE: Provider Supervisors now also have the ability to request internal revisions from Data Entry Users on Objectives and Assessments



Scenario: Complete a Progress Summary



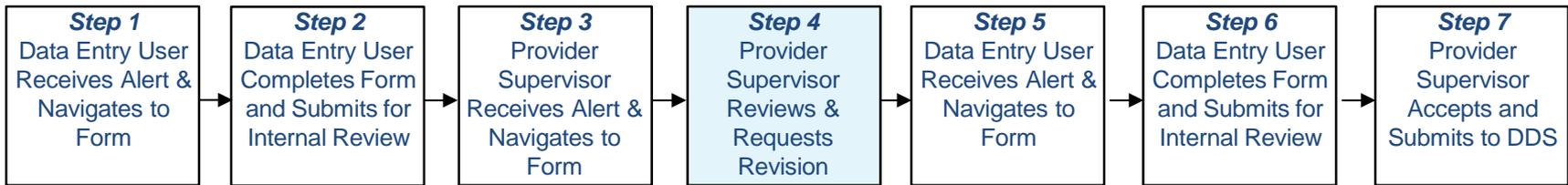
Step 4: Provider Supervisor to Review and Request Revision

Click “Request Internal Revision.” This action will send an alert to the Data Entry User that a revision was requested.

The screenshot shows a web interface for a Provider Supervisor. At the top, there is a section titled "Provider Supervisor Comments" with a text area containing the question "What is the status of his job search?". Below this is a section titled "Acceptance Criteria" with buttons for "Spell Check", "Reset", and "Save". In the bottom right corner, there are two buttons: "Submit for DDS Review" and "Request Internal Revision". The "Request Internal Revision" button is highlighted with a blue box, and a blue arrow points from this box to a larger, separate blue-bordered box at the top right of the image that also contains the text "Request Internal Revision".



Scenario: Complete a Progress Summary



Step 4: Provider Supervisor to Review and Request Revision

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

Internal Revision Requested

Progress Summary Review Switchboard

Expand All | Collapse All

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

Number of Progress Summaries

| Due Dates | Approved | Pending Submission/Revision | Overdue | No Action Required/Pending Review |
|------------|----------|-----------------------------|---------|-----------------------------------|
| 04/04/2014 | 1 / 1 | 0 | 0 | 0 |

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

Number of Progress Summaries

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

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

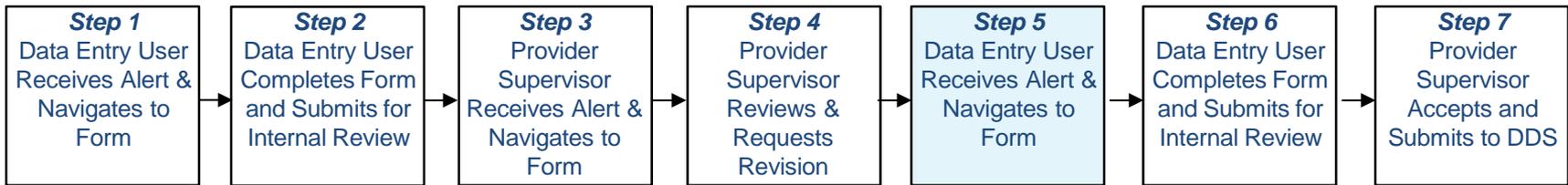
| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|----------|---------------------------------------|--------------------------------|
| Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Semi Annual | 04/04/2014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

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|-----------------------------|---------------------------------------|--------------------------------|
| Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Quarter 1 | 06/03/2015 | | Internal Revision Requested | View Document History | Print Document |
| Semi Annual | 09/01/2015 | | Not Started | View Document History | Print Document |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History | Print Document |
| Annual | 03/04/2016 | | Not Started | View Document History | Print Document |



Scenario: Complete a Progress Summary



Step 5: Data Entry User Receives Alert and Navigates to Form

Data Entry Users will receive an alert.

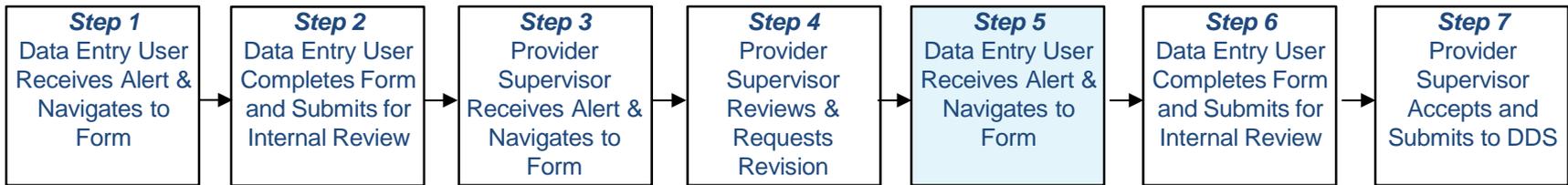
Click “Revisions Requested for proposed Progress Summaries.”

Revisions requested for proposed Progress Summaries:

| Select | Date of Alert | Alert Subject | Alert Message |
|--------------------------|---------------|---|---|
| <input type="checkbox"/> | 09/15/2015 | Provider Supervisor has requested revision of proposed Progress Summaries | Revisions requested for proposed Progress Summaries: None: Test,Bruce; ISP Meeting Date: 03/05/2015 |



Scenario: Complete a Progress Summary



Step 5: Data Entry User Receives Alert and Navigates to Form

The system will redirect to the Progress Summary Review Switchboard.

Click “Internal Revision Requested.”

Internal Revision Requested

Progress Summary Review Switchboard

Expand All | Collapse All

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|----------|
| 04/04/2014 | 1 | Approved |

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|-----------------------------|
| 06/03/2015 | 1 | Internal Revision Requested |
| 09/01/2015 | 1 | Internal Revision Requested |
| 11/30/2015 | 1 | Not Started |
| 02/04/2016 | 1 | Not Started |

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

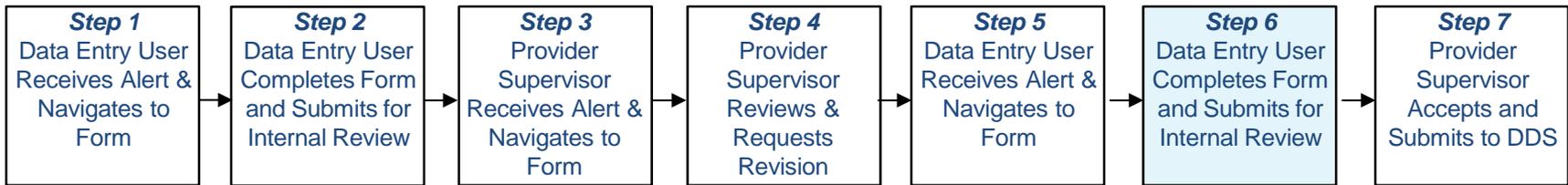
| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|----------|---------------------------------------|-----------------------|
| Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Semi Annual | 04/04/2014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

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|-----------------------------|---------------------------------------|-----------------------|
| Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Quarter 1 | 06/03/2015 | | Internal Revision Requested | View Document History | Print |
| Semi Annual | 09/01/2015 | | Internal Revision Requested | View Document History | Print |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History | Print |
| Annual | 03/04/2016 | | Not Started | View Document History | Print |



Scenario: Complete a Progress Summary



Step 6: Data Entry User Completes Form and Submits for Internal Review

The system will display the Progress Summary. Review the Provider Supervisor Comments.

Back to Progress Summary Review Switchboard

Progress Summary Form
Expand All | Collapse All

- Goal
- Objective
- Support Strategy
- Progress Summary

Previous Progress Summaries

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

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

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

Objective Status: Partially Met

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

Provider Supervisor Comments

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

Provider Supervisor Comments

Comments:
What is the status of his job search? Additional details required.

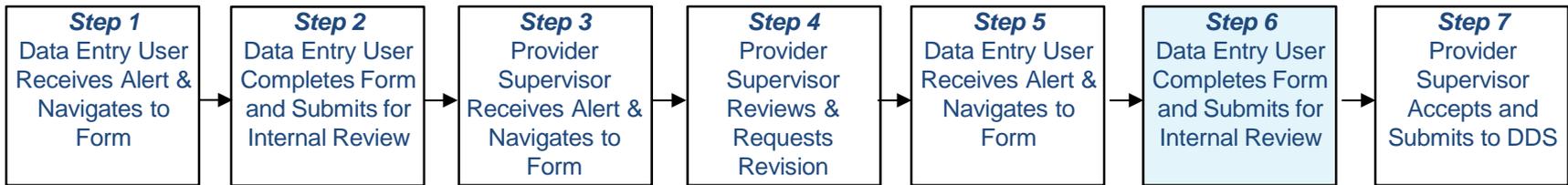
Acceptance Criteria

Spell Check | Reset | Save

Submit for Internal Review



Scenario: Complete a Progress Summary



Step 6: Data Entry User Completes Form and Submits for Internal Review

Revise the Progress Summary to account for the comments made by the Provider Supervisor.

Back to Progress Summary Review Switchboard

Progress Summary Form Expand All | Collapse All

- Goal
- Objective
- Support Strategy
- Progress Summary

Previous Progress Summaries

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

Selected Progress Summary (Due Date: 0)

Objective Status: Partially Met

Describe what progress has been made towards meeting this Objective:

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

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

No recommended changes at this time.

Provider Supervisor Comments

Comments:
What is the status of his job search? Additional details required.

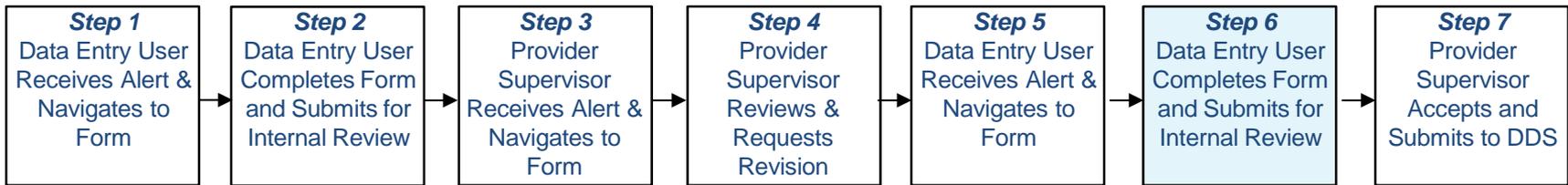
Acceptance Criteria

Spell Check | Reset | Save

Submit for Internal Review



Scenario: Complete a Progress Summary



Step 6: Data Entry User Completes Form and Submits for Internal Review

Click “Submit for Internal Review.”



Back to Progress Summary Review Switchboard

Progress Summary Form

Expand All | Collapse All

- Goal
- Objective
- Support Strategy
- Progress Summary

Previous Progress Summaries

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

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

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

Objective Status: Partially Met

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

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

Provider Supervisor Comments

Comments:
What is the status of his job search? Additional details required.

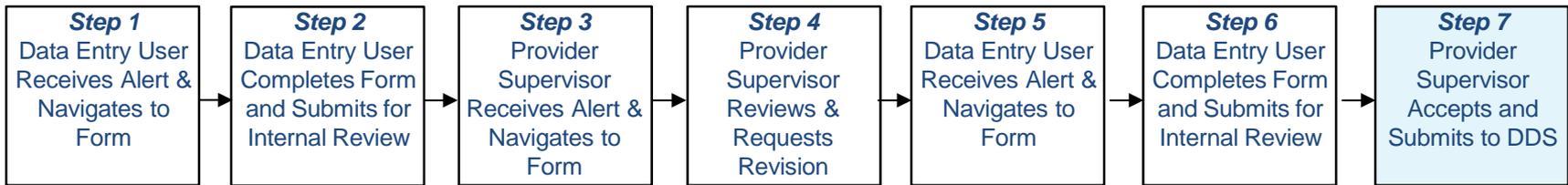
Acceptance Criteria

Spell Check | Reset | Save

Submit for Internal Review



Scenario: Complete a Progress Summary



Step 7: Provider Supervisor Accepts and Submits to DDS

Provider Supervisor receives an alert indicating that the Progress Summary has been submitted for internal review.

Click “Progress Summaries Submitted for Internal Review.”

Progress Summaries Submitted for Internal Review:

Health and Human Services

HOME | QM | PAM | ERP | 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:

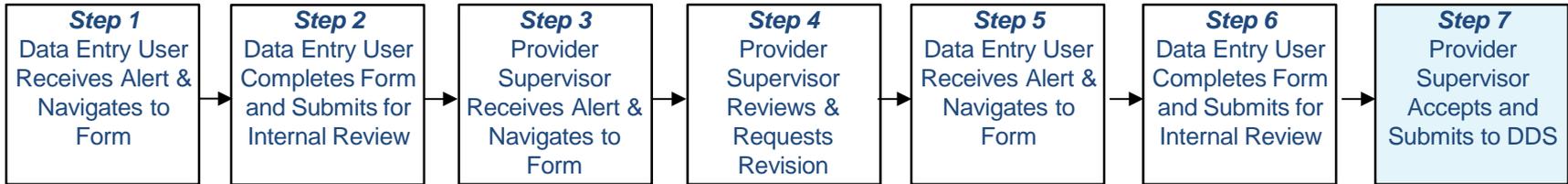
Subject:

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

| Select | Date of Alert | Alert Subject | Alert Message |
|--------------------------|---------------|--|---|
| <input type="checkbox"/> | 09/15/2015 | Progress Summaries Submitted for Internal Review | Progress Summaries Submitted for Internal Review: Name: Test,Bruce; Deadline to Submit Progress Summaries to DDS: 06/03/2015; ISP Meeting Date:03/04/2015 |



Scenario: Complete a Progress Summary



Step 7: Provider Supervisor Accepts and Submits to DDS

The system redirects to the Progress Summary Review Switchboard. Click “Submitted for Internal Review.”

Submitted For Internal Review

Progress Summary Review Switchboard

Expand All | Collapse All

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|----------|
| 04/04/2014 | 1 / 1 | Approved |

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|-----------------------------------|
| 06/03/2015 | 1 / 1 | Overdue |
| 09/01/2015 | 1 / 1 | Overdue |
| 11/30/2015 | 1 / 1 | No Action Required/Pending Review |
| 01/04/2016 | 1 / 1 | No Action Required/Pending Review |

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

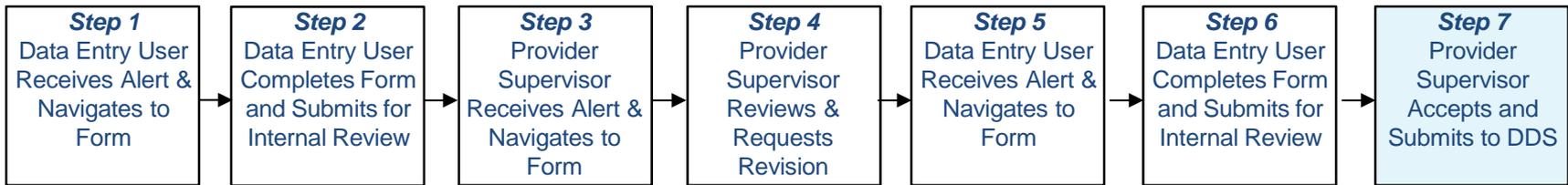
| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|----------|-----------------------|----------------|
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Semi Annual | 04/04/2014 | | Approved | View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

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

| Progress Summary | Due Date | Status | Document History | Print Document |
|---|------------|-------------------------------|-----------------------|----------------|
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | |
| Quarter 1 | 06/03/2015 | Submitted For Internal Review | View Document History | Print |
| Semi Annual | 09/01/2015 | Submitted For Internal Review | View Document History | Print |
| Quarter 3 | 11/30/2015 | Not Started | View Document History | Print |
| Annual | 03/04/2016 | Not Started | View Document History | Print |



Scenario: Complete a Progress Summary



Step 7: Provider Supervisor Accepts and Submits to DDS

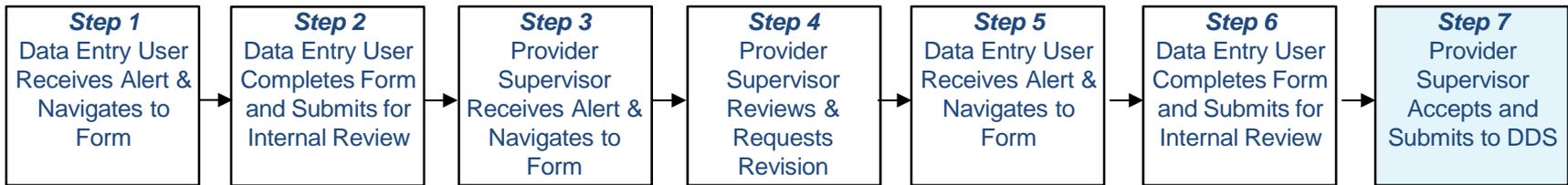
For your reference, the Progress Summary displays previous Progress Summaries completed for this objective associated to the same ISP year as well as the details for the selected Objective.

The screenshot shows the 'Progress Summary' page with the following sections:

- Progress Summary** (collapsible header)
- Previous Progress Summaries**: A list of two previous summaries for the objective 'Bruce is working towards increasing his rate of pay by 30%, for the next 12 months.' The first is for 04/04/2014 and the second is for 10/06/2014. A blue box highlights this section with an arrow pointing to the 'Previous Progress Summaries' label.
- Selected Progress Summary (Due Date: 06/03/2015)**: A blue box highlights this section with an arrow pointing to the 'Selected Progress Summary (Due Date: 06/03/2015)' label.
- Objective Status***: A section with a text area containing the description: 'Bruce is in the process of searching for a different job placement. He has applied to three separate positions. If he is offered any of the positions, he will achieve his increase in rate of pay. The decision on his job placement will be made prior to the next progress summary. An update will be provided at that time.'
- Are there any recommended changes in strategies, resources or supports to aid in achievement of the Objective:***: A section with a text area containing the response: 'No recommended changes at this time.'
- Provider Supervisor Comments** (collapsible header)
- Comments:**: A text area with the prompt: 'What is the status of his job search? Additional details required.'
- Acceptance Criteria** (collapsible header)
- Buttons:** 'Spell Check', 'Reset', 'Save', 'Submit for DDS Review', and 'Request Internal Revision'.



Scenario: Complete a Progress Summary



Step 7: Provider Supervisor Accepts and Submits to DDS

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

Objective Status: Partially Met

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

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

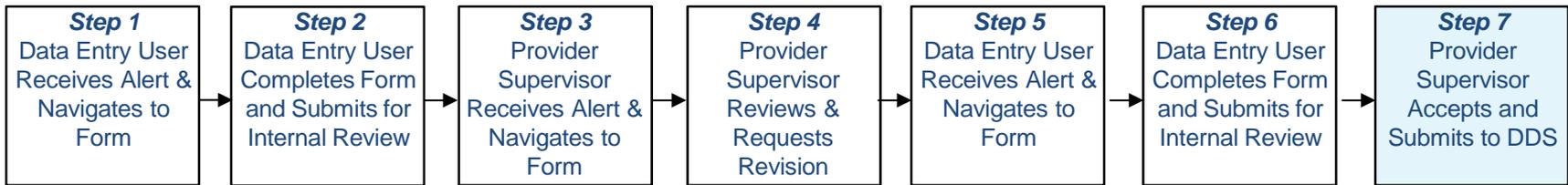
Provider Supervisor Comments
Comments:
What is the status of his job search? Additional details required.

Acceptance Criteria
Spell Check Reset Save

Submit for DDS Review Request Internal Revision



Scenario: Complete a Progress Summary



Step 7: Provider Supervisor Accepts and Submits to DDS

If the Provider Supervisor decides to submit the Progress Summary to DDS, there is no action required in the Provider Supervisor Comments textbox. Do note, however, that the comments are not visible to DDS.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status* Partially Met

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

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

Provider Supervisor Comments

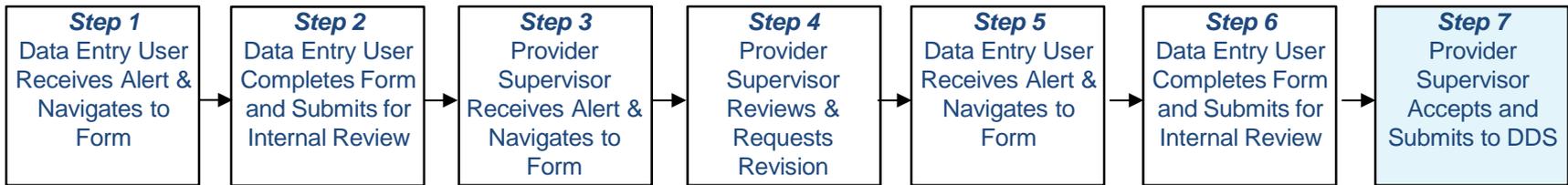
Comments:
What is the status of his job search? Additional details required.

Acceptance Criteria

Spell Check Reset Save Submit for DDS Review Request Internal Revision



Scenario: Complete a Progress Summary



Step 7: Provider Supervisor Accepts and Submits to DDS

Click “Submit for DDS Review.”

Submit for DDS Review

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status: Partially Met

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

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

Provider Supervisor Comments

Comments:

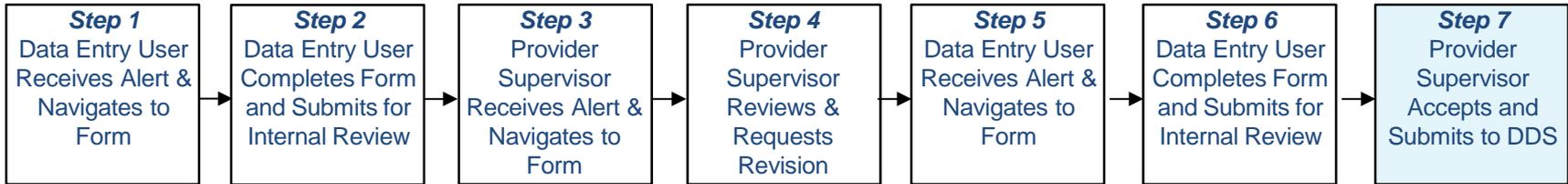
Acceptance Criteria

Spell Check Reset Save

Submit for DDS Review Request Internal Revision



Scenario: Complete a Progress Summary



Step 7: Provider Supervisor Accepts and Submits to DDS

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

Submitted for DDS Review

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

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

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|--------------------------|-----------------------|----------------|
| Bruce will increase his rate of pay by 30%, for the next 12 months. | 06/03/2015 | | Submitted for DDS Review | View Document History | [Print] |
| Quarter 1 | 09/01/2015 | | Not Started | View Document History | [Print] |
| Semi Annual | 11/30/2015 | | Not Started | View Document History | [Print] |
| Quarter 3 | 03/04/2016 | | Not Started | View Document History | [Print] |
| Annual | | | Not Started | View Document History | [Print] |

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



Next Steps and Notes

Next Steps

- Provider Data Entry Users and Provider Supervisors should continue tracking progress of the Objective and Support Strategies. They may also begin entering data into upcoming Progress Summaries, but will not be able to submit until 30 days prior to the due date.
- Service Coordinators will be responsible for reviewing the Progress Summary. They will have the options to approve or request revision to the Progress Summary based on acceptance criteria.
- Provider Data Entry Users and Provider Supervisors can monitor the individual's Progress Summary Review Switchboard to view the status of the Progress Summary.

Alerts

- Provider Data Entry Users and Provider Supervisors will receive an alert if the Service Coordinator has approved a submitted Progress Summary.
- Provider Data Entry Users and Provider Supervisors will receive an alert if the Service Coordinator requests revision of proposed Progress Summaries.

Health and Human Services

HOME PM 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:

Subject: Click to select items from list

Recipient User:

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

Search:

| Select | Date of Alert | Alert Subject | Alert Message |
|--------------------------|---------------|---|---|
| <input type="checkbox"/> | 09/15/2015 | Service Coordinator has requested revision of proposed Progress Summaries | Revisions requested for proposed Progress Summaries: Name: Test,Bruce; ISP Meeting Date: 03/05/2015 |



Key Considerations

- **Availability of Progress Summary**
 - The availability of Progress Summaries in the system is the responsibility of the Service Coordinator. The Progress Summary will only display in the system after the Service Coordinator has marked the objectives as included in the ISP. If a Progress Summary is not yet available to you, please contact the Service Coordinator.
- **Change of Progress Summary Frequency**
 - The Service Coordinator has the ability to change the frequency of Progress Summaries for an objective, after consulting with the provider staff. If the Service Coordinator changes the frequency from semi-annual to quarterly, the Provider Data Entry will now be required to complete four Progress Summaries rather than two.
- **Progress Summaries for Ended Services:**
 - If a service has ended prior to the ISP meeting, and a Progress Summary has not yet been completed, the Progress Summary must be completed off-line on paper. The ending of a service removes the ability for the provider to enter this information in HCSIS. However, the Progress Summary is still required for the annual ISP. We will address this item in a future release.

Scenario: Revise an Progress Summary

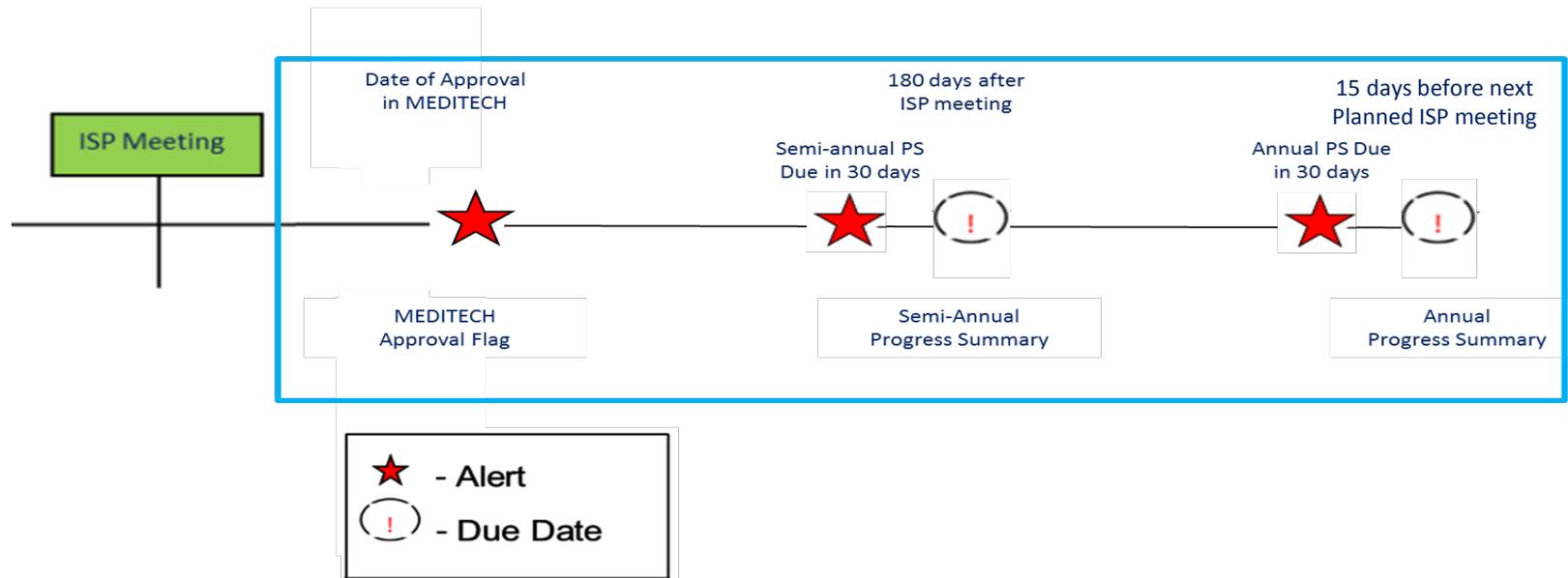


Scenario: Revise a Progress Summary

Description: Once DDS reviews and requests revision of a Progress Summary, Providers are required to make revisions and resubmit the form to DDS for review.

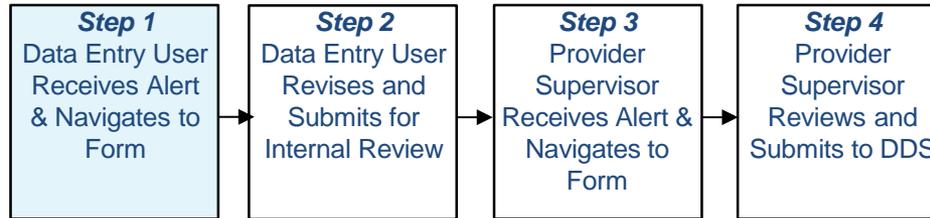
Roles and Responsibilities:

- **Provider Data Entry User:** Submit a Progress Summary for Internal Review
- **Provider Supervisor:** Review a Progress Summary; Submit an Progress Summary to DDS Staff





Scenario: Revise a Progress Summary



Step 1: Data Entry User Receives Alert and Navigates to Progress Summary

Provider Data Entry Users and Provider Supervisors will receive an alert indicating that DDS has returned a Progress Summary for revision.

Click “Revisions requested for proposed Progress Summaries.”

Revisions requested for proposed Progress Summaries:

Health and Human Services

HOME | CM | 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:

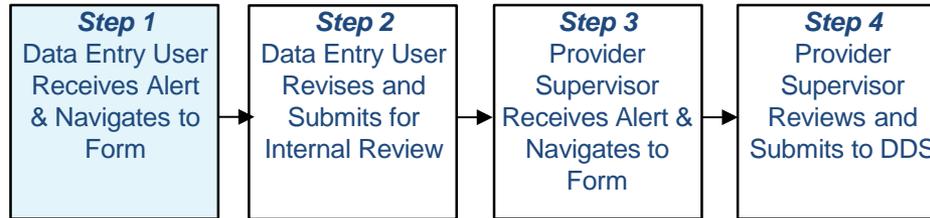
Subject: Click to select items from list

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

| Select | Date of Alert | Alert Subject | Alert Message |
|--------------------------|---------------|---|---|
| <input type="checkbox"/> | 09/15/2015 | Service Coordinator has requested revision of proposed Progress Summaries | Revisions requested for proposed Progress Summaries: Name: Test,Bruce; ISP Meeting Date: 03/05/2015 |



Scenario: Revise a Progress Summary



Step 1: Data Entry User Receives Alert and Navigates to Progress Summary

The system redirects to the Progress Summary Review Switchboard. Click “Revision Requested.”

Revision Requested

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

| Due Dates | Approved | Pending Submission/Revision | Overdue | No Action Required/Pending Review |
|------------|----------|-----------------------------|---------|-----------------------------------|
| 04/04/2014 | 1 / 1 | 0 | 0 | 0 |

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

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

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

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

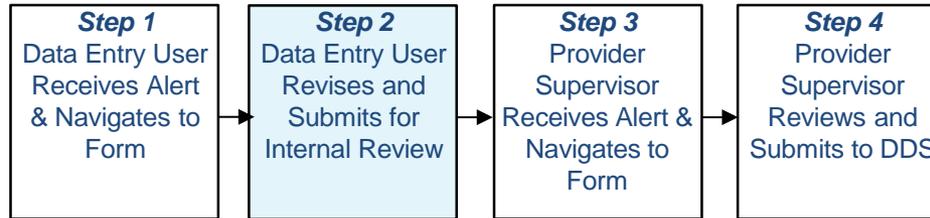
Actual Meeting Date: 03/05/2015 (Update Year ISP)

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|--------------------|---------------------------------------|-----------------------|
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Quarter 1 | 06/03/2015 | | Revision Requested | View Document History | Print |
| Semi Annual | 09/01/2015 | | Not Started | View Document History | Print |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History | Print |
| Annual | 03/04/2016 | | Not Started | View Document History | Print |

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



Scenario: Revise a Progress Summary



Step 2: Data Entry User Revises the Form and Submits It for Internal Review

The system will display the Progress Summary Form. By default all fields are expanded. Review the Acceptance Criteria section and any comments entered by the SC to identify the requested revisions.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status: Partially Met

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

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

Acceptance Criteria

Provider Supervisor Comments

Comments

Acceptance Criteria

Progress Summary Frequency

Individualized

Includes Relevant Strengths and Needs

Identifies Opportunity for Development

Current

Complete

Comments:

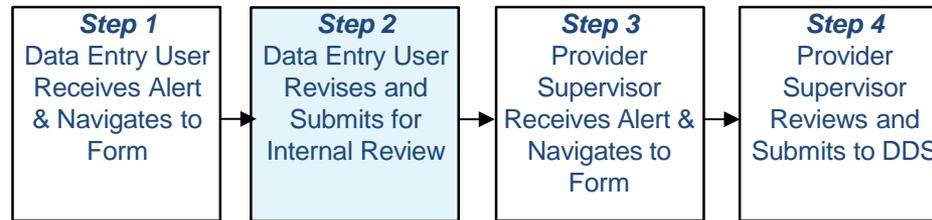
The submitted progress summary form does not identify opportunities for development

Spell Check Reset Save

Submit for Internal Review



Scenario: Revise a Progress Summary



Step 2: Data Entry User Revises the Form and Submits It for Internal Review

Revise the Progress Summary to incorporate the suggested revisions.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status: Partially Met

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

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

Provider Supervisor Comments

Comments: -

Acceptance Criteria

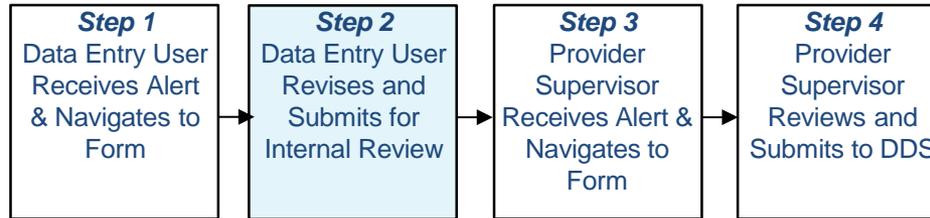
| | |
|--|-----------|
| Progress Summary Frequency | Quarterly |
| Individualized | Yes |
| Includes Relevant Strengths and Needs | Yes |
| Identifies Opportunity for Development | No |
| Current | Yes |
| Complete | Yes |

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

Spell Check Reset Save Submit for Internal Review



Scenario: Revise a Progress Summary



Step 2: Data Entry User Revises the Form and Submits It for Internal Review

Click “Submit for Internal Review.”



Progress Summary

Previous Progress Summaries

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

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

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

Objective Status:* Partially Met

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

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

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

The job placement search is in itself a development opportunity for Bruce. If he is unsuccessful in his pursuit, additional supports will be provided to aid him.

Provider Supervisor Comments

Comments: -

Acceptance Criteria

| | |
|--|-----------|
| Progress Summary Frequency | Quarterly |
| Individualized | Yes |
| Includes Relevant Strengths and Needs | Yes |
| Identifies Opportunity for Development | No |
| Current | Yes |
| Complete | Yes |

Comments:

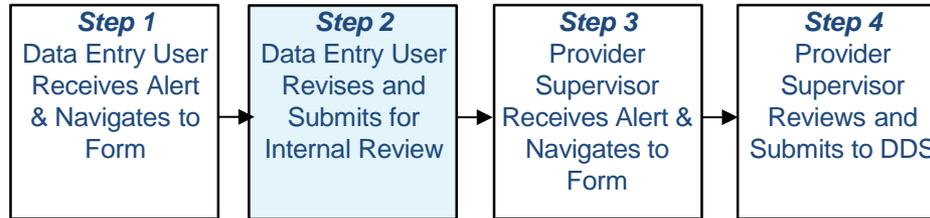
The submitted progress summary form does not identify opportunities for development

Spell Check Reset Save

Submit for Internal Review



Scenario: Revise a Progress Summary



Step 2: Data Entry User Revises the Form and Submits It for Internal Review

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

Submitted For Internal Review

Progress Summary Review Switchboard

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|----------|
| 04/04/2014 | 1 | Approved |

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|-------------------------------|
| 06/03/2015 | 1 | Submitted for Internal Review |
| 09/01/2015 | 1 | Overdue |
| 11/30/2015 | 1 | Approved |
| 03/04/2016 | 1 | Approved |

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

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

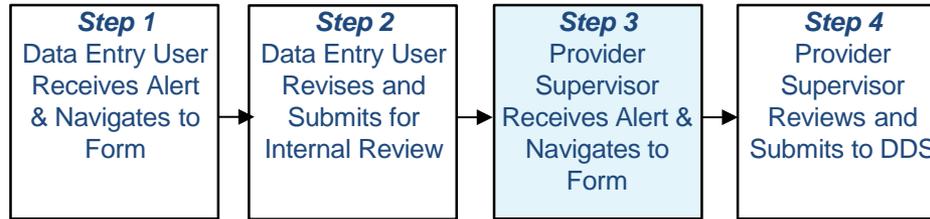
Actual Meeting Dates: 03/05/2015 (Update Year ISP)

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|-------------------------------|---------------------------------------|--------------------------------|
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | 06/03/2015 | | Submitted for Internal Review | View Document History | Print Document |
| Quarter 1 | 09/01/2015 | | Not Started | View Document History | Print Document |
| Semi Annual | 11/30/2015 | | Not Started | View Document History | Print Document |
| Quarter 3 | 03/04/2016 | | Not Started | View Document History | Print Document |
| Annual | 03/04/2016 | | Not Started | View Document History | Print Document |

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



Scenario: Revise a Progress Summary



Step 3: Provider Supervisor Receives Submission Alert and Navigates to Form

Provider Supervisor receives an alert when the Data Entry User submits a Progress Summary for internal review.

Click “Progress Summaries Submitted for Internal Review.”

Progress Summaries Submitted for Internal Review:

Health and Human Services

HOME | QM | PAM | ERP | 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

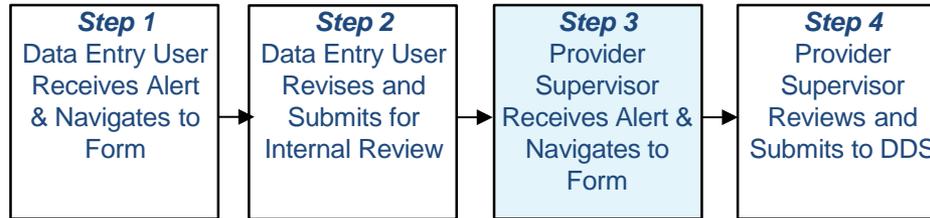
Your search found multiple matches. Please select the desired Alert.

Search:

| Select | Date of Alert | Alert Subject | Alert Message |
|--------------------------|---------------|--|---|
| <input type="checkbox"/> | 09/15/2015 | Progress Summaries Submitted for Internal Review | Progress Summaries Submitted for Internal Review: None; Test,Bruce; Deadline to Submit Progress Summaries to DDS: 06/03/2015; ISP Meeting Date:03/04/2015 |



Scenario: Revise a Progress Summary



Step 3: Provider Supervisor Receives Submission Alert and Navigates to Form

The system will redirect to the Progress Summary Review Switchboard.

Click “Submitted for Internal Review.”

Submitted For Internal Review

Progress Summary Review Switchboard
Export All | Collapse All

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

| Due Dates | Approved | Pending Submission/Revision | Overdue | No Action Required/Pending Review |
|------------|----------|-----------------------------|---------|-----------------------------------|
| 04/04/2014 | 1 / 1 | 0 | 0 | 0 |

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

| Due Dates | Approved | Pending Submission/Revision | Overdue | No Action Required/Pending Review |
|------------|----------|-----------------------------|---------|-----------------------------------|
| 06/03/2015 | 1 / 1 | 0 | 0 | 0 |
| 09/04/2015 | 1 / 1 | 0 | 0 | 0 |
| 11/30/2015 | 1 / 1 | 0 | 0 | 0 |
| 03/04/2016 | 1 / 1 | 0 | 0 | 0 |

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

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

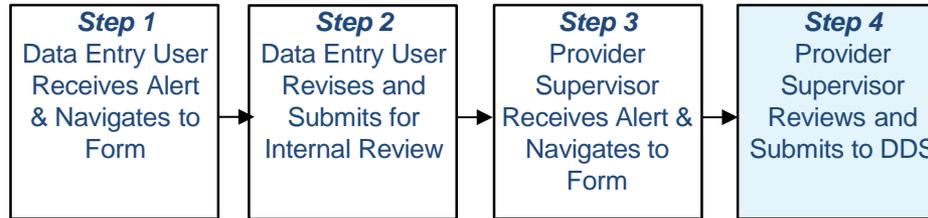
Actual Meeting Date: 03/05/2015 (Update Year ISP)

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|-------------------------------|-----------------------|----------------|
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Quarter 1 | 06/03/2015 | | Submitted For Internal Review | View Document History | Print |
| Semi Annual | 09/01/2015 | | Not Started | View Document History | Print |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History | Print |
| Annual | 03/04/2016 | | Not Started | View Document History | Print |

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



Scenario: Revise a Progress Summary



Step 4: Provider Supervisor Reviews and Submits to DDS

The system will display the Progress Summary. By default all fields are expanded.

Review the Acceptance Criteria section to identify what revisions had been requested.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status* Partially Met

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

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

Provider Supervisor Comments

Acceptance Criteria

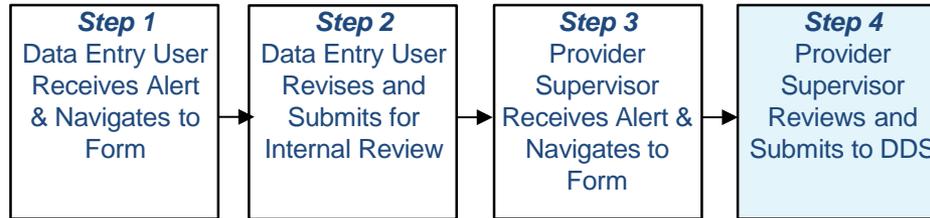
| | |
|--|-----------|
| Progress Summary Frequency | Quarterly |
| Individualized | Yes |
| Includes Relevant Strengths and Needs | Yes |
| Identifies Opportunity for Development | No |
| Current | Yes |
| Complete | Yes |

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

Spell Check Reset Save Submit for DDS Review Request Internal Revision



Scenario: Revise a Progress Summary



Step 4: Provider Supervisor Reviews and Submits to DDS

Review the Progress Summary to validate that the requested revisions have been made.

Progress Summary

Previous Progress Summaries

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

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

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

Objective Status* Partially Met

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

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

Provider Supervisor Comments

Acceptance Criteria

| | |
|--|-----------|
| Progress Summary Frequency | Quarterly |
| Individualized | Yes |
| Includes Relevant Strengths and Needs | Yes |
| Identifies Opportunity for Development | No |
| Current | Yes |
| Complete | Yes |

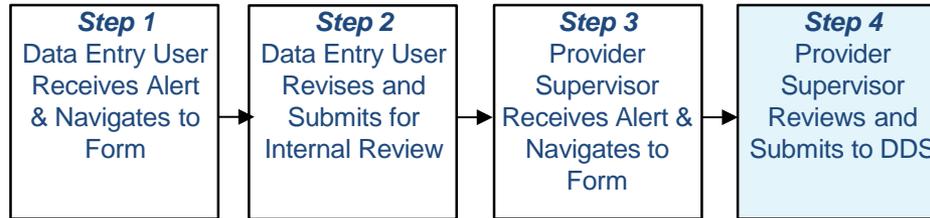
Comments:
The submitted progress summary form does not identify opportunities for development

Spell Check Reset Save

Submit for DDS Review Request Internal Revision



Scenario: Revise a Progress Summary



Step 4: Provider Supervisor Reviews and Submits to DDS

If all the requested revisions have been applied, click “Submit for DDS Review.”
NOTE: Provider Supervisor can Request Internal Revision again if needed.



Progress Summary

Previous Progress Summaries

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

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

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

Objective Status* Partially Met

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

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

Provider Supervisor Comments

Acceptance Criteria

| | |
|--|-----------|
| Progress Summary Frequency | Quarterly |
| Individualized | Yes |
| Includes Relevant Strengths and Needs | Yes |
| Identifies Opportunity for Development | No |
| Current | Yes |
| Complete | Yes |

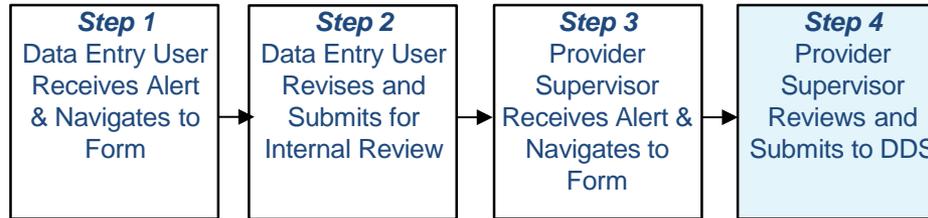
Comments:
The submitted progress summary form does not identify opportunities for development

Spell Check Reset Save

Submit for DDS Review Request Internal Revision



Scenario: Revise a Progress Summary



Step 4: Provider Supervisor Reviews and Submits to DDS

The system redirects to the Progress Summary Review Switchboard. The status of the Progress Summary changes to “Submitted for DDS Review.”

Submitted for DDS Review

Progress Summary Review Switchboard
Expand All | Collapse All

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|----------|
| 04/04/2014 | 1 | Approved |

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

| Due Dates | Number of Progress Summaries | Status |
|------------|------------------------------|----------|
| 06/03/2015 | 1 | Overdue |
| 09/01/2015 | 1 | Overdue |
| 11/30/2015 | 1 | Approved |
| 02/04/2016 | 1 | Approved |

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

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

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

| Progress Summary | Due Date | Provider | Status | Document History | Print Document |
|---|------------|----------|--------------------------|---------------------------------------|-----------------------|
| ● Bruce will increase his rate of pay by 30%, for the next 12 months. | | | | | |
| Quarter 1 | 06/03/2015 | | Submitted for DDS Review | View Document History | Print |
| Semi Annual | 09/01/2015 | | Not Started | View Document History | Print |
| Quarter 3 | 11/30/2015 | | Not Started | View Document History | Print |
| Annual | 02/04/2016 | | Not Started | View Document History | Print |

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



Next Steps and Notes

- Provider Data Entry Users and Provider Supervisors should continue tracking progress. If desired, it is possible to access the next Progress Summary and record information in it. It is not possible, however, to submit a Progress Summary until 30 days prior to the due date.
- DDS Staff will be responsible for reviewing the Progress Summary, and approving or requesting additional revision.
- Provider Data Entry Users and Provider Supervisors are able to monitor the individual's Progress Summary Review Switchboard to view the progress of any revisions.
- The status of a Progress Summary changes to "Approved" when DDS Staff has approved the Progress Summary.
- Provider Data Entry Users and Provider Supervisors receive an alert when a Service Coordinator approves all of an individual's proposed Progress Summaries.
- If an objective is identified as in Met or Discontinued status in a Progress Summary during an ISP update year, the objective will be recalled in the subsequent year.



Next Steps and Notes

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

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



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

Quarter 3 and Annual Forms No Longer Display

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



Next Steps and Notes

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



Chapter 3 Summary

This Chapter covered:

- Overview of Progress Summaries
- Progress Summary Review Switchboard
- Scenario: Complete a Progress Summary
- Scenario: Revise a Progress Summary

Chapter 4: Progress Summary Report





Chapter 4 Overview

This Chapter will cover:

- Scenario: Accessing the Progress Summary Report

Scenario: Accessing the Progress Summary Report

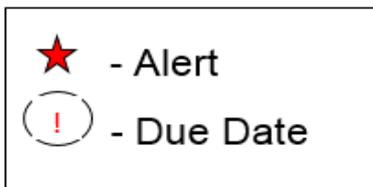
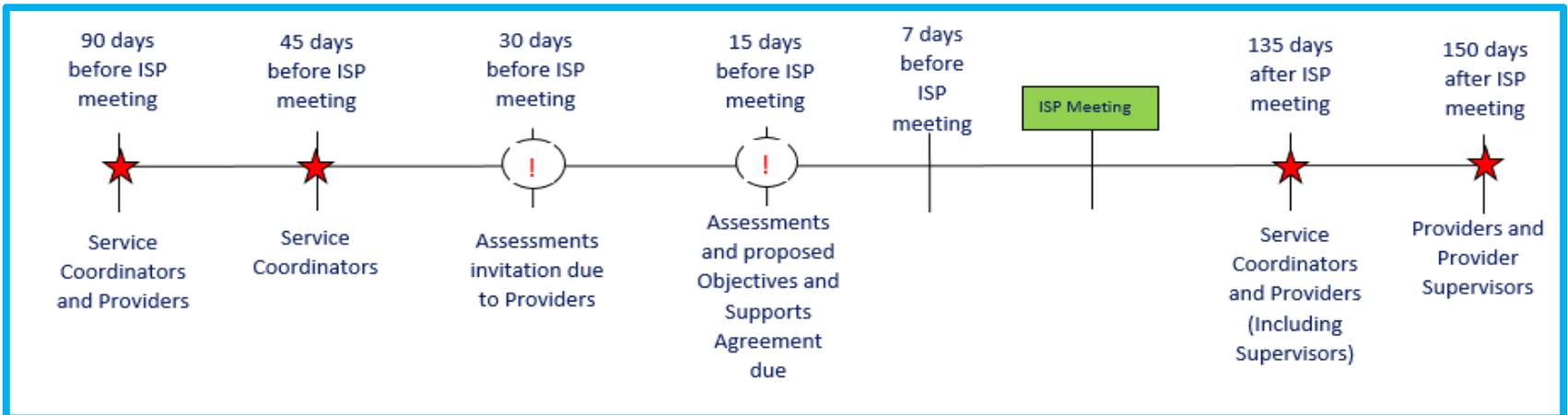


Scenario: Accessing the Progress Summary Report

Description: The Progress Summary Report provides information about the Progress Summary submission, review and approval process. The report aggregates progress summaries based on their due date and enables you to identify upcoming or overdue progress summaries. It is a consolidated view of the status of the progress summaries assigned to you.

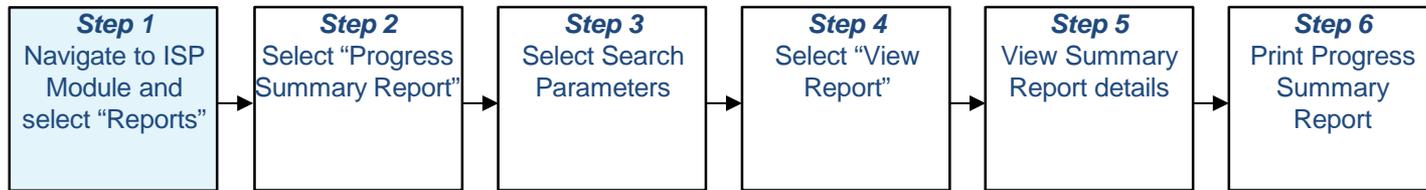
Roles and Responsibilities:

- **Provider Data Entry User:** Generate and view a report
- **Provider Supervisor:** Generate and view a report





Scenario: Accessing the Progress Summary Report



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

Click on “Reports” in the second level menu.

Reports

Health and Human Services Mass.gov

HOME QM PAM ISP ADMIN TOOLS Mass.gov Home Help

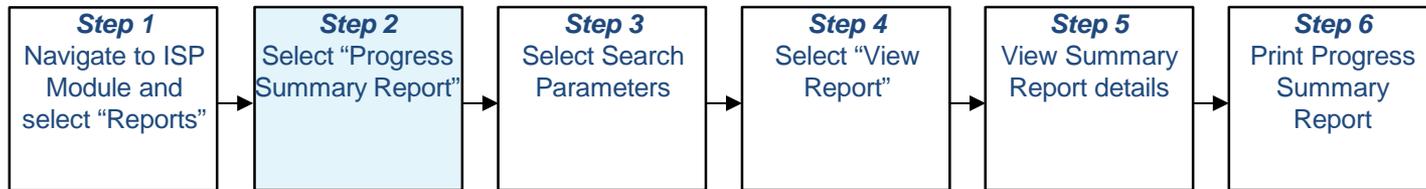
Individual Search | Review Process Management | **Reports** | ISP Data Extracts | References

ISP > Menu Selection

Please Select a Menu Item



Scenario: Accessing the Progress Summary Report



Step 2: Select "Progress Summary Report"

Select the "Progress Summary Report" link.

Progress Summary Report

Health and Human Services Mass.gov

HOME QM PAM ISP ADMIN TOOLS Mass.Gov Home Help

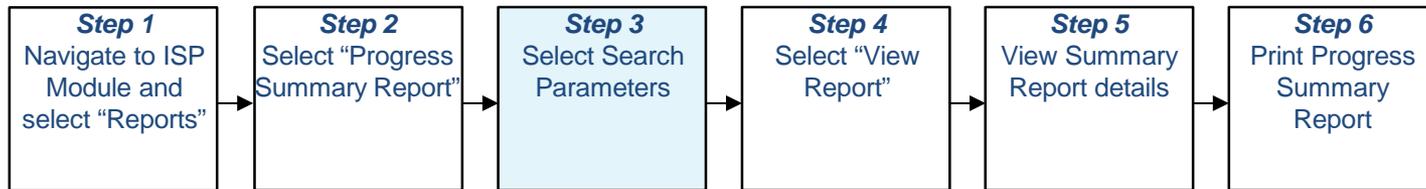
Individual Search | Review Process Management | Reports | ISP Data Extracts | References

ISP > Reports List

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



Scenario: Accessing the Progress Summary Report



Step 3: Select Search Parameters

The system redirects to the Progress Summary Report.

Select the date from the calendar dropdown for the “From ISP Date” and the “To ISP Date” fields. Please note these fields are calculated based on the Progress Summary due date.

From Date: * To Date: *

Health and Human Services Mass.gov

HOME QM PAM ISP ADMIN TOOLS Mass.Gov Home Help

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

ISP > Reports List > Progress Summary Report

Report Filters

From Date: * To Date: *

Area Office:

Provider:

Objective Status:

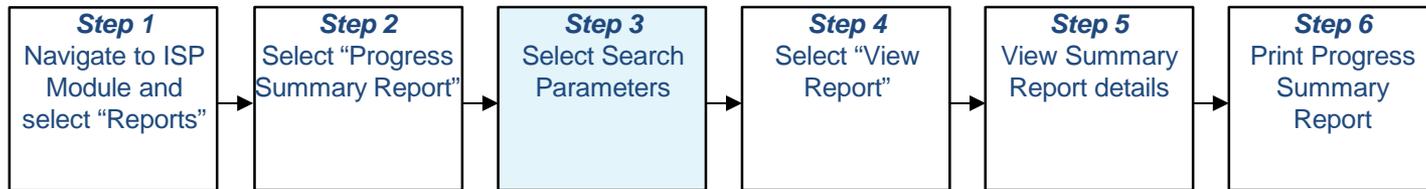
Report Display Option:

Security Group:

Document Status:



Scenario: Accessing the Progress Summary Report



Step 3: Select Search Parameters

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

- Area Office
- Provider
- Objective Status
- Report Display Option
- Security Group
- Document Status

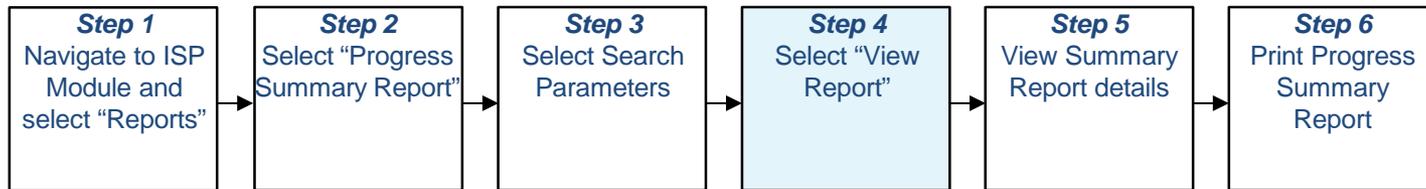
The screenshot displays the 'Report Filters' section of the HCSijs application. The filters are organized as follows:

- Area Office:
- Provider:
- Objective Status:
- Report Display Option:
- Security Group:
- Document Status:

Additional filters shown include 'From Date' and 'To Date' with calendar icons. The interface also features a navigation menu with 'HOME', 'QM', 'PAM', 'ISP', and 'ADMIN' tabs, and a breadcrumb trail: 'ISP > Reports List > Progress Summary Report'. Buttons for 'View Report' and 'Reset' are located at the bottom of the filter section.



Scenario: Accessing the Progress Summary Report



Step 4: Select "View Report"

Click "View Report."

View Report

Health and Human Services Mass.gov

HOME QM PAM ISP ADMIN TOOLS Mass.Gov Home Help

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

ISP > Reports List > Progress Summary Report

Report Filters

From Date: * 10/04/2015 To Date: * 11/28/2015

Area Office:

Provider:

Objective Status:

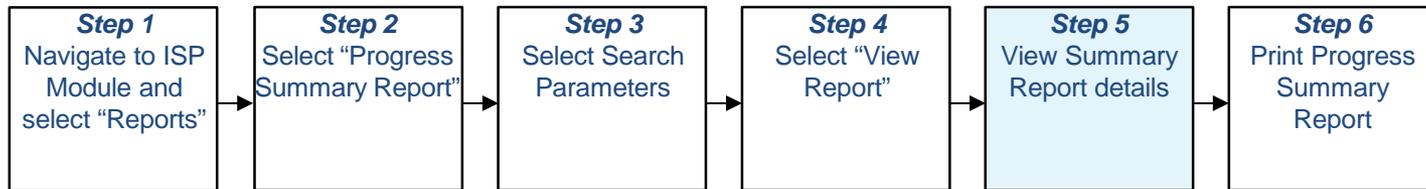
Report Display Option:

Security Group:

Document Status:



Scenario: Accessing the Progress Summary Report



Step 5: View Summary Report Details

The system will display all the individuals satisfying the search criteria.

 *The Commonwealth of Massachusetts*
Department of Developmental Services

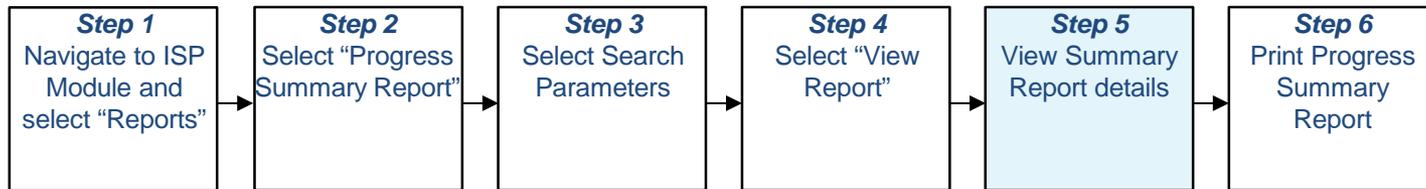
Run Date: 01/12/2016
Run Time: 02:58 PM

SEARCH CRITERIA:

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



Scenario: Accessing the Progress Summary Report



Step 5: View Summary Report Details

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



The Commonwealth of Massachusetts

Department of Developmental Services

Run Date: 01/12/2016

Run Time: 02:58 PM

SEARCH CRITERIA:

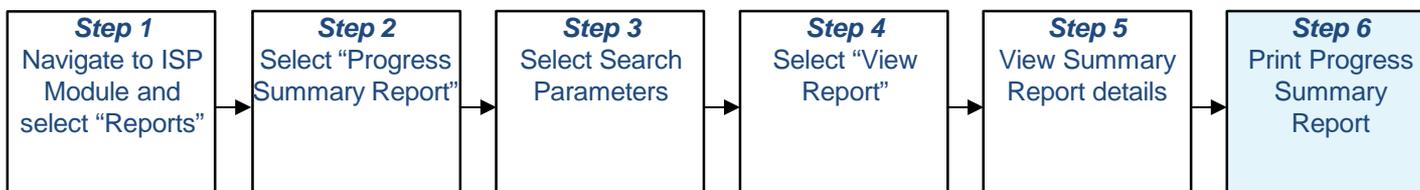
| | | | |
|-------------------------|------------|--------------------------|------------|
| From Date: | 10/04/2015 | To Date: | 11/28/2015 |
| Area Office: | All | Security Group: | N/A |
| Provider: | | Objective Status: | All |
| Document Status: | All | | |

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



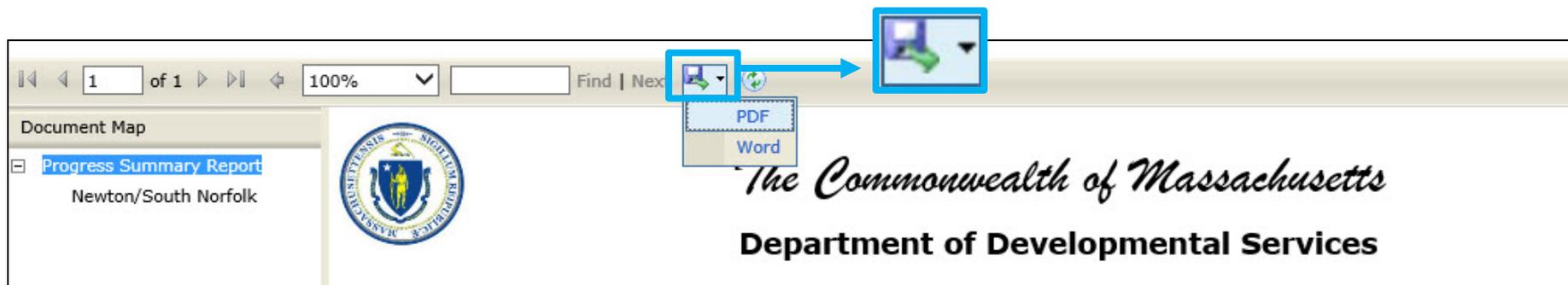


Scenario: Accessing the Progress Summary Report



Step 6: Print Progress Summary Report

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



NOTE: The PDF will print the exact image displayed on the Reports page. If the Progress Summary Report is shown with expanded information, all of that information will be printed.



Next Steps and Notes

- The Progress Summary Report will be by used by Licensing to track Provider's compliance with the Progress Summary regulations. Providers, however, will receive a grace period. Licensing will not begin to track compliance until six months have passed.



Chapter 4 Summary

This Chapter covered:

- Accessing a Progress Summary Report