

**Department of Developmental Services  
Massachusetts Rehabilitation Commission**



**Individual Support Plan (ISP) Module – Release 7.7**

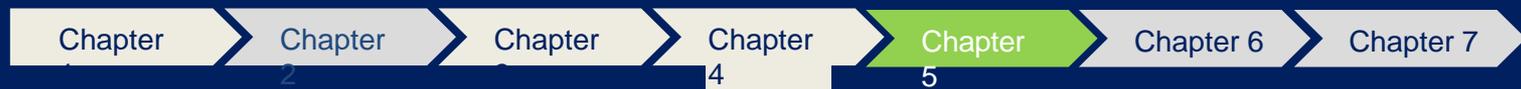
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Training - Provider Staff



**THE COMPUTERWORLD  
HONORS PROGRAM**

# Chapter 5: Area Office Director Approval of the ISP





## Chapter 5 Overview

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### **This Chapter will cover:**

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

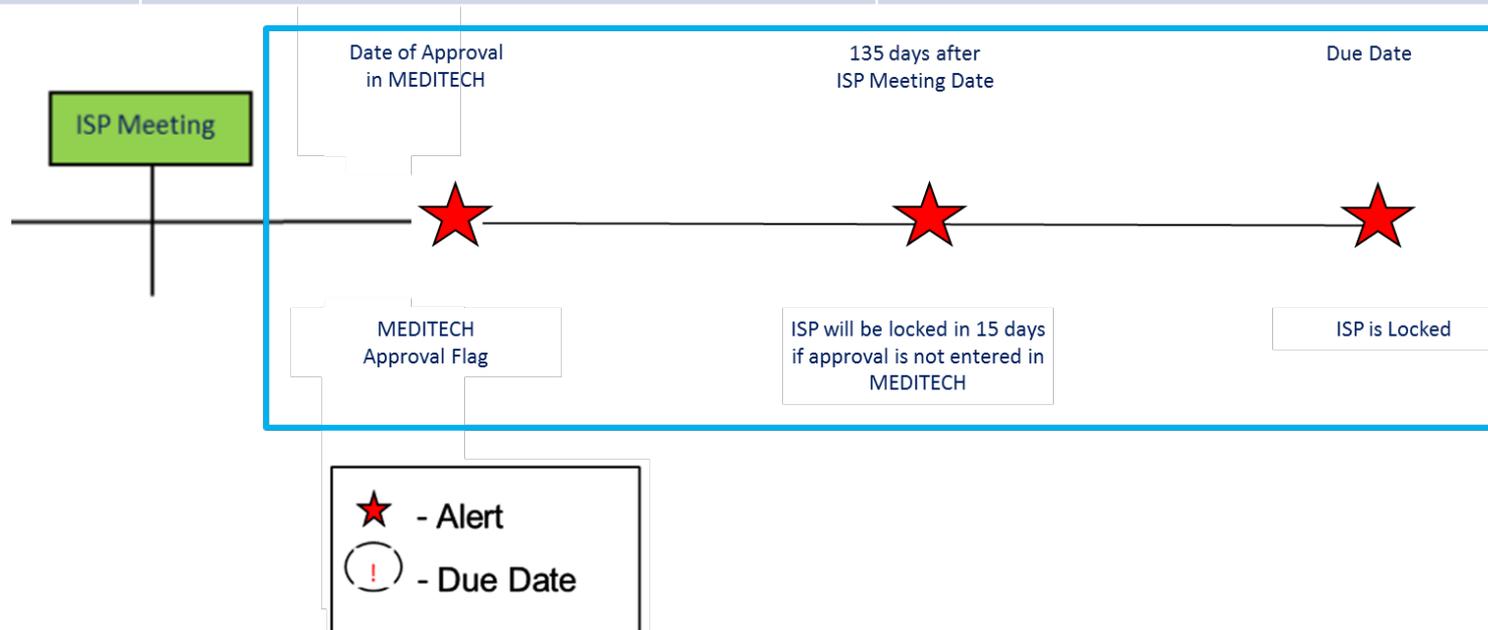
# **New Trigger for Locking the ISP in HCSIS**



# New Trigger for Locking the ISP in HCSIS

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

Topic	Previous Functionality	New Functionality
<b>Trigger for Locking the ISP in HCSIS</b>	Once 150 days have passed since the ISP Meeting Date, the plan will be automatically locked in HCSIS.	Once an Area Office Director (AOD) approves an ISP in MEDITECH, the plan will lock in HCSIS. Alternatively, if the approval has not been submitted in MEDITECH and 150 days have passed since the ISP Meeting Date, the plan will automatically lock in HCSIS, per current functionality.



# Lock Icon on the Individual Dashboard



# Lock Icon on the Individual Dashboard

An ISP Lock Icon will appear on the Individual Dashboard.

A screenshot of a web application interface. At the top, there are four tabs: 'als', 'Objectives', 'Modifications', and 'View/Print ISP'. Below the tabs, there is a profile section for 'Test, Bruce' with a person icon. Underneath, there is a link for 'ISP Meeting Details' which has a red lock icon next to it, highlighted by a blue box. Below the link, the text reads: 'Planned Meeting Date: 08/30/2014' and 'Meeting Time: 10:00 AM'. To the left of this, it says 'Meeting Location:'. Below that, it says 'Actual Meeting Date: 06/03/2014'. At the bottom of the section, it says 'Full Year ISP'.

Area Office Directors and Area Office Director Designees have the ability to manually unlock plans, if needed. The ISP should only be unlocked, however, to make minor corrections or a correction needed in response to an appeal. Contact the service coordinator to make this request.



## Chapter 5 Summary

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### **This Chapter covered:**

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

# Chapter 6: Modifications





## Chapter 6 Overview

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### **This Chapter will cover:**

- Overview of Modifications
- Scenario: Provider Initiates a Modification
- Scenario: Reviewing and Revising Modification

# Overview of Modifications



# Modifications Process

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## **Modifications are used to make changes to a locked ISP document**

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



# Modifications Process

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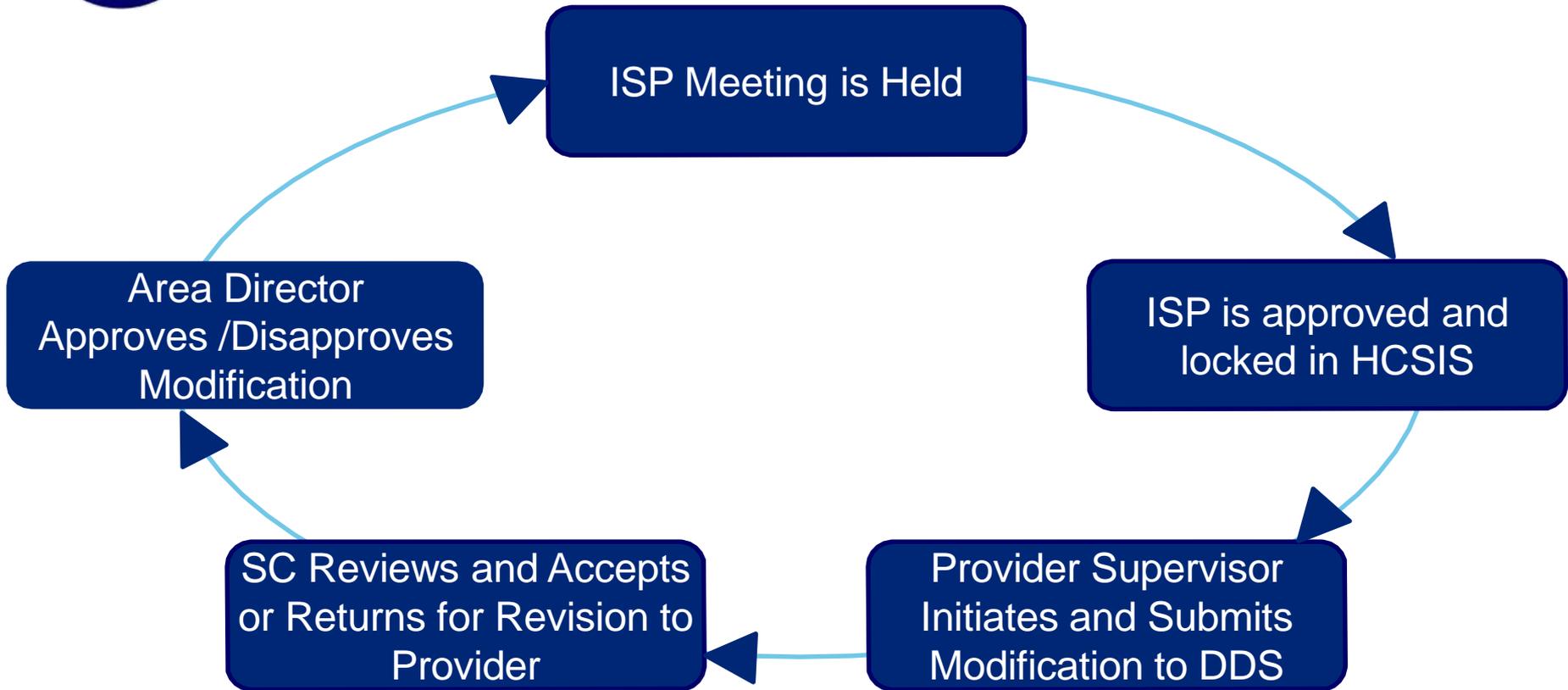
## **Modifications are used to make changes to a locked ISP document**

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



# Modifications Workflow

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***The ISP module provides an efficient mechanism for streamlining the Modification submission process. It allows Provider and DDS staff to coordinate the review, revision, acceptance and approval of a Modification per DDS Regulations.***



# Modifications Roles and Responsibilities

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## Provider Roles and Responsibilities

- **Provider Data Entry User**
  - N/A
- **Provider Supervisors Role**
  - Initiate a Modification
  - Revise a Modification
  - Submit for DDS Review



# Navigating to Modifications

## Click Modifications Tab on Individual Dashboard

Navigate to the Modifications Review Switchboard from the Individual Dashboard. On the Individual dashboard, click the “Modifications” tab

The screenshot displays the Individual Dashboard interface. At the top, a navigation bar contains several tabs: 'ISP Dashboard', 'ISP Meeting Details', 'Vision', 'Assessments', 'Goals', 'Objectives', 'Modifications', and 'View/Print ISP'. The 'Modifications' tab is highlighted with a blue box. Below the navigation bar, the main content area is titled 'Expand this section to see ISP timeline'. It features a profile for 'Test, Bruce' with a 'Service Coordinator' role. Key information includes 'Region/Area Office: Metro/Greater Boston', 'Demographic Information' (SSN and Eligibility), 'ISP Meeting Details' (Planned Meeting Date: 03/04/2015, Meeting Time: 10:00 AM, Actual Meeting Date: 03/05/2015), and 'ISP Deadlines' (Meeting Deadline: 03/04/2015, Semi Annual Review Date: 09/01/2015, Next ISP Meeting Deadline: 03/04/2016). A 'Meeting Location' field is also present. Below this information, there are four summary cards: 'Vision' (Status: Shared, Due Date: 02/02/2015), 'Goals' (Status: Created, Due Date: N/A), 'Objectives & Support Strategies' (Status: Approved, Due Date: 02/17/2015), and 'Assessments' (Status: Approved, Due Date: 02/17/2015). A legend at the bottom right indicates the status of each section: black dot for 'No action needed', yellow dot for 'Action needed', green dot for 'Section complete', and red dot for 'Section overdue'.

## **Scenario: Provider Initiates a Modification**

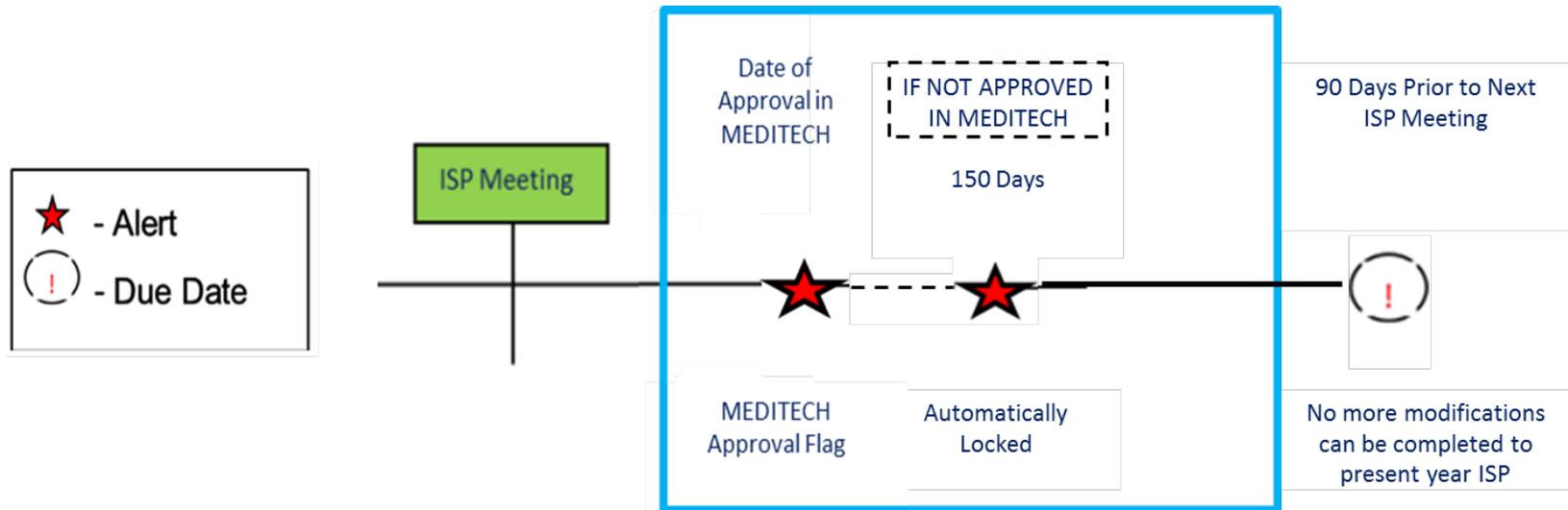


# Scenario: Provider Initiates a Modification

**Description:** Provider Supervisors can initiate a Modification once a Full or Update Year ISP has been locked. A single modification initiated by a Provider can include any combination of the following elements: Goals, Objective Support Strategy, Residential Support / Behavior Plan / Other

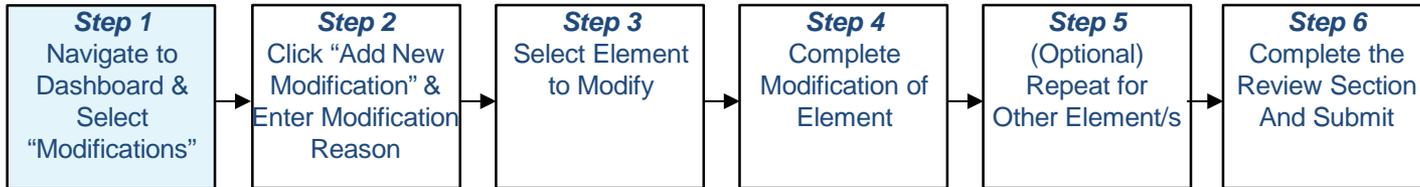
## Roles and Responsibilities:

- **Provider Data Entry User:** N/A
- **Provider Supervisor:** Initiate a Modification





# Scenario: Provider Initiates a Modification



## Step 1: Navigate to Individual Dashboard & Select “Modifications”

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

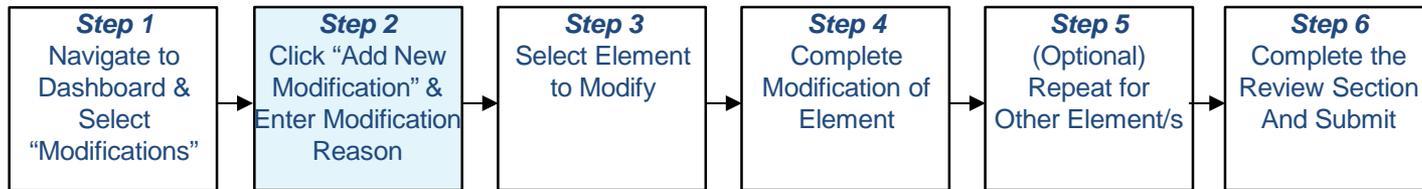
The screenshot shows the Individual Dashboard for a user named Test, Bruce. The 'Modifications' tab is highlighted in the top navigation bar. The dashboard displays the following information:

- Region/Area Office:** Metro/Greater Boston
- Demographic Information:** SSN: [redacted], Eligibility: [redacted]
- ISP Meeting Details:** Planned Meeting Date: 03/04/2015, Meeting Time: 10:00 AM, Meeting Location: [redacted], Actual Meeting Date: 03/05/2015
- ISP Deadlines:** Meeting Deadline: 03/04/2015, Semi Annual Review Date: 09/01/2015, Next ISP Meeting Deadline: 03/04/2016
- Update Year ISP**
- Vision:** Status: Shared, Due Date: 02/02/2015, Last Updated On: 09/01/2015, Last Shared On: 09/01/2015
- Goals:** Status: Created, Due Date: N/A, Last Updated On: 08/21/2014
- Objectives & Support Strategies:** Status: Approved, Due Date: 02/17/2015, Pending Provider Submission: 0/2, Pending DDS Review: 0/2
- Assessments:** Status: Approved, Due Date: 02/17/2015, Pending Provider Submission: 0/3, Pending DDS Review: 0/3

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



# Scenario: Provider Initiates a Modification



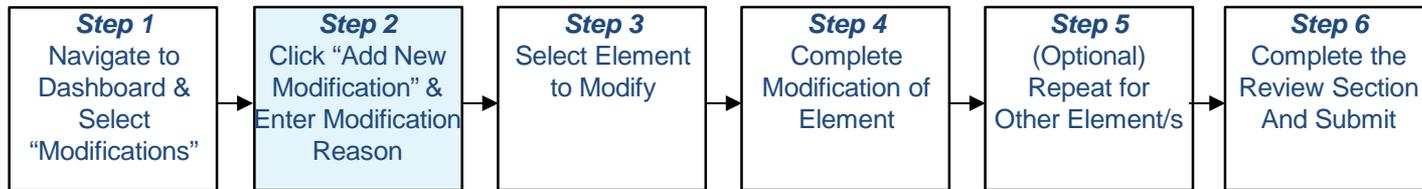
## Step 2: Click on “Add New Modification” and Enter Reason for Modification

The system will redirect to the Modifications Review Switchboard. Click “Add New Modification.”

The screenshot shows the 'Modifications Review Switchboard' interface. At the top, there is a navigation bar with tabs for 'ISP Dashboard', 'ISP Meeting Details', 'Vision', 'Assessments', 'Goals', 'Objectives', 'Modifications', and 'View/Print ISP'. The 'Modifications' tab is active. Below the navigation bar, the main content area is titled 'Modifications Review Switchboard'. On the right side of this area, there is a link 'Update Year ISP'. Below the title, there is a table with the following columns: 'Modification Reason', 'Modification Type', 'Created On', 'Created By', 'Document History', and 'Status'. The table currently contains the text 'No modification created'. In the bottom right corner of the table area, there is a button labeled 'Add New Modification'. A blue box highlights this button, and a blue arrow points from it to another 'Add New Modification' button located above the table area.



# Scenario: Provider Initiates a Modification



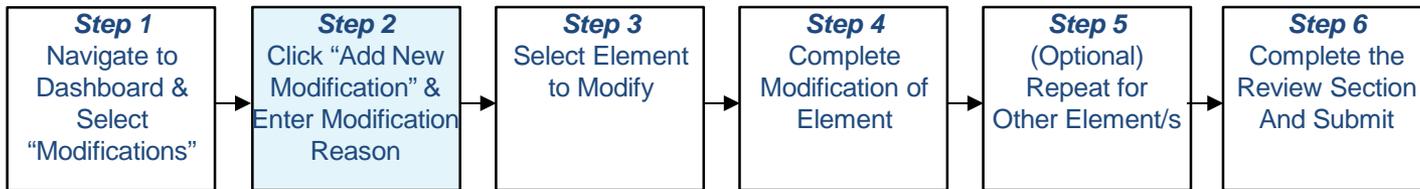
## Step 2: Click on “Add New Modification” and Enter Reason for Modification

The system will display the Modification Details screen.

The screenshot shows the 'Modification Details' screen. At the top, there are navigation tabs: 'ISP Dashboard', 'ISP Meeting Details', 'Vision', 'Assessments', 'Goals', 'Objectives', 'Modifications', and 'View/Print ISP'. Below the tabs, there is a 'Back to Modifications Review Switchboard' link. The main heading is 'Modification Details' with 'Expand All | Collapse All' links. A blue box highlights the 'Modification Details' heading and the 'Expand All | Collapse All' links, with an arrow pointing to the right. Below the heading, there is a 'Modification Reason: \*' field with a text area containing the text: 'There has been a change in Bruce's circumstances that requires his goals and objectives & support strategies to be updated.' Below the text area, there are three sections: 'Goals', 'Objectives & Support Strategies', and 'Residential Support / Behavior Plan / Other'. Each section has a table with columns for 'Original Entry', 'New Entry', 'Created On', and 'Created By'. The 'Goals' section has buttons for 'Add Goal Modification', 'View/Edit Goal Modification', and 'Delete Goal Modification'. The 'Objectives & Support Strategies' section has buttons for 'Add OSS Modification', 'View/Edit OSS Modification', and 'Delete OSS Modification'. The 'Residential Support / Behavior Plan / Other' section has buttons for 'Add OSS Modification', 'View/Edit OSS Modification', and 'Delete OSS Modification'. The 'Update Year ISP' link is located in the top right corner.



# Scenario: Provider Initiates a Modification



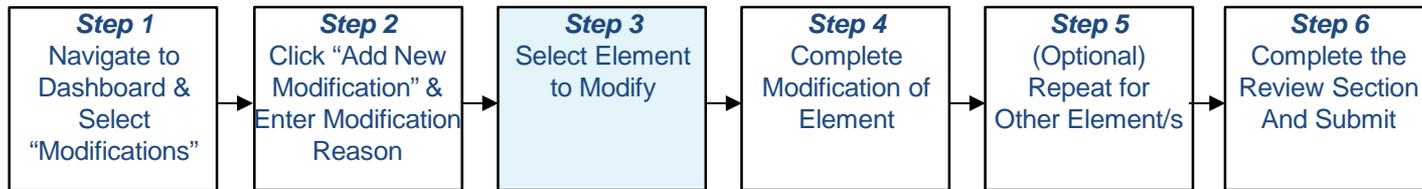
## Step 2: Click on “Add New Modification” and Enter Reason for Modification

Insert comments into the Modification Reason text box.

The screenshot shows the 'Modification Details' form. At the top, there are navigation tabs: 'ISP Dashboard', 'ISP Meeting Details', 'Vision', 'Assessments', 'Goals', 'Objectives', 'Modifications', and 'View/Print ISP'. Below the tabs is a link 'Back to Modifications Review Switchboard' and an 'Update Year ISP' button. The main section is titled 'Modification Details' and includes 'Expand All | Collapse All' links. A red box highlights the 'Modification Reason: \*' label, with an arrow pointing to a text area containing the text: 'There has been a change in Bruce's circumstances that requires his goals and objectives & support strategies to be updated.' Below this are three sections: 'Goals', 'Objectives & Support Strategies', and 'Residential Support / Behavior Plan / Other'. Each section has a table with columns for 'Original Entry', 'New Entry', 'Created On', and 'Created By'. The 'Goals' and 'Objectives & Support Strategies' sections show 'No modifications for goals/objectives created.' and have buttons for 'Add Goal/OSS Modification', 'View/Edit Goal/OSS Modification', and 'Delete Goal/OSS Modification'. The 'Residential Support / Behavior Plan / Other' section shows 'No other modifications created.' and has columns for 'Original Entry', 'New Entry', 'Modification Type', 'Created On', and 'Created By'.



# Scenario: Provider Initiates a Modification



## Step 3: Select Elements to Modify

Decide which elements require modification: A.) "Goals" B.) "Objectives & Support Strategy" and/or C.) "Residential Support / /Behavior Plan / Other."

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

Back to Modifications Review Switchboard

### Modification Details

Expand All | Collapse All

Modification Reason: \*

There has been a change in Bruce's circumstances that requires his goals and objectives to be updated.

Goals

Goals

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

Objectives & Support Strategies

Objectives & Support Strategies

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

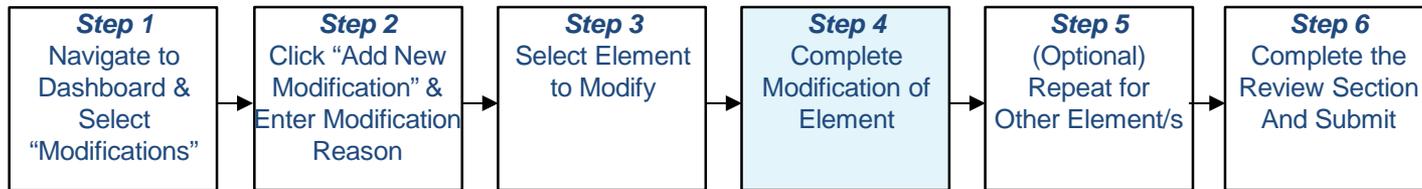
Residential Support / Behavior Plan / Other

Residential Support / Behavior Plan / Other

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



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

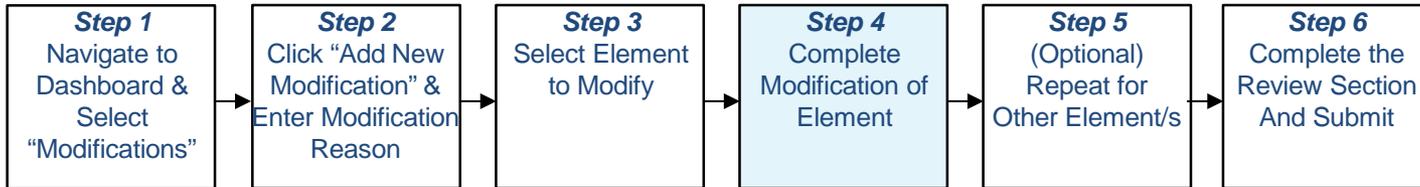
### A.) Goals

Select “Add Goal Modification” to initiate a modification to goals.

The screenshot shows the 'Modification Details' page for an ISP. The page includes a breadcrumb trail: ISP Dashboard > ISP Meeting Details > Visits > Assessments > Goals > Objectives > Modifications > View/Print ISP. Below the breadcrumb is a 'Back to Modifications Review Subdashboard' link. The main content area is titled 'Modification Details' and includes a 'Update Year ISP' link. The 'Modification Reason' field contains the text: 'There has been a change in Bruce's circumstances that requires his goals and objectives & support strategies to be updated.' Below this is a 'Goals' section with a table header: 'Original Entry', 'New Entry', 'Created On', and 'Created By'. The table is currently empty, with the message 'No modifications for goals created.' Below the table are three buttons: 'Add Goal Modification', 'View/Edit Goal Modification', and 'Delete Goal Modification'. The 'Add Goal Modification' button is highlighted with a blue box, and a blue arrow points from it to a larger 'Add Goal Modification' button above it. Below the 'Goals' section is an 'Objectives & Support Strategies' section with a similar table and 'Add', 'View/Edit', and 'Delete' buttons. At the bottom is a 'Residential Support / Behavior Plan / Other' section with a similar table and 'Add', 'View/Edit', and 'Delete' buttons.



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

The system will display the Goals pop-up screen. All of the goals that have been included in the ISP document display on this screen.

**Modify Goals**

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

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current

Goal Title:\*

Goal:\*

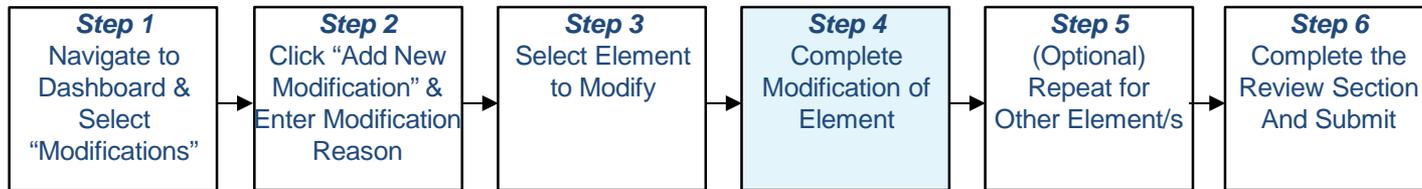
Date Goal Identified:\*

Goal Identified By:\*

Update Year Status:\*



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

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

**Modify Goals**

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

**Goals** Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current

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

Goal Title:\*

Goal:\*

Date Goal Identified:\*

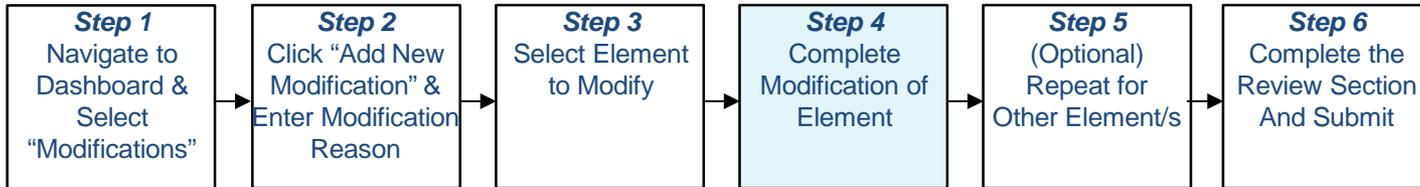
Goal Identified By:\*

Update Year Status:\*

Spell Check | Reset | Save | Save and Close



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

#### Option 1: Adding a New Goal

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

**Modify Goals**

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

**Goals**

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year	ISP
<input type="radio"/> Money Management	08/21/2014					
<input type="radio"/> Community Involvement	08/21/2014					

**Goal Title:\***

**Goal Title:\***

**Goal:\***

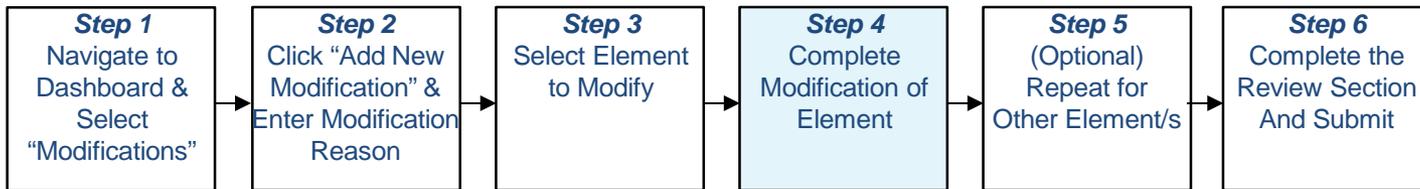
**Date Goal Identified:\***

**Goal Identified By:\***

**Update Year Status:\***



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

#### Option 1: Adding a New Goal

Enter the goal description in the Goal text box.

**Modify Goals**

Individual	Eligibility #
Test, Bruce	SSN #

**Goals**

Goal Title	Date Identified
<input type="radio"/> Money Management	08/21/2014
<input type="radio"/> Community Involvement	08/21/2014

Goal Title: \*

Goal: \*

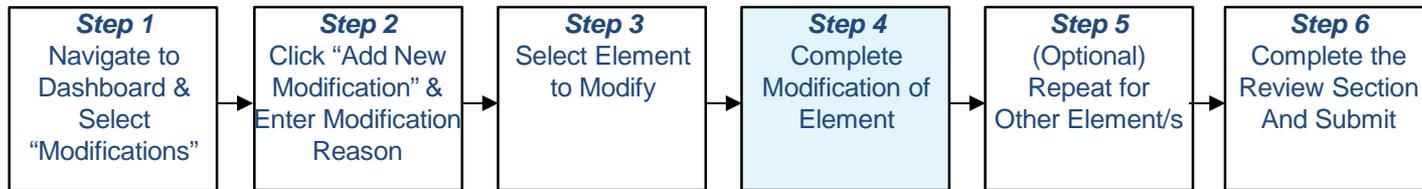
Date Goal Identified: \*

Goal Identified By: \*

Update Year Status: \*



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

#### Option 1: Adding a New Goal

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

**Modify Goals**

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

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current

Goal Title:\*

Goal:\*

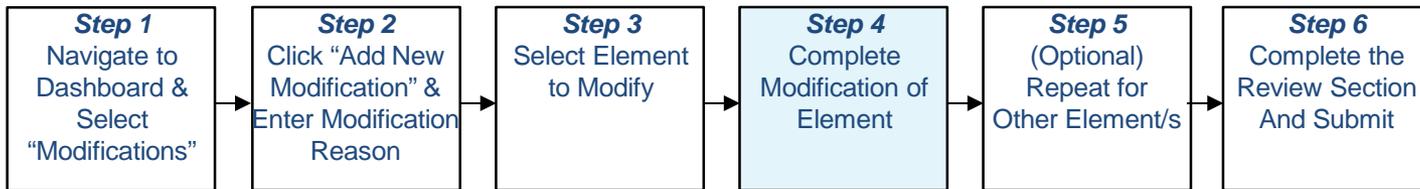
Date Goal Identified:\*

Goal Identified By:\*

Update Year Status:\*



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

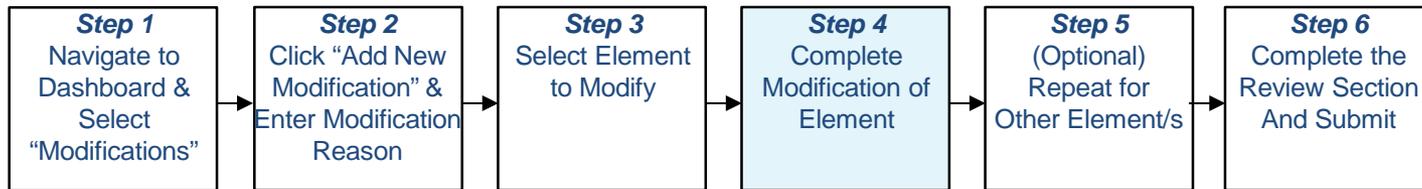
#### Option 1: Adding a New Goal

Select an option from the “Goal Identified by” drop down.

The screenshot shows the 'Modify Goals' interface. At the top, there are fields for 'Individual Test, Bruce', 'Eligibility # SSN #', 'Planned Meeting Date 03/04/2015', 'ISP Meeting Deadline 03/04/2015', and 'Service Coordinator Coordinator, Service'. Below this is a 'Goals' section with a table. The table has columns for 'Identified By', 'Created By', 'Updated By', and 'Update Year Status'. Two rows are visible, both with 'Individual' in the 'Identified By' column and 'Current' in the 'Update Year Status' column. Below the table are buttons for 'View/Edit Goal', 'Delete Goal', and 'Add Goal'. A dropdown menu is open for the 'Goal Identified By' field, showing options: 'Guardian', 'Service Coordinator', 'Individual', and 'Provider'. The 'Individual' option is selected. Below the dropdown is a 'Date Goal Identified' field with the value '10/29/2015' and a calendar icon. Below that is an 'Update Year Status' field with the value 'Current'. At the bottom are buttons for 'Spell Check', 'Reset', 'Save', and 'Save and Close'.



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

#### Option 1: Adding a New Goal

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

**Modify Goals**

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

**Goals**

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current

Goal Title:\*

Goal:\*

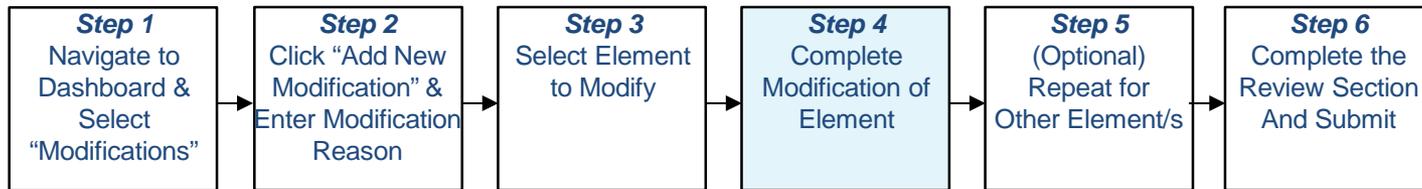
Date Goal Identified:\*

Goal Identified By:\*

Update Year Status:\*



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

#### Option 1: Adding a New Goal

The system will return to the Modifications Details screen. The details of the goal modification will display. The original entry column displays the original goal if one exists. In this scenario, the original entry displays as "N/A" because it is a new goal. The new entry column displays the new goal description.

Original Entry	New Entry	Created On	Created By
N/A	Goal Title: Community Membership Goal Description: By February 2016. Bruce will have participated in.	10/29/2015	User, Provider Two (American Training)

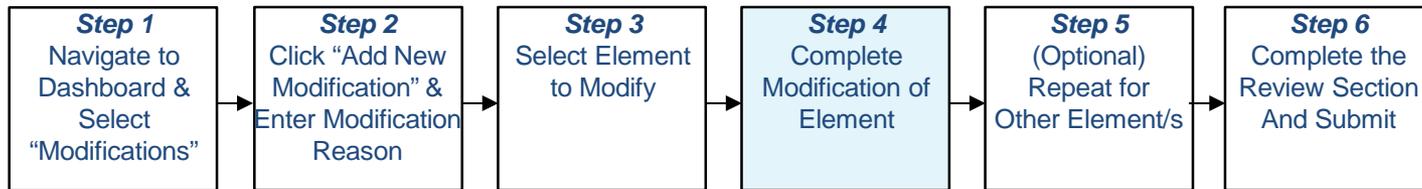
Buttons: Add Goal Modification, View/Edit Goal Modification, Delete Goal Modification

Buttons: Add OSS Modification, View/Edit OSS Modification, Delete OSS Modification

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



# Scenario: Provider Initiates a Modification

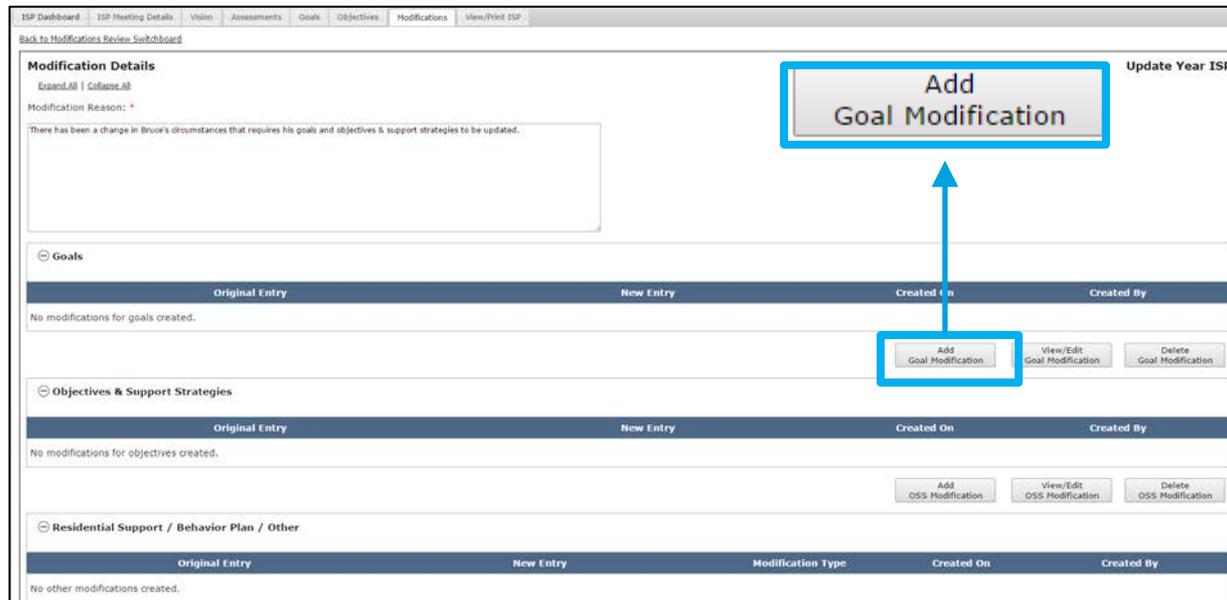


## Step 4: Complete Modification of Element

### A.) Goals

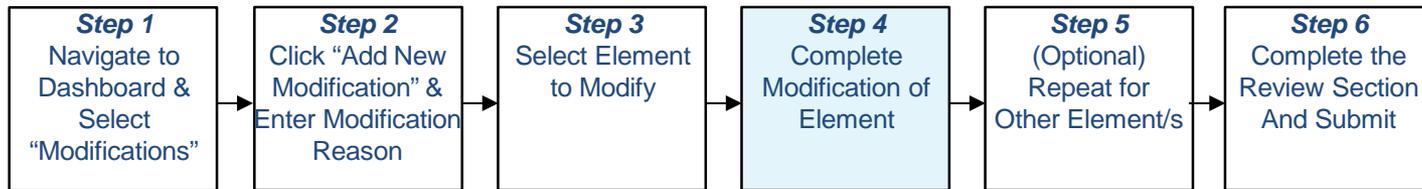
Option 2: Modify an Existing Goal

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





# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

Option 2: Modify an Existing Goal

Select the radio button next to the desired goal and click "View/Edit Goal."

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

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input checked="" type="radio"/> Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current

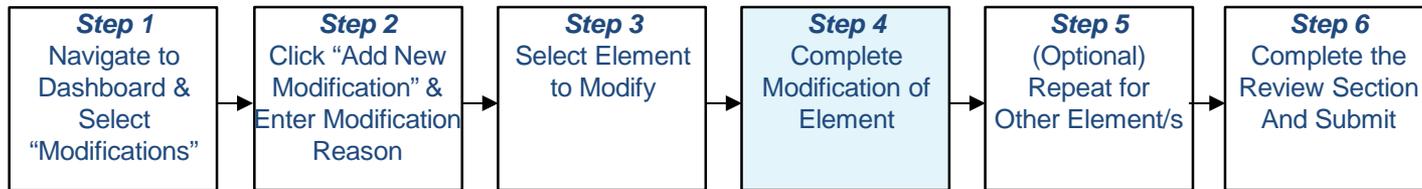
Buttons: View/Edit Goal, Delete Goal, Add Goal

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

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



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

Option 2: Modify an Existing Goal

Click "View / Edit Goal."

View/Edit Goal

**Modify Goals**

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

**Goals** Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input checked="" type="radio"/> Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current

Goal Title:\*

Goal:\*

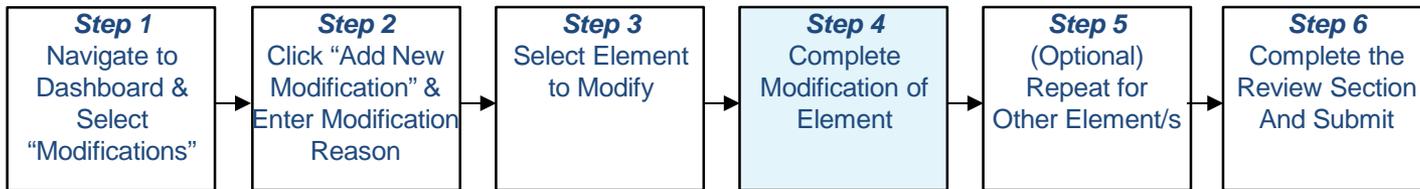
Date Goal Identified:\*

Goal Identified By:\*

Update Year Status:\*



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

Option 2: Modify an Existing Goal

The screen will display the existing Goal details.

**Modify Goals**

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
<b>Goals</b>				
<b>Goal Title:*</b>	<b>Money Management</b>	<b>Created By</b>	<b>Updated By</b>	<b>Update Year Status</b>
<input type="radio"/> Community Involvement	08/21/2014	Individual		Current
<input type="radio"/> Money Management				Current

**Goal Title:\*** Money Management

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

**Date Goal Identified:\*** 08/21/2014

**Goal Identified By:\*** Individual

**Update Year Status:\*** Current

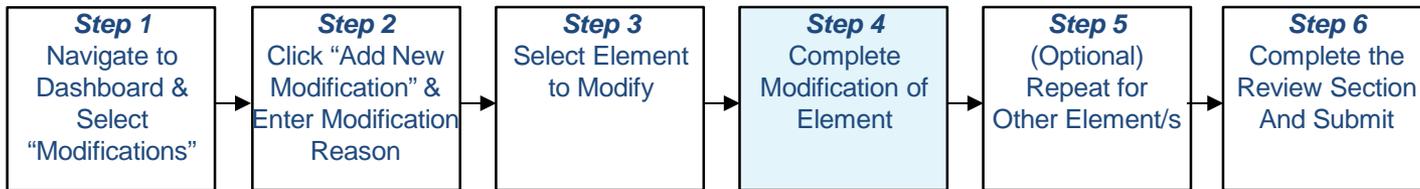
**Update Information**

No Change

**Modification Information**



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

Option 2: Modify an Existing Goal

Enter text in the Modification Information textbox and explain what changes are required to the goal.

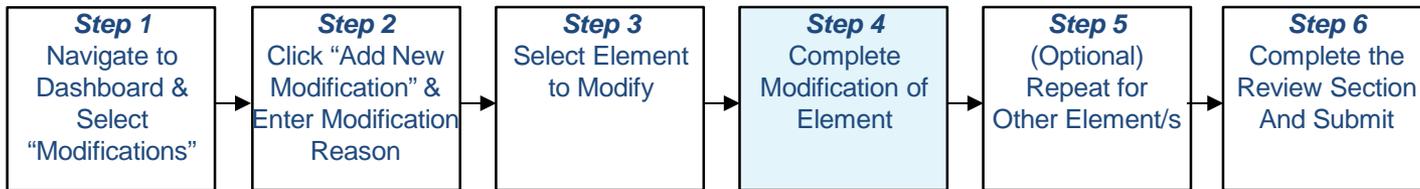
The screenshot shows a web application window titled "Modify Goals". At the top, there is a table with the following data:

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

Below the table is a large text area labeled "Modification Information" with a blue border. The text inside reads: "Bruce is to save up for and attend an event semi-annually rather than quarterly." Below this is another section labeled "Update Information" with a "No Change" radio button selected. A smaller text area within this section also contains the text: "Bruce is to save for and attend events semi-annually rather than quarterly." At the bottom of the window are buttons for "Spell Check", "Reset", "Save", and "Save and Close".



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

Option 2: Modify an Existing Goal

Select "Save and Close."

**Modify Goals**

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

**Goals** Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
Money Management	08/21/2014	Individual			Current
Community Involvement	08/21/2014	Individual			Current

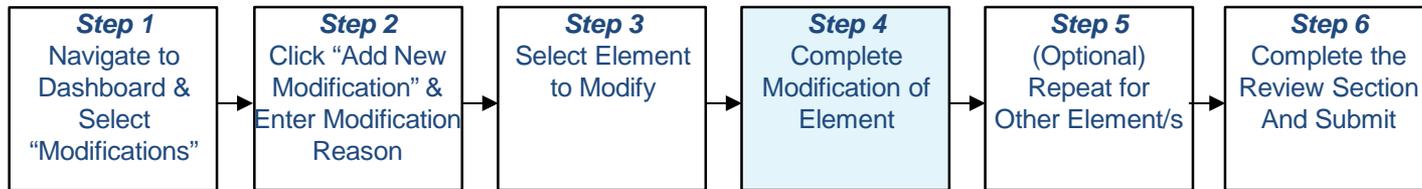
Goal Title: \* Money Management  
Goal: \* Bruce will save up quarterly to do a big event. Each quarter he will identify an event he would like to do. Example: Boston Harbor Cruise, a concert, casino etc  
Date Goal Identified: \* 08/21/2014  
Goal Identified By: \* Individual  
Update Year Status: \*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

**Update Information**  
No Change

**Modification Information**



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

#### Option 2: Modify an Existing Goal

The system will return to the Modifications Details screen. The details of the goal modification will display. In this scenario, the Original Entry column displays the original goal description.

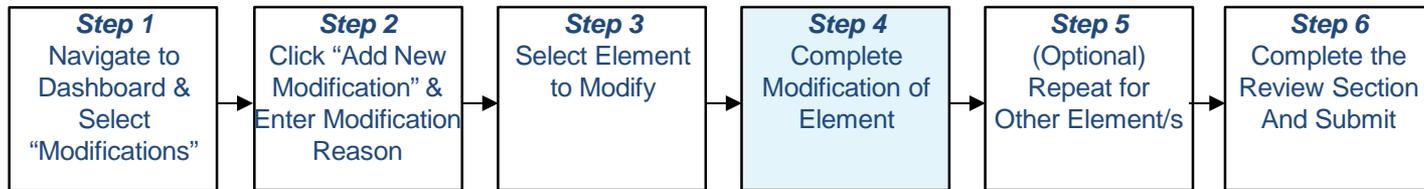
The screenshot displays the 'Modification Details' interface. At the top, there are navigation tabs: 'ESP Dashboard', 'ESP Meeting Details', 'Views', 'Assessments', 'Goals', 'Objectives', 'Modifications', and 'View/Print ESP'. Below the tabs, there are two large boxes labeled 'Original Entry' and 'New Entry' with arrows pointing to the corresponding columns in a table below. The table has columns for 'Original Entry', 'New Entry', 'Created On', and 'Created By'. The 'Goals' section is expanded, showing a goal with the following details:

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

Below the table, there are buttons for 'Add Goal Modification', 'View/Edit Goal Modification', and 'Delete Goal Modification'. The 'Objectives & Support Strategies' section shows a table with columns for 'Original Entry', 'New Entry', 'Created On', and 'Created By', but it is currently empty with the message 'No modifications for objectives created.' Below this, there are buttons for 'Add OSS Modification', 'View/Edit OSS Modification', and 'Delete OSS Modification'. The 'Residential Support / Behavior Plan / Other' section also shows a table with columns for 'Original Entry', 'New Entry', 'Modification Type', 'Created On', and 'Created By', but it is currently empty with the message 'No other modifications created.' Below this, there are buttons for 'Add Modification', 'View/Edit Modification', and 'Delete Modification'.



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

#### Option 3: Delete Goal

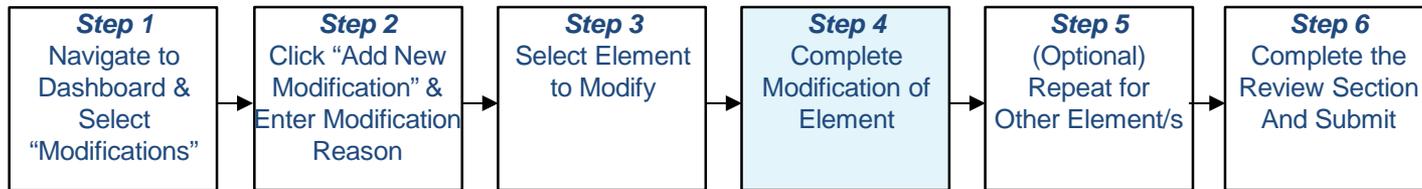
Once a Goal has been added to the Modification, a third option is available. It is possible to use the "Delete Goal" option. The delete function operates differently for newly added goals and existing goals:

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





# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

Option 3: Delete Goal

On the Goals pop-up screen, select the radio button for the newly added goal that requires deletion.

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

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year	ISP
<input type="radio"/> Money Management	08/21/2014	Individual				Current
<input type="radio"/> Community Involvement	08/21/2014	Individual				Current
<input checked="" type="radio"/> ** Community Membership	10/29/2015	Guardian				New

\*\* This element is associated to a Modification

View/Edit Goal Delete Goal Add Goal

Goal Title:\* Community Membership

Goal:\*  
By February 2016, Bruce will have participated in two activities per month and one new activity per quarter

Date Goal Identified:\* 10/29/2015

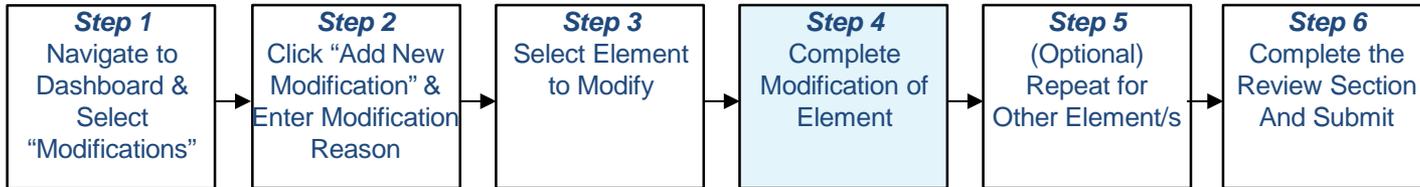
Goal Identified By:\* Guardian

Update Year Status:\* New

Spell Check Reset Save Save and Close



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

Click "Delete Goal."

**Modify Goals**

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

**Goals** Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input checked="" type="radio"/> ** Community Membership	10/29/2015	Guardian			New

\*\* This element is associated to a Modification

Goal Title:\* Community Membership

Goal:\*  
By February 2016, Bruce will have participated in two activities per month and one new activity per quarter

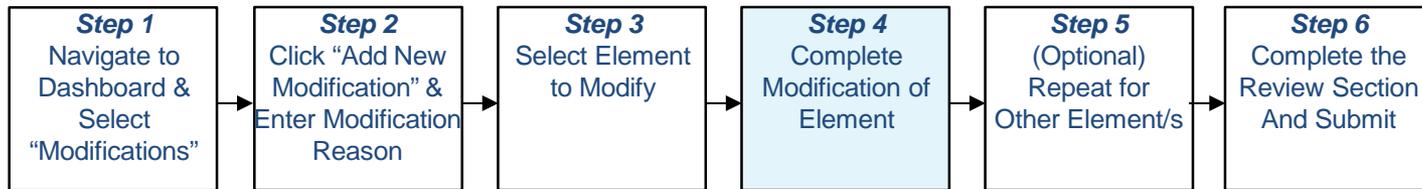
Date Goal Identified:\* 10/29/2015

Goal Identified By:\* Guardian

Update Year Status:\* New



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

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

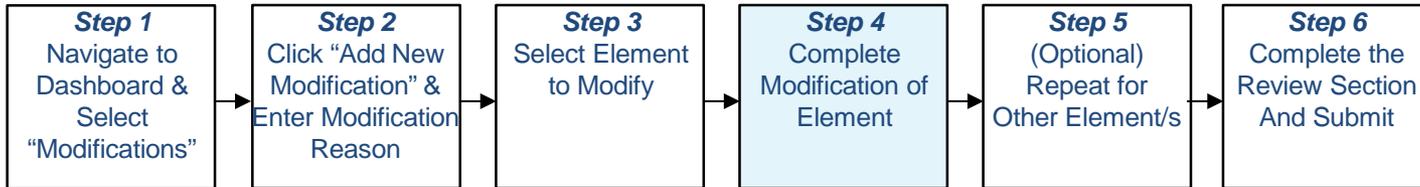
The screenshot displays a confirmation message dialog box with the following text: "The newly added goal added as part of modification will be deleted. Are you sure you want delete the newly added goal?" Below the text are "Yes" and "No" buttons. An arrow points from the "Delete Goal" button in the background form to the dialog box. The background form includes a table with the following data:

Community Involvement	08/21/2014	Individual	Current
** Community Membership	10/29/2015	Guardian	New

Below the table, there is a note: "\*\* This element is associated to a Modification". The form also contains fields for "Goal Title:", "Goal:", "Date Goal Identified:" (set to 10/29/2015), "Goal Identified By:" (set to Guardian), and "Update Year Status:" (set to New). Buttons for "Spell Check", "Reset", "Save", and "Save and Close" are visible at the bottom.



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

### A.) Goals

#### Option 3: Delete Goal

The system will return to the Goals pop-up screen. The goal will no longer appear.

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

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	03/21/2014	Individual			Current
<input type="radio"/> Community Involvement	03/21/2014	Individual			Current

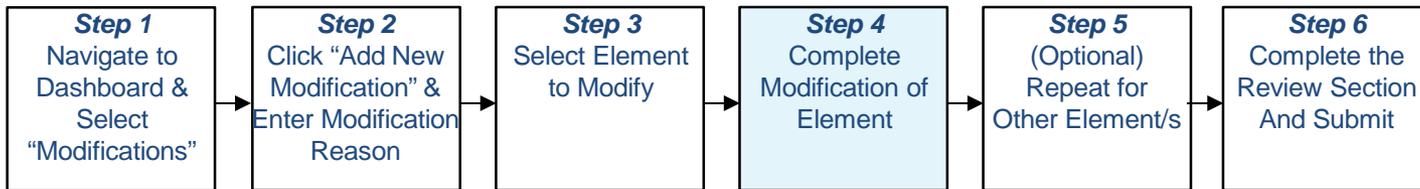
Buttons: View/Edit Goal, Delete Goal, Add Goal

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

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



# Scenario: Provider Initiates a Modification



## Step 4: Complete Modification of Element

A.) Goals

Option 3: Delete Goal

Click "Save and Close."

Modify Goals

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

Goals ⓘ Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current

Goal Title:\*

Goal:\*

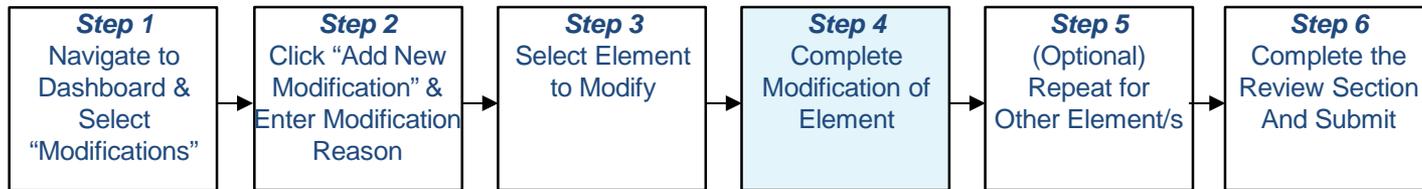
Date Goal Identified:\*

Goal Identified By:\*

Update Year Status:\*



# Scenario: Provider Initiates a Modification

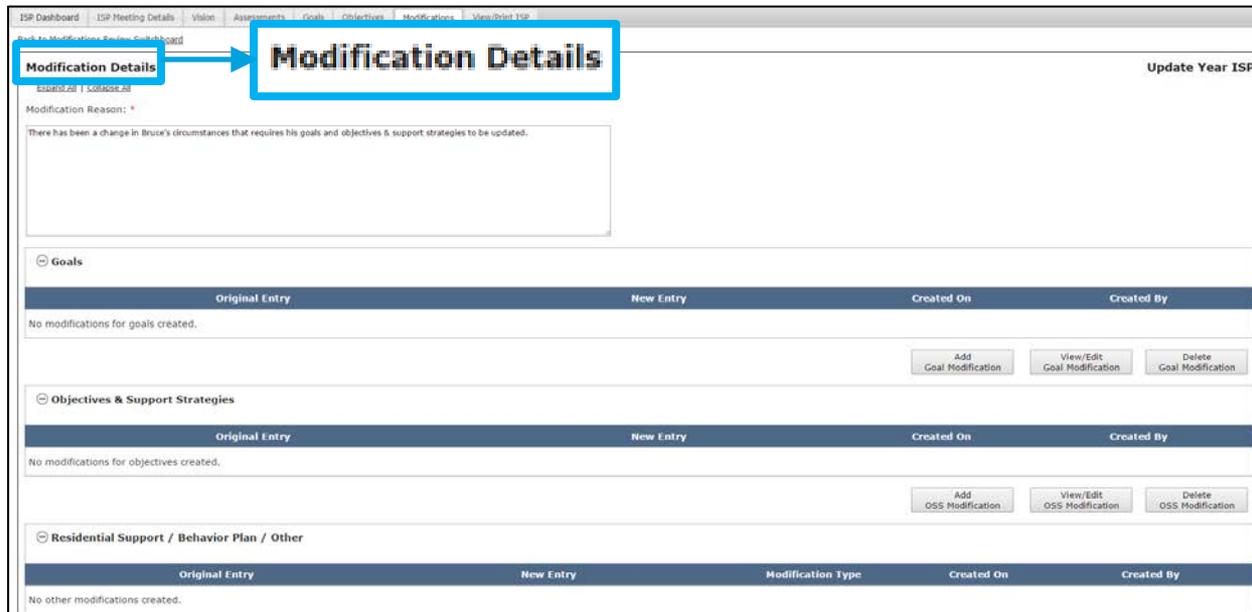


## Step 4: Complete Modification of Element

### A.) Goals

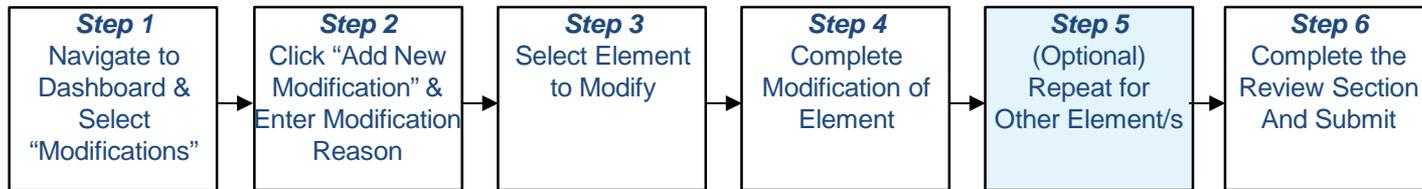
Option 3: Delete Goal

The system will return to the Modifications Details Screen.





# Scenario: Provider Initiates a Modification



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

If desired it is possible to complete additional modifications to “Goals”, “Objectives”, or “Behavior Plan, Residential Support, or Other.”

If there are multiple elements that require a modification and that are required for the same reason, it is best practice to submit a single modification that includes multiple elements rather than submit multiple modifications.

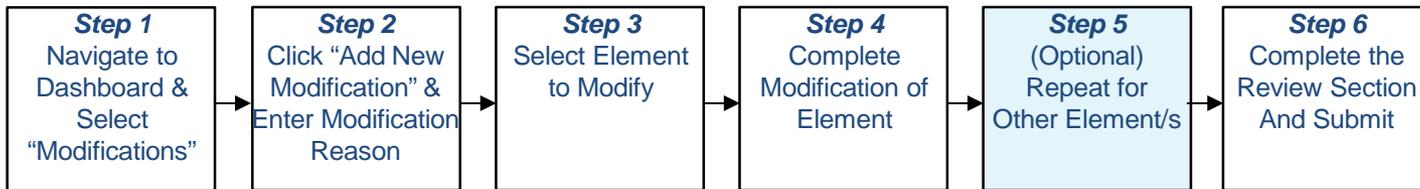
Original Entry	New Entry	Created On	Created By
No modifications for goals created.			

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

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



# Scenario: Provider Initiates a Modification



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

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

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

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

Back to Modifications Review Switchboard

### Modification Details

Expand All | Collapse All

Modification Reason: \*

There has been a change in Bruce's circumstances that requires his goals and objectives & support strategies to be updated.

Update Year ISP

#### Goals

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

Add Goal Modification View/Edit Goal Modification Delete Goal Modification

#### Objectives & Support Strategies

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

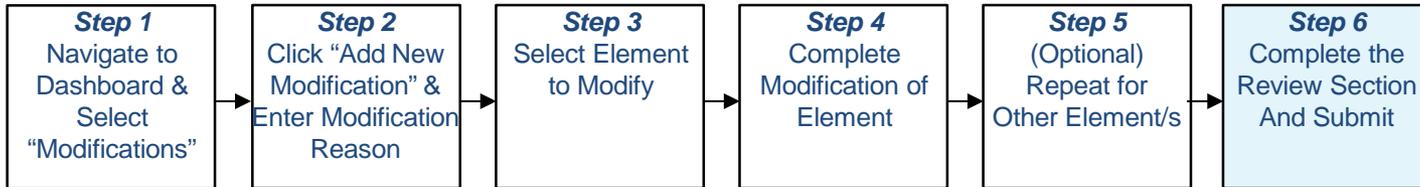
Add OSS Modification View OSS Modification

#### Residential Support / Behavior Plan / Other

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



# Scenario: Provider Initiates a Modification



## Step 6: Complete the Review Section and Submit to DDS for Review

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

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

Back to Modifications Review Dashboard

### Modification Details

Expand All | Collapse All

Update Year ISP

Modification Reason: \*

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

**Goals**

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

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

**Objectives & Support Strategies**

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

**Residential Support / Behavior Plan / Other**

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

Add Modification | View/Edit Modification | Delete Modification

**Summary**

**Review Section**

Proposed Start Date: \*

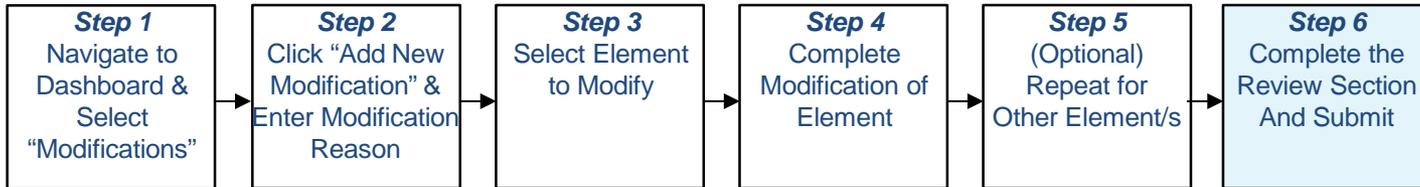
Proposed Review Date:

Spell Check | Reset | Save | Delete

Save and Continue | Submit for DDS Review



# Scenario: Provider Initiates a Modification



## Step 6: Complete the Review Section and Submit to DDS for Review

Click “Submit for DDS Review”. Alternatively, click on the “Save” or “Save and Continue” buttons to save this information so that it can be worked on at a later time.

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

Back to Modifications Review: Dashboard

### Modification Details

Expand All | Collapse All

Update Year ISP

Modification Reason: \*

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

**Goals**

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

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

**Objectives & Support Strategies**

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

Add OSS Modification | View/Edit OSS Modification | Delete OSS Modification

**Residential Support / Behavior Plan / Other**

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

Add Modification

**Summary**

**Review Section**

Proposed Start Date: \* [ ] Proposed Review Date: [ ]

Spell Check | Reset | Save | Delete | Save and Continue | **Submit for DDS Review**



# Notes and Next Steps

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## **Service Coordinator and/or Service Coordinator Supervisor**

- Once a modification has been submitted to DDS, the Service Coordinator or Service Coordinator Supervisor is responsible for reviewing the modification. They can either Disapprove, Accept, or Request Revision on the Modification.
- If the Service Coordinator or Service Coordinator Supervisor determines that the modification has been submitted in error or is not required, they will disapprove the modification. In this case, the Provider Supervisor will receive an alert indicating that it has been disapproved. No additional action is required.
- If the Service Coordinator or Service Coordinator Supervisor determines that the modification requires revision, the Provider Supervisor will receive an alert and will be responsible for revising the modification.
- If the Service Coordinator or Service Coordinator Supervisor determines that the modification is accurate, they will submit the modification for Area Office Director review. The Provider Supervisor will receive an alert indicating that the proposed modification has been accepted by DDS.



# Notes and Next Steps

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## Acceptance v. Approval

If the Service Coordinator or Service Coordinator Supervisor submits the modification for Area Office Director review, Providers will receive an alert indicating that the modification has been accepted but they still must wait for approval by the AOD.

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



# Notes and Next Steps

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## Area Office Director

- If the Area Office Director approves the modification, the status is changed to approved in the Modifications Review Switchboard and the modification can be printed without a draft watermark.
- If the Area Office Director disapproves the modification, the status is changed to disapproved in the Modifications Review Switchboard and no further action is required. The modification content, however, is not deleted and the AOD has the option of changing the status of the modification to approved or requesting revision on the form at a later date if circumstances require it.

**Once a modification for a newly added objective is submitted and approved, Progress Summaries will be triggered for the objective.**

# **Scenario: Reviewing and Revising a Modification**

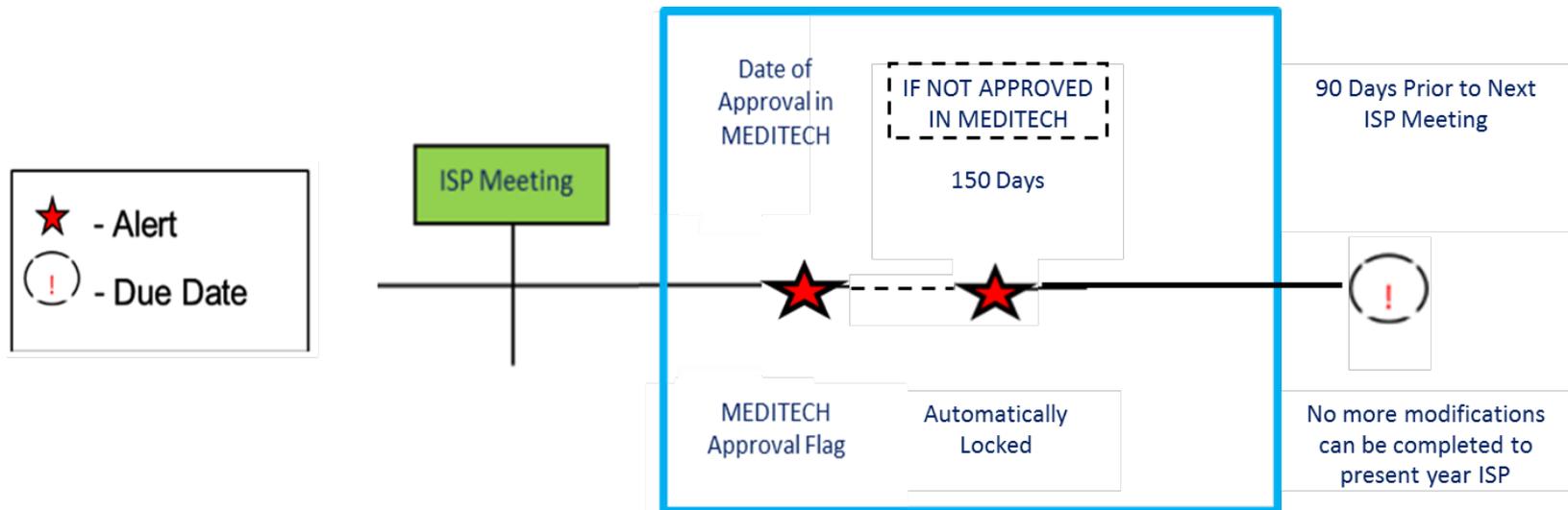


# Scenario: Revising a Modification

**Description:** Once DDS has returned a modification for revision, Providers Supervisors can revise and re-submit an Modification.

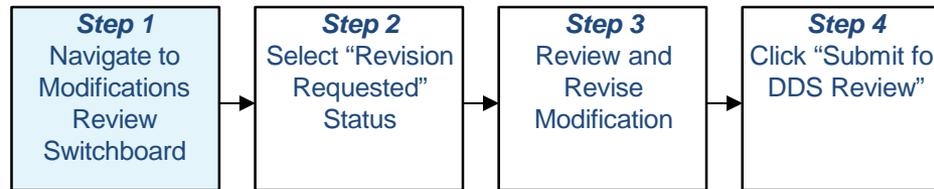
## Roles and Responsibilities:

- **Provider Data Entry User:** N/A
- **Provider Supervisor:** Revise a Modification, Submit for DDS Review





# Scenario: Revising a Modification



## Step 1: Navigate to Modifications Review Switchboard

If DDS returns a modification for revision, the Provider Supervisor will receive an alert.

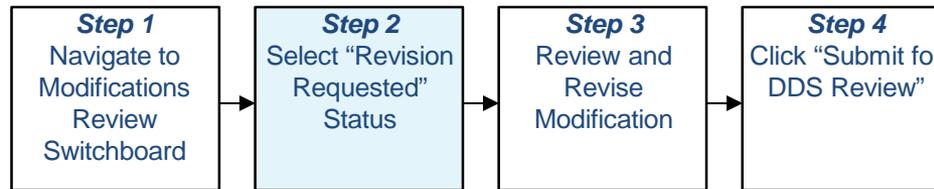
Click “Revision Requested for Proposed Modification.”

Revision requested for proposed Modification:

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	10/30/2015	Service Coordinator has requested revision of proposed modification	Revision requested for proposed Modification: Name: Test,Bruce; ISP Meeting Date: 03/04/2015
<input type="checkbox"/>	10/29/2015	A Modification has been approved for an individual	A Modification has been approved for an individual: Name: ; ISP Meeting Date: 03/04/2015
<input type="checkbox"/>	10/26/2015	Objective(s) & Support Strategy(s) Submitted for Internal Review	Objectives & Support Strategies Submitted for Internal Review: Name: ; Deadline to Submit Objective & Support Strategy to DDS: 11/22/2015; ISP Meeting Date: 12/07/2015.
<input type="checkbox"/>	10/26/2015	Service Coordinator has approved submitted proposed Objectives and Support Strategies	Proposed Objectives and Support Strategies Approved: Name: ;



# Scenario: Revising a Modification



## Step 2: Select “Revision Requested Status”

The system will navigate to the Modifications Review Switchboard and display the modification that has been returned.

Click “Revision Requested.”

Revision Requested

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

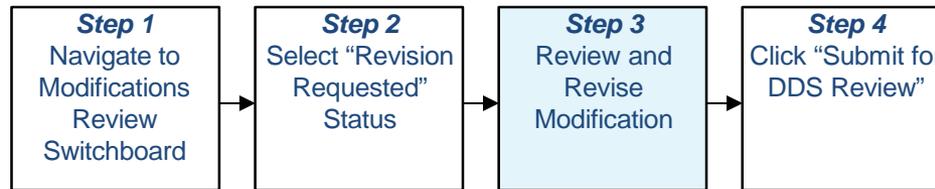
**Modifications Review Switchboard** Update Year ISP

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		<a href="#">View Document History</a>	Revision Requested

[Add New Modification](#)



# Scenario: Revising a Modification



## Step 3: Review and Revise Modification

The Modifications Details Form will display. Review the comments section to identify the requested revisions.

**Comments:**

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

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

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

Original Entry	New Entry	Modification Type	Created On	Created By
----------------	-----------	-------------------	------------	------------

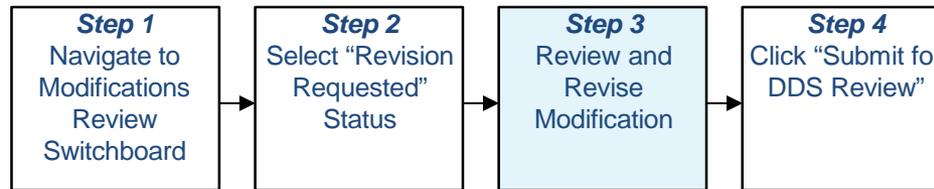
Proposed Start Date: 10/30/2015  
Proposed Review Date:   
Meeting Waived: Yes  
Date Meeting Waived: 10/28/2015

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

Buttons: Spell Check, Reset, Save, Delete, Save and Continue, Submit for DDS Review



# Scenario: Revising a Modification



## Step 3: Review and Revise Modification

Select the Radio Button for the modification element you would like to edit.

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

Back to Modifications Review Switchboard

### Modification Details

Update Year ISIP

Formal ID: 1 | Collins | 01

Modification Reason: \*

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

**Goals**

Original Entry	New Entry	Created On	Created By
<input type="radio"/> Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event, each	<input type="checkbox"/>	10/30/2015	

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

**Objectives & Support Strategies**

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

Add OSS Modification | View/Edit OSS Modification | Delete OSS Modification

**Residential Support / Behavior Plan / Other**

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

Add Modification | View/Edit Modification | Delete Modification

**Summary**

**Review Section**

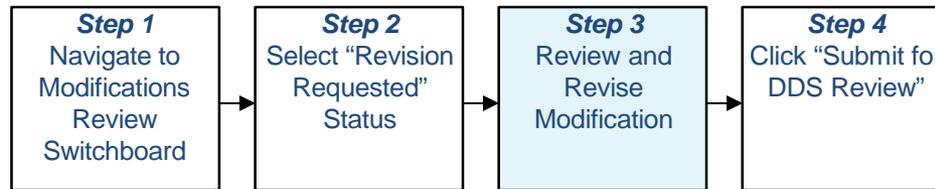
Proposed Start Date: 10/30/2015 | Proposed Review Date: | Meeting Waived: Yes | Date Meeting Waived: 10/28/2015

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

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



# Scenario: Revising a Modification



## Step 3: Review and Revise Modification

Click "View / Edit Goal Modification."

**Modification Details**

Update Year ISP

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

**Goals**

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

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

**Objectives & Support Strategies**

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

Buttons: Add OSS Modification, View/Edit OSS Modification, Delete OSS Modification

**Residential Support / Behavior Plan / Other**

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

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

**Summary**

**Review Section**

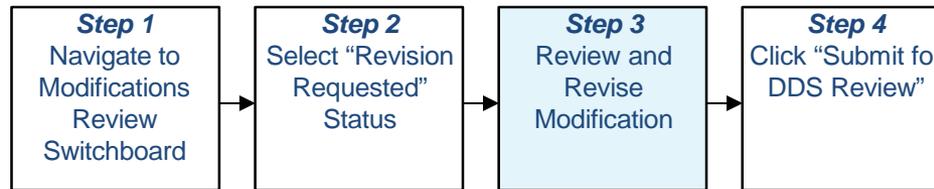
Proposed Start Date: 10/30/2015  
Proposed Review Date:   
Meeting Waived: Yes  
Date Meeting Waived: 10/28/2015

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

Buttons: Spell Check, Reset, Save, Delete, Save and Continue, Submit for DDS Review



# Scenario: Revising a Modification



## Step 3: Review and Revise Modification

The Goals pop-up screen will display. An element associated with a modification will display with two asterisks.

**Modify Goals**

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

**Goals** ⓘ **Update Year ISP**

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<b>**</b> Money Management	08/21/2014	Individual			Current
Community Involvement	08/21/2014	Individual			Current

**\*\* This element is associated to a Modification**

Goal Title:\* Money Management

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

Date Goal Identified:\* 08/21/2014

Goal Identified By:\* Individual

Update Year Status:\* Current

**Update Information**

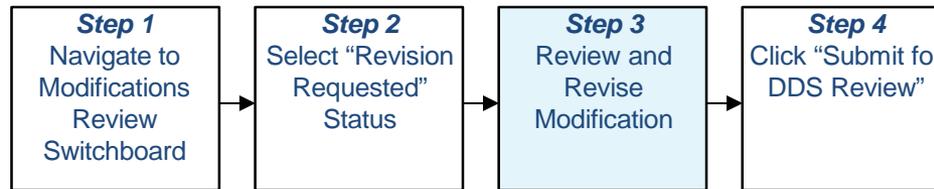
No Change

Bruce is to save for and attend events semi-annually rather than quarterly

**Modification Information**



# Scenario: Revising a Modification



## Step 3: Review and Revise Modification

Modify the goal as requested.

**Modify Goals**

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

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input checked="" type="radio"/> ** Money Management	08/21/2014				
<input type="radio"/> Community Involvement	08/21/2014				

\*\* This element is associated to a Modification

Goal Title:\* Money Management

Goal:\* Bruce will save up quarterly etc

Date Goal Identified:\* 08/21/2014

Goal Identified By:\* Individual

Update Year Status:\* Current

**Update Information**

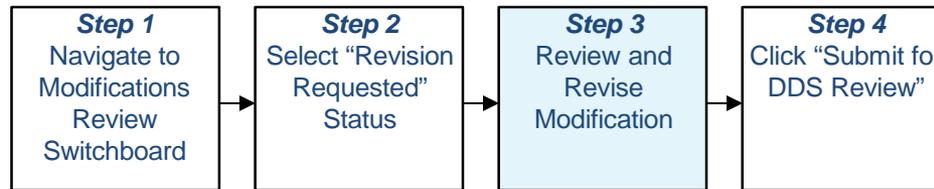
No Change

**Modification Information**

Spell Check Reset Save Save and Close



# Scenario: Revising a Modification



## Step 3: Review and Revise Modification

Click "Save and Close." The system will return to the Modifications Details screen.

**Modify Goals**

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

**Goals**

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input checked="" type="radio"/> ** Money Management	08/21/2014	Individual			Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current

\*\* This element is associated to a Modification

Goal Title:\* Money Management

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

Date Goal Identified:\* 08/21/2014

Goal Identified By:\* Individual

Update Year Status:\* Current

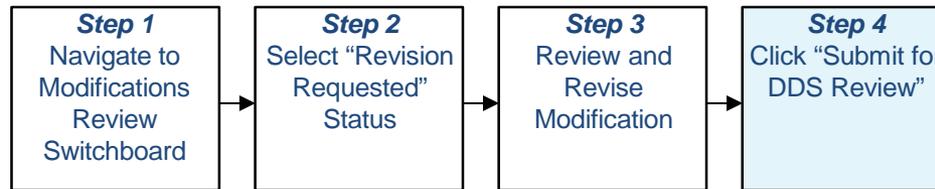
**Update Information**

No Change

**Modification Information**



# Scenario: Revising a Modification



## Step 4: Click “Submit for DDS Review”

Revise the Proposed Start Date, if desired, and then click “Submit for DDS Review.”

The screenshot shows the 'Modification Details' page. At the bottom, there is a 'Review Section' with a 'Proposed Start Date' field set to 10/30/2015. A blue box highlights the 'Submit for DDS Review' button at the bottom right of the page.



# Notes and Next Steps

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## **Service Coordinator and/or Service Coordinator Supervisor**

- Once a modification has been submitted to DDS, the Service Coordinator or Service Coordinator Supervisor are responsible for reviewing the modification. They can either Disapprove, Accept, or Request Revision on the Modification.
- If the Service Coordinator or Service Coordinator Supervisor determines that the modification is acceptable, they will submit the modification for Area Office Director review. The Area Office Director is able to approve or disapprove the modification.

## **Area Office Director**

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



## Notes and Next Steps

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- NOTE: Once a modification for a newly added objective is submitted and approved, progress summaries will be triggered for the objective.
- NOTE: All modifications for a plan need to be approved or disapproved for next years plan to open.
- NOTE: DDS Staff is capable of initiating a modification to a Goal or Residential Support Plan / Other – but not for an Objective Support Strategy. If a modification is initiated by a Service Coordinator or Service Coordinator Supervisor, the Provider Supervisor is not required to complete the form but will receive access to the form once the modification has been approved.



# Printing Modifications

- To print modifications for the current ISP, navigate to the “View / Print ISP” tab from the Individual Dashboard.
- Click on  icon on the Modification bar to expand the modification section.
- Once initiated, all Modifications will appear in the “View / Print” tab.
- Until an Area Office Director approves the modification, however, all modifications will print with a draft watermark.



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

Search Results | ISP Dashboard | Progress Summary

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

Individual Test, Bruce	Eligible SSN	Planned Meeting Date 08/30/2014	ISP Meeting Deadline 07/26/2015	Region - Metro Area Office - Greater Boston	Service Coordinator Coordinator, Service
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ISP Dashboard | ISP Meeting Details | Vision | Assessments | Goals | Objectives | Modifications | View/Print ISP

**View/Print ISP Materials** View Historical ISP Materials

Expand All | Collapse All **Full Year ISP**

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

Test (Goal) - Started 

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



# Review Process Management

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

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

Search Results  
ISP > Review Process Management

**Search Criteria**

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

Region:       Area Office:

Provider:       Security Group:

Showing 1 to 25 of 84 entries Show 25 Entries

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



## Chapter 6 Summary

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### **This Chapter covered:**

- Overview of Modifications
- Scenario: Provider Initiates a Modification
- Scenario: Reviewing and Revising Modification