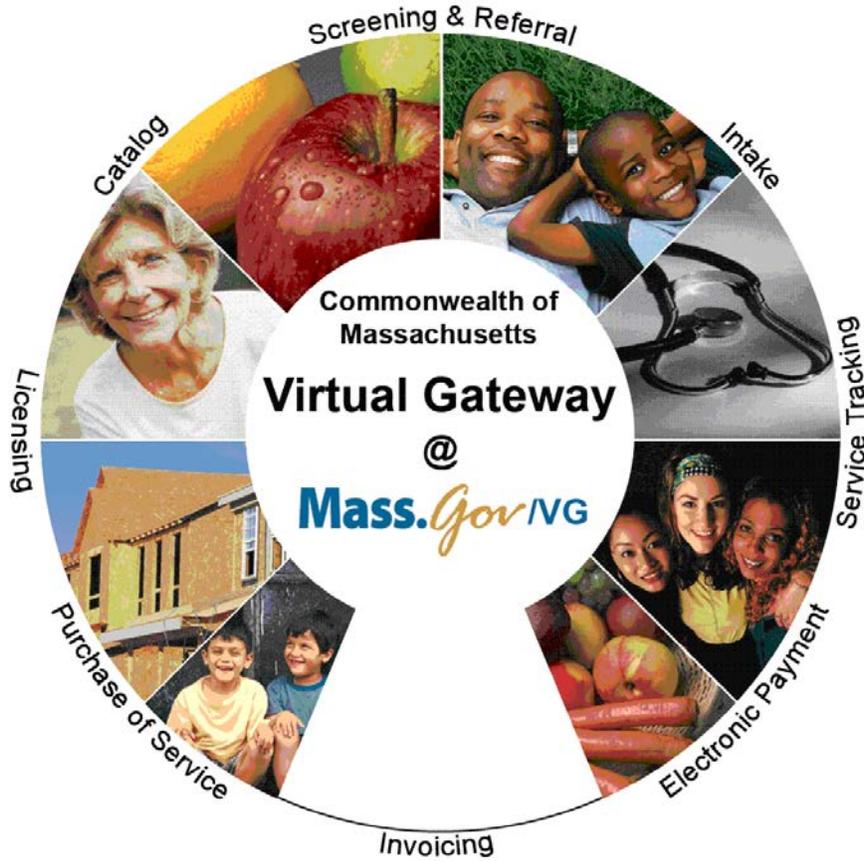


Commonwealth of Massachusetts
Executive Office of Health and Human Services

Virtual Gateway



ISP Assessments Module

User Guide

Lesson 2: Vision and Goals

HCSIS Release 7.7



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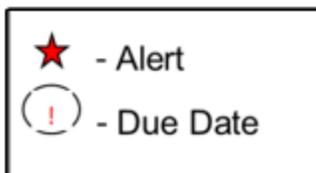
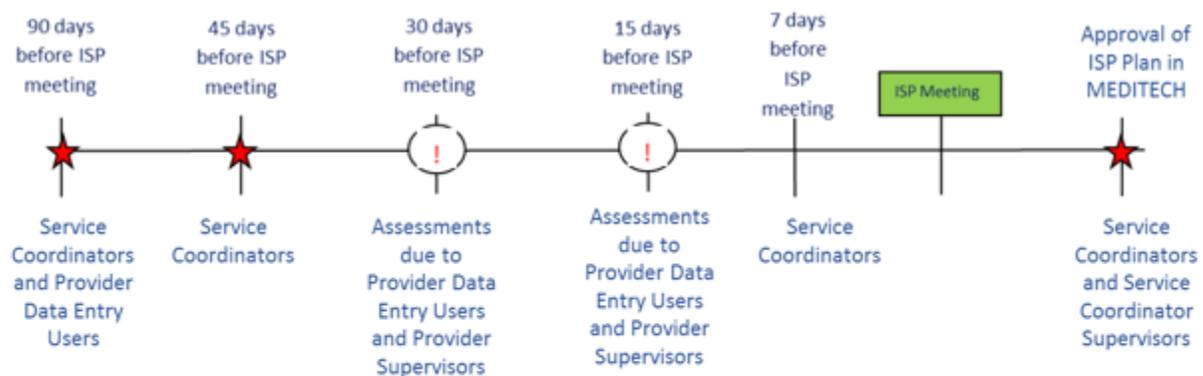
Vision Statement

Creating a Vision by DDS Staff in a Full Year

When creating a Vision in a Full Year ISP, the system will pull information from the individual's previous ISP. If the last plan created for an individual is an Update Year Plan, the system will display the Updated Information recorded in this plan in addition to the information from the previous Full Year ISP plan. Any recalled information from past plans will be editable during a Full Year. Providers will **not** be able to see the recalled information before the Vision is shared with them.

Scenario Description:

- A consultation has taken place between an individual, the individual's guardian and the Service Coordinator, during which a new Vision Statement has been developed
- The Service Coordinator creates the Vision Statement for the individual in the module



First Steps:

- Search for an individual
- View the Individual Dashboard

Roles and Responsibilities:

- **Service Coordinators:** Creates the Vision in the module and shares with Providers.
- **Service Coordinator Supervisors:** Creates the Vision in the module and shares with Providers.



Note: To prevent a loss of information for Service Coordinators and Service Coordinator Supervisors, Auto Save functionality is available when completing the Vision section. Auto Save is implemented for Vision, as well as Other ISP Components, due to the large text boxes and detailed information input into these fields. Auto Save will run after 15 minutes of inactivity. This feature saves documentation automatically to reduce the risk or impact of data loss in the event that the system logs the user out of HCSIS or the computer shuts down. Auto Saved information will be stored temporarily; upon returning to the page the user must click “Save” or “Save and Close” to permanently save the information. In the situation that the user does not want to save the recovered information the user can select “Reset” to delete the information. Auto Save does not apply for any screens other than the Other ISP Components or Vision Statement.

- 1) Select "Vision" from the ISP components table on the ISP Dashboard or select the “Vision” tab.

Component	Status	Due Date	Last Updated On
Vision	Started by DDS	11/07/2015	06/25/2015
Goals	Created	N/A	08/21/2014
Request Assessments	Not Sent	11/07/2015	-
Objectives & Support Strategies	Awaiting Submission	11/22/2015	-
Review Assessments	Pending Request	11/22/2015	-
Other ISP Components	Started	01/21/2016	06/24/2015

- 2) The module redirects the Service Coordinator to the Individual's “Vision” page.



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

Vision Full Year ISP

1. What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore?

Bruce stated that he is an artist. He loves to paint patterns and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that he and his best friend and the two of them are going on a cruise someday soon.

2. What does (s)he think someone needs to know in order to provide effective supports?

Bruce responded that he wants people to know about what he likes to do; his routine. He stated that he wants people to help him have fun. Bruce said that life is too short sometimes and he would like help finding excitement. He shared he wants to walk again someday and could use some help with that. Bruce stated that if people don't know him or have questions about him that they can ask him and he will have a meeting with them.

3. What does (s)he think are his/her strengths and abilities?

Bruce answered this question by stating, "I am an artist, a human rights person - I know a lot about those things, a good friend, and a hard worker." He also shared that he is "honest and dependable." He closed by stating that he likes people a lot.

4. What would (s)he like to see happen in his/her life over the next two years?

Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.

Persons contributed to create Vision: Bruce Test (Self)

Spell Check | Reset | Save | Share with Providers | Save & Continue



Note: Values from the past ISP are recalled along with any updates entered during the past update year and are displayed in the same text box. The character limit for all text boxes will remain the same, and recalled information will not be truncated. The user has to ensure that information does not exceed the allowed character limit in order to save changes.

- 3) Complete the Vision Statement questions with valid responses. All questions must be answered and recalled values that exceed the character limit must be edited before the user can save or share the vision with Providers.

The screenshot shows a web interface for the 'Vision' section of an ISP assessment. The top navigation bar includes: ISP Dashboard, ISP Meeting Details, Vision, Request Assessments, Review Assessments, Current Supports, Safety/Risk, Legal/Financial, Successes/Challenges, Goals, Objectives, Modifications, and View/Print ISP. The page title is 'Full Year ISP'. The main content area contains four numbered questions, each with a text box containing sample text:

- 1. What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore?**
Sample text: Bruce stated that he is an artist. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that Chuck (ATT Program Manager) is his best friend and the two of them are going on a cruise someday soon.
- 2. What does (s)he think someone needs to know in order to provide effective supports?**
Sample text: Bruce responded that he wants people to know about what he likes to do; his routine. He stated that he wants people to help him have fun. Bruce said that life is too short sometimes and he would like help finding excitement. He shared he wants to walk again someday and could use some help with that. Bruce stated that if people don't know him or have questions about him that they can ask him and he will have a meeting with them.
- 3. What does (s)he think are his/her strengths and abilities?**
Sample text: Bruce answered this question by stating, "I am an artist, a human rights person - I know a lot about those things, a good friend, and a hard worker." He also shared that he is "honest and dependable." He closed by stating that he likes people a lot.
- 4. What would (s)he like to see happen in his/her life over the next two years?**
Sample text: Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.

At the bottom, there is a field for 'Persons contributed to create Vision:' with 'Bruce Test (Self)' entered. Buttons for 'Spell Check', 'Reset', 'Save', 'Share with Providers', and 'Save & Continue' are visible.

Note: If the user tries to navigate away prior to saving the information the system will display the "Navigate Away" pop up message. In order to save the recovered information entered for this section the user should select "Remain on this Page" and click "Save" before proceeding to the completing the next action.

- 4) In the event that the user is inactive and the screen goes idle for 15 minutes, Auto Save will run. Auto save will temporarily save the information while the user is idle.

This screenshot is similar to the previous one but includes an auto-save notification banner. The banner text reads: "Information present on the screen has been auto saved on 10/30/2015 01:35:39 EST". The navigation bar and question content are identical to the previous screenshot.

Note: Any information that is entered after auto save has run, in between the 15 minutes before the auto save runs again, will not be recovered.



ISP Assessments User Guide

- At a later time, if you return to the Vision tab, the screen will load the auto-saved information and a message will display that prompts you to determine which text to retain – the auto-saved information or the previously saved information.

Individual: Test, Bruce | Eligibility #: - | SSN #: - | Planned Meeting Date: 12/07/2015 | ISP Meeting Deadline: 12/07/2015 | Region - Metro: Boston | Service Coordinator: Coordinator, Service

Information was Auto Saved on 10/27/2015 06:28:13 EST and is displayed on the screen. Click Reset to remove the auto saved information or click on Save to retain the auto saved information.

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

Vision Full Year ISP

1. What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore? ?

Bruce stated that he is an artist of sorts. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that Chuck (ATI Program Manager) is his best friend and the two of them are going on a cruise someday soon.

Note: An InfoTip displays next to the fields in which autosaved information has been loaded. Click the InfoTip to display and compare the text that was last saved by the Service Coordinator to the autosaved information.

Individual: Test, Bruce | Eligibility #: - | SSN #: - | Planned Meeting Date: 12/07/2015 | ISP Meeting Deadline: 12/07/2015 | Region - Metro: Greater Boston | Area Office - Greater Boston | Service Coordinator: Coordinator, Service

Information was Auto Saved on 10/27/2015 06:28:13 EST and is displayed on the screen. Click Reset to remove the auto saved information or click on Save to retain the auto saved information.

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

Vision Full Year ISP

1. What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore? ?

Bruce stated that he is an artist of sorts. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that Chuck (ATI Program Manager) is his best friend and the two of them are going on a cruise someday soon.

Last Saved By Coordinator, Service On 10/27/2015 6:22:57 PM

Bruce stated that he is an artist. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that Chuck (ATI Program Manager) is his best friend and the two of them are going on a cruise someday soon.

- To remove the auto saved information, click “Reset.” To retain the auto saved information and delete the manually entered information, click “Save”.

4. What would (s)he like to see happen in his/her life over the next two years? ?

Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.

Persons contributed to create Vision: Bruce Test (Self)

Spell Check | **Reset** | **Save** | Share with Providers | Save & Continue

- Click “Share with Providers” to share the Vision Statement in the module.

4. What would (s)he like to see happen in his/her life over the next two years? ?

Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.

Persons contributed to create Vision: Bruce Test (Self)

Spell Check | Reset | Save | **Share with Providers** | Save & Continue

Note: The “Share with Providers” button turns into an “Edit” button once the Vision is shared and the screen will be displayed in read only mode. To make changes, simply click “Edit”. It will be necessary to share again with providers if changes are made. Please note that Providers will not see the updates



unless the vision is re-shared with them. Also, Providers do not receive an alert when the Vision is shared or re-shared with them.

Next Steps

After the system saves the Vision Statement and makes it available to Providers, end users will be able to take the following actions:

- **Service Coordinators** can proceed to request assessments from Providers.
- **Service Coordinators and Providers** will have access to view the date on which the Vision Statement was last updated. This will be reflected on the Individual Dashboard.
- The “Edit” button will not be displayed to Providers and Provider Supervisors. However, Service Coordinators and Service Coordinator Supervisors can edit an individual’s vision by clicking on “Edit” after a Vision Statement has been shared with providers. The Vision would then need to be shared again for Providers to see those changes.

Other buttons are available on this screen. They are as follows:

- **“Save”**: The system will save the user’s work. Saved work can be accessed at a later date.
- **“Reset”**: The system will revert back to what was last saved. In the event that there are no saved data, “Reset” will clear the form.
- **“Spell Check”**: A proofreading tool that can be used prior to saving or sharing.
- **“Save & Continue”**: The system will redirect the user to the ISP Dashboard.

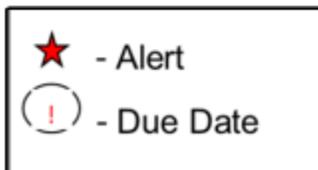
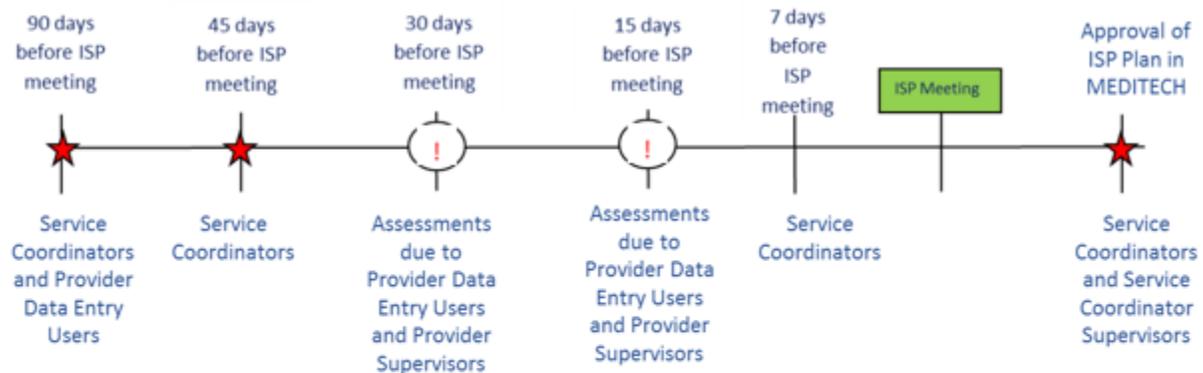


Updating a Vision by DDS Staff in an Update Year

When creating a Vision in an Update Year ISP, the system will pull information from the individual’s last ISP. The recalled information will be editable to allow users to enter any missing information from last year’s approved ISP. All updates to the original Vision must be entered using the process outlined in the below scenario. Providers will **not** be able to see the recalled information before the Vision has been shared with them.

Scenario Description:

- This scenario describes the steps required to update an individual’s Vision.



First Steps:

- Search for an individual
- View the Individual Dashboard

Roles and Responsibilities

- Service Coordinators:** Updates the Vision in the module and shares with Providers
- Service Coordinator Supervisors:** Updates the Vision in the module and shares with Providers



1) Select "Vision" from the ISP components table on the ISP Dashboard or select the "Vision" tab.

The screenshot shows the 'Health and Human Services' dashboard for 'Test, Bruce'. The 'Vision' component is highlighted with a blue box. It shows a status of 'Started by DDS' and a due date of '11/07/2015'. Other components like 'Goals', 'Request Assessments', 'Objectives & Support Strategies', 'Review Assessments', and 'Other ISP Components' are also visible with their respective statuses and due dates.

2) The module redirects the Service Coordinator to the Individual's "Vision" page.

The screenshot shows the 'Vision' page with four questions:

- What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore?

Bruce stated that he is an artist. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned that four of them are by name. He stated that they are all like a family together. Bruce went on to say that his best friend and the two of them are going on a cruise someday soon.
- What does (s)he think someone needs to know in order to provide effective supports?

Bruce responded that he wants people to know about what he likes to do; his routine. He stated that he wants people to help him have fun. Bruce said that life is too short sometimes and he would like help finding excitement. He shared he wants to walk again someday and could use some help with that. Bruce stated that if people don't know him or have questions about him that they can ask him and he will have a meeting with them.
- What does (s)he think are his/her strengths and abilities?

Bruce answered this question by stating, "I am an artist, a human rights person - I know a lot about those things, a good friend, and a hard worker." He also shared that he is "honest and dependable." He closed by stating that he likes people a lot.
- What would (s)he like to see happen in his/her life over the next two years?

Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.

 At the bottom, it shows 'Persons contributed to create Vision:' with 'Bruce Test (Self)' listed.



Note: The Vision from the last Full Year ISP plan will be displayed as editable to allow for entering missing information from last year's approved ISP. If there is no information saved in HCSIS for a specific section, the system will display the following message: "No information recorded in HCSIS for this section." In order to enter the missing information, the Service Coordinator must delete the message and then type or copy and paste the information from last year's approved ISP. Updates are entered in the designated text boxes, as outlined by the steps below.

3) Select the "Update Information" checkbox next to the sections of the Vision that require updating.

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

Vision 1 Update Year ISP

1. What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore? 1

Bruce stated that he is an artist. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that _____ is his best friend and the two of them are going on a cruise someday soon.

Update Information

2. What does (s)he think someone needs to know in order to provide effective supports? 1

Bruce responded that he wants people to know about what he likes to do; his routine. He stated that he wants people to help him have fun. Bruce said that life is too short sometimes and he would like help finding excitement. He shared he wants to walk again someday and could use some help with that. Bruce stated that if people don't know him or have questions about him that they can ask him and he will have a meeting with them.

Update Information

Note: The user may select any combination of sections to update in an update year, or may select to edit none of the sections.

3. What does (s)he think are his/her strengths and abilities? 1

Bruce answered this question by stating, "I am an artist, a human rights person - I know a lot about those things, a good friend, and a hard worker." He also shared that he is "honest and dependable." He closed by stating that he likes people a lot.

Update Information

4. What would (s)he like to see happen in his/her life over the next two years? 1

Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.

Update Information

Bruce decided that he would like to remain in his present location. He reiterated that he would like to strengthen his friendships and spend time making art.

Persons contributed to create Vision: Update Information

Spell Check | Reset | Save | Share with Providers | Save & Continue

Note:

- All Updated Information text boxes will have a 2,000 character limit.
- If information is entered in the "Updated Information" text box and the "Update Information" checkbox is unchecked, the system displays the following pop-up window: "Information entered in this text box will not be saved. Do you wish to proceed?" If the user selects "Yes", the system



unchecks the checkbox and hides the “Updated Information” text box without saving the information entered in it.

4) Select “Share With Providers.”

The screenshot shows a form with three sections, each containing a question, a text area with pre-filled text, and an 'Update Information' checkbox. The first section is for strengths and abilities, the second for future goals, and the third for contributors. At the bottom, there are buttons for 'Spell Check', 'Reset', 'Save', 'Share with Providers' (highlighted with a red box), and 'Save & Continue'.

Note: The “Share with Providers” button turns into an “Edit” button once the Vision is shared and the screen will be displayed in read only mode. To make changes, simply click “Edit”. It will be necessary to share again with providers if changes are made. Providers do not receive an alert when the Vision is shared or re-shared with them.

Note: The system populates “No Change” for all instances when no updates were entered by the Service Coordinator for a certain section.

This screenshot shows the same Vision page but in a read-only state. The 'Updated Information' sections for each question now contain a 'No Change' button (highlighted with a red box). At the bottom, the 'Share with Providers' button has been replaced by an 'Edit' button (highlighted with a red box). The top navigation bar includes 'ISP Dashboard', 'ISP Meeting Details', 'Vision', 'Request Assessments', 'Review Assessments', 'Current Supports', 'Safety/Risk', 'Legal/Financial', 'Successes/Challenges', 'Goals', 'Objectives', 'Modifications', and 'View/Print ISP'. The page title is 'Vision' and there is an 'Update Year ISP' link.



Next Steps

After the system saves the Vision Statement and makes it available to Providers, end users will be able to take the following actions:

- **Service Coordinators** should proceed to request assessments from Providers.
- **Service Coordinators and Providers** will have access to view the date on which the Vision Statement was last updated. This will be reflected on the Individual Dashboard.
- The “Edit” button will not be displayed to Service Providers and Service Provider Supervisors. However, Service Coordinators and Service Coordinator Supervisors can edit an individual’s vision by clicking on “Edit” after a Vision Statement has been shared with providers. The Vision would then need to be shared again for Providers to see those changes.

Other buttons are available on this screen. They are as follows:

- **“Save”**: The system will save the user’s work. Saved work can be accessed at a later date.
- **“Reset”**: The system will revert back to what was last saved. In the event that there are no saved data, “Reset” will clear the form.
- **“Spell Check”**: A proofreading tool that can be used prior to saving or sharing.
- **“Save & Continue”**: The system will redirect the user to the ISP Dashboard.



Viewing a Vision by Provider Staff in a Full Year

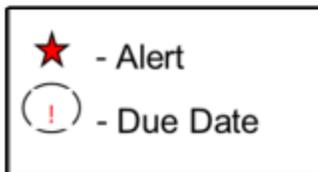
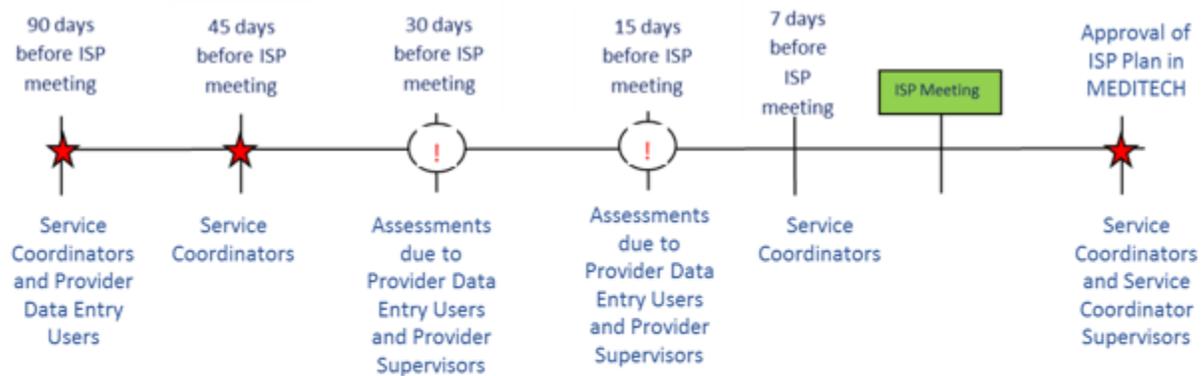
The Provider can view the Vision once the following conditions are met:

- The Service Coordinator has entered the Vision statement and clicked “Share with Providers”

When the Provider or Provider Supervisor accesses the Vision page, the screen is displayed in read-only mode.

Scenario Description:

- A consultation has taken place between an individual, the individual’s guardian and the Service Coordinator, during which a new Vision Statement has been developed and the Service Coordinator has created the Vision Statement for the individual in the module and shared with Providers.



First Steps:

- Search for an individual
- View the Individual Dashboard

Roles and Responsibilities:

- **Providers:** Views the Vision in Read-Only mode in the module
- **Provider Supervisor:** Views the Vision in Read-Only mode in the module



1) Select "Vision" from the ISP components table on the ISP Dashboard or select the "Vision" tab.

Health and Human Services

HOME | GM | 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: [REDACTED]
Eligibility: [REDACTED]

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

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

Full Year ISP

- Vision** (Status: Shared, Due Date: 11/07/2015, Last Updated On: 09/22/2015, Last Shared On: 09/22/2015)
- Goals** (Status: Created, Due Date: N/A, Last Updated On: 08/21/2014)
- Objectives & Support Strategies** (Status: Action Required, Due Date: 11/22/2015, Pending Provider Submission: 1/1, Pending DDS Review: 0/1)
- Assessments** (Status: Awaiting Request, Due Date: 11/22/2015, Pending Provider Submission: 0/0, Pending DDS Review: 0/0)

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

2) The Vision Statement will display in Read-Only mode.

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

Vision **Full Year ISP**

1. What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore?

Bruce stated that he is an artist. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that [REDACTED] is his best friend and the two of them are going on a cruise someday soon.

2. What does (s)he think someone needs to know in order to provide effective supports?

Bruce responded that he wants people to know about what he likes to do; his routine. He stated that he wants people to help him have fun. Bruce said that life is too short sometimes and he would like help finding excitement. He shared he wants to walk again someday and could use some help with that. Bruce stated that if people don't know him or have questions about him that they can ask him and he will have a meeting with them.

3. What does (s)he think are his/her strengths and abilities?

Bruce answered this question by stating, "I am an artist, a human rights person - I know a lot about those things, a good friend, and a hard worker." He also shared that he is "honest and dependable." He closed by stating that he likes people a lot.

4. What would (s)he like to see happen in his/her life over the next two years?

Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.

Persons contributed to create Vision: Bruce Test (Self)

Continue

Next Steps

After the Providers view the shared Vision, they can continue working on an Individual's plan by completing any of the following actions:

- **Providers and Provider Supervisors** can use the Vision Statement as a reference tool when completing assessments requested by the Service Coordinator, recording Goals, Objectives or Support Strategies.

Other buttons are available on this screen. They are as follows:



- **“Continue”**: The system redirect the user to individual Dashboard



Viewing a Vision by Provider Staff in an Update Year

The Provider can view the Vision once the following conditions are met:

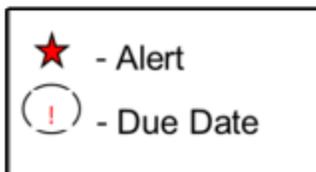
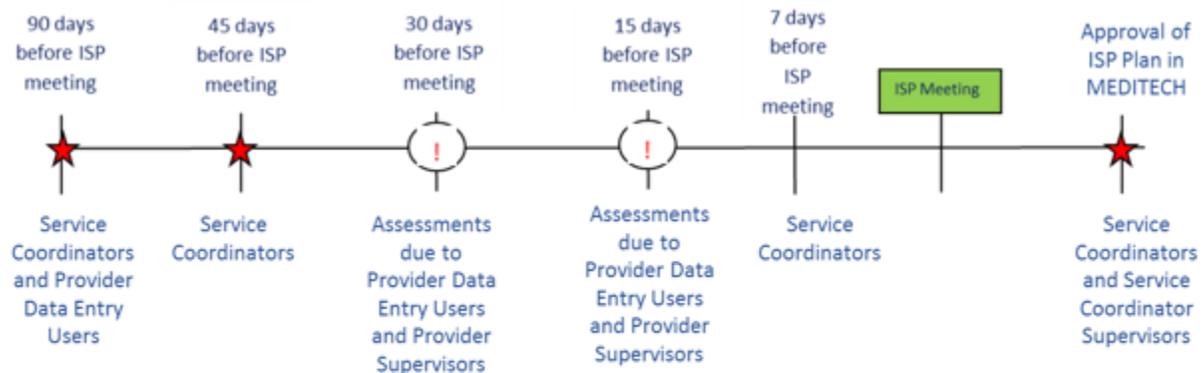
- The Service Coordinator has entered the Vision statement and clicked “Share with Providers.”

When the Provider or Provider Supervisor accesses the Vision page, the screen is displayed in Read-Only mode. On an update year, the Vision from last year’s ISP will be displayed along with any updates entered by the Service Coordinator or Service Coordinator Supervisor.

Scenario Description:

- A consultation has taken place between an individual, the individual’s guardian and the Service Coordinator, during which a new Vision Statement has been developed and the Service Coordinator has created the Vision Statement for the individual in the module and shared with Providers.

Note: The Provider user will not be able to view the Vision answers if the Vision is “Started by DDS.” If the Provider user accesses the Vision screen when the Vision is “Started by DDS,” the following error message will be displayed, “The individual’s Vision is locked for editing. Please contact the Service Coordinator for details.”



First Steps:

- Search for an individual
- View the Individual Dashboard

Roles and Responsibilities:

- **Providers:** Views the Vision in Read-Only mode in the module
- **Provider Supervisor:** Views the Vision in Read-Only mode in the module

1) Select "Vision" from the ISP components table on the ISP Dashboard or select the “Vision” tab.



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: [Redacted]
Eligibility: [Redacted]

ISP Meeting Details
Planned Meeting Date: 08/30/2014
Meeting Time: 10:00 AM
Meeting Location: [Redacted]
Actual Meeting Date: 06/03/2014

ISP Deadlines
Meeting Deadline: 07/26/2015
Semi Annual Review Date: 11/30/2014
Next ISP Meeting Deadline: 06/03/2015

Full Year ISP

Vision
Status: Shared
Due Date: 07/31/2014
Last Updated On: 06/25/2015
Last Shared On: 06/25/2015

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

Objectives & Support Strategies
Status: Approved
Due Date: 08/15/2014
Pending Provider Submission: 0/2
Pending DDS Review: 0/2

Assessments
Status: Action Required (Overdue)
Due Date: 08/15/2014
Pending Provider Submission: 3/3
Pending DDS Review: 0/3

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

2) View the original Vision Statement along with all updates in Read-Only mode.

Note: All updates entered by the Service Coordinator are displayed under last year's ISP information and are labeled as "Updated Information". If the Service Coordinator has not updated a certain question, the text that reads "No Change" will be displayed.

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

Vision Update Year ISP

1. What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore?

Bruce stated that he is an artist. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that the two of them are going on a cruise someday soon.

Updated Information:
No Change

2. What does (s)he think someone needs to know in order to provide effective supports?

Bruce responded that he wants people to know about what he likes to do; his routine. He stated that he wants people to help him have fun. Bruce said that life is too short sometimes and he would like help finding excitement. He shared he wants to walk again someday and could use some help with that. Bruce stated that if people don't know him or have questions about him that they can ask him and he will have a meeting with them.

Updated Information:
No Change

3. What does (s)he think are his/her strengths and abilities?

Bruce answered this question by stating, "I am an artist, a human rights person - I know a lot about those things, a good friend, and a hard worker." He also shared that he is "honest and dependable." He closed by stating that he likes people a lot.

Updated Information:
No Change

4. What would (s)he like to see happen in his/her life over the next two years?

Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.

Updated Information:
Bruce decided that he would like to remain in his present location. He reiterated that he would like to strengthen his friendships and spend time making art.

Persons contributed to create Vision: Bruce Test (Self)

Updated Information:
No Change

Continue

Next Steps

After the Providers view the shared Vision, they can continue working on an Individual's plan by completing any of the following actions:

- **Providers and Provider Supervisors** can refer to the Vision Statement when completing



assessments requested by the Service Coordinator, recording Goals, Objectives or Support Strategies.

Other buttons are available on this screen. They are as follows:

- **“Continue”**: The system redirects the user to the individual dashboard



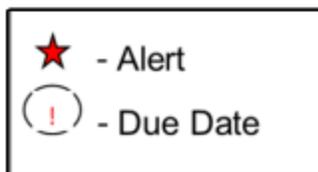
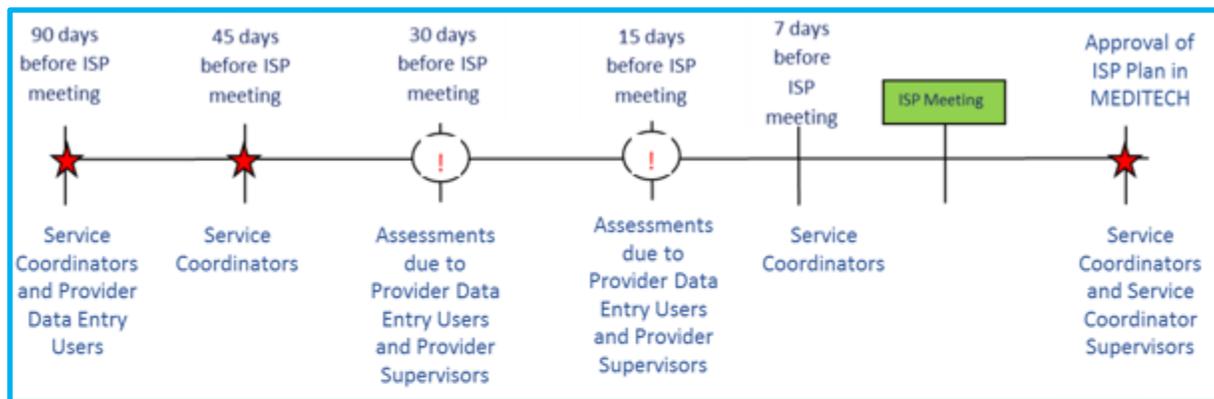
Goals for DDS Staff

Creating a Goal in a Full or Update Year

Scenario Description

Service Coordinators and Service Coordinator Supervisors can create a Goal in the module starting at 90 days before the ISP meeting, once the plan selection has been made. Goals can be created as long as the ISP plan remains unlocked.

Note: For demonstration purposes, the scenario will show the Goals form in an Update Year, and any differences present in a Full Year will be noted.



First Steps

- Search for an Individual
- View the Individual Dashboard

Roles and Responsibilities

- **Service Coordinators:** Create Goals
- **Service Coordinator Supervisors:** Create Goals



1) Select "Goals" from the ISP components on the Individual Dashboard or menu tabs.

The screenshot shows the 'Health and Human Services' dashboard for user 'Test, Bruce'. The 'Goals' tab is highlighted in the top navigation bar. Below the navigation, there are several sections: 'Demographic Information', 'ISP Meeting Details' (with a meeting on 12/07/2015), and 'ISP Deadlines'. A central 'Update Year ISP' button is present. Below these are six cards representing different components: Vision, Goals (highlighted with a blue border), Request Assessments, Objectives & Support Strategies, Review Assessments, and Other ISP Components. A legend at the bottom indicates status icons: black for 'No action needed', yellow for 'Action needed', green for 'Section complete', and red for 'Section overdue'.

The system will display the Goals screen with a blank Goals form where a new Goal can be entered:

The screenshot shows the 'Goals' screen with a table of existing goals and a form to add a new goal. The table has columns for Goal Title, Date Identified, Identified By, Created By, Updated By, Included in ISP Doc?, and Update Year Status. Below the table are buttons for 'View/Edit Goal', 'Delete Goal', and 'Add Goal'. The 'Add Goal' form is highlighted with a blue border and includes fields for 'Goal Title', 'Goal', 'Date Goal Identified', 'Goal Identified By', and 'Update Year Status'. At the bottom of the form are 'Spell Check', 'Reset', 'Save', and 'Save & Continue' buttons.

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

Note: If already viewing an existing Goal, clicking on "Add Goal" will provide the Goals form and allow the user to enter a new Goal.

2) Complete mandatory fields. The Goal fields must be completed with accurate information in order to proceed.



ISP Assessments User Guide

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

Goals **Update Year ISP**

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

View/Edit Goal | Delete Goal | Add Goal

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Spell Check | Reset | Save Save & Continue

Note: The “Update Year Status” will be present only for an Update Year ISP. In a Full year, the Goals form will look similar with the exception of the “Update Year Status” field, which will not be displayed.

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

Goals **Update Year ISP**

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

View/Edit Goal | Delete Goal | Add Goal

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Spell Check | Reset | Save Save & Continue

3) Verify and/or change the “Update Year Status” for the Goal. This will be defaulted to “New” and will be editable.

Note: This step is applicable to **Update Year only**. There will be no “Update Year Status” when creating a Goal in a Full Year.

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Spell Check | Reset | Save Save & Continue

Note: Please see the table below for more information on Update Year Status.



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

4) After completing the Goals form, click “Save” to save the Goal in the module.

The screenshot shows a form with fields for 'Date Goal Identified' (09/09/2015), 'Goal Identified By' (Guardian), and 'Update Year Status' (New). At the bottom, there are buttons for 'Spell Check', 'Reset', 'Save', and 'Save & Continue'. The 'Save' button is highlighted with a red box.

Other buttons are available on this screen. They are as follows:

- **“Save & Continue”**: The system will redirect the user to the ISP Dashboard.
- **“Reset”**: The system will revert back to what was last saved. In the event that there is no saved data, “Reset” will clear the form.
- **“Spell Check”**: A proofreading tool that can be used prior to saving or sharing.

5) After saving the Goal, the system will update the Goals Summary table with the information saved by the user. The system will also display a message reading “Operation Successful.”

The screenshot shows a 'Goals' summary table with columns: Goal Title, Date Identified, Identified By, Created By, Updated By, Included in ISP Doc?, and Update Year Status. Below the table are buttons for 'View/Edit Goal', 'Delete Goal', and 'Add Goal'. At the bottom, there is a form with fields for 'Goal Title', 'Goal', 'Date Goal Identified', 'Goal Identified By', and 'Update Year Status', along with 'Spell Check', 'Reset', 'Save', and 'Save & Continue' buttons. A blue box highlights the 'Operation Successful.' message at the top of the page.



Note: The “Included in ISP Document?” column is visible only to DDS staff and will display a dash prior to the ISP Meeting. For more information on this column, please refer to the *Post ISP Meeting Activities* quick guide posted on the References page.

Next Steps

- The system will update the Goals Summary table with the information.
- **Service Coordinators and Service Coordinator Supervisors** can view and edit Goals submitted by themselves as well as those submitted by Providers.



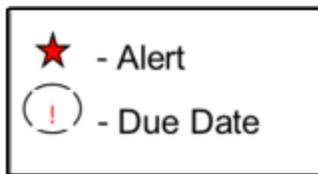
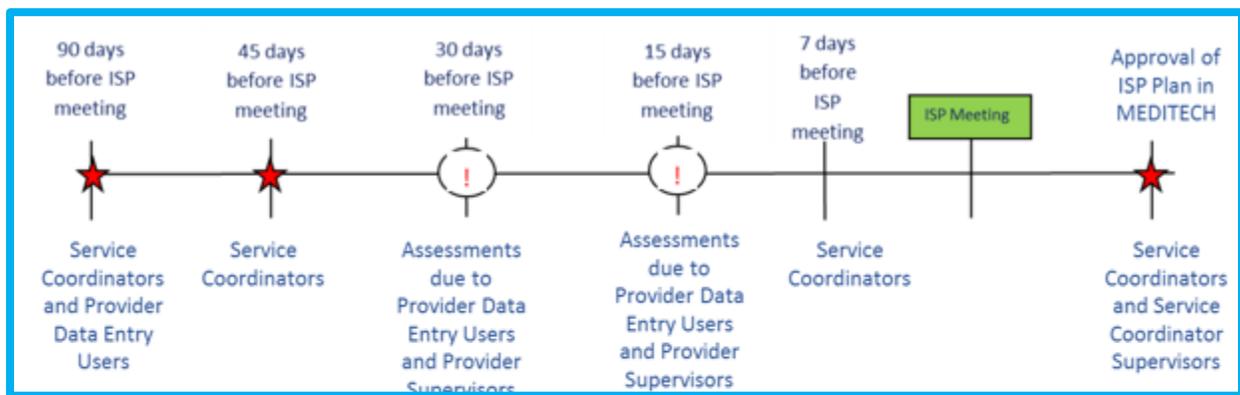
Editing a Goal in a Full Year

Scenario Description

Service Coordinators and Service Coordinator Supervisors can edit an existing Goal in the module in a Full Year ISP once the plan has been created and Goals have been recalled, or new Goals have been created in the Full Year.

Recalled Information

- All Goals from the previous year’s Full or Update ISP will be recalled into a Full Year ISP. All fields will be in editable mode.
- If there is no Full Year ISP saved in HCSIS for the individual, the system will display the following message: “No information recorded in HCSIS for this section.”



First Steps

- Search for the Individual
- View the Individual Dashboard

Roles and Responsibilities

- **Service Coordinators:** Edit a Goal created by the Area Office or any Provider agency
- **Service Coordinator Supervisors:** Edit a Goal created by the Area Office or any Provider agency



- 1) Select "Goals" from the ISP Dashboard or select "Goals" tab. The system redirects the user to the individual's Goals page.

- 2) Select a Goal to edit by clicking the corresponding radio button and then selecting "View/Edit Goal."

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

Note: The "Included in ISP Document?" column is visible only to DDS staff and will display a dash prior to the ISP Meeting. For more information on this column, please see *Post ISP Meeting Activities*.

- 3) The system populates the text boxes with previously saved information for that Goal. All of the text boxes can now be edited.



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

Goals Full Year ISP

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

View/Edit Goal | Delete Goal | Add Goal

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Changes Approved By Provider: *

Person Contacted to Approve Change: *

Spell Check | Reset | Save Save & Continue

If the selected Goal is created by a Provider instead of the Service Coordinator, the Service Coordinator will see two additional fields on the bottom of the screen when viewing/editing the Goal:

Date Goal Identified: *

Goal Identified By: *

Changes Approved By Provider: *

Person Contacted to Approve Change: *

Spell Check | Reset | Save Save & Continue

4) To finish editing a Goal, select "Save."

Date Goal Identified: *

Goal Identified By: *

Changes Approved By Provider: *

Person Contacted to Approve Change: *

Spell Check | Reset | Save Save & Continue

Note: Other buttons are available on this screen. They are as follows:

- **"Save & Continue"**: The system will redirect the user to the ISP Dashboard.
- **"Reset"**: The system will revert back to what was last saved. In the event that there are no saved data, "Reset" will clear the form.
- **"Spell Check"**: A proofreading tool that can be used prior to saving or sharing.

After saving the Goal, the system will update the Goal Summary table with the information saved by the user. The system will also display a message reading "Operation Successful."

Operation Successful

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

Goals Full Year ISP

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

Next Steps



- The system will save the changes made to the Goal and redirect the user to the ISP Dashboard.
- **Service Coordinators, Service Coordinator Supervisors** can create additional Goals or edit Goals that have been previously submitted.



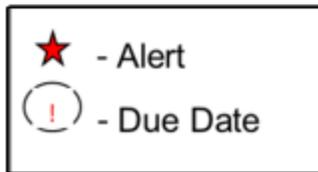
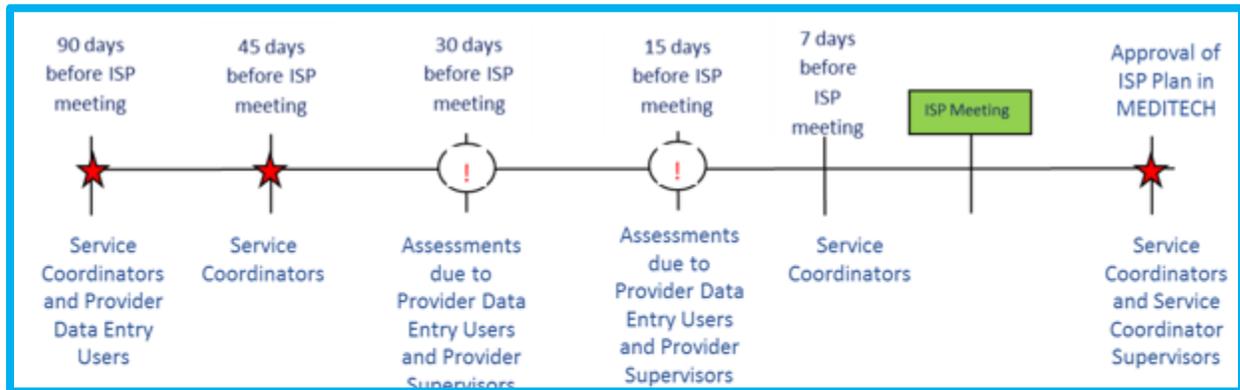
Updating a Recalled Goal in an Update Year

Scenario Description

Service Coordinators and Service Coordinator Supervisors can update a recalled Goal in the module in an Update Year once the Update Year plan has been created, and if there was a Goal in the previous Full Year ISP plan that was recalled.

Recalled Information

- All Goals from the previous year’s full ISP will be recalled into an Update Year ISP. The fields will not be editable.



First Steps

- Search for an individual
- View the Individual Dashboard

Roles and Responsibilities

- **Service Coordinators:** Update a Goal created by the Area Office or any Provider agency
- **Service Coordinator Supervisors:** Update a Goal created by the Area Office or any Provider agency

- 1) Select “Goals” from the ISP Dashboard or select the “Goals’ tab. The system redirects the user to the individual’s Goals page.



Health and Human Services Mass.gov

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Individual Search | Review Process Management | Reports | References
 Search Results | ISP Dashboard | Progress Summary
 ISP > Individual Search > ISP Dashboard

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

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston **Test, Bruce**
View/Print ISP Document **Service Coordinator:** Coordinator, Service

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

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

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

Update Year ISP

Vision
 Status: Shared
 Due Date: 11/07/2015
 Last Updated On: 09/23/2015
 Last Shared On: 09/23/2015

Goals
 Status: Created
 Due Date: N/A
 Last Updated On: 09/23/2015

Request Assessments
 Status: Sent
 Due Date: 11/07/2015
 Notification Last Sent On: 09/23/2015
 Last Updated On: 09/25/2015

Objectives & Support Strategies
 Status: Action Required
 Due Date: 11/22/2015
 Pending Provider Submission: 2/4
 Pending DDS Review: 2/4

Review Assessments
 Status: Awaiting Submission
 Due Date: 11/22/2015
 Pending Provider Submission: 2/4
 Pending DDS Review: 0/4

Other ISP Components
 Status: Started
 Due Date: 01/21/2016
 Current Support Last Updated On: 06/24/2015
 Safety & Risk Last Updated On: 09/23/2015
 Legal Status Last Updated On: 09/23/2015
 Successes & Challenges Last Updated On: 06/24/2015

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

User ID: EPEN

- 2) Select a recalled Goal to update by clicking the corresponding radio button and then selecting "View/Edit Goal."

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

Goals **Update Year ISP**

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

View/Edit Goal | Delete Goal | Add Goal

Goal Title:*

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:*

Spell Check | Reset | Save Save & Continue

Note: The system returns the recalled Goal in read-only mode with an "Updated Information" check box and Goal Status dropdown that are editable.



ISP Assessments User Guide

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

Goals Update Year ISP

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

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

- 3) Select the Update Information checkbox. Enter updates for the Goal in the Updated Information text box that appears.

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

Goals Update Year ISP

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

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

Bruce will expand his money management capabilities to include the ability to independently manage his expenses.

Note: One Updated Information checkbox will appear for each recalled Goal and will be displayed at the end of the form. This field will NOT appear for new Goals added as part of an update year.

Note: The Updated Information text box will have a 2,000 character limit.

- 4) Select a status for the Goal from the Update Year status dropdown.

Changes Approved By Provider:* -
Person Contacted to Approve Change:* -
Update Year Status:*

Current
Discontinued
Met
New
Updated

Bruce will expand his money management capabilities to include the ability to independently manage his expenses.



Note: This field is mandatory for all Goals pulled forward from a previous full year ISP plan. The dropdown value will have the following options: Met, Discontinued, Current, Updated, and New. The Goals status is pre-populated to “Current” for all recalled Goals and will be editable.

Note: Please see the table below for more information on Update Year Status.

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

5) To finish updating a Goal, select “Save”.

The screenshot shows the 'Goals' update interface. At the top, there are navigation tabs: ISP Dashboard, ISP Meeting Details, Vision, Request Assessments, Review Assessments, Current Supports, Safety/Risk, Legal/Financial, Successes/Challenges, Goals, Objectives, Modifications, and View/Print ISP. The main heading is 'Goals' with a sub-heading 'Update Year ISP'. Below this is a table with the following data:

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

Below the table are buttons: View/Edit Goal, Delete Goal, Add Goal. The form fields are as follows:

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

At the bottom, there are buttons: Spell Check, Reset, Save (highlighted with a blue box), and Save & Continue. There is also a checkbox for 'Update Information' which is checked.

Note: Other buttons are available on this screen. They are as follows:

- **“Save & Continue”**: The system will redirect the user to the ISP Dashboard.
- **“Reset”**: The system will revert back to what was last saved. In the event that there are no saved data, “Reset” will clear the form.
- **“Spell Check”**: A proofreading tool that can be used prior to saving or sharing.



- 6) After saving the Goal, the system will update the Goal Summary table with the information saved by the user. The system will also display a message reading “Operation Successful.”

Operation Successful.

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

Next Steps

- The system will save the changes made to the Goal and display a cleared Goals form.
- **Service Coordinators and Service Coordinator Supervisors** will be able to create additional Goals or update Goals that they have previously submitted.



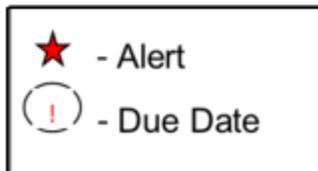
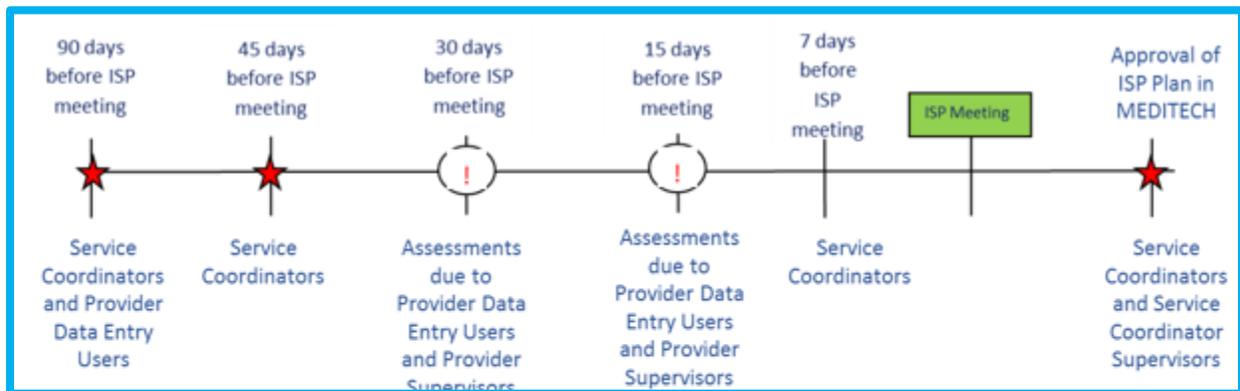
Deleting a Goal in a Full or Update Year

Scenario Description

Service Coordinators, Service Coordinator Supervisors and Area Office Directors can delete a Goal in both a Full Year and Update Year ISP, given the following restrictions:

- A recalled Goal **cannot** be deleted during an Update Year. Only new Goals added during the Update Year can be deleted.
- A Goal cannot be deleted if there are any Objectives and Support Strategies associated to the Goal. The associated Objectives and Support Strategies must be deleted prior to deleting the Goal.
- A Service Coordinator may delete Goals created by the DDS staff or the Provider agency.

Note: For demonstration purposes, the scenario will show the Goals form in an Update Year, and any differences present in a Full Year will be noted.



First Steps

- Search for an Individual
- View the Individual Dashboard

Roles and Responsibilities

- **Service Coordinators:** Delete Goals created by SC or any Provider agency
- **Service Coordinator Supervisors:** Delete Goals created by SC or any Provider agency



1) Select “Goals” from the ISP Dashboard or select “Goals” tab.

2) Select a Goal to delete by clicking the radio button that corresponds to the Goal.

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			-	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			-	Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			-	Current
<input checked="" type="radio"/> Community Membership	09/09/2015	Guardian	Coordinator, Service	Coordinator, Service	-	-

3) Click on “Delete Goal”.



ISP Assessments User Guide

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

Goals 1 Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			-	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			-	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			-	Current
<input checked="" type="radio"/> Community Membership	09/09/2015	Guardian	Coordinator, Service	Coordinator, Service	-	-

Goal Title:*

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:*

Note: It is recommended that all users click “View/Edit Goal” to view Goal content before proceeding to delete the Goal.

4) The system will display a confirmation pop-up screen:

Goals 1 Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			-	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			-	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			-	Current
<input checked="" type="radio"/> Community Membership	09/09/2015	Guardian			-	-

Confirmation Message

Are you sure you want to delete this Goal?

5) Click “Yes.”

Goals 1 Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			-	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			-	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			-	Current
<input checked="" type="radio"/> Community Membership	09/09/2015	Guardian			-	-

Confirmation Message

Are you sure you want to delete this Goal?

6) After clicking “Yes”, the system will delete the Goal and update the Goal Summary table with the information saved by the user. The system will also display a message reading “Operation Successful.”



Operation Successful.

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

Goals Update Year ISP

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

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Note: If the Goal that the user is trying to delete has any associated Objectives and Support Strategies, then the user will be prompted to delete the associated Objectives and Support Strategies before deleting the Goal.

Next Steps

The system will update the Goal Summary table to reflect the changes made by the user.

- **Service Coordinators and Service Coordinator Supervisors** can create new and edit existing Goals



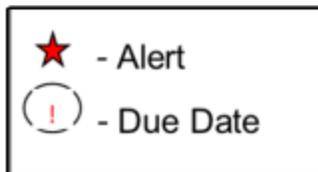
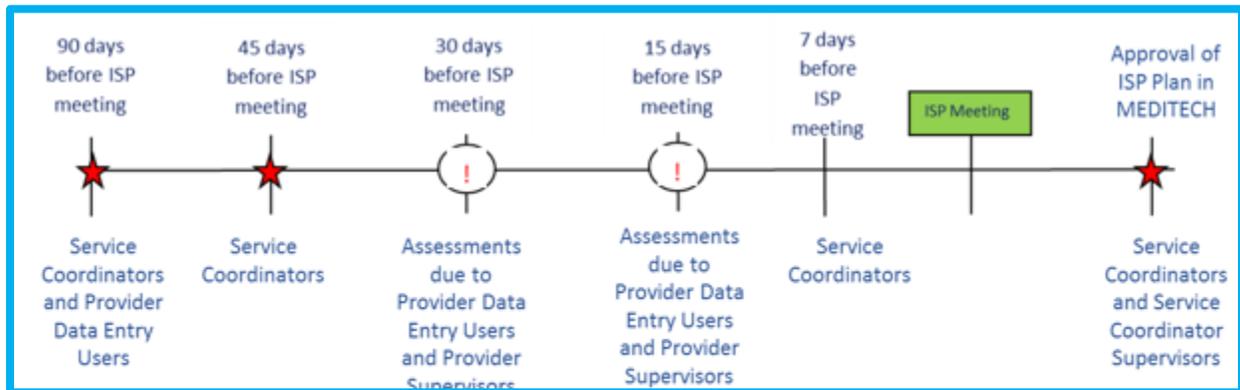
Goals for Provider Staff

Creating a Goal in a Full or Update Year

Scenario Description

Providers and Provider Supervisors can create a Goal in the module once the SC user has made the ISP year selection. Goals can be created as long as the ISP plan remains unlocked. It is not necessary for the Vision to be shared by the Service Coordinator in order to start work on creating Goals.

Note: For demonstration purposes, the scenario will show the Goals form in an Update Year, and any differences present in a Full Year will be noted.



First Steps

- Search for an Individual
- View the Individual Dashboard

Roles and Responsibilities

- **Providers:** Create Goals
- **Provider Supervisors:** Create Goals

The below steps are completed by either a Data Entry User or a Provider Supervisor.



- 1) Select “Goals” from the ISP components on the Individual Dashboard or select “Goals” tab.

The screenshot shows the 'Health and Human Services' Individual Dashboard. The 'Goals' tab is selected and highlighted with a blue box. The dashboard includes a navigation menu at the top with options like HOME, QM, PAM, TSP, ADMIN, and TOOLS. Below the navigation, there are links for Individual Search, Review Process Management, Reports, and ISP Data Extracts. The main content area features a user profile for 'Test, Bruce', a 'Service Coordinator' role, and various information cards for Vision, Objectives & Support Strategies, Assessments, and Goals. The 'Goals' card is highlighted with a blue box, showing its status as 'Created' and a due date of 'N/A'. A legend at the bottom indicates that a green dot represents a 'Section complete'.

- 2) Complete mandatory fields. The Goal fields must be completed with accurate information in order to proceed.

The screenshot displays the 'Goals' form. At the top, there is a table of existing goals with columns for Goal Title, Date Identified, Identified By, Created By, Updated By, and Update Year Status. Below the table, there are buttons for 'View/Edit Goal', 'Delete Goal', and 'Add Goal'. The 'Add Goal' form is highlighted with a blue box and includes the following fields:

- 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: * 09/09/2015
- Goal Identified By: * Provider
- Update Year Status: * New

 At the bottom of the form, there are buttons for 'Spell Check', 'Reset', 'Save', and 'Save & Continue'.

- 3) Verify and/or change the “Update Year Status” for the Goal. This will be defaulted to “New” and will be editable.

This close-up screenshot shows the 'Update Year Status' dropdown menu. The dropdown is open, displaying the following options: Current, Discontinued, Met, New, and Updated. The 'New' option is highlighted with a blue box. Below the dropdown, there are buttons for 'Spell Check', 'Reset', 'Save', and 'Save & Continue'.

Note: This step is applicable to **Update Year only**. There will be no “Update Year Status” when creating a Goal in a Full Year.



Note: Please see the table below for more information on Update Year Status.

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

4) After completing the Goals form, click “Save” to save the Goal in the module.

Note: Other buttons are available on this screen. They are as follows:

- **“Save & Continue”**: The system will redirect the user to the ISP Dashboard.
- **“Reset”**: The system will revert back to what was last saved. In the event that there are no saved data, “Reset” will clear the form.
- **“Spell Check”**: A proofreading tool that can be used prior to saving or sharing.

5) After saving the Goal, the system will update the Goal Summary table with the information saved by the user. The system will also display a message reading “Operation Successful.”



Operation Successful.

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

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			Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			Current
<input type="radio"/> Community Membership	09/09/2015	Provider			New

Goal Title:*

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:*

Next Steps

- **Providers and Provider Supervisors** can view and edit Goals created by their own Provider Agency
- **Providers and Provider Supervisors** can view Goals created by any user
- **Provider and Provider Supervisors** can associate an Objective to any previously created Goal (also for Goals created by Service Coordinators or by Providers from Other Agencies)



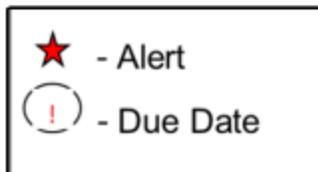
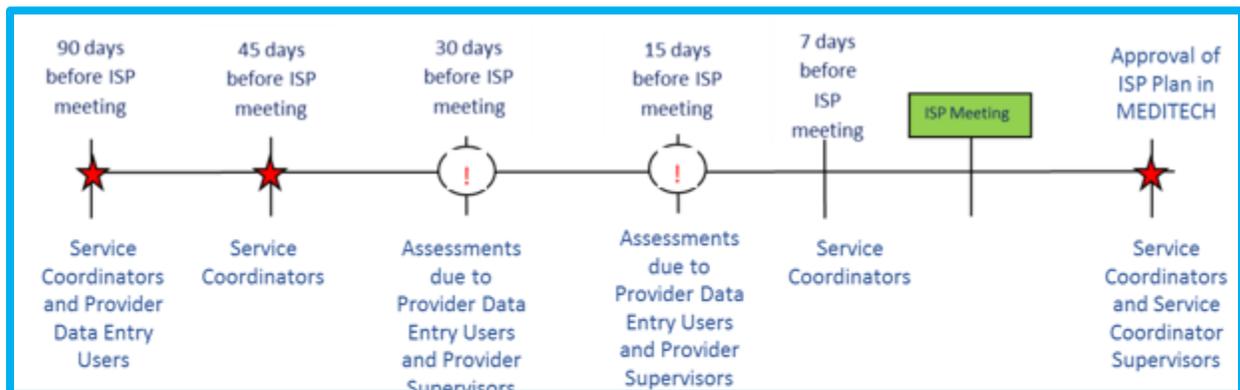
Editing a Goal in a Full Year

Scenario Description

Providers and Provider Supervisors can edit an existing Goal in the module in a Full Year ISP once the plan has been created and Goals have been recalled, or new Goals have been created in the Full Year.

Recalled Information

- All Goals from the previous year's full or Update ISP will be recalled into a Full Year ISP. All fields will be in editable mode.
- If there is no Full Year ISP plan saved in HCSIS for the individual, the system will display the following message: "No information recorded in HCSIS for this section."



First Steps:

- Search for the Individual
- View the Individual Dashboard

Roles and Responsibilities:

- **Providers:** Edit a Goal created by his/her own agency
- **Provider Supervisors:** Edit a Goal created by his/her own agency

The below steps are completed by either a Data Entry User or a Provider Supervisor.



1) Select “Goals” from the ISP Dashboard. The system redirects the user to the individual’s Goals page.

The screenshot shows the 'Goals' page for Bruce Test. The top navigation bar includes 'ISP Dashboard', 'ISP Meeting Details', 'Vision', 'Assessments', 'Goals' (highlighted), 'Objectives', 'Modifications', and 'View/Print ISP'. Below the navigation, there's a header section with 'Region/Area Office: Metro/Greater Boston', 'Test, Bruce', and 'Service Coordinator: Coordinator, Service'. A 'Demographic Information' section shows SSN and Eligibility. 'ISP Meeting Details' include 'Planned Meeting Date: 12/07/2015' and 'Meeting Time: 10:00 AM'. 'ISP Deadlines' show 'Meeting Deadline: 12/07/2015', 'Semi Annual Review Date: 06/04/2016', and 'Next ISP Meeting Deadline: 12/06/2016'. The main content area has four cards: 'Vision' (Status: Shared, Due Date: 11/07/2015), 'Goals' (Status: Created, Due Date: N/A, highlighted with a blue box), 'Objectives & Support Strategies' (Status: Action Required, Due Date: 11/22/2015), and 'Assessments' (Status: Action Required, Due Date: 11/22/2015). A legend at the bottom indicates: ● No action needed ● Action needed ● Section complete ● Section overdue.

2) Select a Goal to edit by clicking the corresponding radio button and then selecting “View/Edit Goal.”

The screenshot shows the 'Goals' page with a table of goals. The 'Money Management' goal is selected with a radio button. The table has columns: Goal Title, Date Identified, Identified By, Created By, and Updated By. Below the table, there are buttons for 'View/Edit Goal', 'Delete Goal', and 'Add Goal'. The 'View/Edit Goal' button is highlighted with a blue box. Below the buttons, there is a form with fields for 'Goal Title:*', 'Goal:*', 'Date Goal Identified:*', and 'Goal Identified By:*'. At the bottom, there are buttons for 'Spell Check', 'Reset', 'Save', and 'Save & Continue'.

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

The system populates the text boxes with previously saved information for that Goal. All of the text boxes can now be edited.

3) Make necessary changes to the Goal. If the Goal needs to be deleted, please refer to the section on deleting Goals.



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

Goals Full Year ISP

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

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

4) To finish editing a Goal, select “Save”.

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

Goals Full Year ISP

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

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Note: Other buttons are available on this screen. They are as follows:

- **“Save & Continue”**: The system will redirect the user to the ISP Dashboard.
- **“Reset”**: The system will revert back to what was last saved. In the event that there are no saved data, “Reset” will clear the form.
- **“Spell Check”**: A proofreading tool that can be used prior to saving or sharing.

5) After saving the Goal, the system will update the Goal Summary table with the information saved by the user. The system will also display a message reading “Operation Successful.”



Operation Successful.

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

Goals Full Year ISP

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

View/Edit Goal | Delete Goal | Add Goal

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Spell Check | Reset | Save Save & Continue

Next Steps

- **Providers and Provider Supervisors** can create Objectives and Support Strategies associated to Goals that have been created in the module, as well as create additional Goals.
- **Providers and Provider Supervisors** can create additional Goals or edit Goals that have been previously submitted by the same agency.



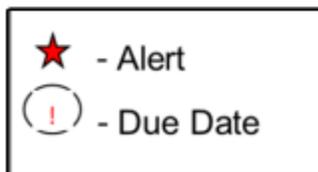
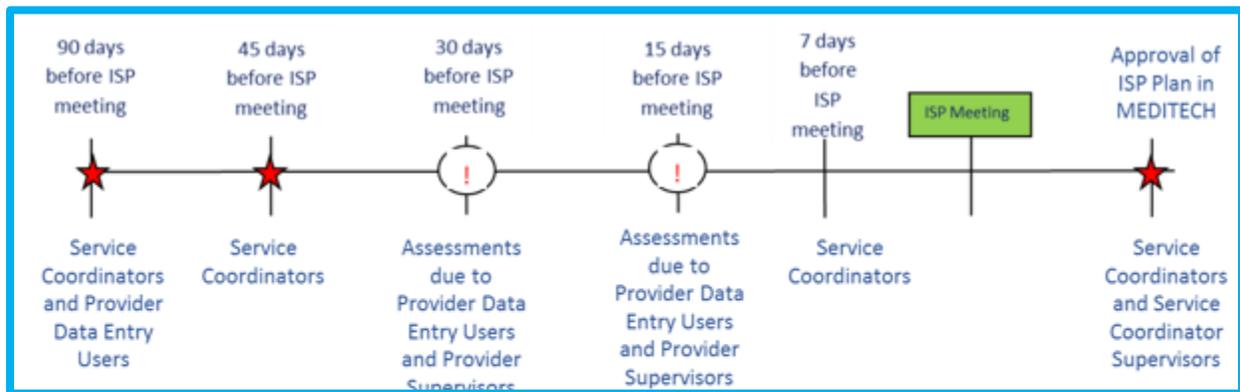
Updating a Recalled Goal in an Update Year

Scenario Description

Providers and Provider Supervisors can update a recalled Goal in the module in an Update Year once the Update Year plan has been created, and if there was a Goal in the previous Full Year ISP plan created by the same agency that was recalled.

Recalled Information

- All Goals from the previous year’s full ISP will be recalled into an Update Year ISP. The fields will not be editable.



First Steps

- Search for an individual
- View the Individual Dashboard

Roles and Responsibilities

- **Provider Data Entry User:** Update a Goal created by the same Provider agency
- **Provider Supervisor:** Update a Goal created by the same Provider agency

The below steps are completed by either a Data Entry User or a Provider Supervisor.

- 1) Select “Goals” from the ISP Dashboard or select “Goals” tab. The system redirects the user to the individual’s Goals page.



Health and Human Services Mass.gov

HOME | QM | PAM | ISP | ADMIN | TOOLS Mass.Gov Home

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: [REDACTED]
 Eligibility: [REDACTED]

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

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

Update Year ISP

Vision

Status: Shared
 Due Date: 11/07/2015
 Last Updated On: 09/23/2015
 Last Shared On: 09/23/2015

Goals

Status: Created
 Due Date: N/A
 Last Updated On: 09/28/2015

Objectives & Support Strategies

Status: Action Required
 Due Date: 11/22/2015
 Pending Provider Submission: 2/2
 Pending DDS Review: 0/2

Assessments

Status: Action Required
 Due Date: 11/22/2015
 Pending Provider Submission: 2/3
 Pending DDS Review: 0/3

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

- 2) Select a recalled Goal to update by clicking the corresponding radio button and then selecting "View/Edit Goal."

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

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	[REDACTED]	[REDACTED]	Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual	[REDACTED]	[REDACTED]	Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider	[REDACTED]	[REDACTED]	Current

View/Edit Goal | Delete Goal | Add Goal

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Spell Check | Reset | Save Save & Continue

Note: The system returns the recalled Goal in read-only mode with an "Updated Information" check box and Update Year Status dropdown that are editable.



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

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			Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			Current

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

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

[Spell Check](#) [Reset](#) [Save](#) [Save & Continue](#)

3) Select the Update Information checkbox. Enter updates for the Goal in the Updated Information text box that appears.

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

Goals Update Year ISP

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

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

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

Bruce will expand his money management capabilities to include the ability to independently manage his expenses.

[Spell Check](#) [Reset](#) [Save](#) [Save & Continue](#)

Note: One Updated Information checkbox will appear for each recalled Goal and will be displayed at the end of the form. This field will NOT appear for new Goals added as part of an update year.

Note: The Updated Information text box will have a 2,000 character limit.

4) Select a status for the Goal from the Update Year status dropdown.

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:*
 Goal Identified By:*
 Update Year Status:* Updated Update Information

Note: This field is mandatory for all Goals pulled forward from a past full year ISP plan. The dropdown value will have the following options: Met, Discontinued, Current, Updated, and New. The Goals status is pre-populated to "Current" for all recalled Goals and will be editable.

Note: Please see the table below for more information on Update Year Status.



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

6) To finish updating a Goal, click “Save”.

The screenshot shows a web form for updating a goal. The form fields are as follows:

- 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: Updated (dropdown menu)
- Update Information:
- Goal Description: Bruce will expand his money management capabilities to include the ability to independently manage his expenses.

At the bottom of the form, there are four buttons: "Spell Check", "Reset", "Save" (highlighted with a red box), and "Save & Continue".

Note: Other buttons are available on this screen. They are as follows:

- **“Save & Continue”**: The system will redirect the user to the ISP Dashboard.
- **“Reset”**: The system will revert back to what was last saved. In the event that there are no saved data, “Reset” will clear the form.
- **“Spell Check”**: A proofreading tool that can be used prior to saving or sharing.

7) After saving the Goal, the system will update the Goal Summary table with the information saved by the user. The system will also display a message reading “Operation Successful.”



Operation Successful.

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

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			Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			Current

Goal Title:*

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:*

Next Steps

- **Providers and Provider Supervisors** will be able to create additional Goals or update Goals that they have previously submitted



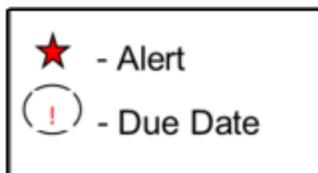
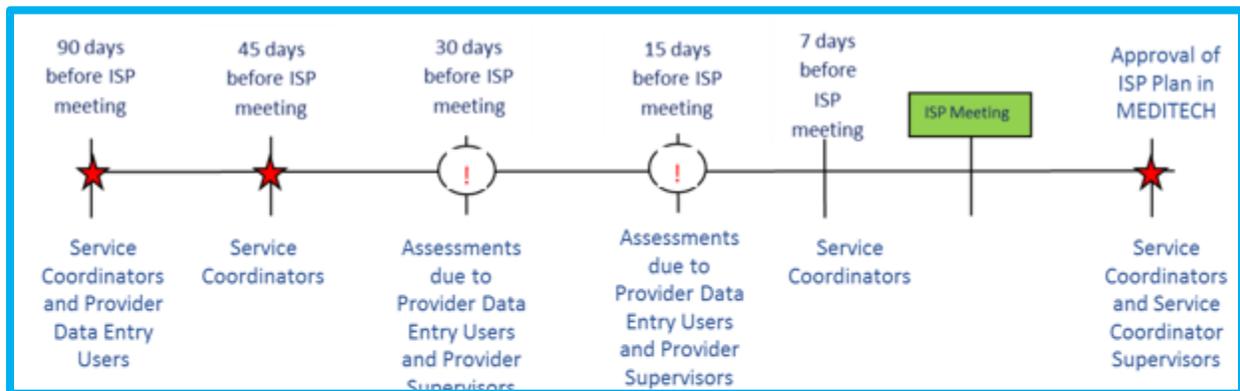
Deleting a Goal in a Full or Update Year

Scenario Description

Providers and Provider Supervisors can delete a Goal in both a Full Year and Update Year ISP, given the following restrictions:

- A recalled Goal cannot be deleted during an Update Year. Only new Goals added during the Update Year can be deleted.
- A Goal cannot be deleted if there are any Objectives and Support Strategies associated to the Goal. The associated Objectives and Support Strategies must be deleted prior to deleting the Goal.
- A Provider user may delete Goals created by the same Provider agency.

Note: For demonstration purposes, the scenario will show the Goals form in an Update Year, and any differences present in a Full Year will be noted.



First Steps

- Search for an Individual
- View the Individual Dashboard

Roles and Responsibilities

- **Providers:** Delete Goals created by his/her Agency
- **Provider Supervisors:** Delete Goals created by his/her own agency



The below steps are completed by either a Data Entry User or a Provider Supervisor.

- 1) Select “Goals” from the ISP Dashboard or select “Goals” tab.

The screenshot shows the 'Health and Human Services' dashboard. The 'Goals' tab is highlighted in blue in the top navigation bar. Below the navigation, there is a header section with 'Region/Area Office: Metro/Greater Boston', a user profile for 'Test, Bruce', and 'Service Coordinator: Coordinator, Service'. The main content area is titled 'Update Year ISP' and contains four status cards: 'Vision' (Status: Shared), 'Goals' (Status: Created, highlighted with a blue box), 'Objectives & Support Strategies' (Status: Awaiting Approval), and 'Assessments' (Status: Approved). A legend at the bottom indicates: No action needed (black dot), Action needed (yellow dot), Section complete (green dot), and Section overdue (red dot).

- 2) Select a Goal to delete by clicking the radio button that corresponds to the Goal.

The screenshot shows the 'Goals' tab interface. At the top, there is a table of goals with columns: Goal Title, Date Identified, Identified By, Created By, Updated By, and Update Year Status. The 'Community Membership' goal is selected with a radio button. Below the table are buttons for 'View/Edit Goal', 'Delete Goal', and 'Add Goal'. Below these buttons are input fields for 'Goal Title', 'Goal', 'Date Goal Identified', 'Goal Identified By', and 'Update Year Status'. At the bottom, there are 'Spell Check', 'Reset', 'Save', and 'Save & Continue' buttons.

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			Current
<input checked="" type="radio"/> Community Membership	09/09/2015	Provider			New

Note: The “Update Year Status” column is displayed only on Update Year.

- 3) Click on “Delete Goal” button.



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

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			Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			Current
<input checked="" type="radio"/> Community Membership	09/09/2015	Provider			New

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

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Spell Check | Reset | Save Save & Continue

Note: It is recommended that all users click “View/Edit Goal” to view Goal content before proceeding to delete the Goal.

4) The system will display a confirmation pop-up screen.

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			Current
<input checked="" type="radio"/> Community Membership	09/09/2015	Provider			New

Goal Title: * Community Membership

By February 2016, Bruce will have participated in two activities per quarter and one activity per quarter.

Confirmation Message

Are you sure you want to delete this Goal?

Yes No

5) Click “Yes”.

Goal Title	Date Identified	Identified By	Created By	Updated By	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input type="radio"/> Personal Growth & Accomplishments--	08/18/2014	Provider			Current
<input checked="" type="radio"/> Community Membership	09/09/2015	Provider			New

Goal Title: * Community Membership

By February 2016, Bruce will have participated in two activities per quarter and one activity per quarter.

Confirmation Message

Are you sure you want to delete this Goal?

Yes No

Note: If the Goal that the user is trying to delete has an associated Objectives and Support Strategy, then the user will be prompted to delete the associated Objectives and Support Strategy before deleting the Goal.

Note: Other buttons are available on this screen. They are as follows:

- **“Save & Continue”**: The system will redirect the user to the ISP Dashboard.
- **“Reset”**: The system will revert back to what was last saved. In the event that there are no saved data, “Reset” will clear the form.
- **“Spell Check”**: A proofreading tool that can be used prior to saving or sharing.

6) After clicking “Yes”, the system will delete the Goal and update the Goal Summary table with the information saved by the user. The system will also display a message reading “Operation



Successful.”

Operation Successful.

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

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			Updated
<input type="radio"/> Community Involvement	08/21/2014	Individual			Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			Current

View/Edit Goal | Delete Goal | Add Goal

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Spell Check | Reset | Save Save & Continue

Next Steps

- **Providers and Provider Supervisors** will be able to create new and edit existing Goals created by their agency.