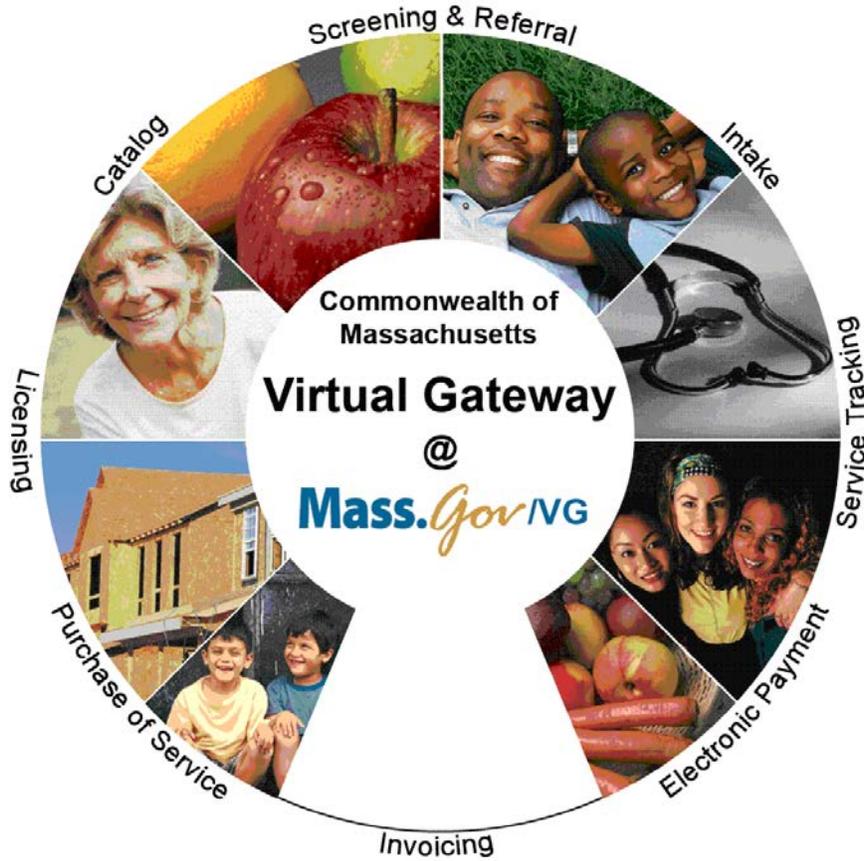


Commonwealth of Massachusetts  
Executive Office of Health and Human Services

---

Virtual Gateway



ISP Assessments Module

User Guide

Lesson 5: Other ISP Components and Post-ISP Meeting Activities

HCSIS Release 7.7



**Contents**

Other ISP Components ..... 2  
    Completing Other ISP Components by DDS Staff in a Full Year..... 3  
    Updating Other ISP Components by DDS Staff in an Update Year.....21  
Post ISP Meeting Activities .....31  
    Post ISP Meeting Activities Overview .....33  
    Selecting Objectives to Include in the ISP Document by DDS Staff in Full or Update Year  
    .....34



## Other ISP Components

To complete the full ISP Document in HCSIS, Service Coordinators and Service Coordinator Supervisors will be responsible for completing the four additional sections of the ISP document in the module. These include the following:

- Current Supports
- Safety and Risk
- Legal/Benefit/Financial Status
- Successes and Challenges

### Clipboard Functionality

The Clipboard functionality is available to reduce the amount of time it takes for Service Coordinators and Service Coordinator Supervisors to complete the Additional ISP Components. The Clipboard, which is available for the Current Supports, Safety and Risk, and Legal/Benefit/Financial Status screens, will pull relevant information from requested assessments that the Service Coordinator can utilize to complete sections of the ISP Components. The content of the Clipboard will change based on the section of the ISP that the Service Coordinator or Service Coordinator Supervisor is working on. The clipboard content will draw from the various sources outlined in the table below. The user will also be able to access select assessments and utilize information from them. The links to assessments listed below will be active only if the assessments are in a status the Service Coordinator has access to.

ISP Component	Source for Clipboard Content	Links to Assessments Available for
Current Supports	Health Care Record and Health & Dental Assessments	Safety, Financial, and Health & Dental Assessments
Safety and Risk	N/A – No information is pulled	Safety Assessments
Financial/ Legal/ Benefit Status	N/A – No information is pulled	Financial Assessments
Successes and Challenges	N/A – No information is pulled	N/A – No links to assessments

**Note:** The source for clipboard content includes current assessments from the most recent ISP plan. No historical records of assessments are available in the clipboard. This is true for both a Full Year and Update Year.

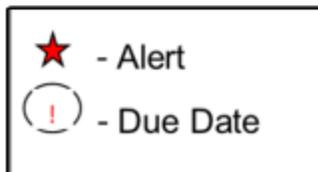
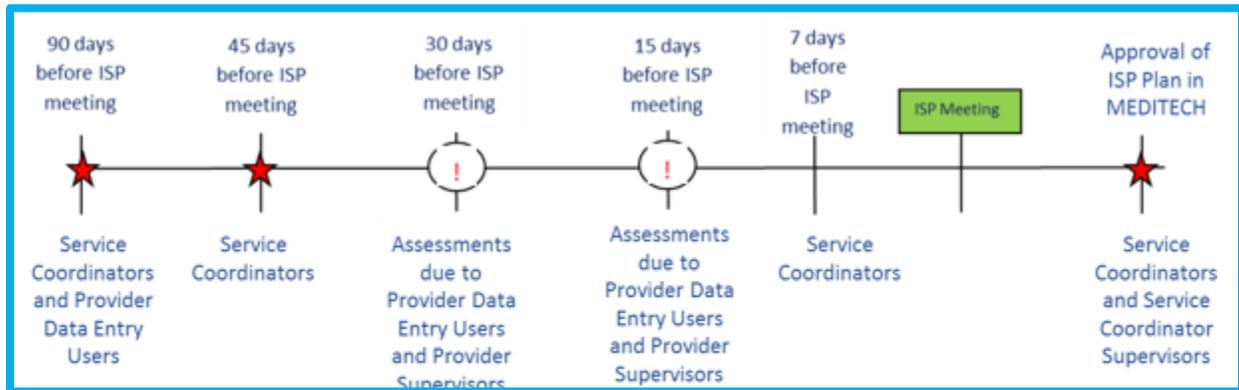
**Note:** To prevent a loss of information for Service Coordinators and Service Coordinator Supervisors, Auto Save functionality is available when completing the Other ISP Components sections. Auto Save is implemented Other ISP Components, as well as for Vision, due to the large text boxes and detailed 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.



## Completing Other ISP Components by DDS Staff in a Full Year

### Scenario Description

The Service Coordinator or Service Coordinator Supervisor is responsible for completing the four additional sections within the ISP module in order for the full ISP to be completed in HCSIS. The components can be completed beginning after the ISP Plan Selection is made.



### First Steps:

- The user searches for an individual
- The user views the Individual Dashboard

### Roles and Responsibilities:

- **Service Coordinators:** Can create, edit, and save content
- **Service Coordinator Supervisors:** Can create, edit, and save content

### Part I: Completing Current Supports

- 1) Click the "Other ISP Components" from the Individual's Dashboard or click on the "Current Supports" tab.



**Health and Human Services** | Mass.gov

HOME | QM | PAM | ISP | ADMIN | TOOLS

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

**Full Year ISP**

- Vision** (Section complete): Status: Shared, Due Date: 11/07/2015, Last Updated On: 09/22/2015, Last Shared On: 09/22/2015
- Goals** (Section complete): Status: Created, Due Date: N/A, Last Updated On: 08/21/2014
- Request Assessments** (Action needed): Status: Not Sent, Due Date: 11/07/2015, Notification Last Sent On: -, Last Updated On: -
- Objectives & Support Strategies** (No action needed): Status: Awaiting Submission, Due Date: 11/22/2015, Pending Provider Submission: 3/3, Pending DDS Review: 0/3
- Review Assessments** (No action needed): Status: Pending Request, Due Date: 11/22/2015, Pending Provider Submission: 0/0, Pending DDS Review: 0/0
- Other ISP Components** (Action needed): Status: Started, Due Date: 01/21/2016, Current Support Last Updated On: 06/24/2015, Safety & Risk Last Updated On: 06/24/2015, Legal Status Last Updated On: 02/20/2015, Successes & Challenges Last Updated On: 06/24/2015

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

The module redirects the Service Coordinator to the Individual's "Current Supports" page.

- Expand the clipboard for Current Supports. The clipboard contains links to the Safety, Financial, and Health and Dental Assessments. Click the PDF icon to open the desired Assessment in a pop-up window.

HOME | QM | PAM | ISP | ADMIN | TOOLS

Individual Search | Review Process Management | Reports | References

Search Results | ISP Dashboard | Progress Summary

ISP > Individual Search > ISP Dashboard > Current Supports

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

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

**Current Supports (Services, Settings, and People)** | Full Year ISP

Expand All | Collapse All

**Home/Community:** Bruce lives at [redacted] he shares the home with three other residents. Bruce has his own bedroom and is independent in his self-care skills. Bruce helps with chores around the house. He is able to do simple cooking tasks. He'd like to expand his skills by planning and cooking a full meal. Bruce self-medicates two of his medications with staff monitoring and is working on developing the skills to be fully independent.

**Employment/Day:** No information recorded in HCISIS for this section.

**Health and Dental:** No information recorded in HCISIS for this section.

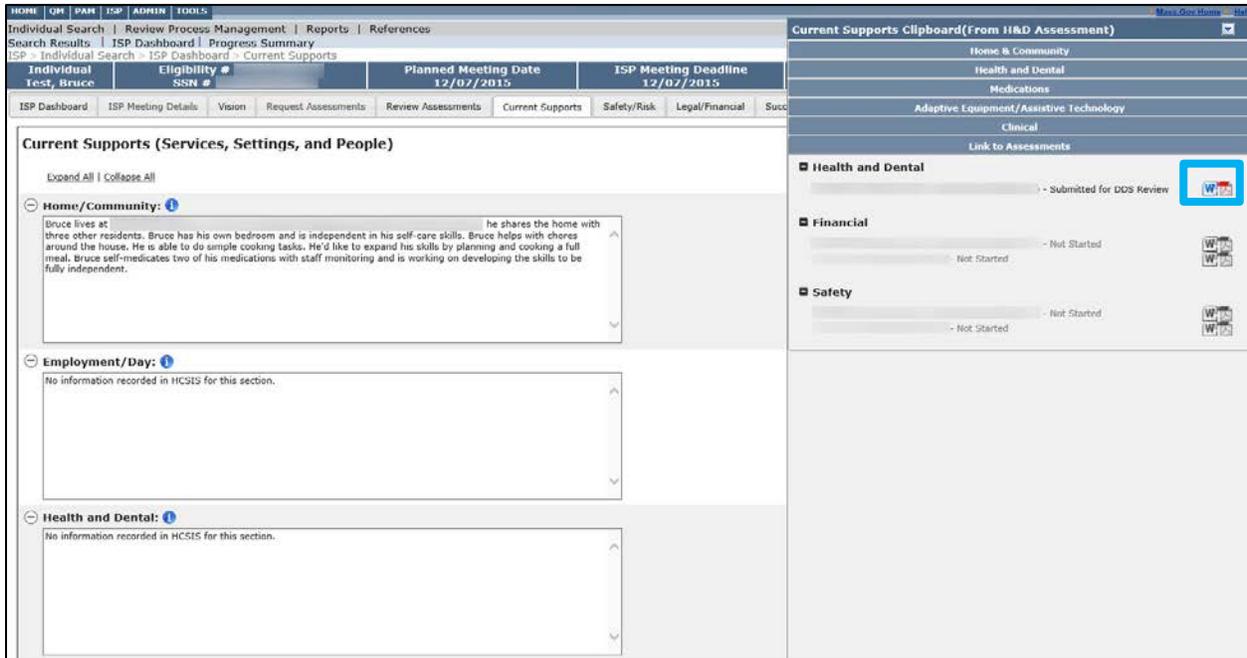
**Medications:**

Current Supports Clipboard(From H&D Assessment)

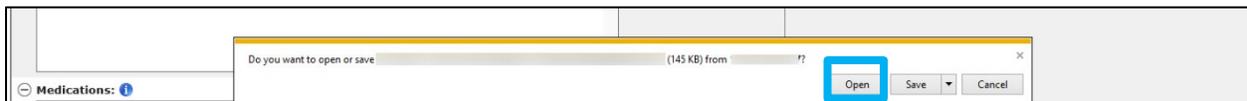
**Note:** Values from the past ISP are recalled along with any updates entered during the past update year and are displayed in the same text box. The character limit for all text boxes will remain the same, and



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. If there was no information entered in a previous plan to recall, the system will display, “No information recorded in HCSIS for this section” in the applicable text box and it will be editable.



3) Click “Open” to view the file.



**Note:** The popup window may look different depending on your browser.

The assessment is displayed.





## The Commonwealth of Massachusetts

### Department of Developmental Services

Date Printed: 10/29/2015

Status: Submitted for DDS Review

Individual's Name:	Test, Bruce
Date of Meeting:	
Submitted to DDS by:	
Agency Responsible:	

### Health and Dental Assessment

(Full Year)

1.	Individual's Name:	Test, Bruce
2.	Date of Birth:	
3.	Height:	
4.	Date Height Recorded:	09/09/2015
5.	Weight (lbs):	
6.	Date Weight Recorded:	09/09/2015
7.	<b>Identify any current medical problems, diagnoses, treatments and medications:(All diagnoses must be supported by documentation from a licensed and qualified medical and/or mental health professional.DO NOT include HIV diagnosis and medications used to treat HIV. Attach any relevant protocols including but not limited to Seizure, Dining, PICA.)</b> Standing Orders/ PRN Medications - N/A	
8.	Are there any emerging medical issues?	No

**Note:** With the Assessment open, you can view, reference, or copy and paste information directly from the Assessment into the fields in HCSIS for Current Supports.

- 4) Complete the Current Supports section by editing recalled information, referencing or copying information from the clipboard or assessments, or adding additional information.



**Note:** Clipboard tabs are readily available to copy and paste information into the current supports section without going into the assessment. To copy and paste from the clipboard expand the section you would like to pull information from. Highlight the information in that section of the clipboard and paste the information into the relevant text box.

- 5) 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.

- 6) At a later time, if you return to the Current Supports 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.



# ISP Assessments User Guide

Individual Test, Bruce	Eligibility # SSN # -	Planned Meeting Date 12/07/2015	ISP Meeting Deadline 12/07/2015	Region - Metro Area Office - Greater Boston	Service Coordinator Coordinator, Service
<b>Information was Auto Saved on 10/30/2015 02:05:23 EST and is displayed on the screen.</b> 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					
<b>Current Supports (Services, Settings, and People)</b> <span style="float: right;">Full Year ISP</span>					
Expand All   Collapse All					
<b>Home/Community:</b> ⓘ Bruce lives at [redacted], he shares the home with three other residents. Bruce has his own bedroom and is independent in his self-care skills. Bruce helps with chores around the house. He is able to do simple cooking tasks. He'd like to expand his skills by planning and cooking a full meal. Bruce self-medicates two of his medications with staff monitoring and is working on developing the skills to be fully independent.					
<b>Employment/Day:</b> ⓘ No information recorded in HCSIS for this section.					

**Note:** An infotip displays next to the fields in which autosaved information has been loaded. Click the icon to the 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 Area Office - Greater Boston	Service Coordinator Coordinator, Service
<b>Information was Auto Saved on 10/30/2015 02:05:23 EST and is displayed on the screen.</b> 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					
<b>Current Supports (Services, Settings, and People)</b> <span style="float: right;">Full Year ISP</span>					
Expand All   Collapse All					
<b>Home/Community:</b> ⓘ Bruce lives at [redacted], he shares the home with three other residents. Bruce has his own bedroom and is independent in his self-care skills. Bruce helps with chores around the house. He is able to do simple cooking tasks. He'd like to expand his skills by planning and cooking a full meal. Bruce self-medicates two of his medications with staff monitoring and is working on developing the skills to be fully independent.					
<b>Employment/Day:</b> ⓘ No information recorded in HCSIS for this section.					
<div style="border: 1px solid blue; padding: 5px;">           Last Saved By Coordinator, Service On 9/24/2015 1:15:02 PM            [redacted] apartment operated by [redacted], he shares the home with three other residents. Bruce has his own bedroom and is independent in his self-care skills. Bruce helps with chores around the house. He is able to do simple cooking tasks. He'd like to expand his skills by planning and cooking a full meal. Bruce self-medicates two of his medications with staff monitoring and is working on developing the skills to be fully independent.         </div>					

**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. Additionally in the user does not want to save the recovered information click “reset”.

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

<b>Clinical:</b> ⓘ No information recorded in HCSIS for this section.
Can this information be considered complete? ⓘ No
<input type="button" value="Spell Check"/> <input type="button" value="Reset"/> <input type="button" value="Save"/> <input type="button" value="Save &amp; Continue"/>



- 8) After entering text into the Current Supports fields, scroll to the bottom of the page. Answer the question “Can this information be considered complete?” by selecting “Yes” or “No”.

The screenshot shows a web form with two main sections: 'Adaptive Equipment/Assistive Technology' and 'Clinical'. The 'Adaptive Equipment/Assistive Technology' section contains a text area with 'N/A'. The 'Clinical' section contains a text area with the text 'Individual does not have any clinical services at this time.' Below these sections is a question: 'Can this information be considered complete?' with a dropdown menu showing 'Yes' selected. At the bottom of the form are buttons for 'Spell Check', 'Reset', 'Save', and 'Save & Continue'.

**Note:** “No” will be pre-selected. As long as the answer to this prompt is “No”, the Current Supports section will print with a “Draft” watermark.

**If you have finished working on the section**, selecting “Yes” will change the status of the component to “Completed by Service Coordinator” on the Dashboard, View/Print Screen, and RPMS. Service Coordinators and those with DDS read-only roles will be able to view and print this component without a draft watermark.

**If you have not finished working on the section**, keeping the pre-selected answer “No” and clicking “Save” or “Save & Continue” will change the status of the component to “Started” on the Dashboard, View/Print Screen, and RPMS. Service Coordinators can print the ISP component with a draft watermark; however, read only roles will not have access to view and print.

**You must click “Save” or “Save & Continue” in order for information to be saved on the ISP screens.** If you do not click “Save” or “Save & Continue,” data entered will be lost, as data is not saved automatically in HCSIS. If you do not save the information on the screen, then the status of the component will remain “Not Started” on the Dashboard, View/Print Screen, and RPMS. When navigating from one ISP component tab to another, please remember to save your work.

- 9) Click “Save & Continue” to move to the next section.

Clicking “Save” will bring the user back to the Dashboard. Clicking “Save & Continue” will bring the user to the Safety/Risk section.

This screenshot is identical to the previous one, showing the same form sections. However, in this image, the 'Save & Continue' button at the bottom right is highlighted with a blue box, indicating the next step in the process.

## Part II: Completing Safety and Risk

- 1) Since the user has selected “Save & Continue” the user is brought directly to the Safety/Risk page. The user can also navigate to Safety/Risk by clicking the Safety/Risk tab.



- 2) Expand the clipboard for Safety/Risk. The clipboard contains links to the Safety Assessments. Click the icon to open the Assessment in a pop-up window.

**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. If there was no information entered in a previous plan to recall, the system will display, “No information recorded in HCSIS for this section” in the applicable text box and it will be editable.

- 3) Click “Open” to download the file.



The screenshot shows the 'Health and Human Services' interface. The main content area is titled 'Safety and Risk' and includes sections for 'Safety' and 'Home Alone Authorization'. A 'File Download' popup window is open, asking 'Do you want to open or save this file?' with fields for Name, Type (Adobe Acrobat Document, 30.9KB), and From (hcsis-qadm.state.ma.us). The 'Open' button is highlighted with a blue box.

**Note:** The popup window may look different depending on your browser.

The assessment is displayed.



## The Commonwealth of Massachusetts

### Department of Developmental Services

Date Printed: 10/29/2015  
Status: Approved

<b>Individual's Name:</b>	[Redacted]
<b>Date:</b>	09/09/2015
<b>Submitted to DDS by:</b>	[Redacted]
<b>Agency Responsible:</b>	[Redacted]

### Safety Assessment

#### (Full Year)

**Part I - (Evacuation)**

1.	Can this person safely evacuate independently from his/her home in two and a half minutes or in timely manner from day/work setting during an emergency?	Yes
2.	Does the individual need assistance or supports to facilitate a safe and timely evacuation?	N/A
3.	If yes, please describe. (e.g. verbal prompts, physical assistance, adaptive equipment).	
4.	Can the individual recognize a fire or other emergency that signals danger and would require evacuation?	Yes
5.	Can the individual call 911 for help?	Yes
6.	Can the individual call staff for help?	Yes
7.	Can the individual respond to a fire/evacuation alarm when asleep as well as when awake?	N/A



**Note:** With the Assessment open, you can view, reference, or copy and paste information directly from the Assessment into the fields in HCSIS for Current Supports.

- 4) Complete Safety/Risk section by editing recalled information, referencing or copying information from the clipboard or assessments, or adding additional information (Remove the “No information recorded in HCSIS for this section”).

**Note:** Auto Save will run after 15 minutes of inactivity. Information will be temporarily saved for Safety and Risk section to avoid losing data. The steps are the same as describe for the Current Supports section.

- 5) After entering text into the Safety/Risk fields, scroll to the bottom of the page. Answer the question “Can this information be considered complete?” by selecting “Yes” or “No”.

Please note that “No” will be pre-selected.

**If you have finished working on the section**, selecting “Yes” will change the status of the component to “Completed by Service Coordinator” on the Dashboard, View/Print Screen, and RPMS. Service Coordinators and those with read-only roles will be able to view and print this component without a draft watermark.



If you have not finished working on the section, keeping the pre-selected answer “No” and clicking “Save” or “Save & Continue” will change the status of the component to “Started” on the Dashboard, View/Print Screen, and RPMS. Service Coordinators can print the ISP component with a draft watermark; however, read only roles will not have access to view and print.

**You must click “Save” or “Save & Continue” in order for information to be saved on the ISP screens.** If you do not click “Save” or “Save & Continue,” data entered will be lost, as data is not saved automatically in HCSIS. If you do not save the information on the screen, then the status of the component will remain “Not Started” on the Dashboard, View/Print Screen, and RPMS. When navigating from one ISP component tab to another, please remember to save your work.

- 6) Click “Save & Continue” to move to the next section.

Clicking “Save” will bring the user back to the Dashboard. Clicking “Save & Continue” will bring the user to the Legal/Benefit/Financial section.

### Part III: Completing Legal/Benefit/Financial Status

- 1) Since the user has selected “Save & Continue” the user is brought directly to the Legal/Benefit/Financial page. The user can also navigate to Legal/Benefit/Financial by clicking the Legal/Financial tab.



**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 or drop down. 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. If there was no information entered in a previous plan to recall, the system will display, “Data for one or more elements for this section was not recorded in HCSIS” will appear in each text box and will be editable.” in the applicable Comments box. For example, if a value for “Competent” has not been recorded in last year’s plan, the above message will be displayed in the Legal Comments text box below any recalled comments. 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 or select the appropriate value from the drop down.

**Note:** On a Full Year, Ricci Class member and Guardian Name information is populated from MEDITECH. The guardian name is pulled from the Demographics screen in MEDITECH. In case of multiple guardians, this field will display all guardian names. (For additional information please refer to the MEDITECH ISP Workflow quick guide on the reference page) On an Update Year, Ricci Class member and Guardian Name information is populated from last year’s ISP.

**Note:** Certain fields on the Legal/Financial/Benefit sections are prepopulated from the financial assessment of the individual, if the individual has only one financial assessment requested in the system. If the individual has multiple financial assessments, a message that reads “Please note: Refer to the multiple financial assessments of the individual to complete this section” is displayed.

- 2) Expand the clipboard for Legal/Benefit/Financial Status. The clipboard contains links to the Financial Assessment.



# 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

### Legal/Benefit/Financial Status

Full Year ISP

Expand All | Collapse All

Legal

Ricci Class Member: No

Competent: Yes

Adjudicated Not Competent: No

Clinical Team Review Recommended: [Dropdown]

Guardian(s) Name(s): [Info Icon] -

Conservator Name: [Text Box]

Rogers' Monitor(s) Name(s): [Text Box]

Health Care Agent Name: [Info Icon] [Text Box]

Alt. Health Care Agent Name: [Text Box]

Power of Attorney Name: [Text Box]

Legal Comments: [Info Icon]

**Link to Assessments** [Icon]

3) Click the icon to open the Assessment in a pop-up window.

Health and Human Services

HOME | QM | PAM | ISP | ADMIN | TOOLS

Individual Search | Review Process Management | Reports | References

Search Results | ISP Dashboard | Progress Summary

ISP > Individual Search > ISP Dashboard > Legal/Financial/Benefit

Individual	Eligible	Planned Meeting Date	ISP Meeting Deadline	Are
	SSN #	09/15/2015	09/15/2015	Are

Please Note: Responses are different with respect to Financial Assessment

ISP Dashboard | ISP Meeting Details | Vision | Request Assessments | Review Assessments | Current Supports | Safety/Risk | Legal/Financial | Successes/Challenges

### Legal/Benefit/Financial Status

Expand All | Collapse All

Legal

Ricci Class Member: No

Competent: Yes

Adjudicated Not Competent: No

Clinical Team Review Recommended: [Dropdown]

Guardian(s) Name(s): [Info Icon] -

Conservator Name: [Text Box]

Rogers' Monitor(s) Name(s): [Text Box]

Health Care Agent Name: [Info Icon] [Text Box]

Alt. Health Care Agent Name: [Text Box]

**Link to Assessments** [Icon]

4) Click "Open" to download the file.

ISP Dashboard | ISP Meeting Details | Vision | Request Assessments | Review Assessments | Current Supports | Safety/Risk | Legal/Financial | Successes/Challenges

### Legal/Benefit/Financial Status

Expand All | Collapse All

Legal

Ricci Class Member: No

Competent: Yes

Adjudicated Not Competent: No

Clinical Team Review Recommended: [Dropdown]

Guardian(s) Name(s): [Info Icon] -

Conservator Name: [Text Box]

Rogers' Monitor(s) Name(s): [Text Box]

Health Care Agent Name: [Info Icon] [Text Box]

Alt. Health Care Agent Name: [Text Box]

**File Download**

Do you want to open or save this file?

Name: [Text Box]

Type: Adobe Acrobat Document, 27.6KB

From: hcsis-qadmr.state.ma.us

Open Save Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What is the risk?



**Note:** The popup window may look different depending on your browser.

The Assessment will open.



## The Commonwealth of Massachusetts

### Department of Developmental Services

Date Printed: 10/29/2015  
Status: Approved

<b>Individual's Name:</b>	
<b>Date:</b>	09/09/2015
<b>Submitted to DDS by:</b>	
<b>Agency Responsible:</b>	

### Financial Assessment (Full Year)

**Part II - (Ability to Manage Finances)**

<b>Please indicate the individual's current ability to handle money in the following categories:</b>		
<b>Purchases:</b>		
27.	Identifies coins:	Total Assistance
28.	Comprehends value of coins:	Independent
29.	Distinguishes bills from other paper objects:	Independent
30.	Recognizes bill denominations:	Independent

**Note:** With the Assessment open, you can view, reference, or copy and paste information directly from the Assessment into the fields in HCSIS for Current Supports.

- 5) Complete Legal/Benefit/Financial section by editing recalled information, referencing or copying information from the clipboard or assessments, or adding additional 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

#### Legal/Benefit/Financial Status Full Year ISP

[Expand All](#) | [Collapse All](#)

**Legal**

Ricci Class Member:	No
Competent:	<input type="button" value="Yes"/>
Adjudicated Not Competent:	<input type="button" value="No"/>
Clinical Team Review Recommended:	<input type="button" value=""/>
Guardian(s) Name(s):	
Conservator Name:	<input type="text"/>
Rogers' Monitor(s) Name(s):	<input type="text"/>
Health Care Agent Name:	<input type="text"/>
Alt. Health Care Agent Name:	<input type="text"/>
Power of Attorney Name:	<input type="text"/>

[Link to Assessments](#)



**Note:** Auto Save will run after 15 minutes when the screen is idle. Information will be temporarily saved for Legal/Benefit/Financial status section to avoid losing data. This applies to both drop downs as well as text fields. The steps are the same as described for the Current Supports section.

- 6) After entering text into the Legal/Benefit/Financial Status fields, scroll to the bottom of the page. Answer the question “Can this information be considered complete?” by selecting “Yes or “No”.

The screenshot shows a web form with the following elements:

- A question: "Has the ISP Team recommended that the individual would benefit from a financial training plan?" with a "Yes" dropdown menu.
- A section titled "Financial Comments:" with a large text input area.
- A question: "Can this information be considered complete?" with a "Yes" dropdown menu, which is highlighted with a blue rectangular box.
- Buttons at the bottom: "Spell Check", "Reset", "Save", "Save & Continue", and "Link to Assessments".

Please note that “No” will be pre-selected.

**If you have finished working on the section,** selecting “Yes” will change the status of the component to “Completed by Service Coordinator” on the Dashboard, View/Print Screen, and RPMS. Service Coordinators and those with read-only roles will be able to view and print this component without a draft watermark.

**If you have not finished working on the section,** keeping the pre-selected answer “No” and clicking “Save” or “Save & Continue” will change the status of the component to “Started” on the Dashboard, View/Print Screen, and RPMS. Service Coordinators can print the ISP component with a draft watermark, however, read only roles will not have access to view and print.

**You must click “Save” or “Save & Continue” in order for information to be saved on the ISP screens.** If you do not click “Save” or “Save & Continue,” data entered will be lost, as data is not saved automatically in HCSIS. If you do not save the information on the screen, then the status of the component will remain “Not Started” on the Dashboard, View/Print Screen, and RPMS. When navigating from one ISP component tab to another, please remember to save your work.

- 7) Click “Save & Continue” to move to the next section.

Clicking “Save” will bring the user back to the Dashboard. Clicking “Save & Continue” will bring the user to the Successes/Challenges section.

This screenshot is identical to the one above, but the "Save & Continue" button at the bottom center is highlighted with a blue rectangular box.



## Part IV: Completing Successes/Challenges

To complete the Safety/Risk section the Service Coordinators can copy and paste information into HCSIS. Service Coordinators can copy and paste information from a previous ISP Word Document where they have previously tracked successes or challenges for individuals.

- 1) Since the user has selected “Save & Continue” the user is brought directly to the Successes/Challenges page. The user can also navigate to Successes/Challenges by clicking the Successes/Challenges tab.

**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. If there was no information entered in a previous plan to recall, the system will display, “No information recorded in HCSIS for this section” in the applicable text box and it will be editable.

- 2) Complete Successes/Challenges section by editing recalled information or typing additional information directly into the text box. (Remove the “No information recorded in HCSIS for this section”).



**Note:** The Successes/Challenges section does not have a clipboard or link to assessments.

**Note:** Auto Save will run after 15 minutes of inactivity when the screen is idle. Information will be temporarily saved for Successes and Challenges section to avoid losing data. The steps are the same as describe for the Current Supports section.

- 3) After entering text into the Successes/Challenges fields, scroll to the bottom of the page. Answer the question “Can this information be considered complete?” by selecting “Yes or “No”.

The screenshot shows a web form with two main sections: 'Emerging Issues' and 'Unmet Needs'. Both sections have a text area with 'None at this time' and 'None' respectively. Below these sections is a question: 'Can this information be considered complete?' with a dropdown menu showing 'Yes' selected. At the bottom of the form are buttons for 'Spell Check', 'Reset', 'Save', and 'Save & Continue'.

Please note that “No” will be pre-selected.

**If you have finished working on the section**, selecting “Yes” will change the status of the component to “Completed by Service Coordinator” on the Dashboard, View/Print Screen, and RPMS. Service Coordinators and those with read-only roles will be able to view and print this component without a draft watermark.

**If you have not finished working on the section**, keeping the pre-selected answer “No” and clicking “Save” or “Save & Continue” will change the status of the component to “Started” on the Dashboard, View/Print Screen, and RPMS. Service Coordinators can print the ISP component with a draft watermark, however, read only roles are not able to print.

**You must click “Save” or “Save & Continue” in order for information to be saved on the ISP screens.** If you do not click “Save” or “Save & Continue,” data entered will be lost, as data is not saved automatically in HCSIS. If you do not save the information on the screen, then the status of the component will remain “Not Started” on the Dashboard, View/Print Screen, and RPMS. When navigating from one ISP component tab to another, please remember to save your work.

- 4) Click “Save & Continue” will redirect the user to the Dashboard.



**Emerging Issues:** ⓘ

None at this time

**Unmet Needs:** ⓘ

None

Can this information be considered complete? ⓘ Yes ▾

Spell Check
Reset
Save

Save & Continue

**Next Steps:**

User can navigate to any section of the ISP by directly clicking on the tabs. Please click on “Save” button before navigating from a screen or section.

While completing the other ISP components, the Service Coordinator and Service Coordinator Supervisor can continue to:

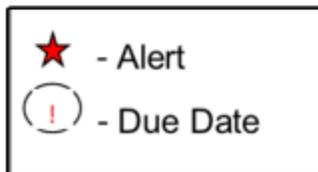
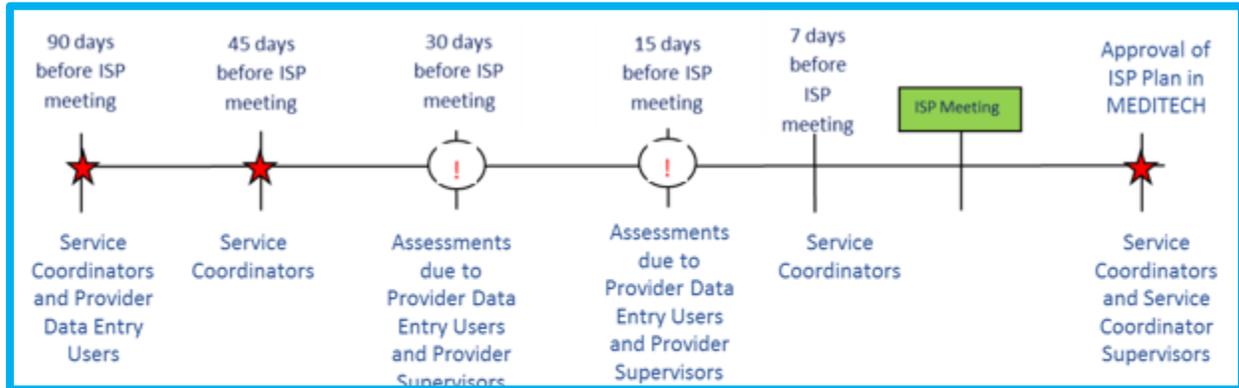
- Edit the Vision Statement
- Create Goals
- Review Objectives and Support Strategies
- Request or Review Assessments
- Print Various ISP components



## Updating Other ISP Components by DDS Staff in an Update Year

### Scenario Description

The Service Coordinator or Service Coordinator Supervisor is responsible for updating the four additional sections within the ISP module in order for the full Update ISP to be completed in HCSIS. The components can be updated beginning after the ISP Plan Selection is made.



### First Steps:

- The user searches for an individual
- The user views the Individual Dashboard

### Roles and Responsibilities:

- **Service Coordinators:** Can create, edit, and save content
- **Service Coordinator Supervisors:** Can create, edit, and save content

### Part I: Updating Current Supports

- 1) Select the Other ISP Components section on the dashboard or select “Current Supports” tab. The module redirects the Service Coordinator to the Individual’s “Current Supports” Page.



Health and Human Services Mass.gov

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

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:   
 Eligibility:   
**ISP Meeting Details**  
 Planned Meeting Date: 12/07/2015  
 Meeting Time: 10:00 AM  
 Meeting Location:   
**Update Year ISP**

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

<b>Vision</b> Status: Shared Due Date: 11/07/2015 Last Updated On: 09/23/2015 Last Shared On: 09/23/2015	<b>Goals</b> Status: Created Due Date: N/A Last Updated On: 09/23/2015	<b>Request Assessments</b> Status: Not Sent Due Date: 11/07/2015 Notification Last Sent On: - Last Updated On: -
<b>Objectives &amp; Support Strategies</b> Status: Action Required Due Date: 11/22/2015 Pending Provider Submission: 2/4 Pending DDS Review: 2/4	<b>Review Assessments</b> Status: Pending Request Due Date: 11/22/2015 Pending Provider Submission: 0/0 Pending DDS Review: 0/0	<b>Other ISP Components</b> Status: Started Due Date: 01/21/2016 Current Support Last Updated On: 06/24/2015 Safety & Risk Last Updated On: 06/24/2015 Legal Status Last Updated On: 02/20/2015 Successes & Challenges Last Updated On: 06/24/2015

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

2) Select the “Update Information” checkbox next to the sections of the Current Supports.

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

**Current Supports (Services, Settings, and People)** Update Year ISP

Expand All | Collapse All

**Home/Community:**

Bruce lives at [redacted] he shares the home with three other residents. Bruce has his own bedroom and is independent in his self-care skills. Bruce helps with chores around the house. He is able to do simple cooking tasks. He'd like to expand his skills by planning and cooking a full meal. Bruce self-medicates two of his medications with staff monitoring and is working on developing the skills to be fully independent.

Update Information

**Employment/Day:**

No information recorded in HCSIS for this section.

Update Information

**Note:** The recalled information from the last Full Year 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.

**Note:** Updated Information checkboxes will appear for the following sections:

- Home/Community
- Employment/Day
- Health and Dental



## ISP Assessments User Guide

- Medication(s)
- Adaptive Equipment/Assistive Technology
- Clinical

3) Enter a valid value into the text box that appears below each section.

The screenshot shows the 'Current Supports (Services, Settings, and People)' section of the ISP assessment interface. The 'Home/Community' section contains a text box with a blue border containing the text: 'Bruce lives at home with three other residents. Bruce has his own bedroom and is independent in his self-care skills. Bruce helps with chores around the house. He is able to do simple cooking tasks. He'd like to expand his skills by planning and cooking a full meal. Bruce self-medicates two of his medications with staff monitoring and is working on developing the skills to be fully independent.' Below it is another text box with a blue border containing: 'Bruce has learned to cook two meals start to finish and has achieved self-medication for one additional medication - now independent on 3 of 5.' The 'Employment/Day' section contains a text box with the text: 'No information recorded in HCSIS for this section.' There are 'Update Information' checkboxes for each section.

**Note:** All Updated Information text boxes will have a 5,000 character limit.

4) Select "Yes" to the question "Can this information be considered complete?"

The screenshot shows the 'Clinical' section of the form. The text box contains: 'Individual does not have any clinical services at this time.' Below the text box is a question: 'Can this information be considered complete?' with a dropdown menu set to 'Yes'. The 'Update Information' checkbox is visible on the right.

5) Select "Save & Continue".

The screenshot shows the 'Clinical' section of the form. The 'Can this information be considered complete?' question is still present. The 'Save & Continue' button is highlighted with a blue box. The 'Update Information' checkbox is visible on the right.

### Next Steps

- The values are saved and the user is navigated to the Safety & Risk Page.

## Part II: Updating Safety & Risk



- 1) Since the user has selected “Save & Continue”, the user is brought directly to the Safety/Risk page. The user can also navigate to Safety/Risk by clicking the Safety/Risk tab.

**Note:** The recalled information 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.

- 2) Select the “Update Information” checkbox next to the sections of the Safety and Risk page.

**Note:** Updated Information check boxes will appear for the following sections:

- o Safety
- o Home Alone Authorization



- o Risk

3) Enter a valid value into the text box that appears below each section.

4) Select “Yes” to the “Can this information be considered complete?” question.

5) Select “Save & Continue.”



**Next Steps**

- The values are saved and the user is navigated to the Legal/Financial/Benefit Status Page.

**Part III: Updating Legal/Financial/Benefit/Financial Status**

- 1) Since the user has selected “Save & Continue”, the user is brought directly to the Legal/Financial/Benefit Status page. The user can also navigate to Legal/Benefit/Financial by clicking the Safety/Risk tab.



**Note:** The recalled information 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 any field within a specific section, the system will display the following message in the applicable comments box: “Data for one or more of these elements for this section was not recorded in HCSIS”. For example, if a value for “Competent” has not been recorded in last year’s plan, the above message will be displayed in the Legal Comments text box below any recalled comments. 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 or select the appropriate value from the drop down. Updates are entered in the designated text boxes, as outlined by the steps below.

**Note:** Guardian Name and Ricci Class Member information will be pulled from the previous ISP and will not be editable. Any updates to these fields will need to be recorded in the “Updated Information” text box available for the section.

- 2) Select the “Update Information” checkboxes next to each of the three sections of the Legal/Benefit/Financial Status page. (Remove the “Data for one or more of these elements for this section was not recorded in HCSIS”).

- 3) Enter all updates for the section into the text box that appears below the section.

**Note:** Updated Information text boxes will appear only if the “Update Information” checkbox for a field is checked. All Updated Information text boxes will have a 5,000 character limit.

- 4) Select “Yes” to the “Can this information be considered complete?” question.



5) Select “Save & Continue.”

**Next Steps:**

- The values are saved and the user is navigated to the Successes/Challenges Page.

**Part IV: Updating Successes/Challenges**

1) Since the user has selected “Save & Continue”, the user is brought directly to the Successes/Challenges page. The user can also navigate to Successes/Challenges by clicking the Successes/Challenges tab.

**Note:** The recalled information 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.



2) Selects the “Update Information” checkbox next to the sections of the Safety and Risk.

The screenshot shows the 'Successes/Positive Events, Challenges, Emerging Issues and Unmet Needs' section of the ISP system. The 'Update Information' checkbox for the 'Successes/Positive Events' section is highlighted with a blue box. The text in the text box reads: "Bruce has lost over 100 lbs in the past year. He feels that his health is stabilizing. He enjoys living close to his mother."

**Notes:** Updated Information check boxes will appear for the following sections:

- Positive Events
- Challenging Issues
- Emerging Needs
- Unmet Needs

3) Enter a valid value into the text box that appears below each section.

The screenshot shows the 'Successes/Positive Events, Challenges, Emerging Issues and Unmet Needs' section of the ISP system. A new text box is highlighted with a blue box, containing the text: "Bruce has continued to lose weight and his health has stabilized." The 'Update Information' checkbox is also visible and checked.

**Note:** Updated Information text boxes will appear only if the “Update Information” checkbox for a field is checked. All Updated Information text boxes will have a 5,000 character limit.

4) Select “Yes” to the “Can this information be considered complete?” question.

The screenshot shows the 'Unmet Needs' section of the ISP system. The text in the text box is "N/A". The question "Can this information be considered complete?" is highlighted with a blue box, and the "Yes" radio button is selected. The "Save & Continue" button is also visible.

5) Select “Save & Continue.”



Unmet Needs: ⓘ

N/A

Update Information

Can this information be considered complete? ⓘ Yes ▾

Spell Check Reset Save Save & Continue

**Next Steps**

- The page is refreshed, the values in each of the updated information text boxes are saved, and the “Operation Successful” message appears at the top of the screen.



## Post ISP Meeting Activities

This section provides an overview of activities that take place after the ISP Meeting has been conducted. Below is a summary of these activities:

- Documents are revised as per the outcomes of the meeting.
- All documents that have been revised need to be approved.
- Objectives and Support Strategies are approved and saved as part of the ISP Document.
- The ISP Document is created and mailed to the Individual, Guardian and Providers by 45 days after the meeting.
- Revisions to any documents can be made up to 150 post the ISP Meeting.
- Once all documents are locked, the Area Office Director/ Designee can manually unlock them if they need to be revised more than 150 days past the ISP Meeting. The Area Office Director / Designee is also responsible for re-locking once tasks are completed. The plan must be manually re-locked for the next plan to be created in HCSIS.

**Note:** In order for these system activities to be triggered in HCSIS, the Service Coordinator must have recorded the actual ISP meeting date in MEDITECH's ISP Meeting and Status screen.

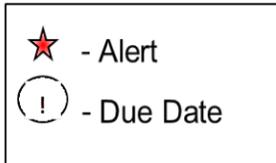
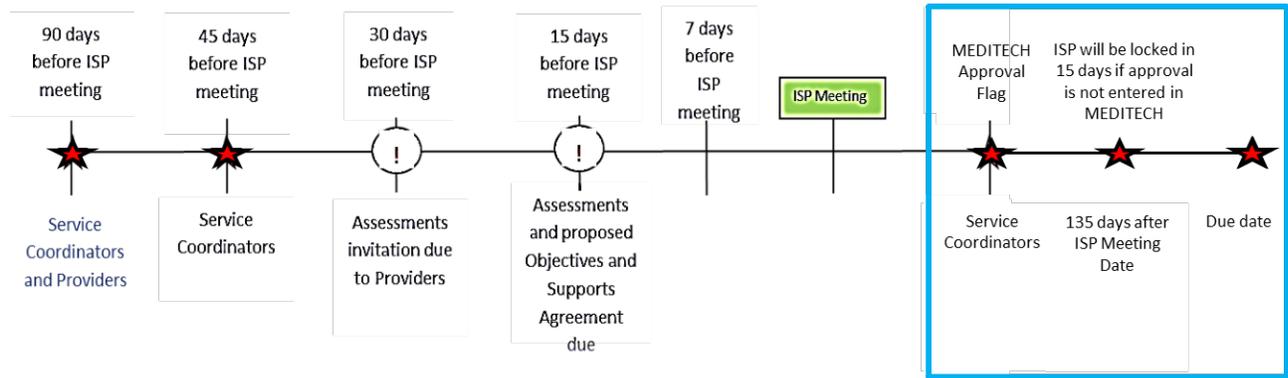
### Roles and Responsibilities

- **Service Coordinator:**
  - Reviews all ISP materials, makes necessary updates to the Vision Statement and Goals as agreed upon at the ISP Meeting.
  - Requests revisions to previously approved Assessments if needed.
  - Approves or requests revision to previously submitted Objectives and Support Strategies that need to be modified as a result of the ISP Meeting discussions.
  - Continues to review and approve or request further revisions to Assessments and Objectives and Support Strategies as they are submitted after the ISP Meeting.
  - Can also request new Assessments per the ISP Meeting discussions.
  - Completes the Current Supports, Safety and Risk, Legal/Benefit/Financial Status, and Successes/Challenges sections of the ISP document.
- **Service Coordinator Supervisor:**
  - Reviews all ISP materials, makes necessary updates to the Vision Statement and Goals as agreed upon at the ISP Meeting.
  - Requests revisions to previously approved Assessments if needed.
  - Approves or requests revision to previously submitted Objectives and Support Strategies that need to be modified as a result of the ISP Meeting discussions.
  - Continues to review and approve or request further revisions to Assessments and Objectives and Support Strategies as they are submitted after the ISP Meeting.
  - Can also request new Assessments per the ISP Meeting discussions.
  - Completes the Current Supports, Safety and Risk, Legal/Benefit/Financial Status, and Successes/Challenges sections of the ISP document.
  - Oversees all ISP materials are completed post meeting period in the system and that the ISP Document is completed and mailed out by 45-days post the meeting.
- **Provider:**
  - Makes necessary updates to the Goals created by their Provider Agency.
  - Revises Assessments or Objectives and Support Strategies as requested by the Service Coordinator in accordance with the ISP Meeting discussions.
- **Provider Supervisor:**
  - Makes necessary updates to the Goals created by their provider agency.
  - Reviews, revises and submits Assessments or Objectives and Support Strategies as requested by the Service Coordinator in accordance with the ISP Meeting discussions.
- **Area Office Directors:**
  - Have the ability to unlock the ISP plan past 150 days.



**Note:** After the ISP meeting Service Coordinators and Service Coordinator Supervisors will be able to select documents which require revisions while the other documents remain approved.

**Post ISP Meeting Alerts**



- “ISP is locked” - triggered when a plan has been locked in HCSIS based on the Approval flag in MEDITECH.
- “ISP will be locked in 15 days if approval is not entered in MEDITECH” – triggered 135 days after the ISP Meeting Date if the approval flag has not yet been pulled from MEDITECH.

**Note:** If the ISP is not approved within 150 days, the plan automatically locks. There is no alert associated with this action.



## Post ISP Meeting Activities Overview

During the 150-day period after the ISP Meeting has taken place, the system will display the date of the meeting as a message on the Individual Dashboard, as seen in the screenshot below:



During the post meeting period, all documents will continue to be in a status they were in prior to the meeting. The Service Coordinator will have to go in and request revision to all previously approved documents that need to be revised as a result of the ISP Meeting. Documents that *have not been approved prior to the ISP Meeting* will maintain the status they had prior to the ISP Meeting (e.g. If an Assessment had been returned to a provider for revisions and the revisions had not been made in advance of the meeting, the status for that Assessment would still be “Revision Requested” or if an Objective and Supports Strategy had been submitted but the Service Coordinator had not approved the materials before the ISP meeting, the status would still be “Submitted for DDS Review”).

**Note:** The Service Coordinator is responsible for approving Objectives & Support Strategies as well as Assessments to which he or she has requested a revision within the 150 day post meeting period.

### Next Steps

The system will lock all documents 150 days after the ISP Meeting has taken place. In the event that further changes need to be made to the ISP materials related to that year’s ISP, the Service Coordinator or Supervisor can request the Area Office Director/Designee to unlock the ISP in HCSIS. Provider staff and Service Coordinators will need to coordinate with the Service Coordinator Supervisor to submit this request outside of the system.

**If an ISP has been manually unlocked by the Area Office Director/ Designee, it must be re-locked for the next plan can be created in HCSIS.**

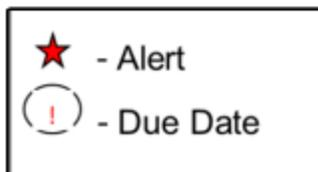
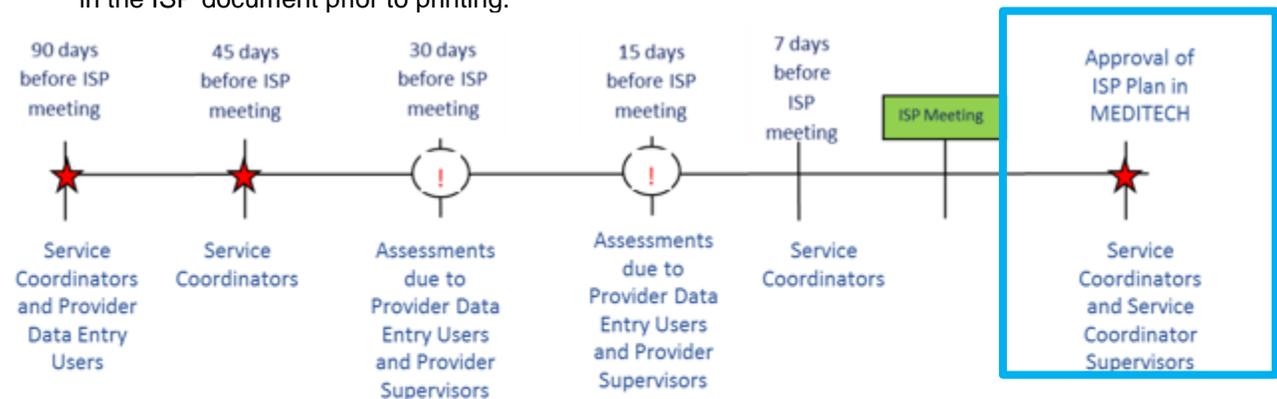


## Selecting Objectives to Include in the ISP Document by DDS Staff in Full or Update Year

As the full ISP document is included in the ISP module, Service Coordinators and Service Coordinator Supervisors will now be able to select which Goals and corresponding Objective and Support Strategies will be included in the final ISP document after the ISP meeting has occurred. Once objectives have been included in the ISP document, the progress summary process will be initiated

### Scenario Description

- The ISP Meeting has taken place and Objectives and Goals are in “Approved” Status.
- To complete the final ISP document, Objectives and Goals will need to be selected for inclusion in the ISP document prior to printing.



### First Steps:

- The user searches for an individual
- The user views the Individual Dashboard
- The user navigates to the Objectives and Support Strategies Review Switchboard

### Roles and Responsibilities:

- Service Coordinators: Selects Objectives and Goals
- Service Coordinator Supervisors: Selects Objectives and Goals

**Note:** The below screenshots are taken from an Update Year ISP plan, but the process for including Objectives in the ISP Document is identical for Full and Update Year.

### Selecting Objectives to Include in the ISP Document

Objectives that need to be modified after the meeting must have revision requested by the Service Coordinator and must be approved prior to inclusion in the ISP document. Only those objectives which have been approved can be selected to be included in the ISP document.



### 1) Select Objectives to be included in the ISP Document

From the Objectives Review Switchboard, the Service Coordinator and Service Coordinator Supervisors are able to select the Objective and corresponding Goal that has been approved post ISP meeting to include in the final ISP document.

**Objectives and Support Strategies Review Switchboard** Update Year ISP

Include in ISP Doc?	Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
<input type="checkbox"/>	<b>Community Involvement</b>					
<input type="checkbox"/>	Bruce will increase his participation in community activities		Approved		<a href="#">View Document History</a>	New
<input type="checkbox"/>	Bruce will serve meals once a week at Cor unum in Lawrence.		Approved		<a href="#">View Document History</a>	Current
<input type="checkbox"/>	<b>Money Management</b>					
<input type="checkbox"/>	Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved		<a href="#">View Document History</a>	Current
<input type="checkbox"/>	<b>Personal Growth &amp; Accomplishments--CLASS</b>					
<input type="checkbox"/>	By November 2015, Bruce will participate in 10 job exploration activities.		Approved		<a href="#">View Document History</a>	New
<input type="checkbox"/>	Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved		<a href="#">View Document History</a>	Current

[Include in ISP document and Initiate Progress Summary](#)

**Note:** By selecting an Objective the underlying Goal will automatically be selected by the system.

### 2) Click “Include in ISP document and Initiate Progress Summary”

These Objectives, along with the associated Goals will now be included in the ISP Document.

**Objectives and Support Strategies Review Switchboard** Update Year ISP

Include in ISP Doc?	Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status
<input checked="" type="checkbox"/>	<b>Community Involvement</b>					
<input checked="" type="checkbox"/>	Bruce will increase his participation in community activities		Approved	Semi-Annual	<a href="#">View Document History</a>	New
<input checked="" type="checkbox"/>	Bruce will serve meals once a week at Cor unum in Lawrence.		Approved	Semi-Annual	<a href="#">View Document History</a>	Current
<input checked="" type="checkbox"/>	<b>Money Management</b>					
<input checked="" type="checkbox"/>	Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved	Semi-Annual	<a href="#">View Document History</a>	Current
<input checked="" type="checkbox"/>	<b>Personal Growth &amp; Accomplishments--CLASS</b>					
<input checked="" type="checkbox"/>	By November 2015, Bruce will participate in 10 job exploration activities.		Approved	Semi-Annual	<a href="#">View Document History</a>	New
<input checked="" type="checkbox"/>	Bruce will increase his rate of pay by 30%, for the next 12 months.		Approved	Semi-Annual	<a href="#">View Document History</a>	Current

[Include in ISP document and Initiate Progress Summary](#)

### 3) View Goals included in the ISP Document

A new column is visible on the Goals screen. The column indicates whether a Goal has been selected for inclusion as part of the ISP document.

**Goals** Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Independence at Home	02/03/2014				No	Updated
<input type="radio"/> Employment	02/11/2014				Yes	Current
<input type="radio"/> Money Management	02/11/2014				No	Updated

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

To change or remove an Objective from inclusion in the ISP document, navigate back to the Objectives and Support Strategies Review Switchboard and uncheck the Objective. Removing an



Objective automatically deletes the associated Goal, assuming there are no other Objectives linked to that Goal.

**Next Steps:**

- **Service Coordinators or Service Coordinator Supervisors** can view and/or print the ISP Document.
- **Service Coordinators or Service Coordinator Supervisors** can continue working on the Other components of the ISP (Vision, Goals, Assessments, Objectives and Support Strategies, Current Support, Safety/Risk, Legal/Financial, Successes/Challenges).
- **Provider Data Entry Role** can access the Progress Summary Switchboard and view the Progress Summary forms – although they can not submit the forms until 30 days prior to the due date.

