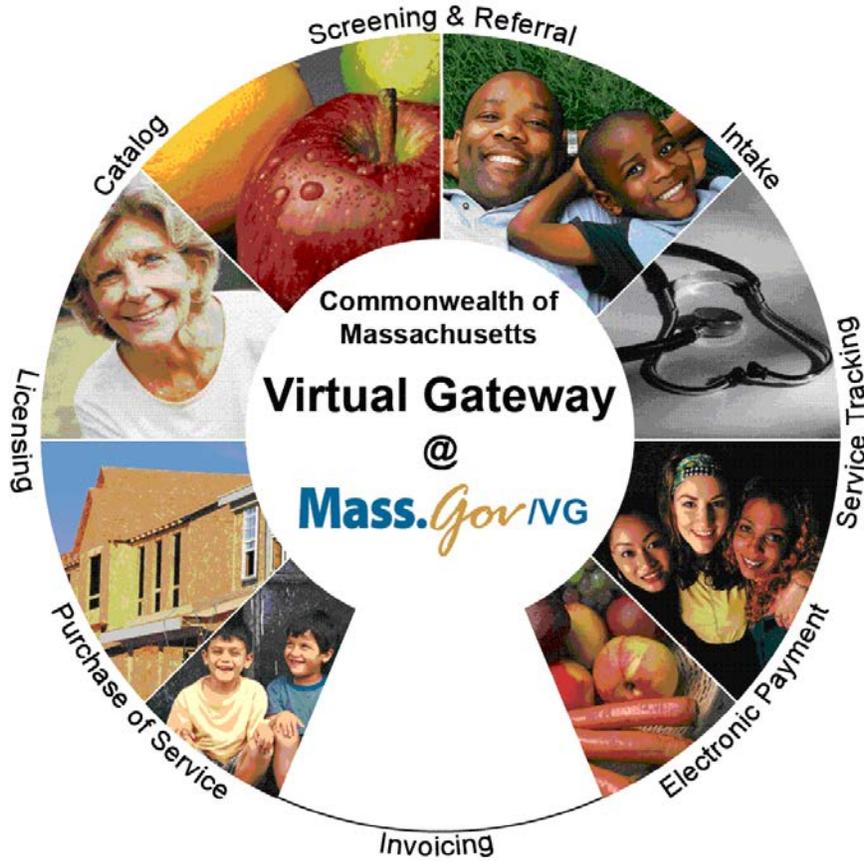


Commonwealth of Massachusetts
Executive Office of Health and Human Services

Virtual Gateway



ISP Assessments Module

User Guide

Lesson 7: Modifications

HCSIS Release 7.7



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Modifications

Modifications are used to make changes to a locked ISP document. The complete Modification workflow is now included on HCSIS as part of the ISP module. Provider and DDS staff are now able to coordinate the review, revision, acceptance and approval of a Modification to a locked ISP document.

Modifications Regulation

Modifications are required to be created in accordance with the following DDS regulations.

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

Modification Timeline

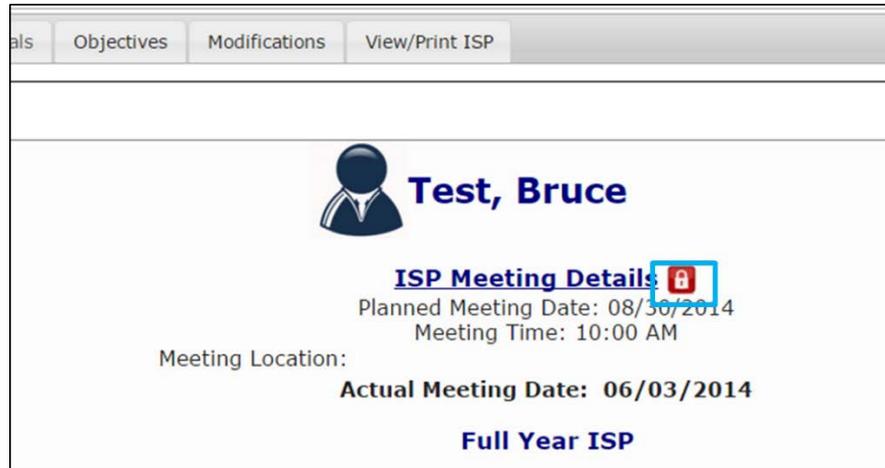
- Once a plan is locked it can be modified at any point up and until 90 days prior to next year's planned meeting date.
- If a Modification is outstanding at the 90 days mark, the new ISP is not opened.
- Once a Modification is submitted, the AOD has 45 days to approve or disapprove the Modification. If the AOD has not approved or disapproved at 45 days, the AOD will receive an overdue alert.

Modification Workflow

Modifications can be completed on both Full Year and Update Year plans. Modifications can be only completed once an Individual Support Plan has been locked. A plan is locked in HCSIS once one of the following conditions has been met.

- The Area Director's approves the ISP in MEDITECH. The system has been enhanced so that HCSIS pulls the approval flag from MEDITECH and locks the plan.
- The Area Director has not approved the ISP within 150 days of the Actual Meeting Date, and the plan is locked automatically.

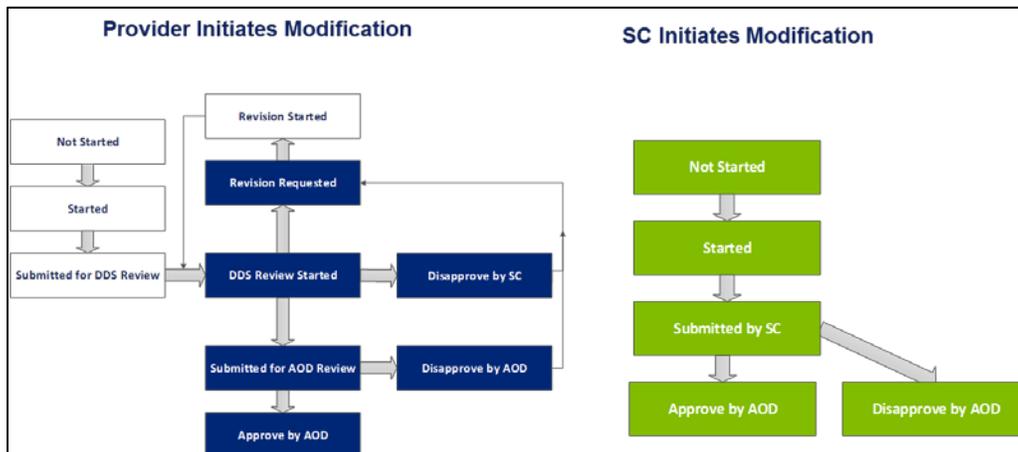
Once the plan is locked, a red lock icon is visible on the Individual Dashboard.



Completing a Modification includes three steps - Initiating a Modification, Adding Elements to a Modification, and Submitting a Modification.

- Initiating a Modification: Opt to complete Modification and identify overall reason for initiating process.
- Adding Elements: Select which elements of ISP need to be modified and indicate what changes are required.
- Submitting a Modification: Entering the submission details and submitting for review.

Once a Modification has been completed, the review process is activated. The review workflow depends on whether the Modification is initiated by the Provider or by the Service Coordinator. The respective review processes are detailed in the graphic below:



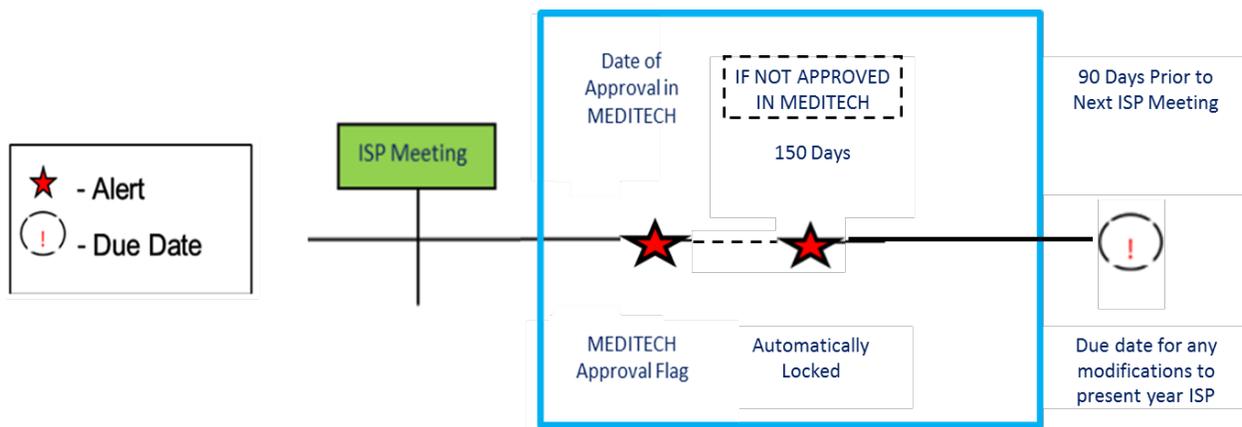


Completing a Modification by DDS Staff

Initiating a Modification by DDS Staff

Scenario Description:

Service Coordinators can create a Modification once a Full or Update Year ISP has been completed and the plan is locked in HCSIS. There are two methods by which an ISP is locked. If the approval is entered in MEDITECH by an Area Office Director, the plan will be locked automatically or, if the approval is not completed within 150 days, the plan will be locked per the current process. Once the plan is locked, a red lock icon is visible on the Individual Dashboard. Once the icon is visible and the plan is locked, DDS Staff can initiate a Modification. A single Modification form can include any combination of the following elements: Goals, Residential Support / Other.



First Steps

- Search for an Individual
- View the Individual Dashboard

Roles and Responsibilities:

- **Service Coordinators:** Initiate a Modification
- **Service Coordinator Supervisors:** Initiate a Modification

- 1) Select "Modifications" from the tabs on the Individual 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: 03/04/2015
Meeting Time: 10:00 AM
Meeting Location: _____
Actual Meeting Date: 03/05/2015
Update Year ISP

ISP Deadlines
Meeting Deadline: 03/04/2015
Semi Annual Review Date: 09/01/2015
Next ISP Meeting Deadline: 03/04/2016

Vision Status: Shared Due Date: 02/02/2015 Last Updated On: 09/01/2015 Last Shared On: 09/01/2015	Goals Status: Created Due Date: N/A Last Updated On: 08/21/2014	Request Assessments Status: Sent Due Date: 02/02/2015 Notification Last Sent On: 09/01/2015 Last Updated On: 09/01/2015
Objectives & Support Strategies Status: Approved Due Date: 02/17/2015 Pending Provider Submission: 0/3 Pending DDS Review: 0/3	Review Assessments Status: Approved Due Date: 02/17/2015 Pending Provider Submission: 0/5 Pending DDS Review: 0/5	Other ISP Components Status: Started (Overdue) Due Date: 04/19/2015 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 “Add New Modification” on the Modifications Review Switchboard

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

Modifications Review Switchboard Update Year ISP

Modification Reason	Modification Type	Created On	Created By	Document History	Status
No modification created					

[Add New Modification](#)

Note: If any Modifications to the individual's current plan have already been submitted or are in progress, the existing Modifications display on the Modifications Review Switchboard

3) Insert comments into the Modification Reason text box and explain the reason a Modification is required.

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

[Back to Modifications Review Switchboard](#)

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

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

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

Residential Support / Other

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

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



- 4) Decide which elements require Modification: A.) Goal or B.) Residential Support / Other. All of these elements fall under the previously entered “Reason for Modification”.

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

[Back to Modifications Review Switchboard](#)

Modification Details Update Year ISP
Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

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

Residential Support / Other

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

- 5) For instructions on how to add an element to the Modification, refer to the “Adding an Element to a Modification by DDS” section.

Note: If either a Provider Supervisor or DDS staff initiates a Modification for an element and the Modification is in Started status, it is not possible for another user to initiate a Modification on the same element. It is only possible to initiate a modification for that element after the modification in process has been approved or disapproved by an Area Office Director.

Note: 90 days prior to the next ISP meeting date, next year’s ISP document is generated by the system. After this has happened, it is not possible to initiate, complete or submit Modifications to the prior year’s ISP. Instead, any change that occurs in that timeframe should be included as part of the upcoming individual’s ISP meeting.

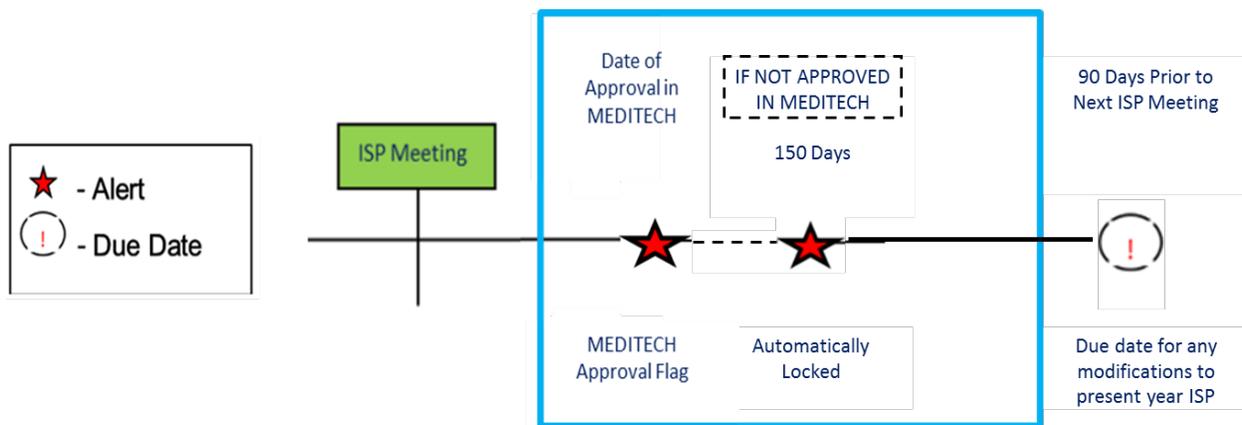


Adding Elements to a Modification by DDS Staff

Scenario Description:

Service Coordinators can add an element to an Modification once the following conditions have been met:

- The ISP has been locked. There are two methods by which an ISP is locked. The plan locks when a Full or Update Year ISP has been completed and the approval has been entered in MEDITECH by the Area Director, locking the plan in HCSIS. Alternatively, if the approval is not completed within 150 days, the plan will be locked automatically per the current process.
- The Service Coordinator / Service Coordinator Supervisor has initiated a Modification.



First Steps

- Navigate to the Modifications Review Switchboard

Roles and Responsibilities

- **Service Coordinators:** Add Elements to a Modification
- **Service Coordinator Supervisors:** Add Elements to a Modification

Addition of a New Goal

- 1) On the Modifications Review Switchboard, select “Add Goal Modification” to initiate a Modification to Goals.



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

Back to Modifications | Review Switchboard

Modification Details Update Year ISP
 Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

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

Residential Support / Other

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

2) The system redirects to the Modify Goals pop-up screen. It displays all of the existing Goals included in the ISP document.

Modify Goals

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

Goals Update Year ISP

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

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

3) Enter the title of the Goal in the "Goal Title" text box.



Modify Goals

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

Goals Update Year ISP

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

View/Edit Goal Delete Goal Add Goal

Goal Title:* Community Membership

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:* New

Spell Check Reset Save Save and Close

4) Enter the Goal description in the "Goal" text box.

Modify Goals

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

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current

View/Edit Goal Delete Goal Add Goal

Goal Title:* Community Membership

Goal:*

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

Date Goal Identified:*

Goal Identified By:*

Update Year Status:* New

Spell Check Reset Save Save and Close

5) Select a date in the "Date Goal Identified" calendar drop down.



Modify Goals

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

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current

View/Edit Goal Delete Goal Add Goal

Goal Title:* Community Membership

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

Date Goal Identified:* 09/08/2015

Goal Identified By:*

Update Year Status:* New

Spell Check Reset Save Save and Close

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

Modify Goals

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

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current

View/Edit Goal Delete Goal Add Goal

Goal Title:* Community Membership

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

Date Goal Identified:* 09/08/2015

Goal Identified By:*
Guardian
Service Coordinator
Individual
Provider

Update Year Status:*

Spell Check Reset Save Save and Close

7) Click “Save and Close.”



Modify Goals

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

Goals Update Year ISP

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

View/Edit Goal Delete Goal Add Goal

Goal Title:*

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:*

Upon selecting “Save and Close” the system will return to the Modification Details screen and will display the original entry, new entry, date and the individual who created the Modification. In the image below, the original entry displays N/A because it is a newly added 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

[Back to Modifications Review Switchboard](#)

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

	Original Entry	New Entry	Created On	Created By
<input type="radio"/> N/A		Goal Title: Community Membership Goal Description: By February 2016, Bruce will have participated in	10/29/2015	Coordinator, Service

Add Goal Modification View/Edit Goal Modification Delete Goal Modification

Residential Support / Other

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

Add Modification View/Edit Modification Delete Modification

Note: It is also possible to select “Delete a Goal,” on the same pop-up accessed from the “Add Goal Modification” button. To do so, select the radio button for the newly added Goal that requires deletion and click “Delete Goal.” Please note that the delete function operates differently for newly added Goals and existing Goals. Deleting a newly added Goal will remove the entire Goal from the Modification. Deleting an existing Goal Modification will only remove the modified information. The Goal will remain a part of the ISP. It is not possible to delete an unmodified existing Goal.

Note: The addition of a new goal will likely require the addition of a new objective.

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



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

Goals ⓘ
Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current
<input checked="" type="radio"/> ** Community Membership	09/08/2015	Guardian			No	New

** This element is associated to a Modification

View/Edit Goal | Delete Goal | Add Goal

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Spell Check | Reset | Save
Save and Close



Modification of an Existing Goal

- 1) On the Modifications Review Switchboard, select “Add Goal Modification” to initiate a Modification to Goals.

- 2) The system will display the Modify Goals pop-up screen. It displays all of the existing Goals included in the ISP document. Select the radio button next to the desired Goal and click “View/Edit Goal.”

The system will display the existing Goal details for the selected Goal.



Modify Goals

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

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	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: Current

Update Information
No Change

Modification Information

Spell Check | Reset | Save Save and Close

3) Enter text in the “Modification Information” textbox to explain the required Modification to the Goal.

Modify Goals

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

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	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: Current

Update Information
No Change

Modification Information

Bruce is to save up for and attend an event semi-annually rather than quarterly.

Spell Check | Reset | Save Save and Close

4) Select “Save and Close.”



Modify Goals

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

Goals | Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	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: Current

Update Information
 No Change

Modification Information
 Bruce is to save up for and attend an event semi-annually rather than quarterly.

Spell Check | Reset | Save | Save and Close

The system will return to the Modification Details screen and will display the original entry, new entry, date and the individual who created the Modification. In the image below, the Original Entry column displays the original Goal description and the New Entry displays the modified 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

Back to Modifications Review Dashboard

Modification Details | Update Year ISP

Board # | Call Area # | Modification Reason: There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save up for and attend an event semi-annually rather than quarterly.	10/29/2015	Coordinator, Service

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

Residential Support / Other

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

Add Modification | View/Edit Modification | Delete Modification

Note: It is also possible to select "Delete a Goal," on the same pop-up accessed from the "Add Goal Modification" button. To do so, select the radio button for the newly added Goal that requires deletion and click "Delete Goal." Please note that the delete function operates differently for newly added Goals and existing Goals. Deleting a newly added Goal will remove the entire Goal from the Modification. Deleting an existing Goal Modification will only remove the modified information. The Goal will remain a part of the ISP. It is not possible to delete an unmodified existing Goal.

Note: The modification of a goal may also require modification of an associated objective.



Modify Goals

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

Goals Update Year ISP

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

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

Goal Title:*

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:*

Spell Check Reset Save Save and Close

Note: All modified information will display with an asterisk on the system. For example, if an existing goal is modified, an asterisk displays next to the goal on the Goal tab for the individual.

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current
** Community Memberships	09/08/2015	Guardian			No	New

** This element is associated to a Modification

Addition or Modifying Residential Supports or Other

1) Click "Add Modification."

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

Back to Modifications Review Sinkboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstances that requires an update to his Residential Support plan

Goals

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

Add Goal Modification View/Edit Goal Modification Delete Goal Modification

Residential Support / Other

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

Add Modification View/Edit Modification Delete Modification

The system will display the Residential Support / Other pop-up screen.



Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
<p>Residential Support / Other</p> <p>Type of Modification : * Residential Supports or Type of Supports ▾</p> <p>Original Entry: * Sample Original Entry</p> <p>New Entry: * Sample New Entry</p> <p>Spell Check Reset</p> <p style="text-align: right;">Save and Close</p>				

Note: As these elements are paper-processes and not completed in the system, no information will be prepopulated into the “Original Entry” field. Both the “Original Entry” and “New Entry” fields will be completed by the user.

4) Click “Save and Close.”

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
<p>Residential Support / Other</p> <p>Type of Modification : * Residential Supports or Type of Supports ▾</p> <p>Original Entry: * Sample Original Entry</p> <p>New Entry: * Sample New Entry</p> <p>Spell Check Reset</p> <p style="text-align: right;">Save and Close</p>				

The system will return to the Modification Details screen and will display the original entry, new entry, Modification type, date and the individual who created the Modification. In the image below, the Original Entry column displays the original Goal description and the New Entry displays the modified information.



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

[Back to Modifications Review Subboard](#)

Modification Details

Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstances that requires an update to his Residential Support plan

Goals

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

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

Residential Support / Other

Original Entry	New Entry	Modification Type	Created On	Created By
Sample Original Entry	Sample New Entry	Residential Supports or Type of Supports	11/02/2015	Coordinator, Service

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

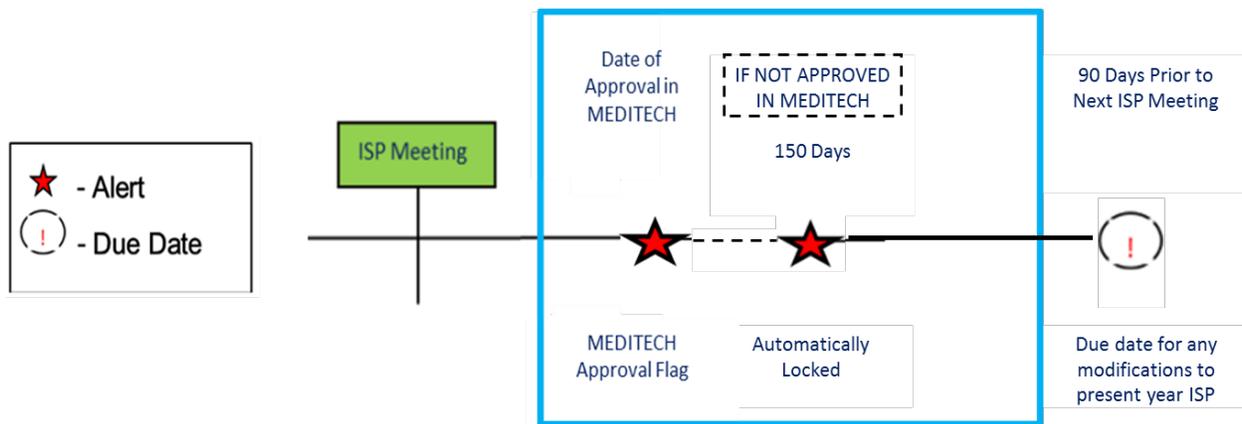


Submitting a Modification by DDS Staff

Scenario Description:

Service Coordinators can submit a Modification once the following conditions have been met

- The ISP has been locked. There are two methods by which an ISP is locked. The plan locks when a Full or Update Year ISP has been completed and the approval has been entered in MEDITECH by the Area Director, locking the plan in HCSIS. Alternatively, if the approval is not completed within 150 days, the plan will be locked automatically per the current process.
- The Modification has been initiated and at least one element has been added
- All mandatory fields are completed.



First Steps

- Initiate a Modification
- Add Elements to a Modification

Roles and Responsibilities

- **Service Coordinator:** Submit Modification for review
- **Service Coordinator Supervisors:** Submit Modification for review

1) Once you have added elements to a Modification, navigate to the Review Section.



Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstance that require his goals and residential support details to be updated.

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save up for and attend an event semi-annually rather than quarterly.	10/29/2015	Coordinator, Service

Residential Support / Other

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

Summary

Review Section

Proposed Start Date: *

Proposed Review Date:

Meeting Waived:

Date of Meeting: *

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

2) Enter a "Proposed Start Date." If desired, add in a "Proposed Review Date" as well.

Review Section

Proposed Start Date: *

Proposed Review Date:

Meeting Waived:

Date Meeting Waived: *

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

Note: The only restriction on the dates selected is that the date selected for the Proposed Review Date must occur after the date selected for the Proposed Start Date.

3) If the Modification meeting has occurred, select "No" in the "Meeting Waived" drop-down and select the date from the Date of Meeting calendar drop down. If the meeting did not occur, select "Yes" and select a date from the calendar drop down.

Review Section

Proposed Start Date: *

Proposed Review Date:

Meeting Waived:

Date Meeting Waived: *

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

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

Review Section

Proposed Start Date: *

Proposed Review Date:

Meeting Waived:

Date Meeting Waived: *

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

Note: Service Coordinator's retain the ability to edit a submitted Modification until an Area Office Director approves the Modification. Service Coordinator's retain these editing rights because Area Office Director's only have the ability to approve or disapprove a Modification. In the scenario that an Area Office Director disapproves of a Modification because it requires revision, the Area Office Director will explain the reason for disapproving in an offline discussion with the Service Coordinator. The Service Coordinator will be responsible for making any necessary revisions and resubmitting for Area Office Director review.



Reason for Disapproval	Next Step (DDS Initiated)	Next Step (Provider Initiated)
Revision Required	SC to Make Revisions	SC to Request Revision by Provider
Modification Not Required	No Action Required	No Action Required

Note: If the Area Office Director disapproves the Modification, the status is changed to disapproved in the Modifications Review Switchboard and no further action is required. The Modification content, however, is not deleted and the Area Office Director has the option of changing the status of the Modification to approved or requesting revision on the form at a later date if circumstances require it.

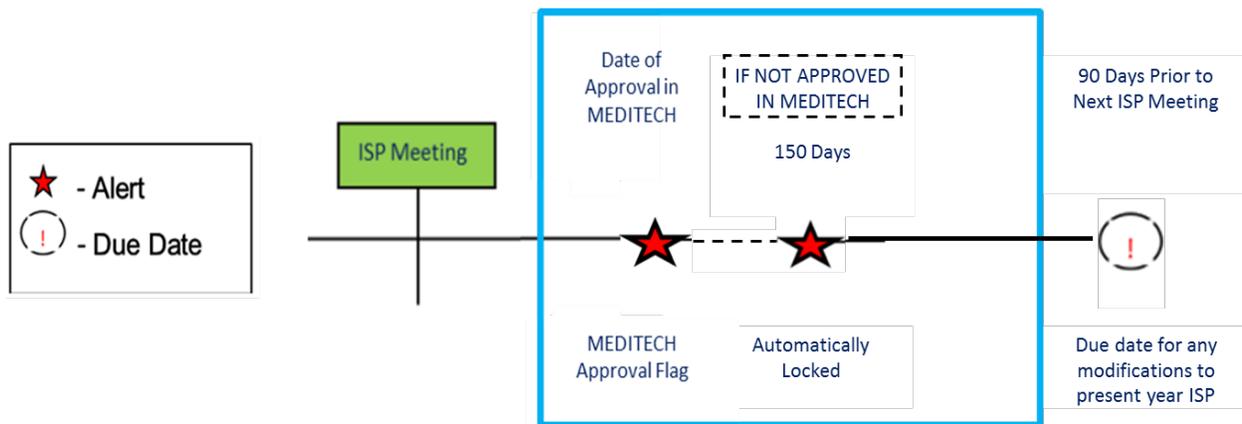


Completing a Modification by Provider Staff

Initiating a Modification by Provider Staff

Scenario Description:

Provider Supervisors can initiate an Modification once a Full or Update Year ISP has been completed and the plan is locked in HCSIS. There are two methods by which an ISP is locked. If the approval is entered in MEDITECH by an Area Office Director, the plan will be locked automatically or, if the approval is not completed within 150 days, the plan will be locked per the current process. Once the plan is locked, a red lock icon is visible on the Individual Dashboard. Once the icon is visible and the plan is locked, Provider Supervisor Staff can initiate a Modification. A single Modification initiated by a Provider can include any combination of the following elements: Goal, Objective & Support Strategy (OSS), Residential Support / Behavior Plan/Other



First Steps

- Search for an Individual
- View the Individual Dashboard

Roles and Responsibilities

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

- 1) Select "Modification" from the tabs on the Individual 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: 03/04/2015
Meeting Time: 10:00 AM
Meeting Location: [Redacted]
Actual Meeting Date: 03/05/2015

ISP Deadlines
Meeting Deadline: 03/04/2015
Semi Annual Review Date: 09/01/2015
Next ISP Meeting Deadline: 03/04/2016

Update Year ISP

Vision

Status: Shared
Due Date: 02/02/2015
Last Updated On: 09/01/2015
Last Shared On: 09/01/2015

Goals

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

Objectives & Support Strategies

Status: Approved
Due Date: 02/17/2015
Pending Provider Submission: 0/2
Pending DDS Review: 0/2

Assessments

Status: Approved
Due Date: 02/17/2015
Pending Provider Submission: 0/3
Pending DDS Review: 0/3

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

2) Select “Add New Modification” on the Modifications Review Switchboard.

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

Modifications Review Switchboard **Update Year ISP**

Modification Reason	Modification Type	Created On	Created By	Document History	Status
No modification created					

[Add New Modification](#)

Note: If any Modifications to the individual’s current plan have already been submitted or are in progress, the existing Modifications display on the Modifications Review Switchboard

The system will redirect to the Modification Details page.

3) Insert comments into the Modification Reason text box and explain the reason that a Modification is required.



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

Back to Modifications Review Switchboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

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

Goals

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

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

Objectives & Support Strategies

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

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

Residential Support / Behavior Plan / Other

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

- 4) Decide which elements require Modification: A.) Goal and/or B.) Objective & Support Strategy (OSS) and/or C.) Residential Support / Behavior Plan / Other. All of these elements fall under the previously entered “Reason for Modification”. In this scenario, you will initiate a Modification for a Goal.

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

Back to Modifications Review Switchboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

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

Goals

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

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

Objectives & Support Strategies

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

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

Residential Support / Behavior Plan / Other

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

Note: 90 days prior to the next ISP meeting date, next year’s ISP document is generated by the system. After this has happened, it is not possible to initiate, complete or submit Modifications to the prior year’s ISP. Instead, any change that occurs in that timeframe should be included as part of the upcoming individual’s ISP meeting.

For instructions on how to add an element to the Modification, refer to the “Adding an Element to a Modification by Provider” section.

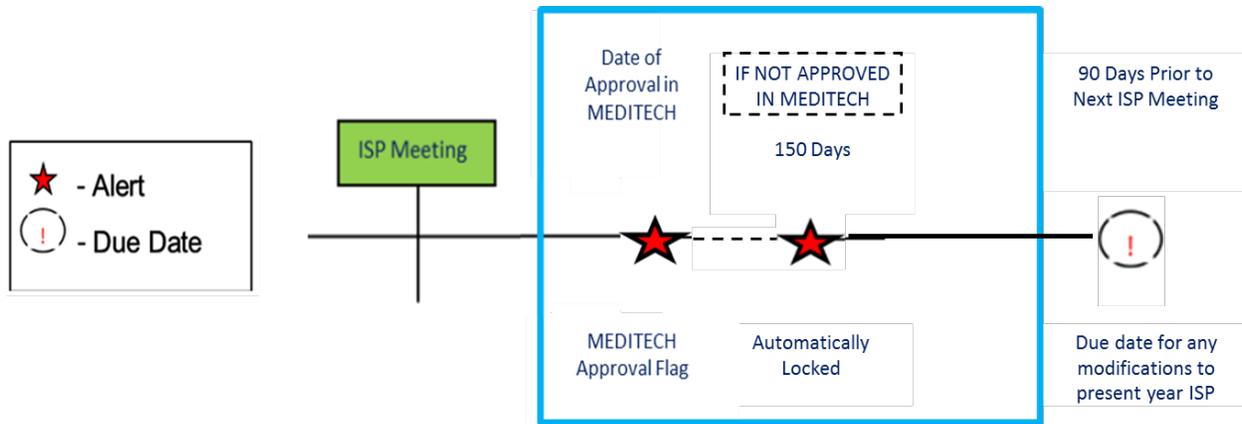


Adding Elements to a Modification by Provider Staff

Scenario Description:

Provider Supervisors can add an element to a Modification once the following conditions have been met:

- The ISP has been locked. There are two methods by which an ISP is locked. The plan locks when a Full or Update Year ISP has been completed and the approval has been entered in MEDITECH by the Area Director, locking the plan in HCSIS. Alternatively, if the approval is not completed within 150 days, the plan will be locked automatically per the current process.
- The Provider Supervisor has initiated a Modification.



First Steps

- Navigate to the Modifications Review Switchboard

Roles and Responsibilities

- **Provider Data Entry User:** N/A
- **Provider Supervisors:** Add Elements to a Modification

Addition of a New Goal

- 1) On the Modifications Review Switchboard, select “Add Goal Modification” to initiate a Modification to Goals.



ISP Assessments User Guide

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

Back to Modifications Review Switchboard

Modification Details

Expand All | Collapse All

Modification Reason: *

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

Goals

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

Objectives & Support Strategies

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

Residential Support / Behavior Plan / Other

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

- 2) The Modify Goals pop-up screen will display. It displays all of the existing Goals included in the ISP document.

Modify Goals

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

Goals

Update Year ISP

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

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

- 3) Enter the title of the Goal in the "Goal Title" text box.



Modify Goals

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

Goals ⓘ Update Year ISP

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

View/Edit Goal Delete Goal Add Goal

Goal Title:* Community Membership

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:* New

Spell Check Reset Save Save and Close

4) Enter the Goal description in the "Goal" text box.

Modify Goals

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

Goals ⓘ Update Year ISP

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

View/Edit Goal Delete Goal Add Goal

Goal Title:* Community Membership

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

Date Goal Identified:*

Goal Identified By:*

Update Year Status:* New

Spell Check Reset Save Save and Close

5) Select a date in the "Date Goal Identified" calendar drop down.



Modify Goals

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

Goals Update Year ISP

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

View/Edit Goal Delete Goal Add Goal

Goal Title:* Community Membership

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

Date Goal Identified:* 10/29/2015

Goal Identified By: *

Update Year Status:* New

Spell Check Reset Save Save and Close

Note: The date selected for the “Date Goal Identified” needs to be in the past.

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

Modify Goals

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

Goals Update Year ISP

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

View/Edit Goal Delete Goal Add Goal

Goal Title:* Community Membership

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

Date Goal Identified:* 10/29/2015

Goal Identified By:*
Guardian
Service Coordinator
Individual
Provider

Update Year Status:*

Spell Check Reset Save Save and Close

7) Click “Save and Close.”



Modify Goals

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

Goals Update Year ISP

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

View/Edit Goal Delete Goal Add Goal

Goal Title: * Community Membership

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

Date Goal Identified: * 10/29/2015

Goal Identified By: * Guardian

Update Year Status: * New

Spell Check Reset Save Save and Close

The system will return to the Modification Details screen and will display the original entry, new entry, Modification type, and the date and individual who created the Modification for the completed Modification. In the image below, the original entry displays N/A because it is a newly added Goal.

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

back to Modifications Review Dashboard

Modification Details Update Year ISP

Edward, III | Colleen, III

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

Goals

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

Add Goal Modification View/Edit Goal Modification Delete Goal Modification

Objectives & Support Strategies

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

Add OSS Modification View/Edit OSS Modification Delete OSS Modification

Residential Support / Behavior Plan / Other

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

Add Modification View/Edit Modification Delete Modification

Note: It is also possible to select "Delete a Goal," on the same pop-up accessed from the "Add Goal Modification" button. To do so, select the radio button for the newly added Goal that requires deletion and click "Delete Goal." Please note that the delete function operates differently for newly added Goals and existing Goals. Deleting a newly added Goal will remove the entire Goal from the Modification. Deleting an existing Goal Modification will only remove the modified information. The Goal will remain a part of the ISP. It is not possible to delete an unmodified existing Goal.



Modify Goals

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

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
<input type="radio"/> Money Management	08/21/2014	Individual			Yes	Current
<input type="radio"/> Community Involvement	08/21/2014	Individual			Yes	Current
<input type="radio"/> Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current
<input checked="" type="radio"/> ** Community Membership	09/08/2015	Guardian			No	New

** This element is associated to a Modification

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

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: * New

Spell Check Reset Save Save and Close

Modification of an Existing Goal

- 1) On the Modifications Review Switchboard, select “Add Goal Modification” to initiate a Modification to Goals.

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

Back to Modifications Review Switchboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

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

Goals

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

Add Goal Modification View/Edit Goal Modification Delete Goal Modification

Objectives & Support Strategies

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

Add OSS Modification View/Edit OSS Modification Delete OSS Modification

Residential Support / Behavior Plan / Other

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

- 2) The system will display the Modify Goals pop-up screen. The form includes all existing Goals which were included in the ISP document. Select the radio button next to the desired Goal and click “View/Edit Goal.”



ISP Assessments User Guide

Modify Goals

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

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

Goal Title:*

Goal:*

Date Goal Identified:*

Goal Identified By:*

Update Year Status:*

The system will display the details for the selected Goal.

Modify Goals

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

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

No Change

Modification Information

3) Enter text in the Modification Information textbox and explain what changes are required to the Goal.



Modify Goals

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

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	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:* Current

Update Information
 No Change

Modification Information

Bruce will save up to do a big event three times a year - rather than quarterly

Spell Check Reset Save Save and Close

- Click "Save and Close." Alternatively, click on the "Save" buttons to save this information so that it can be worked on at a later time.

Modify Goals

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

Goals Update Year ISP

Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status
Money Management	08/21/2014	Individual			Yes	Current
Community Involvement	08/21/2014	Individual			Yes	Current
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	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:* Current

Update Information
 No Change

Modification Information

Spell Check Reset Save Save and Close

Once, "Save and Close" has been selected, the system will return to the Modification Details screen and will display the original entry, new entry, Modification type, and the date and individual who created the Modification for the completed Modification. In the image below, the Original Entry column displays the original Goal description and the New Entry displays the modified information.



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

Back to Modifications Review Subboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

There has been a change in Bruce's circumstances that requires an update to his Residential Support plan

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: <input checked="" type="radio"/> Money Management Goal Description: Bruce will save in quarterly to do a big event. Each	Goal Description: Bruce will save up to do a big event three times a year - rather than quarterly	11/02/2015	

Residential Support / Other

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

Note: It is also possible to select "Delete a Goal," on the same pop-up accessed from the "Add Goal Modification" button. To do so, select the radio button for the newly added Goal that requires deletion and click "Delete Goal." Please note that the delete function operates differently for newly added Goals and existing Goals. Deleting a newly added Goal will remove the entire Goal from the Modification. Deleting an existing Goal Modification will only remove the modified information. The Goal will remain a part of the ISP. It is not possible to delete an unmodified existing Goal.

Modify Goals X

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

Goals Update Year ISP

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

Goal Title: *

Goal: *

Date Goal Identified: *

Goal Identified By: *

Update Year Status: *

Note: If an existing Goal is modified, two asterisks display next to the Goal on the Goal tab for the individual.



Goals						Update Year ISP	
Goal Title	Date Identified	Identified By	Created By	Updated By	Included in ISP Doc?	Update Year Status	
Money Management	08/21/2014	Individual			Yes	Current	
Community Involvement	08/21/2014	Individual			Yes	Current	
Personal Growth & Accomplishments	08/18/2014	Provider			Yes	Current	
** Community Membership	08/08/2015	Guardian			No	New	

** This element is associated to a Modification

Addition of a New Objective & Support Strategy (OSS)

1) Click "Add OSS Modification."

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

Back to Modifications Review Subboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

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

Goals

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

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

Objectives & Support Strategies

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

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

Residential Support / Behavior Plan / Other

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

2) The system will display the Modify Objectives pop-up screen. Select a Goal from the drop-down.

Modify Objectives x

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

Update Year ISP

Select Goal :

- Community Involvement
- Money Management
- Personal Growth & Accomplishments



- 3) Begin filling in the Objective section by entering comments in the “Measurable Objective” and “Setting and Learning Environment” text boxes.

The screenshot shows the 'Modify Objectives' window with the following details:

- Individual:** Test, Bruce
- Eligibility # SSN #:** [Redacted]
- Planned Meeting Date:** 03/04/2015
- ISP Meeting Deadline:** 03/04/2015
- Service Coordinator:** Coordinator, Service
- Update Year ISP:** [Dropdown menu]
- Select Goal:** Community Involvement
- Objective(s) Table:**

Objective(s)	Created By	Status	Update Year Status
Bruce will serve meals once a week at Cor unum in Lawrence.	[Redacted]	Approved	Current
- Objective and Support Strategy Form:**
 - Objective:** Measurable Objective: Bruce will wear appropriate attire during cooking 100% of the time. Setting and Learning Environment: Cor unum in Lawrence.

- 4) Identify the Responsible Party.

The screenshot shows the 'Modify Objectives' window with the following details:

- Responsible Party:** [Text box highlighted with a blue border]
- Update Year Status:** New
- Support Strategy:** [Collapsible section]
- Teaching Method and Skills to be Developed:** [Text box]
- Criteria for Evaluating Success:** [Text box]
- Data Collection Method and Report Frequency:** [Text box]
- Buttons:** Spell Check, Reset, Save, Save and Close

- 5) If the Modification is submitted in an Update Year, select the Update Year status from the drop-down.



Modify Objectives

Responsible Party: Jeff Test

Update Year Status: **New**

Support Strategy

Teaching Method and Skills to be Developed:

Criteria for Evaluating Success:

Data Collection Method and Report Frequency:

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

- 6) Fill in the Support Strategy section, by entering comments in the “Teaching Method and Skills to be Developed,” “Criteria for Evaluating Success” and “Data Collection Method and Report Frequency” text boxes.

Modify Objectives

Responsible Party: Jeff Test

Update Year Status: **New**

Support Strategy

Teaching Method and Skills to be Developed:
Appropriate preparation and presentation

Criteria for Evaluating Success:
100% success in dressing appropriately

Data Collection Method and Report Frequency:
Supervisor at: will document any violations

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

- 7) When all sections are complete, click “Save and Close”.



The system will return to the Modification Details screen and will display the original entry, new entry, date and individual who completed the Modification. In the image below, the Original Entry column displays the original OSS description and the New Entry displays the modified information.

Original Entry	New Entry	Created On	Created By
<input type="radio"/>	Measurable Objective: Bruce will wear appropriate attire during cooking 100% of the time during and	11/02/2015	User, Provider Two

Note: A new OSS that is added as part of a Modification does not need to follow the approval process that OSS usually require. Rather the approval of the Modification is recognized as an implicit approval of the OSS and its status displays as approved.

Note: It is possible to delete an OSS Modification on the same pop-up accessed from the “Add OSS Modification” button. To do so, select the radio button for the newly added OSS that requires deletion and click “Delete.” Please note that the delete function operates differently for newly added OSS and existing OSS. Deleting a newly added Goal will remove the entire Goal from the Modification. Deleting an existing



Goal Modification will only remove the modified information. The Goal will remain a part of the ISP. It is not possible to delete an unmodified existing Goal.

Modification of an Existing Objective & Support Strategy (OSS)

- 1) Click “Add OSS Modification”.

- 2) The system will display the Modify Objectives pop-up screen. Select a Goal from the drop-down.



Modify Objectives

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

Update Year ISP

Select Goal : Community Involvement
Money Management
Personal Growth & Accomplishments

3) Select the radio button next to the Objective that you would like to modify.

Modify Objectives

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

Update Year ISP

Select Goal : Community Involvement

Objective(s)	Created By	Status	Update Year Status
<input checked="" type="radio"/> Bruce will serve meals once a week at		Approved	Current

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

Objective and Support Strategy Form

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

Objective

Measurable Objective:

Setting and Learning Environment:

4) Click "View/Edit."



Modify Objectives

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
Update Year ISP				
Select Goal: Community Involvement				
Objective(s)	Created By	Status	Update Year Status	
Bruce will serve meals once a week at		Approved	Current	
View/Edit Delete				

Objective and Support Strategy Form

Expand All | Collapse All

Objective

Measurable Objective:

Setting and Learning Environment:

The Objective and Support Strategy form for the selected Objective will display.

Modify Objectives

Individual Test, Bruce	Eligibility # SSN #	Planned Meeting Date 03/04/2015	ISP Meeting Deadline 03/04/2015	Service Coordinator Coordinator, Service
Update Year ISP				
Select Goal: Community Involvement				
Objective(s)	Created By	Status	Update Year Status	
Bruce will serve meals once a week at		Approved	Current	
View/Edit Delete				

Objective and Support Strategy Form

Expand All | Collapse All

Objective

Measurable Objective:

Bruce will serve meals once a week at

Update Information

No Change **Modification Information**

Setting and Learning Environment:

Bruce will be in a building at with other volunteers and a staff from his residence. Bruce will then serve food to less fortunate for 1-2 hours a night once a week depending how long he is needed each time he goes.

Update Information

No Change **Modification Information**

- 5) Select the Modification Information checkboxes for each section of the Objective and Support Strategy form that requires Modification. Textboxes will appear below a section after you select the checkbox. Enter Modification information in the desired text boxes.



Modify Objectives

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

Update Year ISP

Select Goal: Community Involvement

Objective(s)	Created By	Status	Update Year Status
Bruce will serve meals once a week at		Approved	Current

View/Edit Delete

Objective and Support Strategy Form

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

Objective

Measurable Objective:
Bruce will serve meals once a week at

Update Information
No Change

Modification Information

6) Click "Save and Close".

Modify Objectives

Update Information
No Change

Modification Information

Update Year Status: Current

Support Strategy

Teaching Method and Skills to be Developed:
Bruce will learn to serve portioned food to others. He will make friends with other volunteers. Bruce will learn more social skills.

Update Information
No Change

Modification Information

Criteria for Evaluating Success:
Bruce continuing to go each week and serve food.

Update Information
No Change

Modification Information

Data Collection Method and Report Frequency:
We will collect via share point. Colleagues will document when Bruce attends and how long he served food for. We will also have a paper copy to check off and write how long he served food for.

Update Information
No Change

Modification Information

Spell Check Reset Save

Save and Close

The system will return to the Modification Details screen and will display the original entry, new entry, Modification type, the date and individual who created the Modification. In the image below, the Original Entry column displays the original Goal description and the New Entry displays the modified information.



Note: A new OSS that is added as part of a Modification does not need to follow the approval process that OSS usually require. Rather the approval of the Modification is recognized as an implicit approval of the OSS and its status displays as approved.

Note: It is possible to delete an OSS Modification on the same pop-up accessed from the “Add OSS Modification” button. To do so, select the radio button for the newly added OSS that requires deletion and click “Delete.” Please note that the delete function operates differently for newly added OSS and existing OSS. Deleting a newly added Goal will remove the entire Goal from the Modification. Deleting an existing Goal Modification will only remove the modified information. The Goal will remain a part of the ISP. It is not possible to delete an unmodified existing Goal.

Note: If an existing OSS is modified, an asterisk displays next to the OSS on the Goal tab for the individual.



Objectives and Support Strategies Review Switchboard						Update Year ISP
Objective(s)	Created By	Status	PS Frequency	Document History	Update Year Status	
Community Involvement						
** Bruce will serve meals once a week at		Approved	Quarterly	View Document History	New	
Money Management						
Bruce will find a big activity he would like to do at the beginning of each quarter. He will then s		Approved	Semi-Annual	View Document History	Current	
** This element is associated to a Modification						

Addition or Modifying a New Behavior Plan, Residential Support, or Other

1) Click "Add Modification".

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

back to Modifications Review Switchboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

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

Goals

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

Objectives & Support Strategies

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

Residential Support / Behavior Plan / Other

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

Add Modification **View/Edit Modification** **Delete Modification**

The system will display the Residential Support / Behavior Plan / Other pop-up screen.



Residential Support / Behavior Plan / Other

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

Residential Support / Behavior Plan / Other

Type of Modification : *

Original Entry: *

New Entry: *

Spell Check Reset Save and Close

- 2) Select the Type of Modification drop-down and identify which type of Modification will be submitted: Residential Supports of Types of Supports, Behavior Plan Modification or Initiation, Other.

Residential Support / Behavior Plan / Other

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

Residential Support / Behavior Plan / Other

Type of Modification : *

Residential Supports or Type of Supports
Behavior Plan Modification or Initiation
Other

New Entry: *

Spell Check Reset Save and Close

- 3) Fill out the "Original Entry" and "New Entry" text boxes.



Residential Support / Behavior Plan / Other

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

Residential Support / Behavior Plan / Other

Type of Modification : *
Residential Supports or Type of Supports ▾

Original Entry: *
[Empty text area]

New Entry: *
[Empty text area]

Spell Check Reset Save and Close

Note: As these elements are paper-processes and not completed in the system, no information will be prepopulated into the “Original Entry” field. Both the “Original Entry” and “New Entry” fields will be completed by the user.

4) Click “Save and Close.”

Residential Support / Behavior Plan / Other

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

Residential Support / Behavior Plan / Other

Type of Modification : *
Residential Supports or Type of Supports ▾

Original Entry: *
Sample original entry

New Entry: *
Sample new entry

Spell Check Reset Save and Close



The system will return to the Modification Details screen and will display the original entry, new entry, Modification type, date and the individual who created the Modification.

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

Back to Modifications Review Dashboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

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

Goals

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

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

Objectives & Support Strategies

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

[Add OSS Modification](#) [View/Edit OSS Modification](#) [Delete OSS Modification](#)

Residential Support / Behavior Plan / Other

Original Entry	New Entry	Modification Type	Created On	Created By
Sample original entry	Sample new entry	Residential Supports or Type of Supports	11/02/2015	User, Provider Two

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



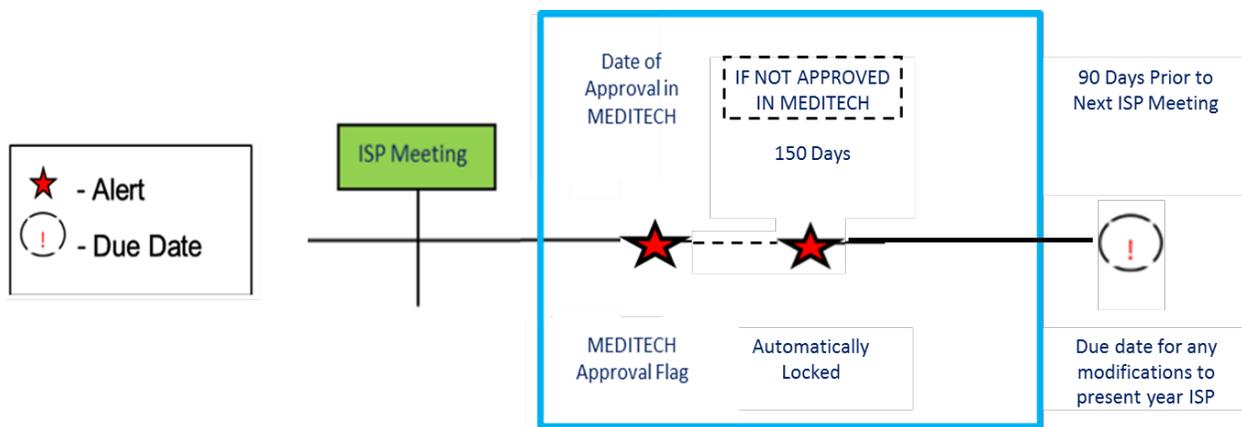
Submitting a Modification by Provider Staff

Scenario Description:

Provider Supervisors can submit a Modification once the following conditions have been met

- The ISP has been locked. There are two methods by which an ISP is locked. The plan locks when a Full or Update Year ISP has been completed and the approval has been entered in MEDITECH by the Area Director, locking the plan in HCSIS. Alternatively, if the approval is not completed within 150 days, the plan will be locked automatically per the current process.
- The Modification has been initiated and at least one element has been added
- All mandatory fields are completed.

Note: The Provider Supervisor will submit a Modification to the Service Coordinator for Acceptance, before it is sent to the Area Office Director for Approval. The Service Coordinator may accept, disapprove, or request revision of a proposed Modification submitted by a Provider.



First Steps

- Initiate a Modification
- Add Elements to a Modification
- Navigate to Modifications form

Roles and Responsibilities

- **Provider Data Entry User:** N/A
- **Provider Supervisors:** Submit Modifications

1) Once you have added elements to a Modification, navigate to the Review Section.



ISP Assessments User Guide

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

Back to Modifications Review Subdashboard

Modification Details Update Year ISP

Reasons: 1 | Collapse All

Modification Reason: *

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

Goals

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

Objectives & Support Strategies

No modifications for objectives created.

Residential Support / Behavior Plan / Other

No other modifications created.

Summary

Review Section

Proposed Start Date: *

Proposed Review Date:

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

2) Enter a “Proposed Start Date.” If desired, add in a “Proposed Review Date” as well.

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

Back to Modifications Review Subdashboard

Modification Details Update Year ISP

Reasons: 1 | Collapse All

Modification Reason: *

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

Goals

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

Objectives & Support Strategies

No modifications for objectives created.

Residential Support / Behavior Plan / Other

No other modifications created.

Summary

Review Section

Proposed Start Date: *

Proposed Review Date:

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

Note: The only restriction on the dates selected are that the date selected for the Proposed Review Date occur after the date selected for the Proposed Start Date.

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



ISP Dashboard | ISP Meeting Details | View | Assessments | Goals | Objectives | Modifications | View Draft ISP

Back to Modifications Review Switchboard

Modification Details Update Year ISP

Student ID: 7 | Counselor ID: [redacted]

Modification Reason: *

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

Goals

Original Entry	New Entry	Created On	Created By
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event, each	Goal Description: Bruce is to save for and attend events semi-annually rather than quarterly.	10/30/2013	User, Provider Tacy

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

Objectives & Support Strategies

No modifications for objectives created.

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

Residential Support / Behavior Plan / Other

No other modifications created.

Add Modification | View/Edit Modification | Delete Modification

Necessary

Review Sections

Proposed Start Date: [calendar icon] Proposed Review Date: [calendar icon]

Save and Continue | **Submit for DDS Review**

Next Steps

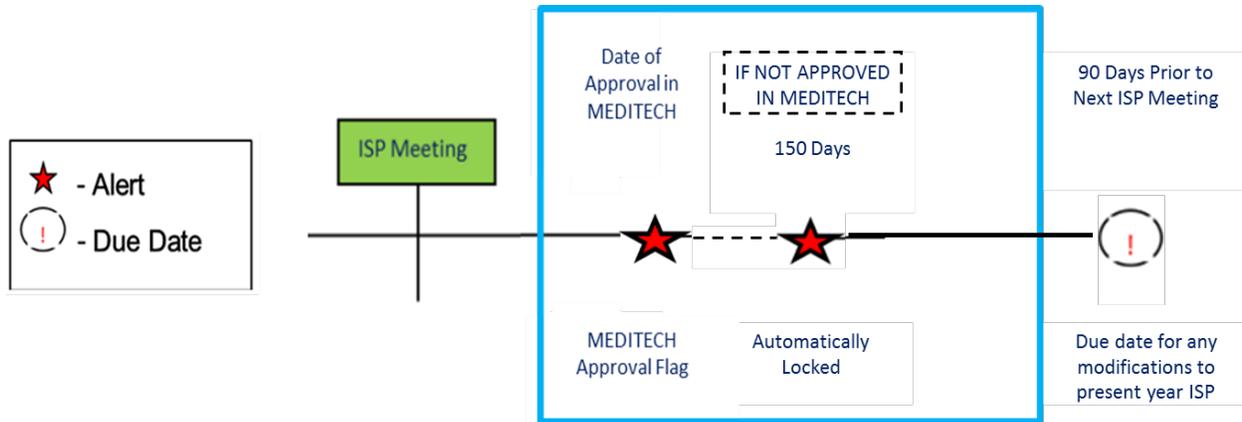
- Once a Modification has been submitted to DDS, the Service Coordinator or Service Coordinator Supervisor is responsible for reviewing the Modification. They can either Disapprove, Accept, or Request Revision on the Modification.
- If the Service Coordinator or Service Coordinator Supervisor determines that the Modification has been submitted in error or is not required, they will disapprove the Modification. In this case, the Provider Supervisor will receive an alert indicating that it has been disapproved. No additional action is required.
- If the Service Coordinator or Service Coordinator Supervisor determines that the Modification requires revision, the Provider Supervisor will receive an alert and will be tasked with revising the Modification.
- If the Service Coordinator or Service Coordinator Supervisor determines that the Modification is acceptable, they will submit the Modification for Area Office Director review. The Provider Supervisor will receive an alert indicating that the proposed Modification has been accepted by DDS.
- If the Area Office Director approves the Modification, the status of the Modification changes to approved in the Modifications Review Switchboard and the Modification can be printed without a draft watermark.
- If the Area Office Director disapproves the Modification, the status of the Modification is changed to disapproved in the Modifications Review Switchboard and no further action is required. The Modification content, however, is not deleted and the Area Office Director has the option of changing the status of the Modification to approved or requesting revision on the form at a later date if circumstances require it.
- Once a Modification for a newly added OSS is submitted and approved, Progress Summaries will be triggered for the objective.
- All Modifications for a plan need to be approved or disapproved for next years plan to open.



Reviewing and Accepting of a Modification by DDS Staff

Scenario Description:

Service Coordinators or Service Coordinator Supervisors are responsible for reviewing a Modification once a Provider Supervisor has submitted it to DDS for review. A Provider initiated Modification can include any combination of the following elements: Goals, Objective & Support Strategy (OSS), Residential Support / Other. Service Coordinators or Service Coordinator Supervisors can accept, disapprove, or request revision to a Provider initiated Modification. This scenario covers the process of accepting a Modification.



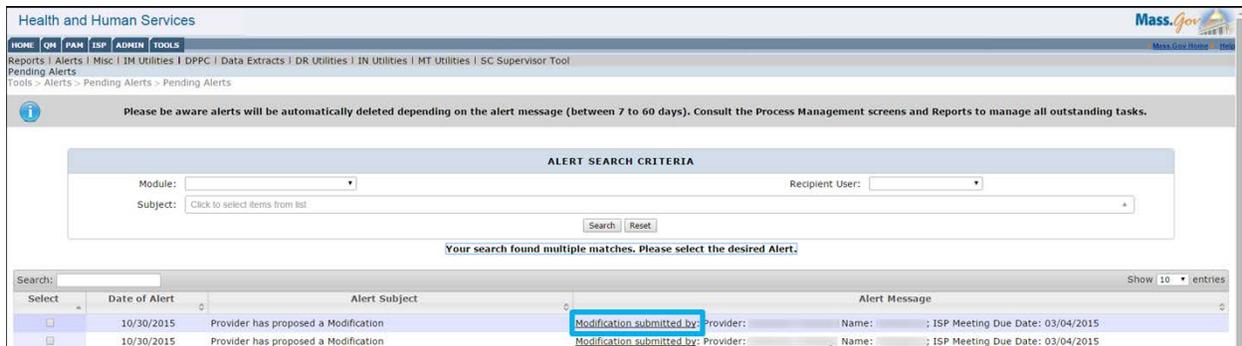
First Steps

- Navigate to Alert Dashboard

Roles and Responsibilities

- **Service Coordinators:** Review a Modification, Request Revision of a Modification, Disapprove of a Modification, Accept Modification and Submit for AOD Review
- **Service Coordinator Supervisors:** Review a Modification, Request Revision of a Modification, Disapprove of a Modification, Accept Modification and Submit for AOD Review

- 1) Service Coordinators will receive an alert indicating that Modifications have been submitted by Provider agencies. Click the “Modification submitted by” link in the alert message.



- 2) The system will navigate to the Modifications Review Switchboard and display the Modification that has been submitted. Click the “Submitted for DDS Review” link.



ISP Assessments User Guide

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Submitted for DDS Review

[Add New Modification](#)

- 3) Review the Goals, Objectives & Support Strategies and Residential Support / Other Sections on the Modification Details page.

Modification Details Update Year ISP

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

Goals

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

Objectives & Support Strategies

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

Residential Support / Other

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

Summary

Review Section

Proposed Start Date: * Proposed Review Date:

Meeting Waived: Date of Meeting: *

Comments:

[Spell Check](#) [Reset](#) [Save](#) [Disapprove](#) [Save and Continue](#) [Request Revision](#) [Submit for ACO Review](#)

- 4) Complete all of the mandatory sections in the Review Section on the Modification Details 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

Back to Modifications Review SubBoard

Modification Details Update Year ISP

Expand All | Collapse All

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

Goals

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

Objectives & Support Strategies

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

Residential Support / Other

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

Summary

Review Section

Proposed Start Date: * 10/30/2015

Proposed Review Date:

Meeting Waived: No

Date of Meeting: *

Comments:

[Spell Check](#) | [Reset](#) | [Save](#) | [Disapprove](#)

[Save and Continue](#) | [Request Revision](#) | [Submit for AOD Review](#)

- If the Modification is complete and ready for Area Office Director review, click "Submit for AOD Review."

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

Back to Modifications Review SubBoard

Modification Details Update Year ISP

Expand All | Collapse All

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

Goals

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

Objectives & Support Strategies

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

Residential Support / Other

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

Summary

Review Section

Proposed Start Date: * 10/30/2015

Proposed Review Date:

Meeting Waived: No

Date of Meeting: *

Comments:

[Spell Check](#) | [Reset](#) | [Save](#) | [Disapprove](#)

[Save and Continue](#) | [Request Revision](#) | [Submit for AOD Review](#)



The system redirects to the Modifications Review Switchboard and the status of the Modification displays as “Submitted for AOD Review.”

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Submitted For AOD Review

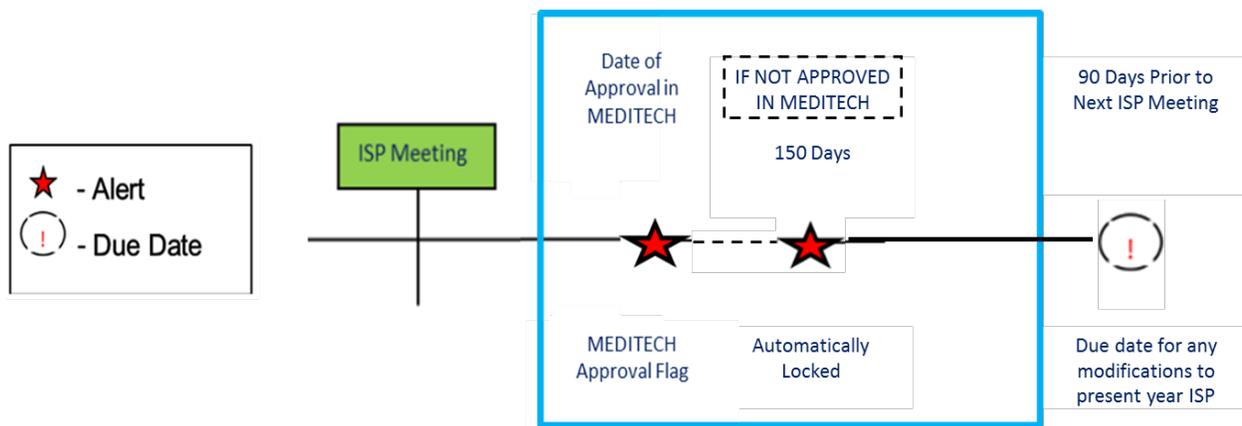
Note: When a Service Coordinator reviews a Provider initiated modification and opts to submit it for Area Office Director review, it constitutes acceptance of the Modification. It does not, however, constitute approval of the modification. A modification is only approved after a Area Office Director reviews the document and decides to approve the document. With that in mind, after you submit a modification for Area Office Director review, Providers will receive an alert indicating that the modification has been accepted but they still must wait for approval by the Area Office Director.



Reviewing and Disapproving of a Modification by DDS Staff

Scenario Description:

Service Coordinators or Service Coordinator Supervisors are responsible for reviewing a Modification once a Provider Supervisor has submitted it to DDS for review. A Provider initiated Modification can include any combination of the following elements: Goals, Objective & Support Strategy (OSS), Residential Support / Other. Service Coordinators or Service Coordinator Supervisors can accept, disapprove, or request revision to a Provider initiated Modification. This scenario covers the process of disapproving a Modification.



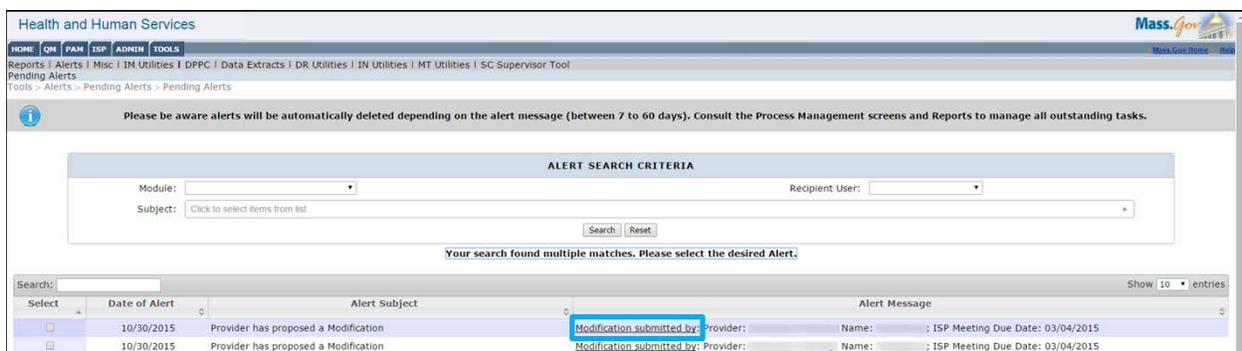
First Steps

- Navigate to Alert Dashboard

Roles and Responsibilities

- **Service Coordinators:** Review a Modification, Request Revision of a Modification, Disapprove of a Modification, Accept Modification
- **Service Coordinator Supervisors:** Review a Modification, Request Revision of a Modification, Disapprove of a Modification, Accept Modification

- 1) Service Coordinators will receive an alert indicating that a Modification has been submitted by a Provider agency. Click the “Modification submitted by” link in the alert message.



- 2) The system will redirect to the Modifications Review Switchboard and display the Modification that has been submitted. To navigate to the Modification Details screen, click the “Submitted for DDS Review” link.



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
Modifications Review Switchboard																
Update Year ISP																
Modification Reason	Modification Type	Created On	Created By	Document History	Status											
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Submitted for DOS Review											
Add New Modification																

3) Review the content on the Modification Details screen.

ISP Dashboard					ISP Meeting Details	Vision	Request Assessments	Review Assessments	Current Supports	Safety/Risk	Legal/Financial	Successes/Challenges	Goals	Objectives	Modifications	View/Print ISP
Modification Details																
Update Year ISP																
Back to Modifications Review Switchboard																
Modification Reason: There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives & Support Strategies																
Goals																
Original Entry	New Entry	Created On	Created By													
Goal Title: Money Management Goal Description: Bruce will save up quarterly to do a big event. Each	Goal Description: Bruce is to save for and attend events semi-annually rather than quarterly	10/30/2015														
Objectives & Support Strategies																
Original Entry	New Entry	Created On	Created By													
No modifications for objectives created.																
Residential Support / Other																
Original Entry	New Entry	Modification Type	Created On	Created By												
No other modifications created.																
Summary																
Review Section																
Proposed Start Date: *	10/30/2015	Proposed Review Date:														
Meeting Waived:	No	Date of Meeting: *														
Comments:																
<div style="border: 1px solid gray; height: 40px;"></div>																
Save and Continue Request Revision Submit for ADO Review																

4) If the Modification was submitted in error or is not required, click "Disapprove."



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

[Back to Modifications Review Switchboard](#) Update Year ISP

Modification Details

Expand All | Collapse All

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

Goals

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

Objectives & Support Strategies

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

Residential Support / Other

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

Summary

Review Section

Proposed Start Date: * 10/30/2015

Proposed Review Date: *

Meeting Waived: No

Date of Meeting: *

Comments:

Spell Check | Reset | **Disapprove** | Save and Continue | Request Revision | Submit for ADD Review

The system redirects to the Modifications Review Switchboard and the status of the Modification displays as “Disapproved by SC.”

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

Modifications Review Switchboard Update Year ISP

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Disapproved By SC

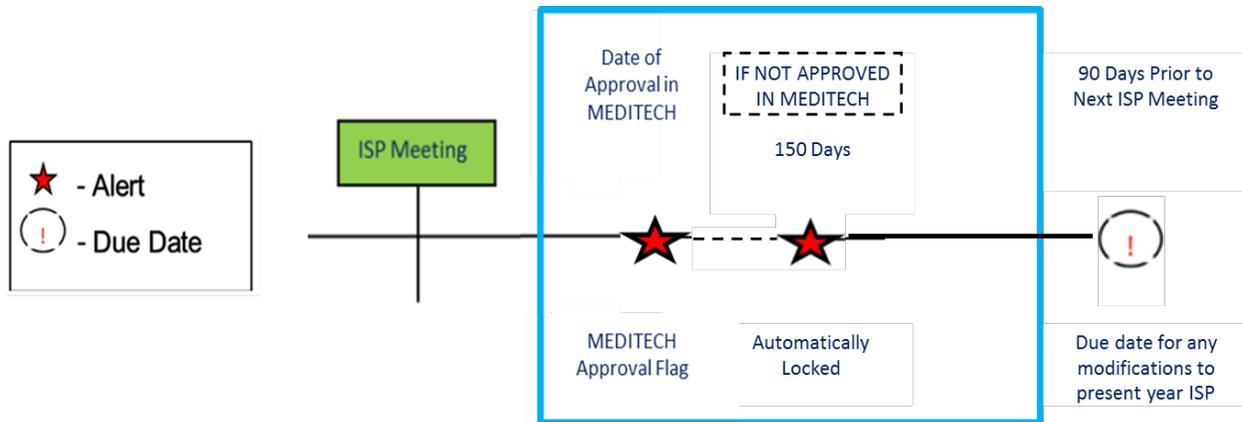
[Add New Modification](#)



Reviewing and Requesting Revision on a Modification by DDS Staff

Scenario Description:

Service Coordinators or Service Coordinator Supervisors are responsible for reviewing a Modification once a Provider Supervisor has submitted it to DDS for review. A Provider initiated Modification can include any combination of the following elements: Goals, Objective & Support Strategy (OSS), Residential Support / Other. Service Coordinators or Service Coordinator Supervisors can accept, disapprove, or request revision to a Provider initiated Modification. This scenario covers the process of requesting revision on a Modification.



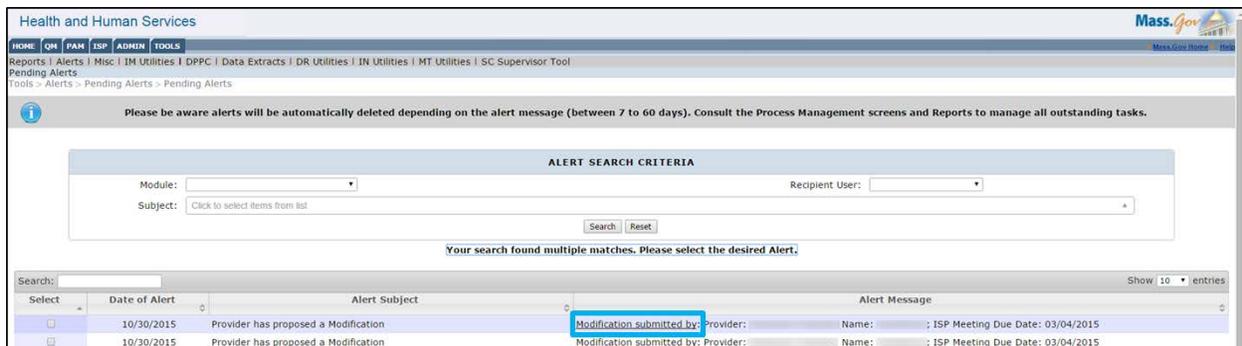
First Steps

- Navigate to Alert Dashboard

Roles and Responsibilities

- **Service Coordinators:** Review a Modification, Request Revision of a Modification, Disapprove of a Modification, Accept Modification
- **Service Coordinator Supervisors:** Review a Modification, Request Revision of a Modification, Disapprove of a Modification, Accept Modification

- 1) Service Coordinators will receive an alert indicating that Modifications have been submitted by Provider agencies. Click the “Modification submitted by” link in the alert message.



- 2) The system will navigate to the Modifications Review Switchboard and display the Modification that has been returned. To navigate to the Modification Details screen, click the “Submitted for DDS Review” link.



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

Modifications Review Switchboard Update Year ISP

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Submitted for DOS Review

[Add New Modification](#)

3) Review the content on the Modification Details screen.

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

[Back to Modifications Review Switchboard](#) Update Year ISP

Modification Details

Search: All | Collapse All

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

Goals

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

Objectives & Support Strategies

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

Residential Support / Other

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

Summary

Review Section

Proposed Start Date: * Proposed Review Date:

Meeting Waived: Date of Meeting: *

Comments:

[Spell Check](#) [Reset](#) [Dismiss](#) [Save and Continue](#) [Request Revision](#) [Submit for AOD Review](#)

4) If the Modification is required but is either incomplete or requires changes, enter an explanation in the "Comments" text box and click "Request Revision."



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

[Back to Modifications Review Switchboard](#) Update Year ISP

Modification Details

Expand All | Collapse All

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

Goals

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

Objectives & Support Strategies

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

Residential Support / Other

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

Summary

Review Section

Proposed Start Date: * 10/30/2015
 Meeting Waived: No
 Proposed Review Date: *
 Date of Meeting: *

Comments:

The system redirects to the Modifications Review Switchboard and the status of the Modification displays as "Revision Requested."

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

Modifications Review Switchboard Update Year ISP

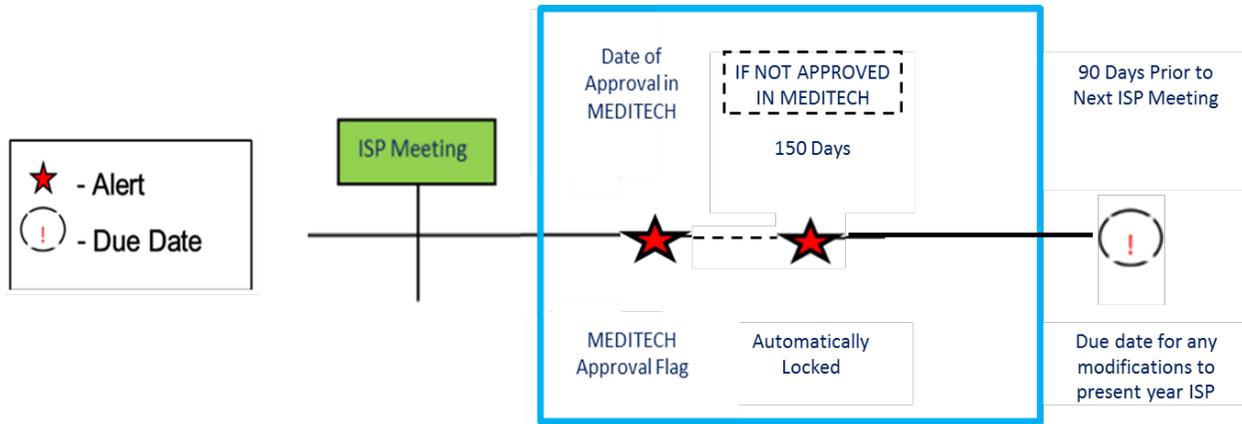
Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Revision Requested



Reviewing and Revising a Modification by Provider Staff

Scenario Description:

Providers Supervisors are responsible for revising and re-submitting a Modification once DDS has returned a Modification for revision.



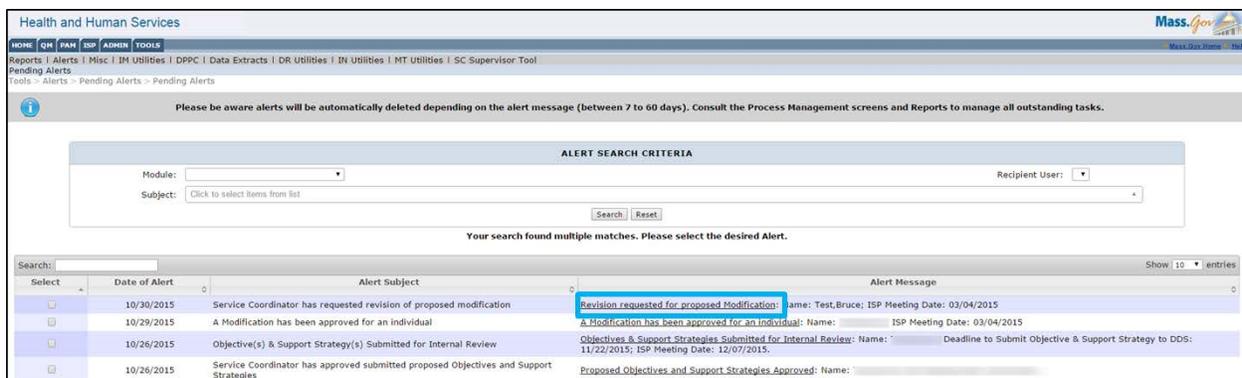
First Steps

- Navigate to the Alert Dashboard

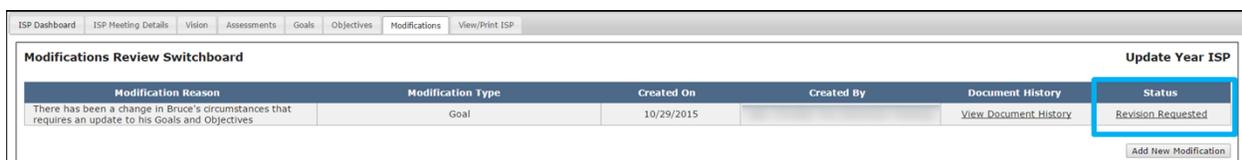
Roles and Responsibilities:

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

1) Provider Supervisors will receive an alert indicating that DDS has requested revision on submitted Modifications. Click the “Revision Requested for Proposed Modification” link in the alert message.



2) The system will redirect to the Modifications Review Switchboard and display the Modification that has been returned. Click “Revision Requested”



3) The Modification Details screen will display. Review the comments section to identify the requested HCSIS ISP Module



revisions.

Modification Details Update Year ISP

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

Goals

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

Objectives & Support Strategies

No modifications for objectives created.

Residential Support / Behavior Plan / Other

No other modifications created.

Summary

Review Section

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

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

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

4) Select the Radio Button next to the element you would like to edit.

Modification Details Update Year ISP

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

Goals

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

Objectives & Support Strategies

No modifications for objectives created.

Residential Support / Behavior Plan / Other

No other modifications created.

Summary

Review Section

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

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

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

Note: The review process is identical for all of the elements. This scenario demonstrates an example of how to revise a Modification to a Goal.

5) Click "View / Edit Goal Modification."



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

Link to Modifications Review Subboard

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

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

Goals

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

Objectives & Support Strategies

No modifications for objectives created.

Residential Support / Behavior Plan / Other

No other modifications created.

Summary

Review Section

Proposed Start Date: * Proposed Review Date:

Meeting Waived: Yes Date Meeting Waived: 10/28/2015

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

6) The "Modify Goals" screen will display. Modify the Goal as requested.

Modify Goals

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

Goals Update Year ISP

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

** This element is associated to a Modification

Goal Title: * Money Management

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

Date Goal Identified: * 08/21/2014

Goal Identified By: * Individual

Update Year Status: * Current

Update Information

No Change

Modification Information

Note: Elements associated with the Modification will display with two asterisks.

7) Click "Save and Close." The system will return to the Modification Details screen.



Modify Goals

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

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

** This element is associated to a Modification

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

No Change

Bruce is to save for and attend events three events annually

Modification Information

Save and Close

Spell Check Reset Save

Note: The user also has the ability to add additional elements once a Modification is returned for revision, in addition to making changes to the previously added elements.

- 8) Once all requested changes have been addressed, return to the Modification Details page and click "Submit for DDS Review."

ISP Dashboard | ISP Meeting Details | Home | Assessments | Goals | Objectives | Modifications | Search for ISP

[Back to Modifications Review Switchboard](#)

Modification Details Update Year ISP

Expand All | Collapse All

Modification Reason: *

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

Goals

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

Add Goal Modification View/Edit Goal Modification Delete Goal Modification

Objectives & Support Strategies

No modifications for objectives created.

Add OSS Modification View/Edit OSS Modification Delete OSS Modification

Residential Support / Behavior Plan / Other

No other modifications created.

Add Modification View/Edit Modification Delete Modification

Summary

Review Section

Proposed Start Date: * 10/30/2015

Proposed Review Date: *

Meeting Waived: Yes Date Meeting Waived: 10/28/2015

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

Spell Check | Reset | Save | Delete

Save and Continue **Submit for DDS Review**

The system redirects to the Modifications Review Switchboard and the status of the Modification displays as "Submitted for DDS Review."



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

Modifications Review Switchboard **Update Year ISP**

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	Created On 2/9/2015		View Document History	Submitted for DDS Review

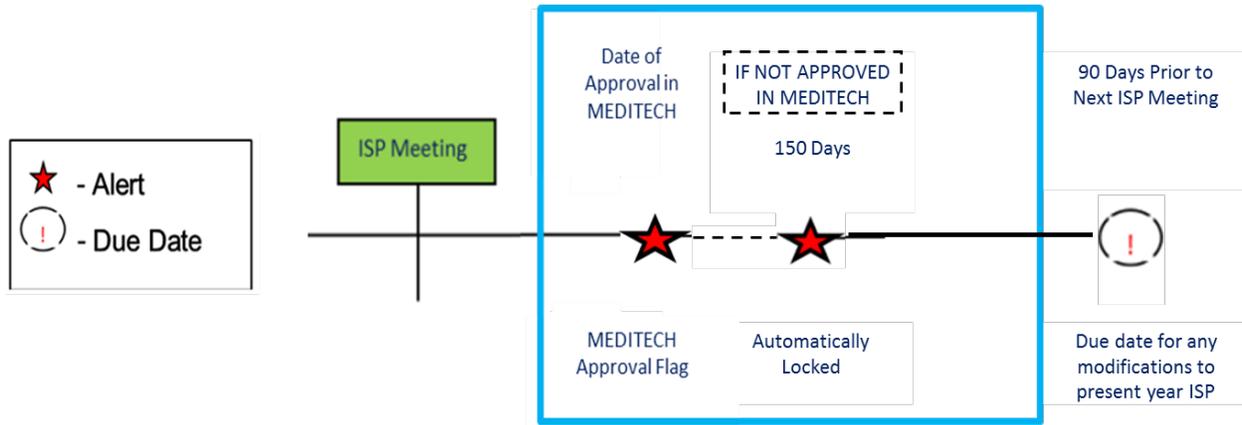
[Add New Modification](#)



Reviewing and Approving a Modification by Area Office Directors

Scenario Description:

Once DDS has submitted a Modification for review, Area Office Directors are responsible for reviewing the Modification. The Area Office Director has two options – to “Approve” or “Disapprove” the Modification. This scenario covers the process of approving a Modification.



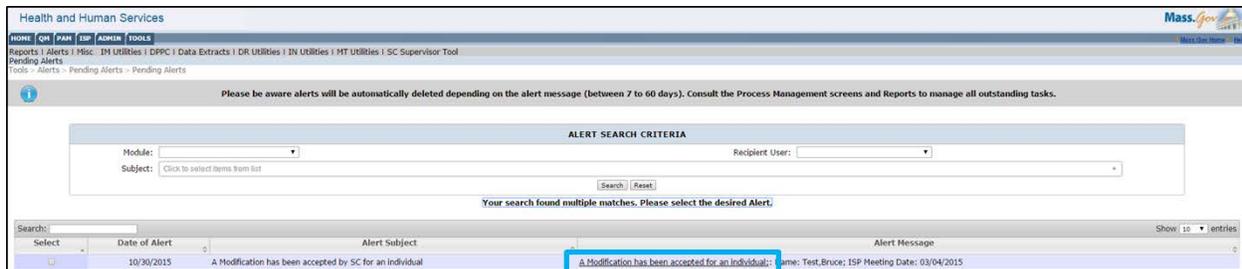
First Steps

- Navigate to Alerts Dashboard

Roles and Responsibilities

- **Area Office Director:** Review Modification, Approve Modification, Disapprove Modification

- 1) Area Office Director receive an alert when a Modification has been submitted for review. Click the “A Modification has been accepted for an individual” link in the alert message.



- 2) The system will redirect to the Modifications Review Switchboard. Click the “Submitted for AOD Review” link.



Note: Until the Area Office Director completes their review and approves the document, the SC remains able to edit a Modification. If the SCs opts to edit the Modification after it is been submitted, the status of the Modification changes to “Started.”



3) The system will display the Modification Details page. Review the content on the page.

4) If the Modification is complete and required, click “Approve.”

5) The system will redirect to the Modifications Review Switchboard. The status of the Modification will read “Approved by AOD.”



ISP Dashboard	ISP Meeting Details	Vision	Request Assessments	Review Assessments	Current Supports	Safety/Risk	Legal/Financial	Successes/Challenges	Goals	Objectives	Modifications	View/Print ISP
Modifications Review Switchboard												
											Update Year ISP	
Modification Reason	Modification Type	Created On	Created By	Document History	Status							
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Approved By AOD							

Note: The Area Office Director is not able to approve part of a modification. If the Area Office Director decides to click “Approve,” the entire modification is approved, including all the elements included in it.

Note: Once a Modification has been approved, the modified information will display in the individual’s plan.

Note: After an Area Office Director approves a Modification that includes changes to either Goals or OSS, the Provider Service Agreement is updated and all users are able to print an updated copy of the Provider Service Agreement.

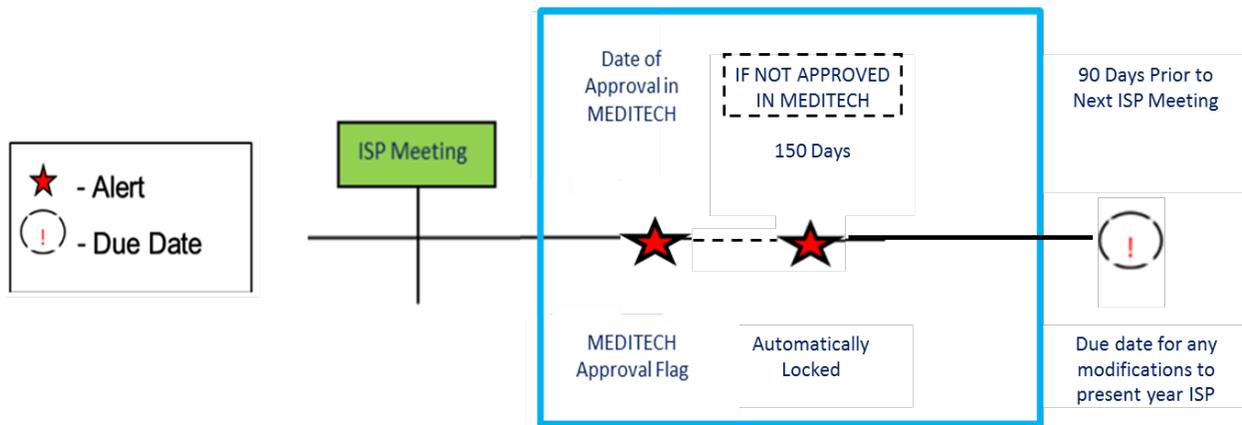
Note: An new objective that is added as part of a Modification does not follow the approval process that objectives usually require in a typical ISP year. Rather, the approval of the Modification is recognized as an implicit approval of the objective and its status display as approved. Once approved, the objective will appear on the Objectives and Support Strategies Review Switchboard and, by default, the check mark will be selected in the Include in ISP? Column.



Reviewing and Disapproving a Modification by Area Office Directors

Scenario Description:

Once DDS has submitted a Modification for review, Area Office Directors review the Modification. The Area Office Director has two options – to either “Approve” or “Disapprove” the Modification. This scenario covers the process of disapproving a Modification.



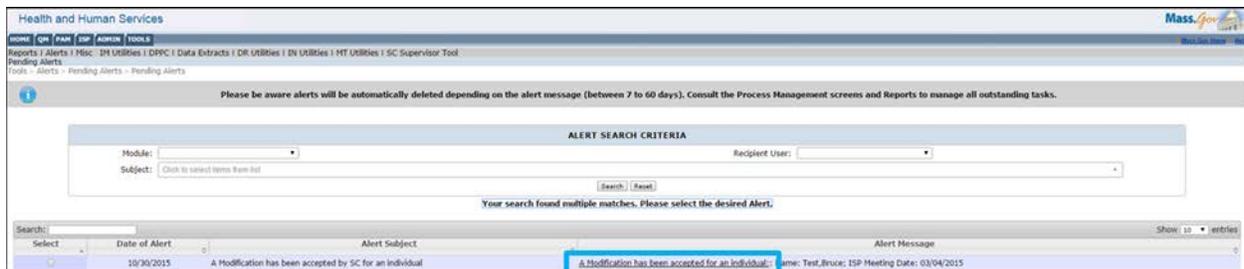
First Steps

- Navigate to Alerts Dashboard

Roles and Responsibilities

- **Area Office Director:** Review Modification, Approve Modification, Disapprove Modification

1) Area Office Director receives an alert when a Modification has been submitted for review. Click the “A Modification has been accepted for an individual” link in the alert message.



Note: Until the Area Office Director completes their review and approves the document, the SC remains able to edit a Modification.

2) The system will redirect to the Modifications Review Switchboard. Click the “Submitted for AOD Review” link.





3) The system will display the Modification Details page. Review the content on the page.

4) If the Modification is either incomplete or not required, click “Disapprove.”

Note: In an offline discussion with the SC, the Area Office Director will explain the reason for disapproving. The Area Office Director will either indicate that the Modification requires revision or that it is not required altogether. The reason will determine the next steps.

Note: If the Area Office Director disapproves the Modification, the status is changed to disapproved in the Modifications Review Switchboard and no further action is required. The Modification content, however, is



not deleted and the Area Office Director has the option of changing the status of the Modification to approved at a later date if circumstances require it.

Reason for Disapproval	Next Step (DDS Initiated)	Next Step (Provider Initiated)
Revision Required	SC to Make Revisions	SC to Request Revision by Provider
Modification Not Required	No Action Required	No Action Required

- The system will redirect to the Modifications Review Switchboard. The status of the Modification will read "Disapproved by AOD".

Modification Reason	Modification Type	Created On	Created By	Document History	Status
There has been a change in Bruce's circumstances that requires an update to his Goals and Objectives	Goal	10/29/2015		View Document History	Disapproved By AOD