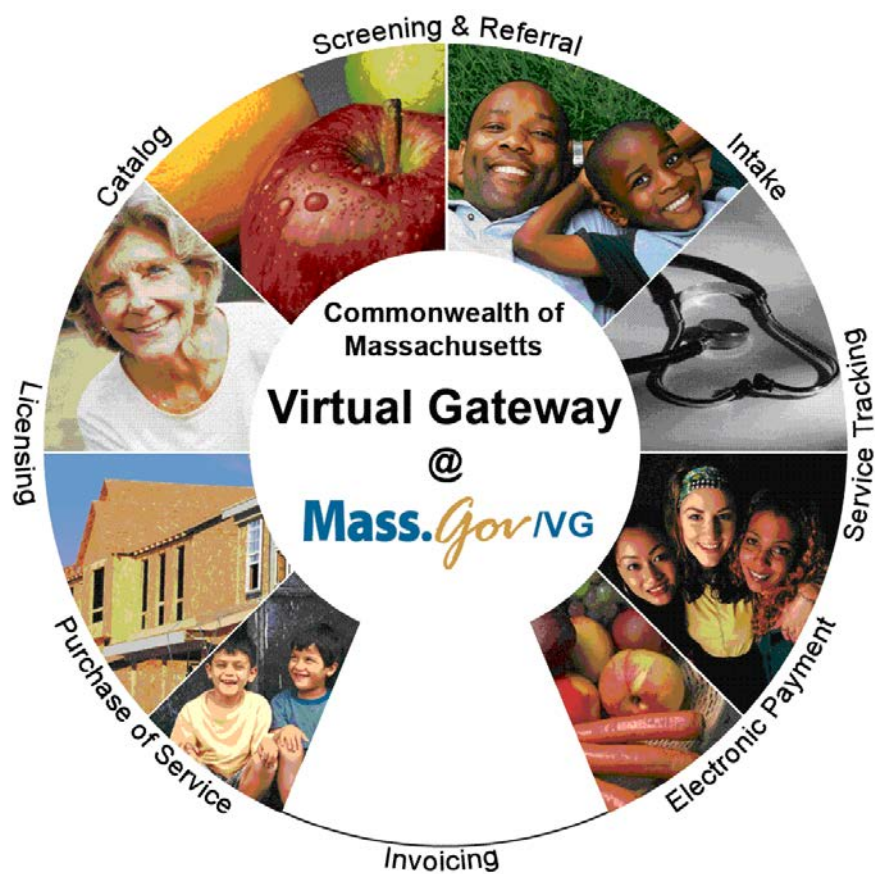


Commonwealth of Massachusetts  
Executive Office of Health and Human Services

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Virtual Gateway



ISP Assessments Module

User Guide

Lesson 1: ISP Module Overview

HCSIS Release 7.7



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The Home and Community Services Information System (HCSIS) is an online information system used by the Department of Developmental Services (DDS).

Virtual Gateway provides a central portal for accessing programs and services offered by the Executive Office of Health and Human Services (EOHHS).

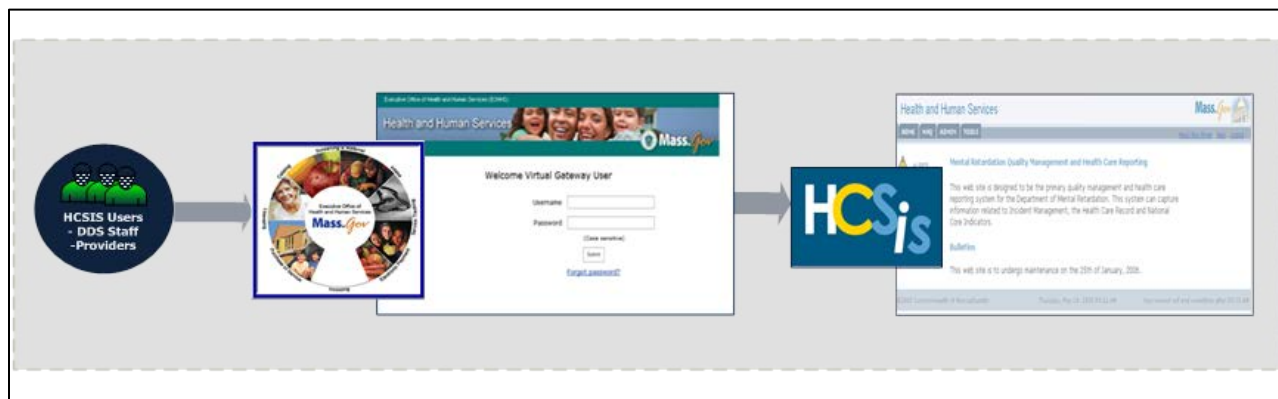
- Consumers
- Service Providers
- Internal Health and Human Services (HHS) staff

- Obtain Virtual Gateway logins for new users in your organization. User Request Forms (URFs) are available through the HCSIS link under the “Administration” section. This URF contains the ISP roles to assign to new users.

Page 2



- Assign roles in HCSIS. Users can assign roles to new users and add/change roles for existing users. Roles must be assigned in order to start using the module.
  - Provider agencies can assign roles to new users once VG logins are obtained.
  - DDS Staff will automatically be assigned their specific roles.
- Virtual Gateway is the entry point for HCSIS end users to log into the HCSIS application.





## ISP Assessments Module Overview

### What is the ISP Assessments module?

The Individual Support Plan (ISP) Assessments module exists within the Home and Community Services Information System (HCSIS). It standardizes and streamlines the capture, submission and review of the required ISP Assessment documents. The required ISP Assessments documents include the individual's Vision Statement, Goals, Assessments, Objectives and Support Strategies which are mapped to the Individual's Goals, Current Supports, Safety and Risk, Financial/Legal/Benefit Status, and Successes and Challenges. Providers, Provider Supervisors, Service Coordinators and Service Coordinator Supervisors are the main users of the ISP Assessments module in HCSIS.

Implementing the ISP Assessments process into the MA HCSIS system promotes consistent standards for required ISP Assessments documents that clarify DDS's expectations, reduce redundancy and encourage priorities that create an individual centric ISP document. Implementing required ISP Assessment documents into online forms in HCSIS and providing the tools to manage end users' workflows will enable information sharing. Efficient workflow distribution will enhance Service Coordinators' and Providers' ability to prepare for and adhere to ISP Assessment timelines. Implementing the ISP Assessments module in HCSIS enables changes to the ISP Assessments process in a system that is familiar to end-users and will increase accountability, traceability and transparency at the organizational level.

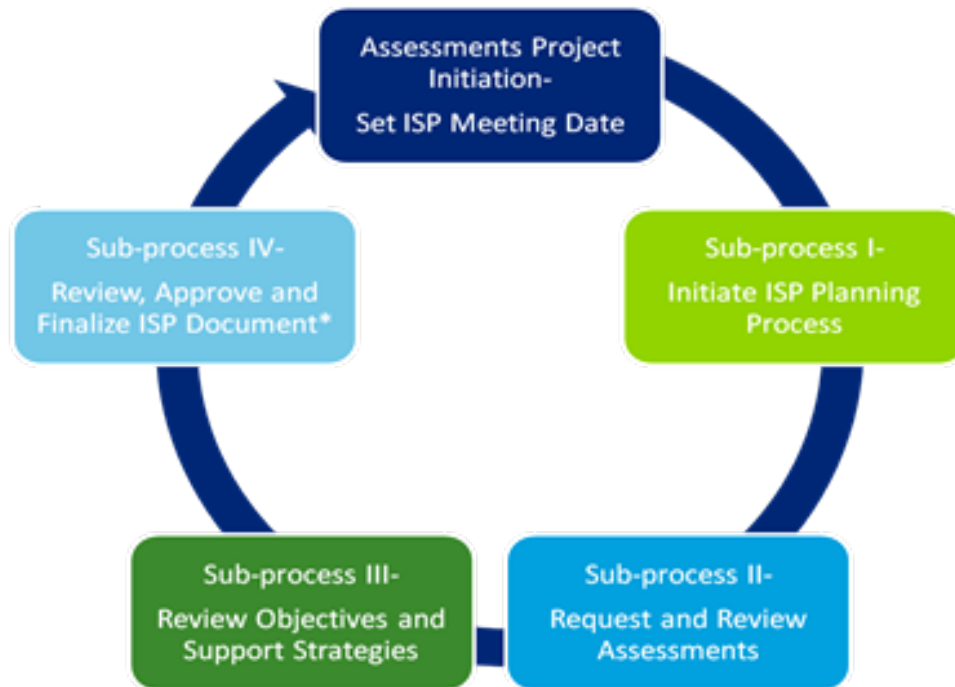
Implementing components of the ISP Assessments process into MA HCSIS does not restrict or inhibit existing communication channels, but instead provides an efficient mechanism for capturing and solidifying offline discussions and enabling better information sharing between Service Coordinators and Providers.



## The ISP Assessments Process

The ISP Assessments module has been developed to support waiver assurances and monitor regulatory requirements. The module itself is focused on system features that address the following business needs for Sub-process I, II and III of the ISP Assessments process.

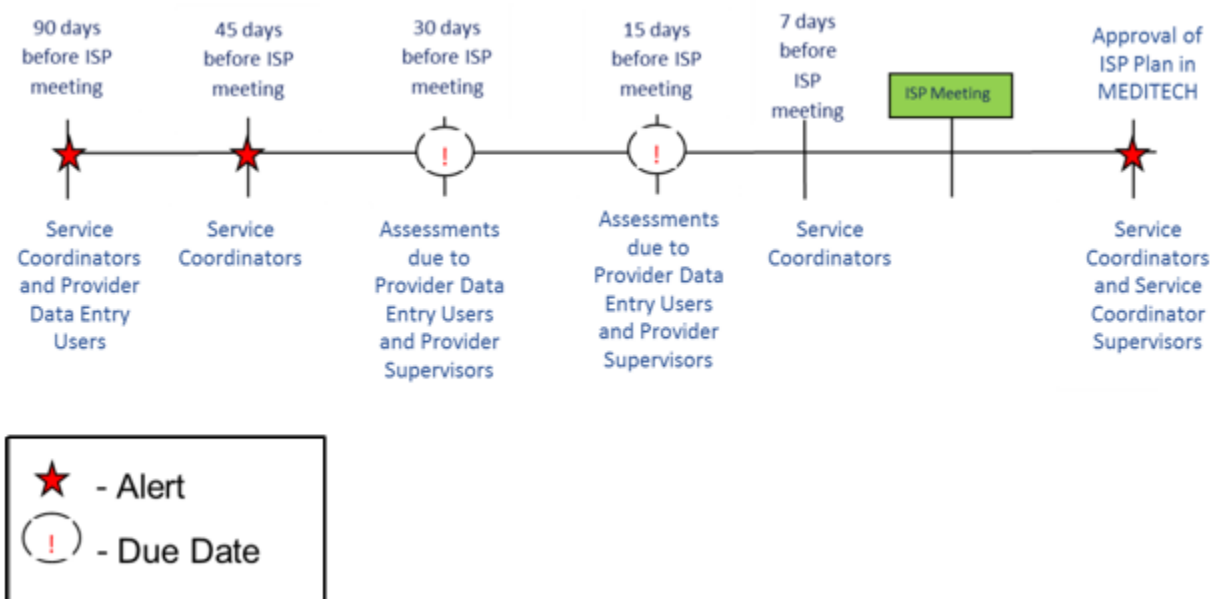
A high level overview of the ISP Assessments process is below:



\* This activity is related to implementing full ISP Module functionality into HCSIS and is not covered by the ISP Assessments module. The ISP Document is now part of HCSIS, but the review and approval process will continue to be in MEDITECH.



Following is a summary timeline for how these processes are defined in the ISP Assessments module in HCSIS:



The actions in the table below correspond to the ISP timeline as per current regulations. Actions listed may or may not correspond with Alerts in the module.

Action	End User	Regulations	Alert?
Consult with Guardian and Individual on required Assessments, Vision, and Goals	Service Coordinator	45-60 days prior to the ISP meeting	No
Notification of ISP meeting and request for Assessments	Service Coordinator	30 days prior to the ISP meeting	Yes
Create and enter proposed Goals for the individual	Providers and DDS Staff	N/A	No
Assessments and Proposed Objectives & Support Strategies submitted to Service Coordinator	Providers	15 days prior to the ISP meeting	Yes
Annual Progress Summary Due	Service Coordinators and Providers	15 days prior to the ISP meeting	Yes



Action	End User	Regulations	Alert?
Review and approval or request for revision of submitted documents	Service Coordinator	7 days prior to the ISP meeting	Yes
Print documents for ISP meeting	Providers and DDS staff	N/A	No
Revise ISP documents if required	Providers and DDS staff	Up to 45 days after the ISP meeting	Depends on the type of revision
ISP Mailed to ISP Team	Service Coordinator	45 Days after the ISP meeting	No
Semi-Annual Progress Summary Due	Service Coordinators and Providers	180 Days after the ISP Meeting	Yes





## ISP Assessments Module Implementation Overview

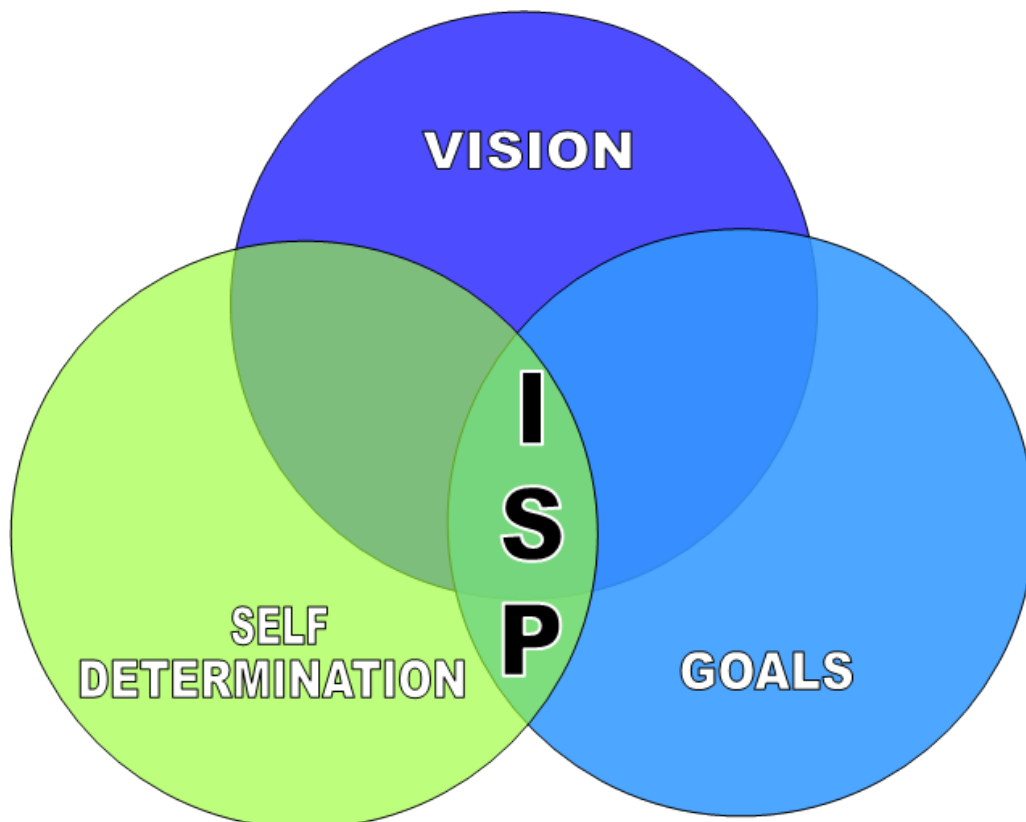
The ISP Implementation Team's vision for the module was to develop a system that accomplished two important Goals.

### 1) Standardize the ISP Renewal Process

- Develop ISP documents that increase clarity, reduce redundancy and promote priorities that will create an individual-centric ISP document.
- Strengthen DDS's focus on developing measurable and achievable objectives that promote on-going growth and development for the individual.

### 2) Establish consistent standards that clarify DDS's expectations and reinforce requirements

- Build a module in HCSIS that enables electronic submission and review of required ISP documents including individual's Vision, Goals, Assessments, and Objectives & Support Strategies.





## Basic ISP Assessments Module Navigation

The ISP Assessments module can be accessed through the Virtual Gateway.

### Basic Module Navigation

- 1) Access the Virtual Gateway using this link: <https://gateway.hhs.state.ma.us/authn/login.do>.
- 2) Login to the Virtual Gateway with username and password.

Executive Office of Health and Human Services - Virtual Gateway

## Virtual Gateway

Mass.gov

### Welcome to the Virtual Gateway

**Login**

Username

Password  (Case sensitive)

Login

[Forgot Password](#)

**Important Messages**

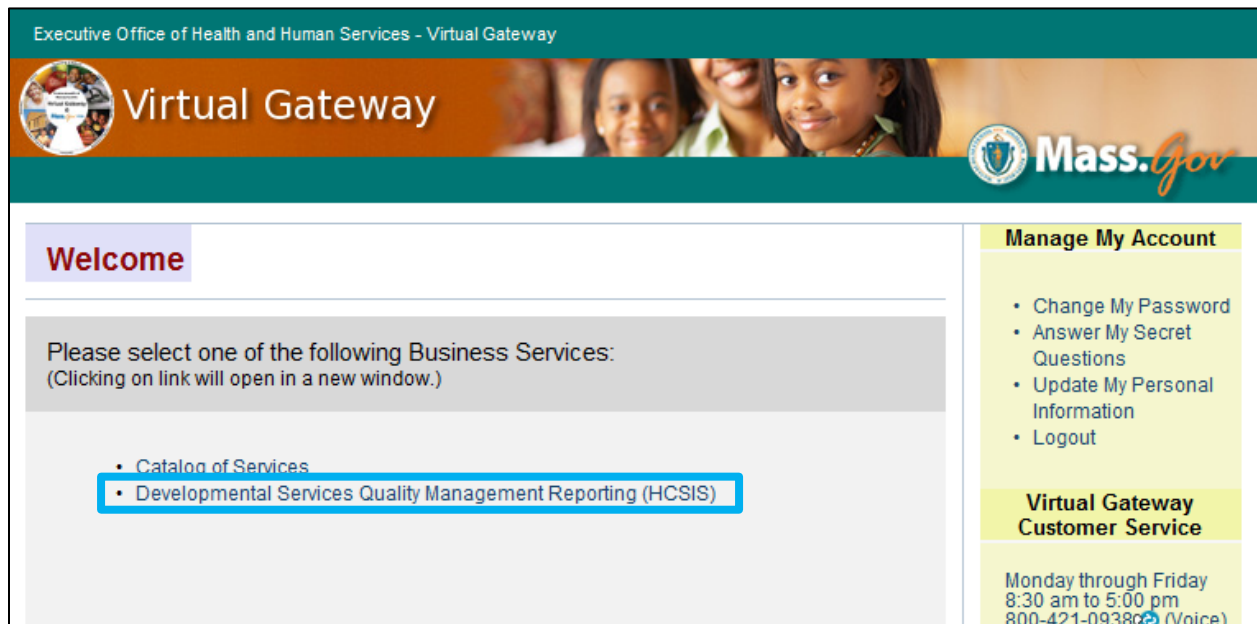
When logging in, you may be required to change your password and update your user profile.  
For assistance with logging in, please visit [www.mass.gov/vg/loginassistance](http://www.mass.gov/vg/loginassistance).

**Virtual Gateway Customer Service**

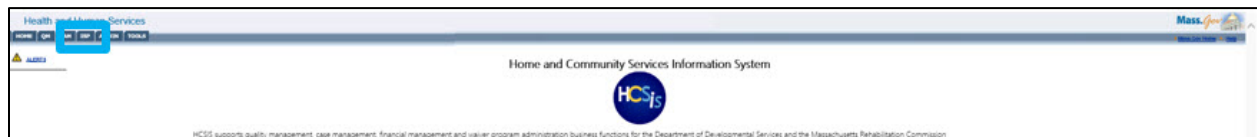
Monday through Friday  
8:30 am to 5:00 pm  
800-421-0938 (Voice)  
617-847-6578 (TTY for the deaf and hard of hearing)



- 3) Click the “Developmental Services Quality Management Reporting (HCSIS)” hyperlink to access HCSIS.



- 4) This is the homepage for HCSIS. Click the “ISP” tab at the top of the page to access the ISP module.



- 5) After clicking the “ISP” tab, the system returns the page shown below.





## Confirmatory Pop-up Message

The confirmatory pop-up message appears in the ISP Module in HCSIS if the user has unsaved information on the screen and attempts to navigate to a different screen within the Individual's Plan.

### Navigating within the ISP Module

#### Scenario Description:

The user has unsaved information in any section of an individual's ISP and attempts to navigate away from the page without saving, prompting a confirmation pop-up to appear.

**Note:** The confirmatory pop-up window only appears when navigating **within** sections of the ISP module, i.e. while within any of the tabs as highlighted below. The confirmatory pop-up window does not appear when navigating to other modules, or to the second level menu options.

For DDS staff, the confirmatory pop-up window appears when clicking on the tabs below:



For Provider staff, the confirmatory pop-up window appears when clicking on the tabs below:



**Note:** For demonstration purposes, this scenario shows the functionality of the pop-up from the Goals screen, however please note that this is present on all screens within an Individual's Plan. The below screenshots show the tabs visible to DDS users, but an identical navigating away pop-up functionality is available for Providers.

#### First Steps

- Search for an Individual
- View the Individual Dashboard
- Navigate to the Goals Screen

#### Roles and Responsibilities

- **Service Coordinators:** Enter information in the Individual's Plan
- **Service Coordinator Supervisors:** Enter information in the Individual's Plan
- **Provider Data Entry User:** Enter information in the Individual's Plan
- **Provider Supervisor:** Enter information in the Individual's Plan



- 1) Enter information into a textbox on the Goals 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

**Goals** 1 Update Year ISP

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

View/Edit Goal | Delete Goal | Add Goal

Goal Title: \*

Goal: \*

Date Goal Identified: \*

Goal Identified By: \*

Update Year Status: \*

Spell Check | Reset | Save Save & Continue

- 2) Select the ISP Dashboard Tab from the menu tabs.

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

**Goals** 1 Update Year ISP

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

View/Edit Goal | Delete Goal | Add Goal

Goal Title: \*

Goal: \*

Date Goal Identified: \*

Goal Identified By: \*

Update Year Status: \*

Spell Check | Reset | Save Save & Continue

- 3) A confirmation pop-up window message will read: "Entered information has not been saved. Leaving this page will cause unsaved information to be lost. Do you wish to leave this page?"

Community Involvement | 08/21/2014 | Individual | - | Current

Personal Growth & Accomplishments | 08/18/2014 | Provider | - | Current

Goal Title: \*

Goal: \*

Date Goal Identified: \*

Goal Identified By: \*

Update Year Status: \*

Spell Check | Reset | Save Save & Continue

**Confirmation Message** X

Entered information has not been saved. Proceeding with the next action will cause unsaved information to be lost. Do you wish to proceed to the next action?

Proceed to next action | Stay on this page

**Note:** Clicking "Leave this page" navigates the user to the ISP Dashboard without saving information on the current screen. Clicking "Stay on this page" or "X" at the top right corner of the pop up window keeps the user on the same page with the previously entered information, and user must select "Save" or "Save & Continue".





## Roles and Responsibilities in the ISP Assessments Module

Each process in the ISP Assessments Module is triggered or executed by one or more of the roles listed below. Roles may be people, groups, or systems that work together or individually to accomplish the actions required as part of the ISP Assessment renewal process. The following list provides an overview of the roles involved in the module, along with a brief description of each role.

Role	Role Description	Access
Individual	An individual with developmental disabilities who is receiving services provided by Massachusetts DDS.	N/A
Service Coordinator	Performs case management activities, and acts as a liaison between the Provider and Individual.	Create, review, approve, request revision
Service Coordinator Supervisor	Provides oversight for the Service Coordinators working with service plans. Supervisors can perform the functions of a case manager but have additional responsibilities relating to service planning that are more financially oriented. Clinical Managers and Service Coordinator Supervisors are both represented as Supervisors.	Create, review, approve, request revision
Provider	An agency or individual providing services to individuals served by DDS.	Create, edit, submit for internal review
Provider Supervisor	Provides oversight for the Providers working with individuals served by DDS.	Create, edit, submit for DDS review
Area Director Data Entry User	Provides oversight for Service Coordinators and Service Coordinator Supervisors working with service plans.	Create, review, approve, request revision, unlock and relock plans
Area Office Director Read Only, Regional Directors and Commonwealth Users	Area Office Directors view ISP-related documents in Read-Only mode in the module. They are required to review Provider initiated or Service Coordinator initiated modifications.	Read-only ISP documents; Review, approve or disapprove Modifications



## Service Coordinator Roles and Responsibilities

Within the ISP Assessments module, Service Coordinators have the ability to:

- View and verify ISP meeting information (date, time, location, etc.).
- Enter, edit and share the vision statement with Providers.
- Create, edit, and delete Goals created by any member of the ISP Team.
- Create and edit ISP sections: Current Supports, Safety and Risk, Financial/Legal/Benefit Status, and Successes and Challenges.
- Request assessments from Providers.
- Delete assessments prior to their approval.
- Review Goals entered by Providers.
- Review assessments, Objectives and Support Strategies submitted by Providers. Approve these documents or request revision, if necessary.
- Delete Objectives and Support Strategies submitted by Providers.
- View Goals, assessments, Objectives and Support Strategies created by all members of the ISP Team.
- Print ISP components as well as the full ISP Document in PDF and Word.
- View the ISP Summary Report.
- View the Reference page documents.
- View and Print Historical ISP documents, Assessments and Objectives and Support Strategies
- Review Progress Summaries submitted by Providers. Approve or request revision, if necessary.
- Initiate Modifications to a locked ISP.
- Review Provider Initiated Modifications to a locked ISP. Accept, disapprove or request revision, if necessary.

The roles and responsibilities of the Service Coordinator begin when the Service Coordinator develops the Vision Statement with the individual. Service Coordinators should also expect to receive 3 to 9 different types of alerts related to the submission of ISP components for each individual in the Service Coordinator's caseload; these alerts will start 90 days prior to the scheduled ISP meeting.

Below is a sample view of the ISP Assessments module for Service Coordinators, which depicts how Service Coordinators will be able to create, edit and view a Vision Statement for an individual.





Health and Human Services						Mass.gov
HOME	QM	PAM	ISP	ADMIN	TOOLS	
<a href="#">Individual Search</a>   <a href="#">Review Process Management</a>   <a href="#">Reports</a>   <a href="#">References</a> <a href="#">Search Results</a>   <a href="#">ISP Dashboard</a>   <a href="#">Progress Summary</a> <a href="#">ISP &gt; Individual Search &gt; ISP Dashboard &gt; Visions</a>						
Individual Test, Bruce	Eligibility # - SSN # -	Planned Meeting Date 12/07/2015	ISP Meeting Deadline 12/07/2015	Region - Metro Area Office - Greater Boston	Service Coordinator Coordinator, Service	
<a href="#">ISP Dashboard</a>   <a href="#">ISP Meeting Details</a>   <a href="#">Vision</a>   <a href="#">Request Assessments</a>   <a href="#">Review Assessments</a>   <a href="#">Current Supports</a>   <a href="#">Safety/Risk</a>   <a href="#">Legal/Financial</a>   <a href="#">Successes/Challenges</a>   <a href="#">Goals</a>   <a href="#">Objectives</a>   <a href="#">Modifications</a>   <a href="#">View/Print ISP</a>						
<b>Vision</b>						<b>Update Year ISP</b>
<b>1.What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore?</b>						
<p>Bruce stated that he is an artist. He loves to paint pottery and to paint other things like pictures. Bruce responded that he would like to explore other forms of artwork and making different jewelry. He would also like to make things out of wood like he used to when he was younger. He said he would like to make money working as an artist selling his artwork. Bruce shared that he has lots of friends who are special to him like the ones that live at his place; he then mentioned each of his four housemates by name. He stated that they are all like a family together. Bruce went on to say that ( is his best friend and the two of them are going on a cruise someday soon.</p>						
<b>Updated Information:</b> No Change						
<b>2.What does (s)he think someone needs to know in order to provide effective supports?</b>						
<p>Bruce responded that he wants people to know about what he likes to do; his routine. He stated that he wants people to help him have fun. Bruce said that life is too short sometimes and he would like help finding excitement. He shared he wants to walk again someday and could use some help with that. Bruce stated that if people don't know him or have questions about him that they can ask him and he will have a meeting with them.</p>						
<b>Updated Information:</b> No Change						
<b>3.What does (s)he think are his/her strengths and abilities?</b>						
<p>Bruce answered this question by stating, "I am an artist, a human rights person - I know a lot about those things, a good friend, and a hard worker." He also shared that he is "honest and dependable." He closed by stating that he likes people a lot.</p>						
<b>Updated Information:</b> No Change						
<b>4.What would (s)he like to see happen in his/her life over the next two years?</b>						
<p>Bruce stated that he might move out to a place that is quieter. He said he only thinks about moving when some people that live with him get too loud or angry. He said in two years he hopes to be happy and to have lots of friends. Bruce wants to still be an artist making artwork. He wants to see his mother stating he hasn't seen her in a while.</p>						
<b>Updated Information:</b> Bruce decided that he would like to remain in his present location. He reiterated that he would like to strengthen his friendships and spend time making art.						

## Service Coordinator Supervisor Roles and Responsibilities

**Note:** Service Coordinator Supervisors receive a reduced number of alerts. All of the information pertaining to Service Coordinator Supervisors also applies to Area Office Directors.

Within the ISP Assessments module, Service Coordinator Supervisors have the ability to:

- View and verify ISP meeting information (date, time, location, etc.).
- Enter, edit and share the vision statement with Providers.
- Create, edit, and delete Goals created by any member of the ISP Team.
- Create and edit ISP sections: Current Supports, Safety and Risk, Financial/Legal/Benefit Status, and Successes and Challenges.
- Request assessments from Providers.
- Delete approved and unapproved Assessments.
- Review Goals entered by Providers.
- Review Assessments, Objectives and Supports Strategies submitted by Providers. Approve these documents or request revision, if necessary.
- Delete Objectives and Supports Strategies submitted by any member of the ISP Team.
- View Goals, Assessments, Objectives and Supports Strategies created by all members of the ISP Team.
- Print ISP components and the full ISP Document in PDF and Word.
- View the ISP Summary Report.
- View the Reference page documents.
- View and Print Historical ISP documents, Assessments and Objectives and Support Strategies.
- Review Progress Summaries submitted by Providers. Approve or request revision, if necessary.
- Initiate Modifications to a locked ISP.
- Review Provider Initiated Modifications to a locked ISP. Accept, disapprove or request revision, if necessary.



While the Service Coordinator Supervisors can perform the same actions as Service Coordinators, Service Coordinator Supervisors' primary responsibility is to monitor the ISP process for each Service Coordinator they oversee.

Below is a sample view of the ISP Assessments module for Service Coordinator Supervisors, which depicts how Service Coordinator Supervisors will be able to create, edit and view a Vision Statement for an individual.

The screenshot displays the 'Health and Human Services' portal with a navigation bar including links like HOME, QM, PAM, ISP, ADMIN, and TOOLS. Below the navigation bar, there's a search bar and a list of links: Individual Search, Review Process Management, Reports, and References. The main content area is titled 'ISP > Individual Search > ISP Dashboard > Visions'. It features a table with columns: Individual Test, Bruce, Eligibility #, SNH #, Planned Meeting Date (12/07/2015), ISP Meeting Deadline (12/07/2015), Region - Metro Area Office - Greater Boston, and Service Coordinator Coordinator, Service. Below the table, there's a tabbed interface with tabs for Vision, Request Assessments, Review Assessments, Current Supports, Safety/Risk, Legal/Financial, Successes/Challenges, Goals, Objectives, Modifications, and View/Print ISP. The 'Vision' tab is active, showing a 'Vision' section with a 'Update Year ISP' button. The vision statement is divided into four numbered sections, each with a question and a response from Bruce. The responses are: 1. What does (s)he identify as important activities and relationships to continue to be involved in? What other things would (s)he like to explore? 2. What does (s)he think someone needs to know in order to provide effective supports? 3. What does (s)he think are his/her strengths and abilities? 4. What would (s)he like to see happen in his/her life over the next two years?

## Area Office Director Data Entry Role

The Area Office Director Data Entry Role has the same responsibilities as the Service Coordinator Supervisor; Above and beyond these responsibilities, the Area Office Director Data Entry Role has the ability to unlock and re-lock and ISP plan after it has been locked and is responsible for approving Modifications.

## Service Provider Data Entry User Roles and Responsibilities

Within the ISP Assessments module, Service Providers with the data entry role have the ability to:

- View the shared Vision statement.
- View ISP meeting details (date, time, location, etc.).
- Create Goals, Assessments.
- Create Objectives and Support Strategies related to a Goal created by any of the ISP Team members.
- Save Assessments, Objectives and Support Strategies prior to internal review by a Provider Supervisor.
- Submit Assessments, Objectives and Support Strategies for internal review by Provider Supervisor.
- Edit Goals, Assessments, Objectives and Support Strategies created by the same Provider Agency.
- Delete Goals, Objectives and Support Strategies created by the same Provider Agency.
- View Goals, approved Assessments, approved Objectives and Supports Strategies created by all members of the ISP Team.
- Complete Progress Summaries for Objectives.



- Print all documents created by the same Provider Agency regardless of the status of the documents in PDF and Word.
- Print approved documents created by all members of the ISP Team in PDF and Word.
- View the ISP Summary Report.
- View the Reference page documents.
- View and print Historical Assessments and Objectives and Support Strategies.
- Request Data Extracts (with the Data Extract Role).

The Service Provider's responsibilities begin with the development of Goals in relation to the Vision Statement that has been submitted by the Service Coordinator, in addition to completing assessments once they have been requested by the Service Coordinator. Providers can access the ISP Assessments module as early as 90 days prior to the ISP meeting after the SC has made the plan selection, to create Goals, Objectives and Support Strategies. It is not necessary for the Vision statement to be shared by the Service Coordinator to begin work on these documents. Service Providers should expect to receive between 6 and 12 alerts related to the submission of assessments and objectives per individual; these alerts will begin 90 days prior to the ISP meeting. Provider Agencies will determine how to manage required ISP Assessments tasks in HCSIS within their Agency.

Below is a sample view of the ISP Assessments module for Service Providers, which depicts the alerts for a Service Provider.

## Service Provider Supervisor Roles and Responsibilities

The roles and responsibilities for Service Provider Supervisors are very similar to those for Service Providers. However, only Provider Supervisors can submit documents to DDS for review. Within the ISP Assessments module, Service Provider Supervisors have the ability to:

- View the shared vision statement.
- View ISP meeting details (date, time, location, etc.).
- Create Goals and assessments.
- Create Objectives and Support Strategies related to a Goal created by any of the ISP Team members.
- Save Goals, assessments, Objectives and Support Strategies.
- Edit Goals, assessments, Objectives and Support Strategies created by the same Provider Agency.
- Delete Goals, Objectives and Support Strategies created by the same Provider Agency.
- Review and submit assessments, Objectives and Support Strategies created by the same Provider Agency for DDS review.



- View Goals, approved assessments, approved objectives and supports created by all members of the ISP Team.
- Print all documents created by the same Provider Agency regardless of the status of the documents in PDF and Word.
- Print approved documents created by all members of the ISP Team in PDF and Word.
- View the ISP Summary Report.
- View the Reference page documents.
- View and print Historical Assessments and Objectives and Support Strategies
- Request Data Extracts (with the Data Extracts Role).
- Review Progress Summaries submitted for internal review by Provider Data Entry User. Request Revision or Submit for DDS Review.
- Initiate Modifications to a locked ISP. Revise if DDS Staff reviews the Modification and requests revision.
- Review Provider Initiated Modifications to a locked ISP. Accept, disapprove or request revision, if necessary.

The Service Provider Supervisor's roles and responsibilities can begin with the development of Goals, Objectives and Support Strategies or when the Service Coordinator has shared the vision and requests an assessment from a Provider. Service Provider Supervisors will receive 1 – 6 alerts (for additional information on alerts, please refer to the *ISP Timeline and Alerts* quick guide). Provider Agencies will determine how to manage required ISP Assessments tasks in HCSIS within their agency.



## **Area Office Directors Read Only Role, Regional Directors and Commonwealth Users**

Area Office Directors Read Only Roles, Regional Directors and Commonwealth users may view ISP-related documents in Read-Only mode in the module. These roles will not receive alerts, nor will they be tasked with the completion of ISP documents in the module. The roles will not be able to view or print documents that have not been approved/ completed. They can also:

- View the ISP Summary Report
- View the Reference page documents
- View Historical ISP documents, Assessments, Objectives and Support Strategies and Modifications



## ISP Year Selection

Upon accessing an individual's plan for the first time, Service Coordinators, Service Coordinator Supervisors and Area Office Director Data Entry roles will see a pop-up message prompting them to make an ISP Year Selection as either a "Full Year ISP" or an "Update Year ISP". No information can be entered for the individual's plan by both Providers and DDS Staff until the ISP year has been selected. If the user does not wish to make a plan selection at that time, selecting "X" or "Cancel" will navigate away from the pop-up and Dashboard.

Providers do not have access to the individual's plan until the selection has been made. **It is important to make this selection as early as possible to allow sufficient time for Providers to work on the ISP.** The following message is displayed when a Provider attempts to access a Dashboard before the ISP Year selection is made by the Service Coordinator: "The plan cannot be accessed as the Service Coordinator has not yet designated an Update Year or Full Year ISP. Please contact the Service Coordinator for details."

## Making an ISP Year Selection for DDS Staff

### Scenario Description:

- This scenario describes the steps required to select an ISP Year.

### First Steps:

- Access the ISP Dashboard through the Individual Search, Review Process Management or Alerts screen (Refer to *Accessing the Individual Dashboard* section for detailed steps).

### Roles and Responsibilities:

- Service Coordinators:** Select the ISP Year
- Service Coordinator Supervisors:** Select the ISP Year

- 1) View the ISP Year selection pop-up for the selected individual.





**Note:** The year selection process has been partially automated. If the plan type for the most recently completed plan is an update year, the system will automatically choose full year for the subsequent plan. If, on the other hand, the plan type for the most recently completed plan is a full year, the Service Coordinator is still required to manually make the year selection.

**Note:** If, on the other hand, the plan type for the most recently completed plan is a full year, The name of the individual, along with their eligibility number, will be displayed on the top left corner of the ISP Year selection pop-up window. The ISP Dashboard will be grayed out and the user will not be able to navigate to the individual's plan until the ISP year has been selected.

2) Select an ISP year (Full or Update) from the pop-up and click on "Save".

The dialog box titled "ISP Plan Year selection" has a close button (X) in the top right corner. Below the title bar, the text reads: "Test, JOL, Individual (0000000000)". The main content area contains the instruction: "Either the previous ISP for this individual was a Full Year ISP, or there were no previous ISP's completed in HCSIS for this individual. You may choose either an Update Year Plan or Full Year Plan." There are two buttons: "ISP Update Year" (highlighted with a blue border and a green checkmark icon) and "ISP Full Year". At the bottom, there are "Save" and "Cancel" buttons.

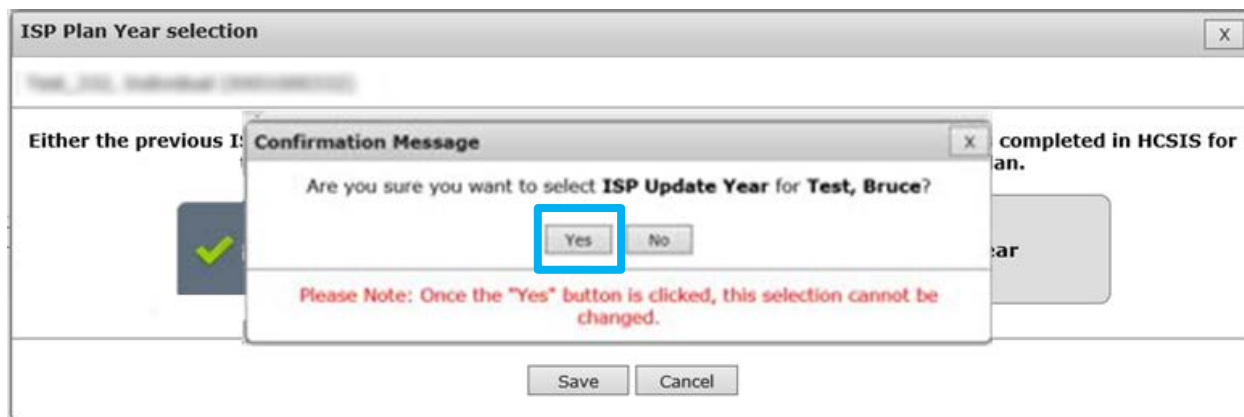
**Note:** When you select an individual and are prompted to make the year selection the pop-up screen will indicate what year selection was used in the previous plan.

The system will display a second pop-up window prompting you to confirm the selection. The pop-up message will read: "Are you sure you want to make this selection?" and the available options are "Yes" and "No".

The "ISP Plan Year selection" dialog box is shown with a "Confirmation Message" overlay. The overlay text reads: "Are you sure you want to select **ISP Update Year** for **Test, Bruce**?" with "Yes" and "No" buttons. Below the overlay, the "ISP Update Year" button is highlighted with a green checkmark. At the bottom of the main dialog box are "Save" and "Cancel" buttons. A red note at the bottom of the overlay states: "Please Note: Once the 'Yes' button is clicked, this selection cannot be changed."

**Note:** Once the ISP Year has been confirmed, it cannot be reversed or re-selected. The following message will be displayed at the bottom of the box: "Please Note: Once the "Yes" button is clicked, this selection cannot be changed."

3) Review the selection and click on "Yes".



**Note:** Clicking "Yes" will close both pop-up windows and display the ISP Dashboard. Clicking "No" or the "X" button will close the confirmatory pop-up and allow the user to change the ISP Year selection made in the first pop-up window.





## Viewing ISP Year Selection for DDS Staff and Providers

Depending on the selected ISP year, either “Full Year ISP” or “Update Year ISP” will be displayed in the ISP Summary box. In this case, since the user selected Update Year ISP, “Update Year ISP” appears in bold in the Summary box.

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

Test, Bruce  
View/Print ISP Document

Service Coordinator: Coordinator, Service

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

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

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

**Update Year ISP**

In the screenshot below, since the user selected Full Year ISP, “Full Year ISP” appears in bold in the Summary box and the following message is displayed: “Information recalled from past plans will not be truncated and could exceed the allowable character limit in a Full Year ISP. If recalled information exceeds the character limit of a text box, the information must be edited within the acceptance range prior to saving”

Health and Human Services Mass.gov

ISP > Individual Search > ISP Dashboard

Please note: Information recalled from past plans will not be truncated and could exceed the allowable character limit in a Full Year ISP. If recalled information exceeds the character limit of a text box, the information must be edited within the acceptance range prior to saving.

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

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

Test, Bruce  
View/Print ISP Document

Service Coordinator: Coordinator, Service

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

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

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

**Full Year ISP**

### Next Steps

After confirming the ISP Year selection, users can begin working on the individual's plan. Goals and Objectives can now be completed by Providers. SC's should enter and share the Vision so that Providers can also complete Assessments.



## The Individual Dashboard

The Individual Dashboard is a feature that provides a comprehensive snapshot (one stop shop) of an individual who is served by DDS. The Dashboard includes basic demographic information (SSN, Eligibility number), an individual's Region and Area Office, planned meeting date, and ISP meeting deadline. Each of the links on this Dashboard will navigate the user to the corresponding detail level page.

The ISP Assessments module creates an ISP for each Ricci class member, as well as individuals enrolled in adult HCBS waiver programs, individuals receiving residential supports, individuals receiving day or employment supports, and individuals receiving Day Habilitation or Adult Day Health services.

### Note

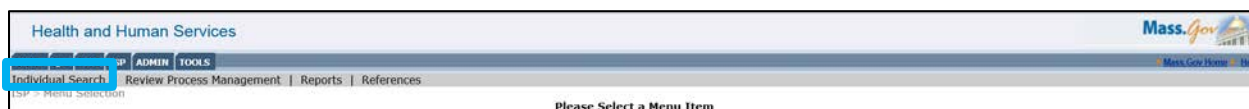
- For Individuals ages 18-21, ISPs will be created in HCSIS as long as a planned meeting date has been entered in MEDITECH.
- For individuals for whom a Death Report has been filed after an ISP plan is created in HCSIS and an ISP Meeting has been held, the plan will continue to be active in HCSIS allowing the Service Coordinator to complete work on the plan.
- If an ISP has been manually unlocked by the Area Office Director post 150 days after the ISP meeting, the plan must be manually re-locked by the Area Office Director for a following plan to be created in HCSIS.

## Accessing the Individual Dashboard

The Individual Dashboard can be accessed by searching for an individual.

**Note:** This action can be completed by either DDS or Provider staff.

- 1) Select the Individual Search screen.



- 2) Users can search using any of the search fields displayed in the screen below. In the scenario below, the eligibility number has been entered after selecting the identifier type as Eligibility Number.

- 3) Enter search criteria and click "Search".



Health and Human Services

Individual Search | Review Process Management | Reports | References

ISP > Individual Search

**Individual Search**

Last Name:  First Name:

Identifier Type:  Identifier:

Region:  Area Office:

ISP Due In:

Eligibility or SSN numbers are unique identifiers so clicking on “Search” will direct the user to the ISP Dashboard of the individual. If the user were to search using a common Last Name, the user will see a list of all individuals with that last name. If there is only one individual with that last name the user is brought directly to the individual’s Dashboard. The Individual Dashboard will appear differently to DDS and Provider staff.



## Individual Dashboard for DDS Staff

Service Coordinators can use the dashboard to monitor their progress on completing an ISP and access various components of an individual's ISP including:

- Vision
- Goals
- Objectives and Support Strategies
- Request Assessments
- Review Assessments
- Other ISP Components

Health and Human Services

Mass.gov

Individual Search | Review Process Management | Reports | References

Search Results | ISP Dashboard | Progress Summary

ISP > Individual Search > ISP Dashboard

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

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

Test, Bruce  
View/Print ISP Document

Service Coordinator: Coordinator, Service

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

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

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

Update Year ISP

**Vision**  
Status: Started by DDS  
Due Date: 11/07/2015  
Last Updated On: 06/25/2015  
Last Shared On: -

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

**Request Assessments**  
Status: Not Sent  
Due Date: 11/07/2015  
Notification Last Sent On: -  
Last Updated On: -

**Objectives & Support Strategies**  
Status: Awaiting Submission  
Due Date: 11/22/2015  
Pending Provider Submission: 3/3  
Pending DDS Review: 0/3

**Review Assessments**  
Status: Pending Request  
Due Date: 11/22/2015  
Pending Provider Submission: 0/0  
Pending DDS Review: 0/0

**Other ISP Components**  
Status: Started  
Due Date: 01/21/2016  
Current Support Last Updated On: 06/24/2015  
Safety & Risk Last Updated On: 06/24/2015  
Legal Status Last Updated On: 02/20/2015  
Successes & Challenges Last Updated On: 06/24/2015

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

Summary information appears below each of the major sections – this information, specifically relating to reviewing assessments and the completion of Objectives and Support Strategies will change depending on how many assessments, Objectives and Support Strategies are pending Provider submissions or DDS review. Below each hyperlink, the user can view a summary of the information contained in that particular page.

The DDS staff user can view the following components and corresponding details:

- **Vision:** The Vision box tracks the status of all actions involved with completing an individual's vision. This informs Service Coordinators of the status, the due date, the last updated on date, and the date the Vision was shared with providers. Clicking the box will navigate Service Coordinators to the Vision tab.
- **Goals:** The Goals box tracks the status of all actions involved with completing Goals. This informs Service Coordinators on the status and the last updated on date and Due Date (displayed as N/A). Clicking the box will navigate Service Coordinators to the Goals tab.
- **Request Assessments:** The Request Assessments box tracks the status of all actions involved with Requesting Assessments. This informs Service Coordinators on the status, the due date, and the date the notification was sent to Providers. Clicking the box will navigate Service



Coordinators to the Request Assessments tab.

- Objectives & Support Strategies:** The Objectives & Support Strategies box tracks the status of all actions involved with completing objectives. Since completing objectives are the responsibility of the Providers the purpose of this status update is to inform Service Coordinators on submission of objectives and objectives awaiting their review.
- Review Assessments:** The Review Assessments box tracks the status of all actions involved with reviewing assessments. Since completing assessments are the responsibility of the Providers the purpose of this status update is to inform Service Coordinators on submission of assessments and assessments awaiting their review. As a Service Coordinator, clicking on this link will redirect the user to the Assessments Review Switchboard. The Service Coordinator can begin to review and approve assessments on this page, and view the status of assessments. The Review Assessments page allows the user to view assessments which are pending review either by DDS or that are pending submission/ revision by a Provider. SCs will be able to review completed assessments, but will not be able to make changes to the assessments themselves. The SC will need to request revision of the Provider for the documents to be edited.
- Other ISP Components:** The Other ISP Components box tracks the status of all actions involved with completing sections on Current Supports, Safety/Risk, Legal/Financial Status and Successes/Challenges. This informs Service Coordinators of the status, the lock date the last updated on date for each additional ISP Component (Current Supports, Safety and Risk, Legal and Financial Status, Successes/Challenges). Clicking the box will navigate Service Coordinators to the Current Supports tab.
- Modifications:** If there is a modification initiated in the system for the individual, a modification component will be added to the dashboard for the particular individual with the corresponding status information.

## Status Icons and Text

A status icon along with a text status is displayed for each component of the ISP. The text and colored icon provide an update on the status of the document at any given point. The status is reflective of the user's responsibility. A legend indicating the meaning of each color is available at the bottom of the page.

Below is the description of the legend displayed on the dashboard

Black – No action needed by the logged in user.

Yellow – Action needed by the logged in user.

Green – Section has been completed.

Red – Section is Overdue.

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

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

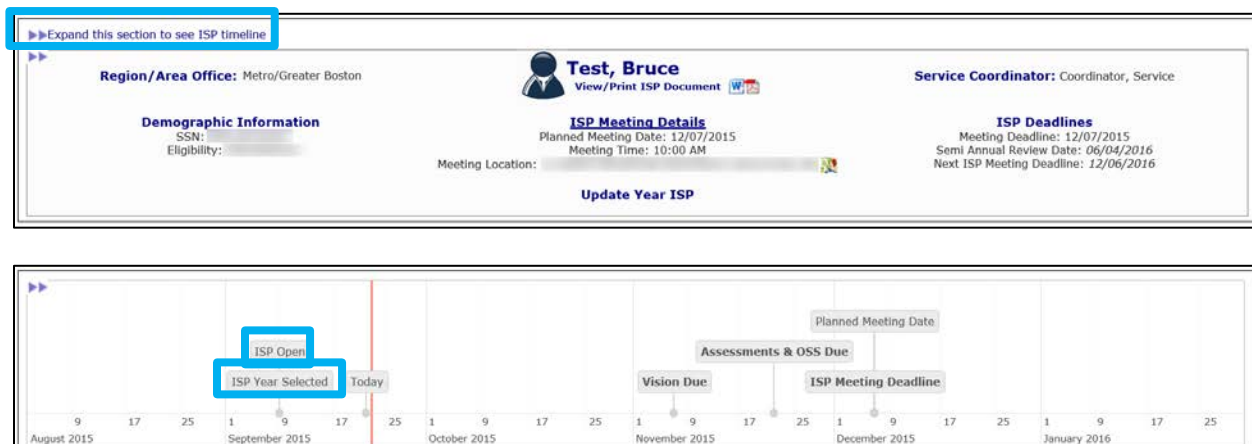


**Note:** In the example above, information from a past plan has been pulled forward into the newly created plan. Since HCSIS has pulled forward the Vision questions entered in a past plan, the Vision Status appears as “Started by DDS”. If there was no information to pull forward, the status would appear as “Not Started by DDS”. Similarly, as there are Goals pulled forward from a past plan, the Goals Status appears as “Created”. For more information on what information is pulled forward, please visit the respective chapter for each component.

## Timeline

Above each individual's ISP dashboard details, there will be a personalized ISP timeline graph for that individual. The timeline will be collapsed by default. Click the expand arrows next to “Expand this section to see ISP timeline” to view the timeline.

- With Full and Update Year plan types, the timeline displays events related to an ISP plan including when the ISP was opened by the system and when the ISP Year was selected:
  - **ISP Open** reflects the date the ISP is created in HCSIS--90 days prior to the Planned ISP Meeting Date. If the ISP Planned Meeting Date has not been entered in MEDITECH, the ISP Meeting Deadline will be used
  - **ISP Year Selected** appears only when the Service Coordinator/ Service Coordinator Supervisor/ Area Office Director Data Entry role makes a selection in HCSIS to indicate if the plan is for an Update Year or a Full Year ISP.
- Hovering over an action will show the actual date it was completed
- The red vertical line represents the current date allowing users to track where they currently fall in the process
- Deadlines are marked bold



## Summary Box

Demographic information for each individual will be displayed in a summary box on the dashboard. The summary box is below the timeline and it will be expanded by default.

- Summary box provides ISP Meeting details and deadlines
- Shows the Service Coordinator assigned to the individual
- Shows the ISP Year selection made for the individual (Update or Full Year)
- Allow the Service Coordinator to view and/or print the full ISP Document



## ISP Assessments User Guide

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

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

**Test, Bruce**  
View/Print ISP Document

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

**Service Coordinator:** Coordinator, Service

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

Update Year ISP

Clicking Google Maps icon on the ISP Meeting Details will bring the user to the ISP Meeting Details page. This page provides ISP Meeting Details including the planned meeting date, meeting time, and location as well as a Google Maps feature that will allow the user to pull up directions to the ISP meeting if a meeting location has been entered into MEDITECH.

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

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

**Test, Bruce**  
View/Print ISP Document

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

**Service Coordinator:** Coordinator, Service

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

Update Year ISP

Individual Test, Bruce	Eligibility # SSN # -	Planned Meeting Date 12/07/2015	ISP Meeting Deadline 12/07/2015	Region - Metro Area Office - Greater Boston	Service Coordinator Coordinator, Service
ISP Dashboard   ISP Meeting Details   Vision   Request Assessments   Review Assessments   Current Supports   Safety/Risk   Legal/Financial   Successes/Challenges   Goals   Objectives   Modifications   View/Print ISP					
<b>ISP Meeting Details</b>					
Update Year ISP					
Planned Meeting Date: 12/07/2015					
Time: 10:00 AM					
Location: [redacted]					
Continue					

## Tabs

Your role determines the tabs that are displayed as well as the order that those tabs are in. The view below is from a DDS view.





## ISP Assessments User Guide

Health and Human Services

Mass.gov

HOME | QM | PAM | ISP | ADMIN | TOOLS

Individual Search | Review Process Management | Reports | References

Search Results | ISP Dashboard | Progress Summary

ISP > Individual Search > ISP Dashboard

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

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

Test, Bruce

View/Print ISP Document

Service Coordinator: Coordinator, Service

Demographic Information

SSN: [REDACTED]

Eligibility: [REDACTED]

ISP Meeting Details

Planned Meeting Date: 12/07/2015

Meeting Time: 10:00 AM

Meeting Location: [REDACTED]

ISP Deadlines

Meeting Deadline: 12/07/2015

Semi Annual Review Date: 06/04/2016

Next ISP Meeting Deadline: 12/06/2016

Update Year ISP

Vision

Status: Started by DDS

Due Date: 11/07/2015

Last Updated On: 06/25/2015

Last Shared On: -

Goals

Status: Created

Due Date: N/A

Last Updated On: 08/21/2014

Request Assessments

Status: Not Sent

Due Date: 11/07/2015

Notification Last Sent On: -

Last Updated On: -

Objectives & Support Strategies

Status: Awaiting Submission

Due Date: 11/22/2015

Pending Provider Submission: 3/3

Pending DDS Review: 0/3

Review Assessments

Status: Pending Request

Due Date: 11/22/2015

Pending Provider Submission: 0/0

Pending DDS Review: 0/0

Other ISP Components

Status: Started

Due Date: 01/21/2016

Current Support Last Updated On: 06/24/2015

Safety & Risk Last Updated On: 06/24/2015

Legal Status Last Updated On: 02/20/2015

Successes & Challenges Last Updated On: 06/24/2015

No action needed Action needed Section complete Section overdue





## Individual Dashboard for Provider Staff

Service Providers can use the dashboard to monitor their progress on completing an ISP and access various components of an individual's ISP including the individual's:

- Vision
- Goals
- Objectives and Support Strategies
- Assessments

**Note:** Providers do not have access to the Individual Dashboard until the ISP Year Selection has been made by Service Coordinators, Service Coordinator Supervisors or Area Office Directors. If a Provider accesses the individual's dashboard and the plan type has not been selected by DDS user, the following message is displayed on top of the screen: "The plan cannot be accessed as the Service Coordinator has not yet designated an Update Year or Full Year ISP. Please contact the Service Coordinator for details."

Once the plan selection has been made and the Provider user can access the individual's dashboard, "Update Year ISP" or "Full Year ISP" will be displayed in the summary information box.

The screenshot shows the 'Individual Dashboard for Provider Staff' interface. At the top, there's a navigation bar with links like 'HOME', 'DM', 'PAM', 'ISP', 'ADMIN', and 'TOOLS'. Below this is a breadcrumb trail: 'Individual Search > Review Process Management > Reports > ISP Data Extracts > References > Search Results > ISP Dashboard > Progress Summary > ISP > Individual Search > ISP Dashboard'. The main content area is titled 'Expand this section to see ISP timeline'. It features a summary box for 'Test, Bruce' with 'Demographic Information' (SSN, Eligibility), 'ISP Meeting Details' (Planned Meeting Date: 12/07/2015, Meeting Time: 10:00 AM, Meeting Location), and 'ISP Deadlines' (Meeting Deadline: 12/07/2015, Semi Annual Review Date: 06/04/2016, Next ISP Meeting Deadline: 12/06/2016). Below this is a section labeled 'Update Year ISP'. The dashboard is divided into four main sections: 'Vision' (Status: Started by DDS, Due Date: 11/07/2015, Last Updated On: 06/25/2015, Last Shared On: -), 'Goals' (Status: Created, Due Date: N/A, Last Updated On: 08/21/2014), 'Objectives & Support Strategies' (Status: Action Required, Due Date: 11/22/2015, Pending Provider Submission: 1/1, Pending DDS Review: 0/1), and 'Assessments' (Status: Awaiting Request, Due Date: 11/22/2015, Pending Provider Submission: 0/0, Pending DDS Review: 0/0). A legend at the bottom indicates: 'No action needed' (black dot), 'Action needed' (yellow dot), 'Section complete' (green dot), and 'Section overdue' (red dot).

Modifications displays for Provider Data Entry Users in Read-Only mode.

Summary information appears below each of the major sections – this information, specifically relating to reviewing assessments and the completion of Objectives and Support Strategies will change depending on how many assessments, Objectives and Support Strategies are pending Provider submissions or DDS review. Below each hyperlink, the user can view a summary of the information contained in that particular page.

The Provider user can view the following components and corresponding details:

- **Vision:** The Vision box tracks the status of all actions involved with completing an individual's vision. This informs Providers of the status, the due date, the last updated on date, and the date the Vision was shared with providers. Clicking the box will navigate Providers to the Vision tab.



- **Goals:** The Goals box tracks the status of all actions involved with completing Goals. This informs Providers on the status and the last updated on date. Clicking the box will navigate the providers to the Goals tab.
- **Objectives & Support Strategies:** The Objectives & Support Strategies box tracks the status of all actions involved with completing objectives. The purpose of this status update is to inform Providers on submission of objectives and objectives awaiting Service Coordinators review.
- **Assessments:** The Assessments box tracks the status of all actions involved with completing and submitting assessments. The purpose of this status update is to inform Providers on submission of assessments and assessments awaiting Service Coordinators review. As a Provider data entry user, clicking on this link will redirect the user to the Assessments Review Switchboard. The Provider data entry user can begin to complete and submit assessments to Provider Supervisors for Internal Review and view the status of the assessment. As a Provider Supervisor, clicking on this link will redirect the user to the Assessments Review Switchboard. The Provider Supervisor can review, edit and submit assessments to service coordinators, and view the status of assessments. The Assessments page allows the user to view assessments which are pending review either by DDS or that are pending submission/ revision by a Provider.
- **Modifications:** If there is a modification initiated in the system for the individual, a modification component will be added to the dashboard for the particular individual with the corresponding status information.

## Status Icons and Text

A status icon along with a text status is displayed for each component of the ISP. The text and colored icon provide an update on the status of the document at any given point. The status is reflective of the user's responsibility. A legend indicating the meaning of each color is available at the bottom of the page.

Below is the description of the legend displayed on the dashboard

Black – No action needed by the logged in user.

Yellow – Action needed by the logged in user.

Green – Section has been completed.

Red – Section is Overdue.



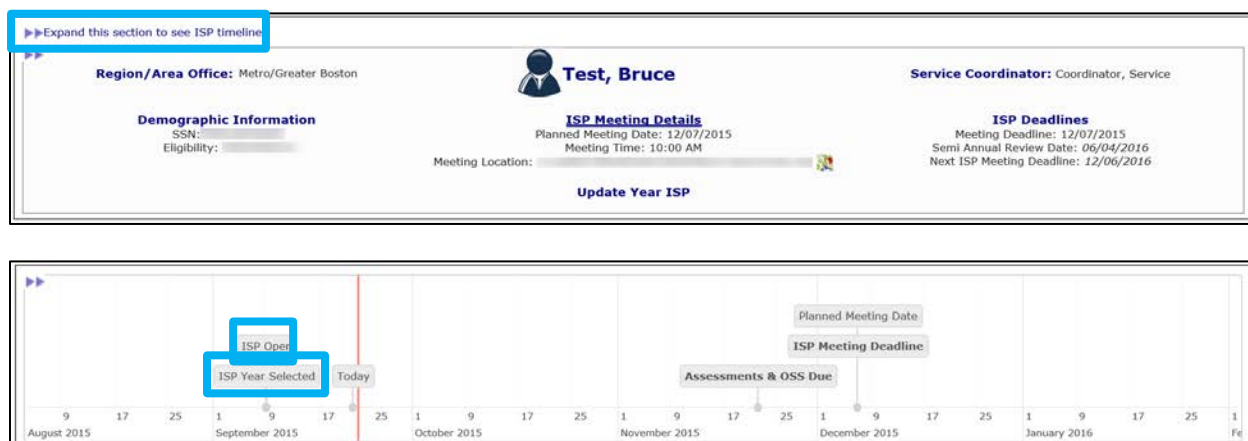
**Note:** In the example above, information from a past plan has been pulled forward into the newly created plan. Since HCSIS has pulled forward the Goals from a past plan, the Goals Status appears as “Created”. If there was no information to pull forward, the status would appear as “Not Started”. For more information on what information is pulled forward, please visit the respective chapter for each component.



## Timeline

Above each individual's ISP dashboard details, there will be a personalized ISP timeline graph for that individual. The timeline will be collapsed by default. Click the expand arrows next to "Expand this section to see ISP timeline" to view the timeline.

- With Full and Update Year plan types, the timeline displays events related to an ISP plan including when the ISP was opened by the system and when the ISP Year was selected:
  - **ISP Open** reflects the date the ISP is created in HCSIS--90 days prior to the Planned ISP Meeting Date. If the ISP Planned Meeting Date has not been entered in MEDITECH, the ISP Meeting Deadline will be used.
  - **ISP Year Selected** appears only when the Service Coordinator/ Service Coordinator Supervisor/ Area Office Director Data Entry user makes a selection in HCSIS to indicate if the plan is for an Update Year or a Full Year ISP.
- Hovering over an action will show the actual date it was completed
- The red vertical line represents the current date allowing users to track where they currently fall in the process
- Deadlines are marked bold



## Summary Box

Demographic information for each individual will be displayed in a summary box on the dashboard. The summary box is below the timeline and it will be expanded by default.

- Summary box provides ISP Meeting details and deadlines
- Shows the Service Coordinator assigned to the individual
- Shows the ISP Year selection made for the individual (Update or Full Year)



Clicking Google Maps icon on the ISP Meeting Details will bring the user to the ISP Meeting Details page. This page provides ISP Meeting Details including the planned meeting date, meeting time, and location as well as a Google Maps feature that will allow the user to pull up directions to the ISP meeting if a meeting location has been entered into MEDITECH



Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

Test, Bruce

Service Coordinator: Coordinator, Service

**Demographic Information**  
 SSN:   
 Eligibility:

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

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

Update Year ISP

Individual Test, Bruce	Eligibility # - SSN # -	Planned Meeting Date 12/07/2015	ISP Meeting Deadline 12/07/2015	Region - Metro Area Office - Greater Boston	Service Coordinator Coordinator, Service
<p>ISP Dashboard   <b>ISP Meeting Details</b>   Vision   Assessments   Goals   Objectives   Modifications   View/Print ISP</p> <p><b>ISP Meeting Details</b></p> <p>Planned Meeting Date: 12/07/2015              Time: 10:00 AM              Location: <input type="text"/></p> <p>Update Year ISP</p> <p>Continue</p>					

## Tabs

The order of the tabs has been revised dependent on your role. For Provider staff, the Goals and Objectives tabs have been moved to the end as Objectives are associated to Goals in the system.

Health and Human Services

HOME | **QM** | PAM | ISP | ADMIN | TOOLS

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

Search Results | ISP Dashboard | Progress Summary

ISP - Individual Search - ISP Dashboard

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

Expand this section to see ISP timeline

Region/Area Office: Metro/Greater Boston

Test, Bruce

Service Coordinator: Coordinator, Service

**Demographic Information**  
 SSN:   
 Eligibility:

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

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

Update Year ISP

**Vision**

Status: Started by DDS  
 Due Date: 11/07/2015  
 Last Updated On: 06/25/2015  
 Last Shared On: -

**Goals**

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

**Objectives & Support Strategies**

Status: Action Required  
 Due Date: 11/22/2015  
 Pending Provider Submission: 1/1  
 Pending DDS Review: 0/1

**Assessments**

Status: Awaiting Request  
 Due Date: 11/22/2015  
 Pending Provider Submission: 0/0  
 Pending DDS Review: 0/0

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