STANDARDIZED ISP-THERAP USER GUIDE

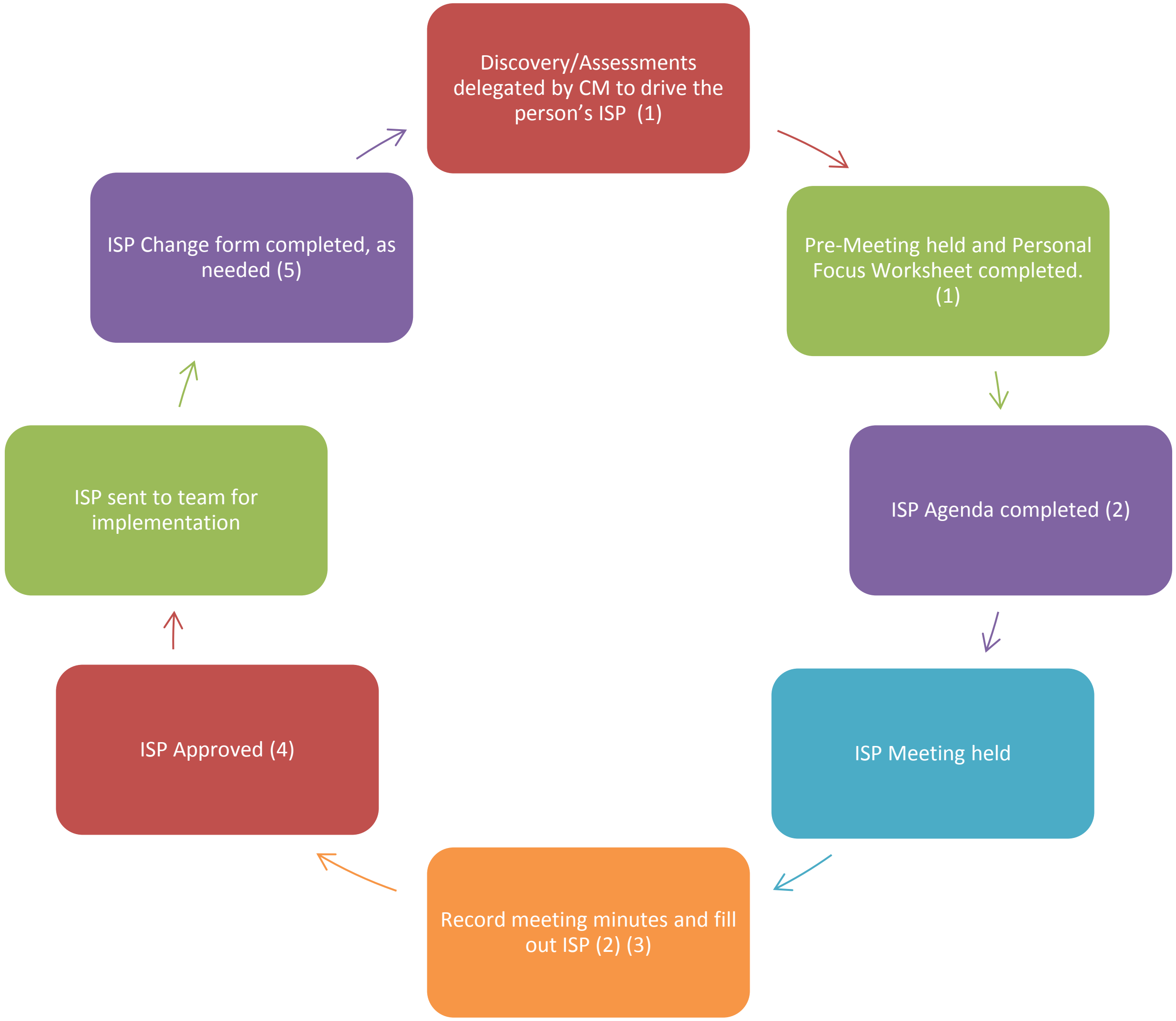
December 1, 2016

The Standardized ISP and guide materials have been developed by the Division of Developmental Disabilities in partnership with the Conflict Free Case Management subcommittee of the Financial Workgroup and Therap Services. The guide is intended to provide information for completion of the Personal Focus Worksheet, the ISP Agenda, and the Individual Support Plan within Therap.

South Dakota DHS

DEPARTMENT OF HUMAN SERVICES

Person Centered Discovery and Planning Process using Therap



(1) For more information about discovery tools, delegation of assessments, and completion of the Personal Focus Worksheet please refer to page 2.
(2) For more information about the creation of the ISP agenda please refer to page 7.
(3) For more information about recording of meeting minutes (as part of the ISP agenda) please see page 14.
(4) For more information about how to complete the ISP, ISP approval please see page 23.
(5) For more information about how to complete ISP revisions please see page 34.

The Therap guides were developed utilizing all of the information and content from the original standardized ISP

INDIVIDUAL SUPPORT PLAN – OVERVIEW OF THE PERSON CENTERED PLANNING (PCP) PROCESS IN THERAP

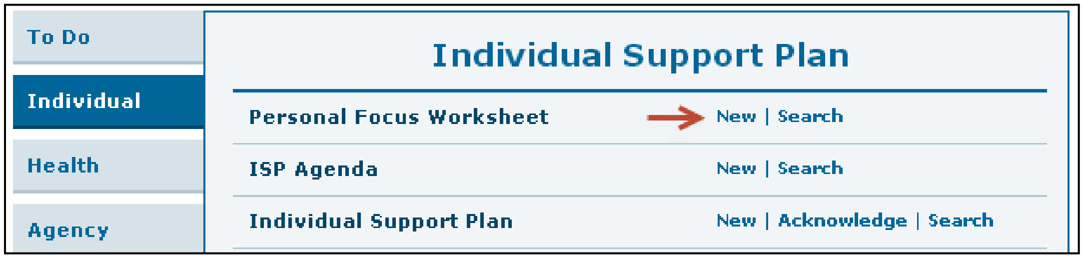
Therap's Individual Support Plan (ISP) allows you to collaboratively develop a person centered plan of delivering services and supports to individuals. The ISP, in tandem with the Personal Focus Worksheet (PFW), and ISP Agenda can be used to design supports and activities for the individual and record decisions that are made among the team members in the planning process. The following workflow diagram describes how the Person Centered Planning (PCP) process works in Therap.

Personal Focus Worksheet (PFW)

Personal Focus Worksheet reflects the perspective of the individual, the residential provider and, when applicable, the employment services provider as well as the perspectives of those who know and care about the individual. In the worksheet, you may enter responses to the 20 questions, the associated agenda questions, and Add Participants to the ISP team. The PFW answers can be directly accessed from and copied to the ISP and the ISP Agenda form.

You can get started with the person-centered support planning process by filling out the **Personal Focus Worksheet** with information from the perspective of the individual as well as information from the perspective of others who know and care about the individual. This will be based on information gathered through Person Centered Discovery tools and organizational assessments completed as warranted by the team.

1. Create a new **Personal Focus Worksheet** by clicking on the **New** link in the 'Personal Focus Worksheet' section of the 'Individual' tab.

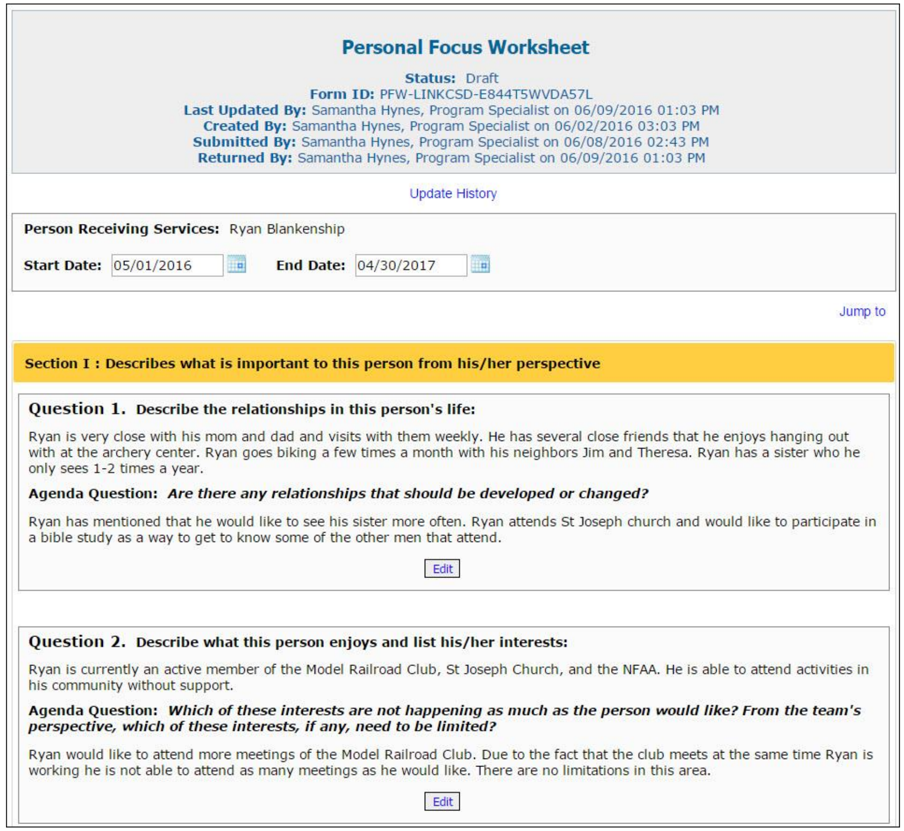


2. Select the Individual for whom the Personal Focus Worksheet is to be created by clicking on the 'Last Name' in the Individual List page.

3. In the **Personal Focus Worksheet** (PFW), you will see 22 questions divided into six sections. Each question is followed by the Add button.

   *Following are some questions which can be addressed in the **PFW**:*

- *What do others like and admire about me? (i.e. Question: 6)*
- *How do I participate in my community? (i.e. Question: 7,18)*
- *What are my personal strengths and assets?*
- *Where can my personal strengths and assets be shared/used?*
- *What successes and accomplishments have I experienced in the past year? (i.e. Question: 18, 22)*
- *What do others need to know to support me best? (i.e. Question: 22)*
- *How do I want to spend my time? (i.e. Question: 2,4,5,9,22)*
- *Community-based and Relationship-based supports (i.e. Question: 14)*
    - *To complete, reference Community Based Section and Relationship Based Section of Services and Supports Star in LifeSpan folder materials AND Relationship Map in Discovery section. Also reference groups, clubs, organizations, etc., that the person is involved in.*



Personal Focus Worksheet

Status: Draft
Form ID: PFW-LINKCSD-E844T5WVDA57L
Last Updated By: Samantha Hynes, Program Specialist on 06/09/2016 01:03 PM
Created By: Samantha Hynes, Program Specialist on 06/02/2016 03:03 PM
Submitted By: Samantha Hynes, Program Specialist on 06/08/2016 02:43 PM
Returned By: Samantha Hynes, Program Specialist on 06/09/2016 01:03 PM

Update History

Person Receiving Services: Ryan Blankenship

Start Date: 05/01/2016 **End Date:** 04/30/2017

Jump to

Section I : Describes what is important to this person from his/her perspective

Question 1. Describe the relationships in this person's life:

Ryan is very close with his mom and dad and visits with them weekly. He has several close friends that he enjoys hanging out with at the archery center. Ryan goes biking a few times a month with his neighbors Jim and Theresa. Ryan has a sister who he only sees 1-2 times a year.

Agenda Question: ***Are there any relationships that should be developed or changed?***

Ryan has mentioned that he would like to see his sister more often. Ryan attends St Joseph church and would like to participate in a bible study as a way to get to know some of the other men that attend.

Edit

Question 2. Describe what this person enjoys and list his/her interests:

Ryan is currently an active member of the Model Railroad Club, St Joseph Church, and the NFAA. He is able to attend activities in his community without support.

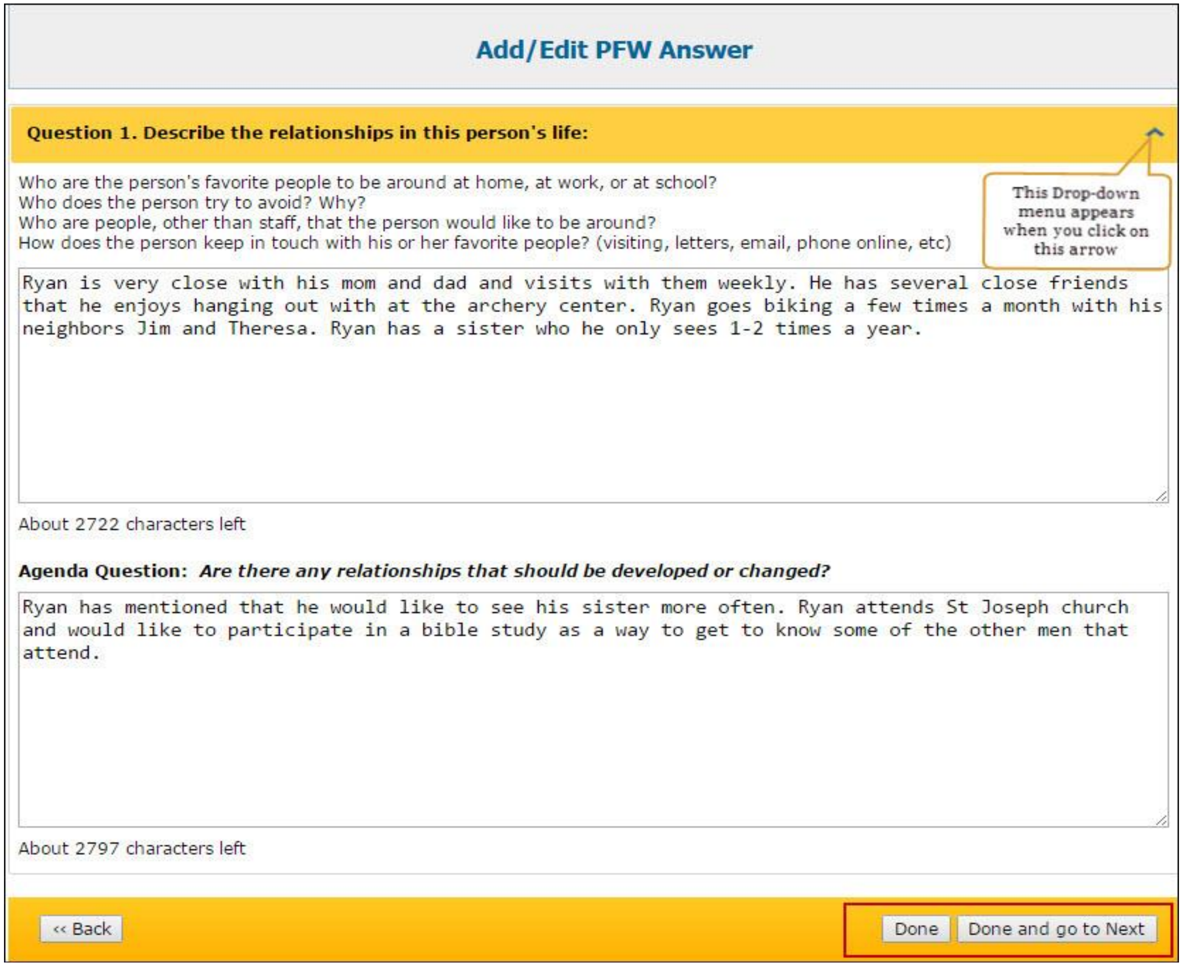
Agenda Question: ***Which of these interests are not happening as much as the person would like? From the team's perspective, which of these interests, if any, need to be limited?***

Ryan would like to attend more meetings of the Model Railroad Club. Due to the fact that the club meets at the same time Ryan is working he is not able to attend as many meetings as he would like. There are no limitations in this area.

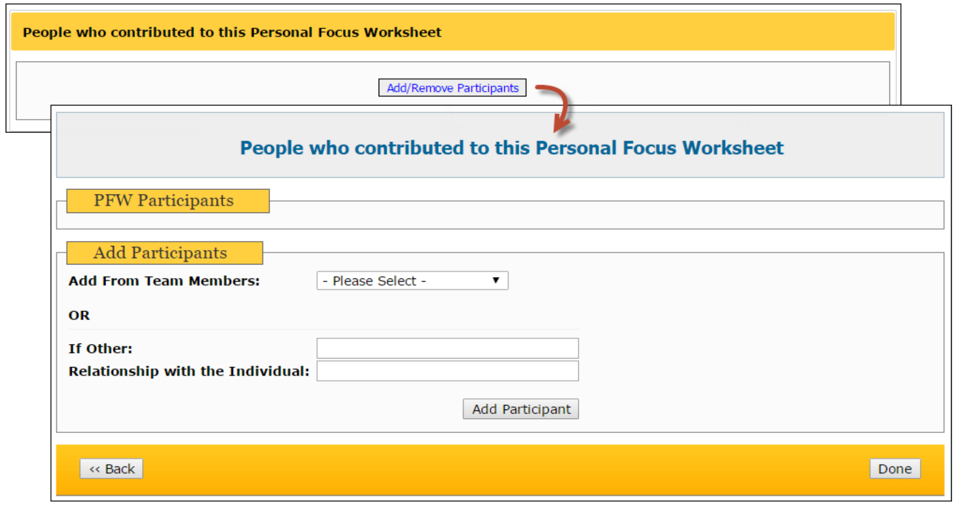
Edit

PFW Start and End dates coincide with the ISP dates. ISP starts on one date and ends one year later (i.e. 6/1/16 through 5/31/17).
***Tip: To change the 'End' date, change in this order: Year, Month, Day.**

4. Selecting the **Arrow** provides you with a drop-down list of questions to prompt deeper consideration of the answers. Once completed, click the **Done** button to return to the PFW form. However, the **Done** and **Go to Next** option takes you to enter an answer for the next question.



5. Agenda Questions are intended to prompt further discussion needed to develop or enhance supports in place. Once the ISP Agenda is created, specific Agenda Questions from the PFW can be linked automatically to prompt this discussion at the ISP meeting.
6. With the Add Participants link, users can add participants to the PFW from Team Members section of the Individual Data Form. The 'Other' box can be used to add other participants as well. Ensure people who are important to the participant are a part of the discovery process.



7. Once all the information is filled out, you may choose to either Save, Submit or Approve the PFW depending on your permissions.

8. Then, you will see a notification of your chosen action.

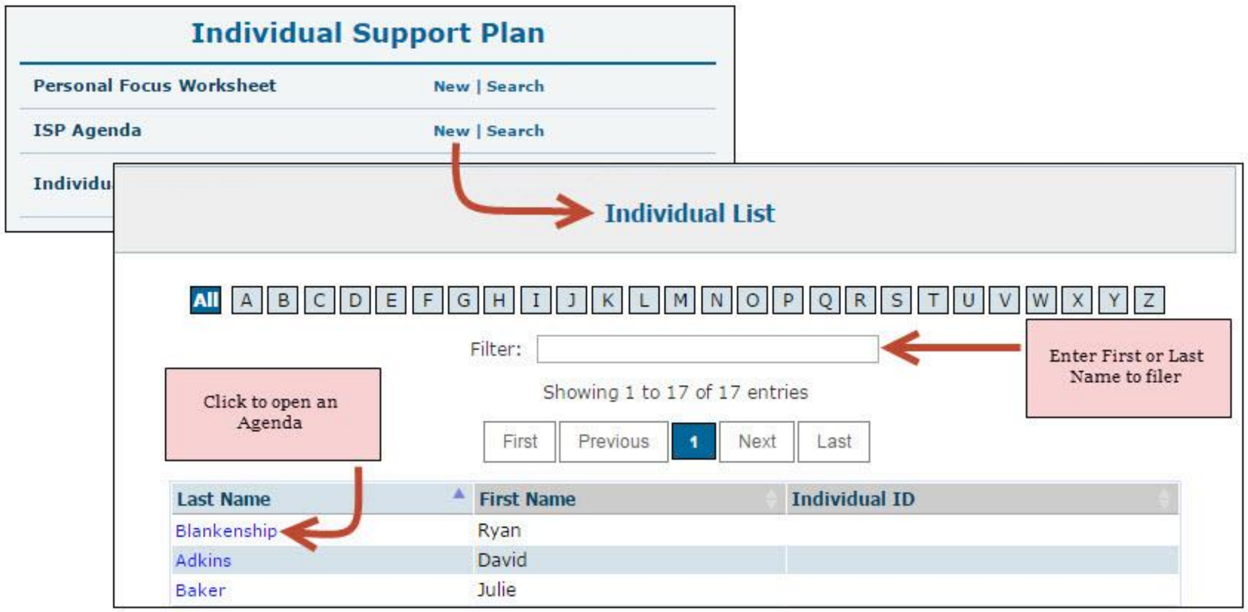
The PFW needs to be approved by the CM supervisor before the information can be linked to ISP Agenda.

ISP Agenda

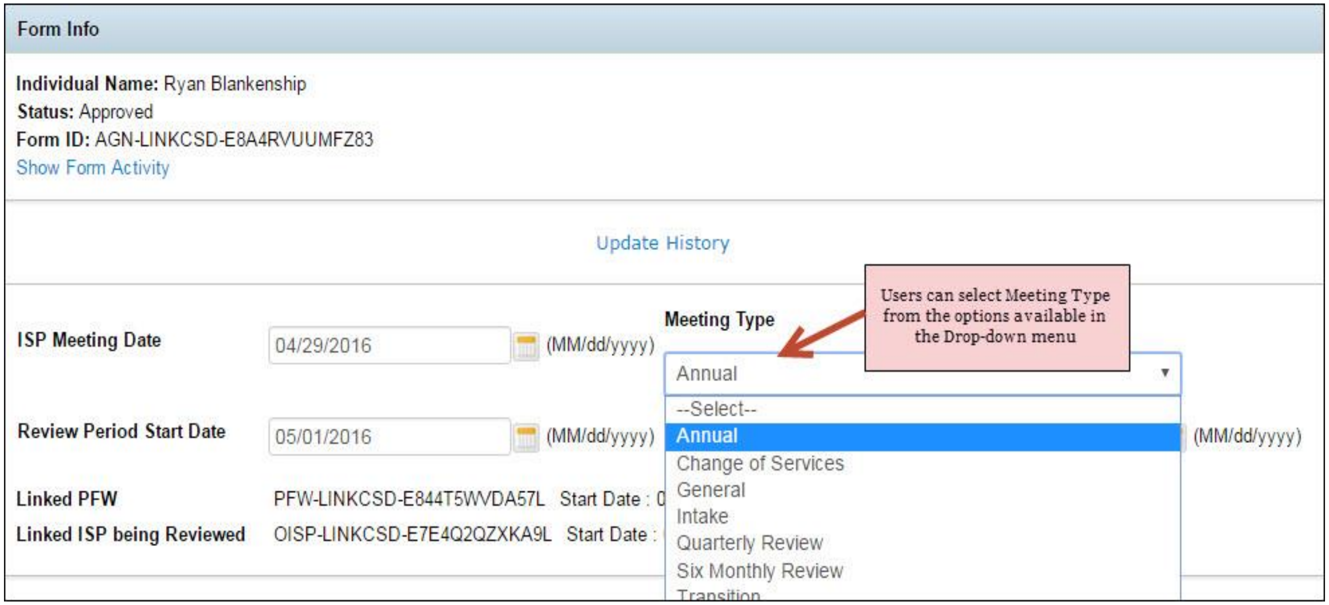
The ISP Agenda module is being launched to record electronically a statement of the matters which will be considered and discussed in ISP Planning meetings. Users will have the option to add notes to the module once the meeting is over. This will greatly assist users to model ISPs that serve the particular needs of the Individual.

CREATE NEW ISP AGENDA

1. To create a New ISP Agenda, click on the New link in the **ISP Agenda** section in the Individual tab of your Dashboard, then select the Individual by clicking on the Select link on the same row as Individual's name in the **Individual List** page. Users with the *ISP Plan Update* role can create a new ISP Agenda.



2. You will see the full ISP Agenda with the Name and/or ID of the Individual, Status of the Form, and a Unique Form ID. Then you can select **ISP Meeting Date**, **Review Period Start** and **End Date**, and the **Meeting Type**.

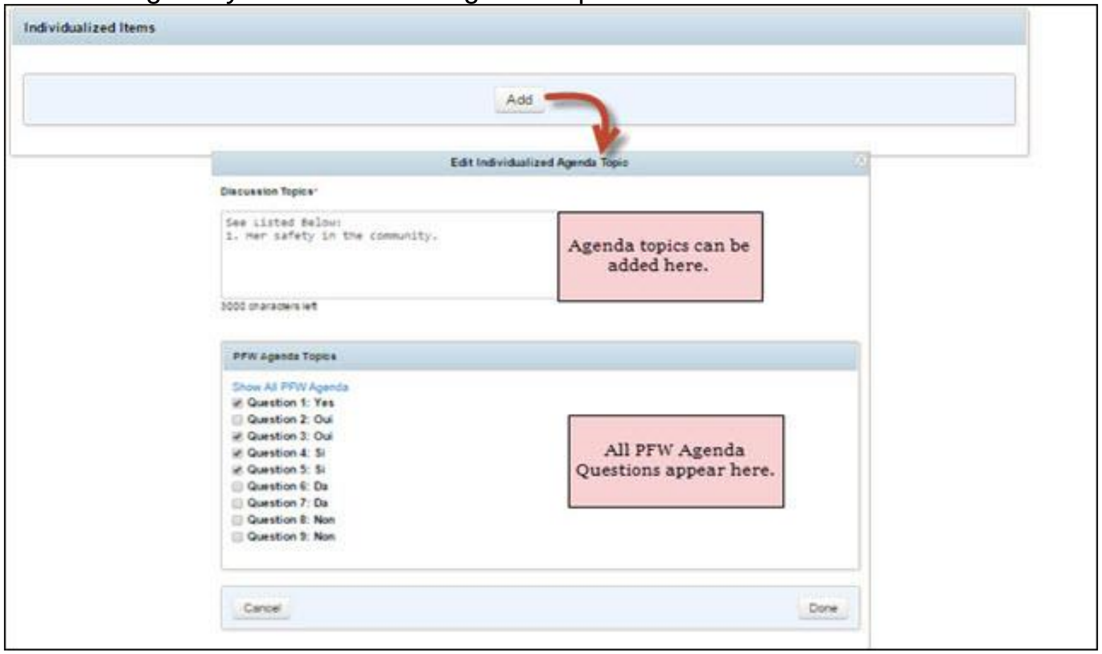


- ISP Start Date should be no later than 15 days after the ISP Meeting Date and indicates the date of implementation of the plan.
- The Case Manager should use the 15 days between the meeting and the start date to finalize and approve the ISP documents so they are ready for implementation on the plan start date.
- ISP End Date will be 365 days after the ISP Start Date. An example is below:
  - ISP Meeting on June 1, 2016
    - ISP Start Date June 16, 2016
    - ISP End Date June 15, 2017 (this allows for the previous plan to be implemented while the 2017 plan is in development)

Meeting types:

- Annual – should be used for the yearly plan completed every 365 days.
- Change of services – should be used for any update or team meeting that happens outside of the annual team meeting. For example: updates to a person's goals, changes to guardianship status, and changes in Community Support Provider or Case Management organization. *See Activate Change Form and Edit ISP" section for details regarding using/editing an ISP Agenda.
- Intake – should be used for an initial ISP.
- General, Quarterly Review, Transition, and Six Month Review should <u>not</u> be utilized.

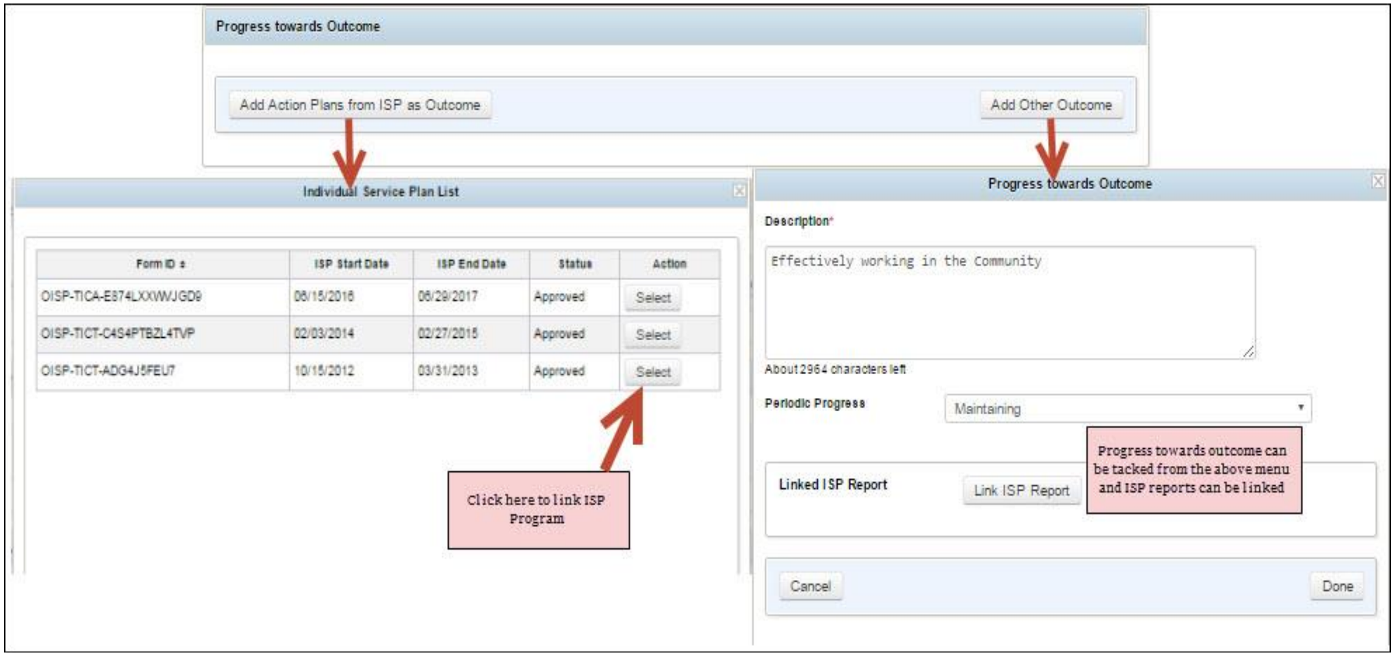
3. By clicking on the **Add** button in the **Individualized Items** section, you can edit the Individualized Agenda Topic. You can add discussion topics in the text field to guide your discussion. Agenda topics can be added from an Individual's PFW as well.



Discussion topics should be chosen based on the important themes identified in the personal focus worksheet. Each theme should have its own individualized item as a discussion topic. Each of the individualized items can pull in multiple questions from the personal focus worksheet. For example, one of the themes identified could be related to community employment. The case manager will describe the items related to employment that need to be discussed during the ISP and pull in the responses from questions 2,4,10,17, and 20 on the Personal Focus Worksheet.

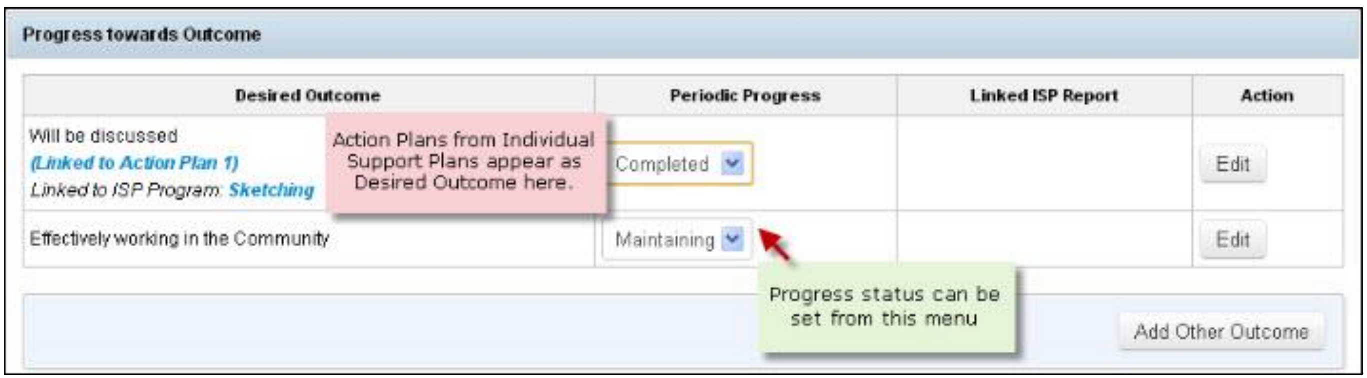
- There should be multiple individualized items addressing a variety of different themes.
- Multiple questions from the Personal Focus Worksheet can be pulled into each individualized item.
- Not every question from the personal focus worksheet needs to be pulled into the ISP Agenda.

4. To discuss desired outcomes, you can add **Action Plans from ISP as Outcome** or **Add other outcomes** in the **Progress Towards Outcome** section of ISP agenda.



The previous year's ISP should be linked to the ISP Agenda to allow for review and discussion of last year's plan and evaluation of progress towards goals from the previous year when identifying goals for the upcoming year.

5. After adding Action plans from ISP and/or Other Outcomes, the Progress Towards Outcome section displays desired outcomes, periodic progress, and Linked ISP Reports, if any.

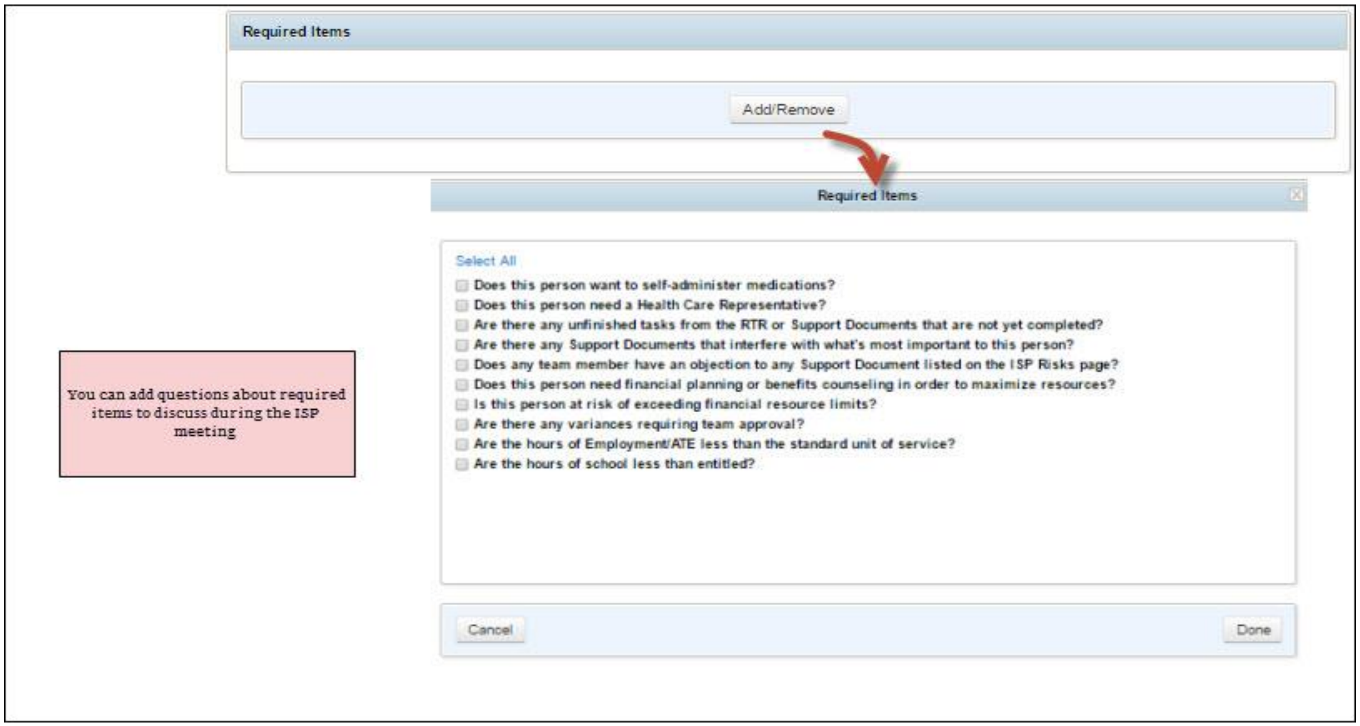


Status of progress towards outcomes:

- Completed: The goal was met.

- Maintaining: The goal is still important to the person and they are engaged in activities related to the goal; however, it is not their main focus, and it is not something the provider is collecting data on.
- Making progress: The person is still working on the goal and is making progress toward accomplishing the goal.
- Not making progress: The goal is no longer important to the person and is not something they are working on. If the person is not making progress towards goals the Case Manager should document why progress is not being made and what changes need to be made either to the goal, action steps, or what new goals are in place.
- Discontinued: The goal is no longer important to the person and they do not want to continue to focus on it. This should only be marked if the goal was ended before the goal was met. The case manager should document why the goal is being discontinued and whether changes need to be made to the persons plan or action items.

6. You can select additional questions or Required Items to your ISP Agenda to discuss during the ISP Meeting. Required Items actually help to collect participants' needs which can easily be presented in the ISP meeting.



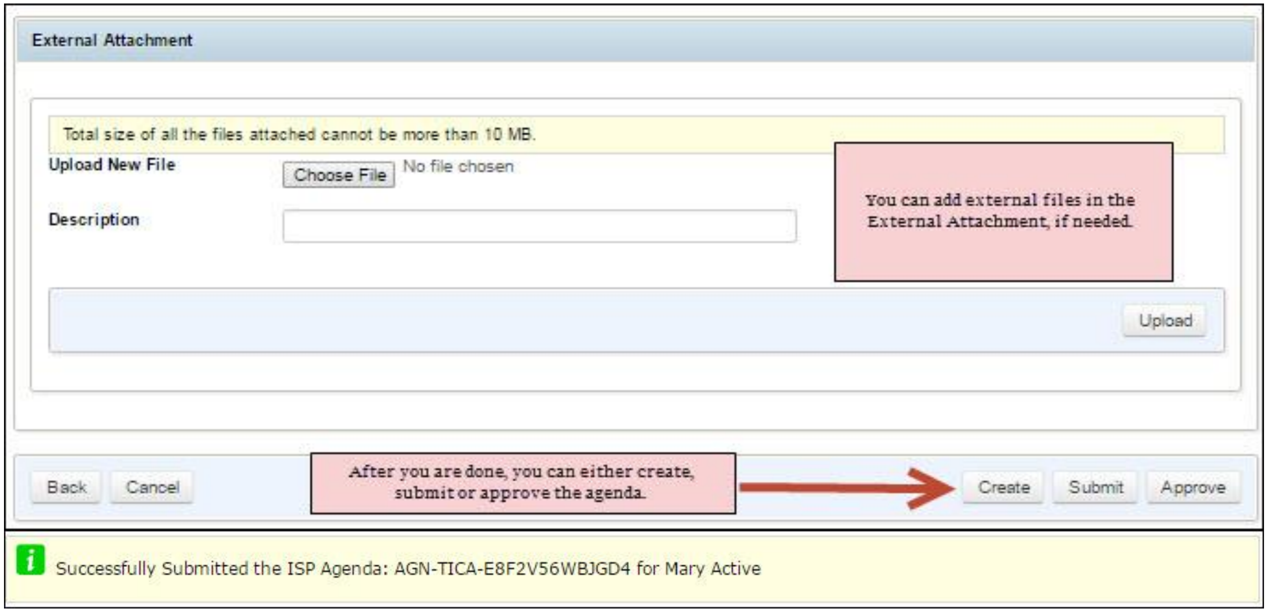
ALL of the following questions in the required items section are required for **EVERY** ISP. These are items that specifically address Administrative Rules of South Dakota and are required to be discussed and documented at **EVERY** annual ISP.

- Are Personal Finances managed by the CSP?
- Has the team discussed Medication Benefits vs. risk?
- Has ANE Participant/Guardian Training occurred annually?
- Has Grievance Training/Procedures occurred annually?
- Has the participant/ guardian received training regarding their rights?
- Has Medication Self Administration been discussed with the team?
- Has the team discussed the amount of time a participant has alone?
- Has the participant/guardian been provided with Service Choice Notice?
- Has the participant/guardian been provided with Provider Choice Notice?
- Does the participant receive Alternative Services?
- Was the participant involved in ISP facilitation?
- Were team members involved in ISP development?
- Has the participant expressed an interest in obtaining advocacy?
- What is the current guardianship status? Do any changes need to be made to guardianship?
- Has the team reviewed assessments?

7. You can add any external files in the **External Attachment.** Sometimes, few references are required to support the agenda. This section helps to store any type of external documents.
Documents that should be added as attachments include:

- Signature pages for provider choice
- Signature pages for service choice
- Annual medication administration assessment
- Any assessment reviewed or assigned
- Person Centered Thinking (PCT) tools
- ANE training-content and signature
- Grievance training-content and signature
- Rights training-content and signature

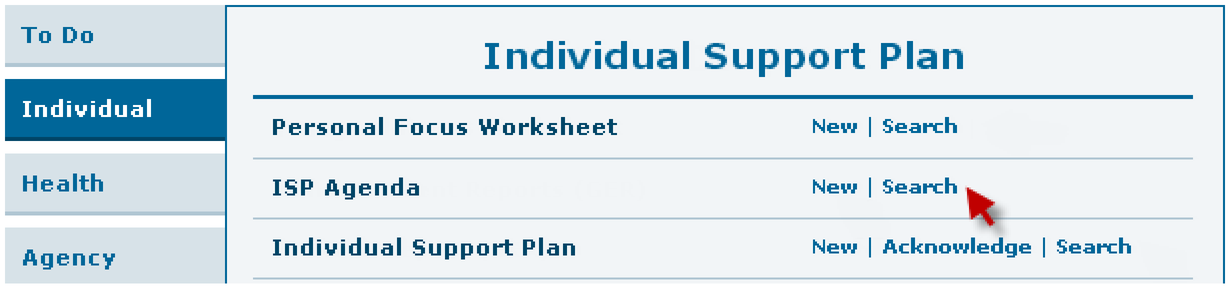
External Attachments may include the content and signature pages for ANE, Grievance, and Rights training, as well as any other pertinent documents related to plan development.


External Attachment
Total size of all the files attached cannot be more than 10 MB.
Upload New File
Choose File
No file chosen
Description
You can add external files in the External Attachment, if needed.
Upload
Back
Cancel
After you are done, you can either create, submit or approve the agenda.
Create
Submit
Approve
Successfully Submitted the ISP Agenda: AGN-TICA-E8F2V56WBJGD4 for Mary Active

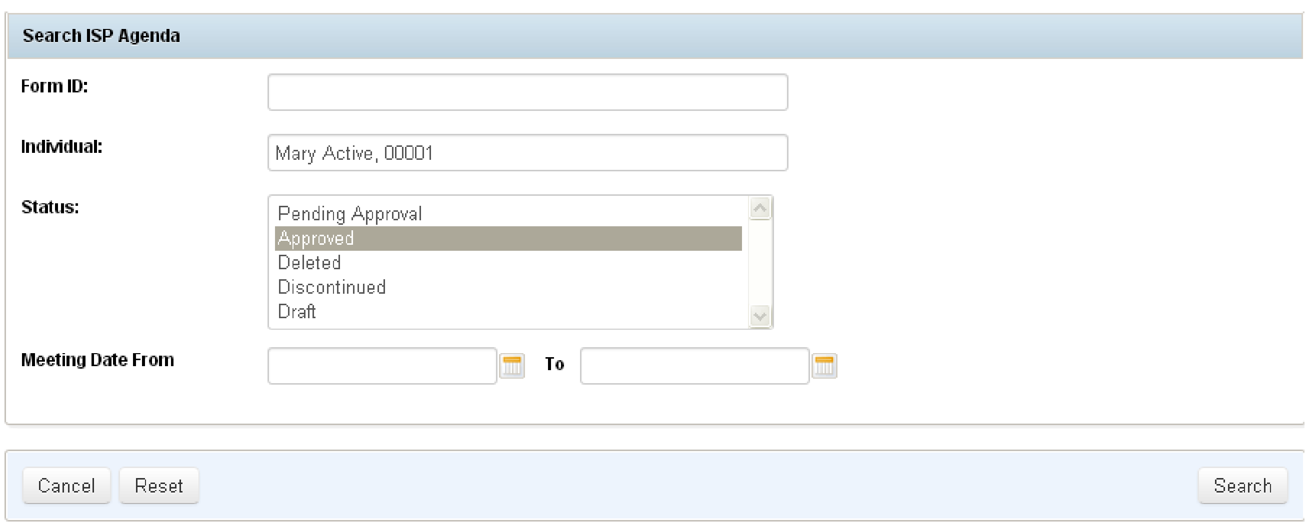
Record Meeting Minutes

Meeting Minutes should be recorded after the ISP meeting is held.

1. On the Dashboard, click on the Search link in the ISP Agenda module under the 'Individual Tab'.



2. On the **Search ISP Agenda** page, enter the name of the individual and select the 'Approved' form status. If you type in a few letters of an individual's name, an auto-complete list will appear from where you can select the individual's name. You can enter other search parameters in order to narrow down the search results.



Users can record meeting minutes for **Approved** ISP Agenda only.

3. Next, you will arrive to the **Search ISP Agenda** page. Click on the particular form for which you would like to Record Meeting Minutes.

Search ISP Agenda

Status Approved

6 items found, displaying all

Form ID	Individual Name	Meeting Date	Start Date	End Date	Meeting Minutes Recorded?
AGN-TICT-DAC4SYSKZGD8Q	Active, Mary	05/01/2015	06/10/2015	08/01/2015	Yes
AGN-TICT-DAB4U74XW4M6S	Active, Mary	08/08/2015	08/04/2015	08/14/2015	No
AGN-TICT-D6N556FZM496E	Lee, Alyssa	04/01/2015	04/02/2015	04/02/2015	Yes
AGN-TICT-CDC4U9NZ7ZN6A	Johnson, Elijah	01/26/2015	01/27/2015	11/15/2015	Yes
AGN-TICT-C9K4QV4UV7J7W	Johnson, Isabella	07/01/2013	07/02/2013	01/02/2014	No
AGN-TICT-B9V2E3F3M8VB	Wright, Andrew	07/01/2013	07/02/2013	07/04/2013	Yes

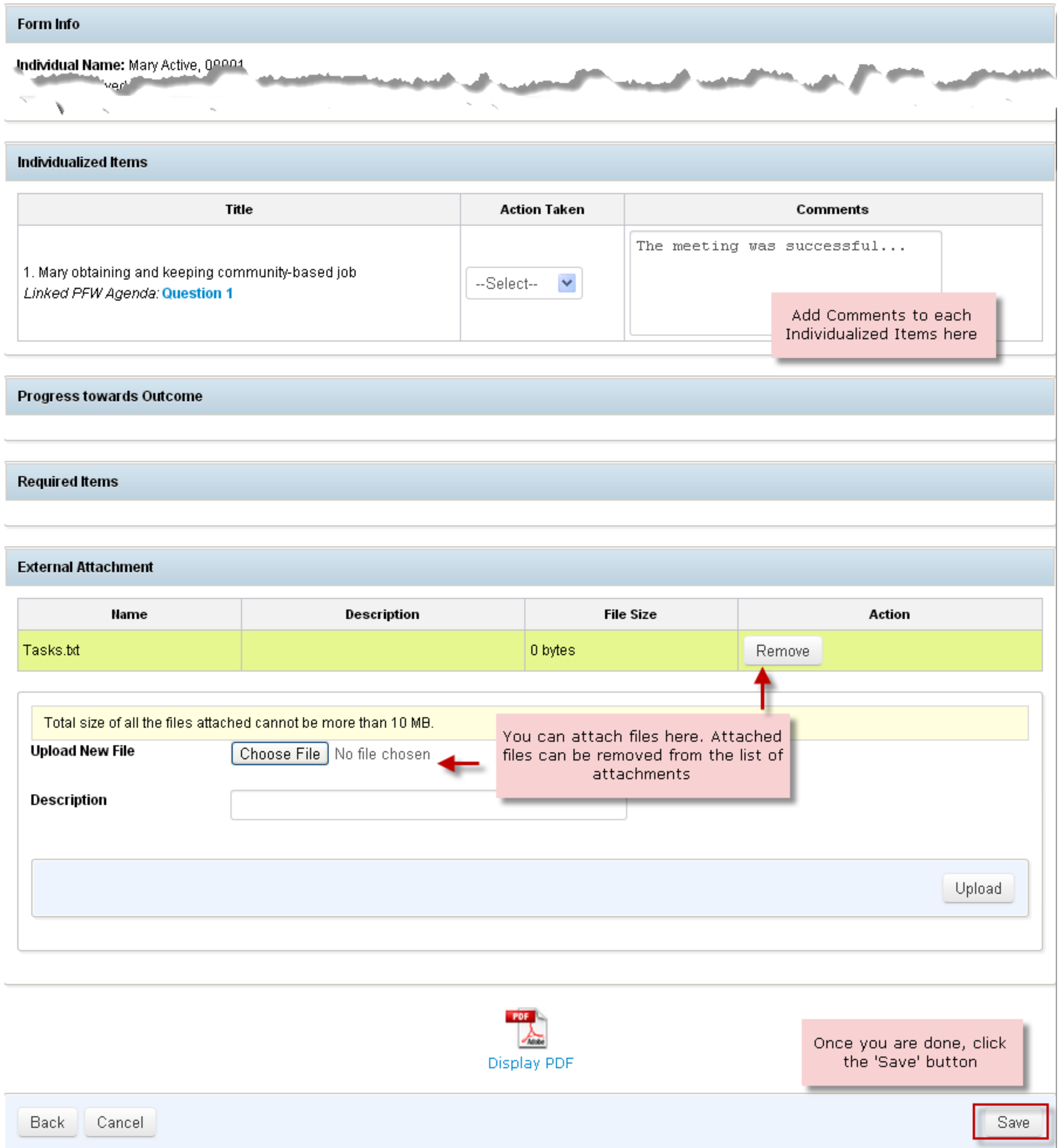
Export To Excel

New Search

4. On the ISP Agenda, scroll down to the bottom of the page and click on the ‘Record ISP Meeting Minutes’ button.

5. A warning message will display notifying that the **ISP Agenda will no longer be editable** once the Meeting Minutes are recorded. Click ‘OK’ to proceed.

6. You can then add comments for ‘Individualized Items’ and upload external attachments to the ISP Agenda. Once you are done Recording Meeting Minutes, click on the **Save** button.



Individualized Items: Individualized Items are the items selected during the initial creation of the ISP Agenda. In the meeting minutes, the CM will address all of the items by selecting an option in the action taken column.

- Issue resolved: This can be used when the item has been addressed and no further follow up is needed. An example is below:

Individualized Items

Title	Action Taken	Comments
1. In past years Ryan has worked seasonally at the Menards garden center, team needs to discuss if this is something Ryan is still interested in. *Linked PFW Agenda:* **Question 10** , **Question 17** , **Question 18**	Issue Resolved	Ryan has decided that he wants to focus on his job at Culver's, learning to work at the counter and run the cash register. Ryan feels that by learning these new skills, he will have opportunities to work more hours and earn more money.

- Action plan: This can be used when the Individualized Item needs to be addressed in the action plan (for instance if the Individual Item relates to a person's goals, action steps, etc.).

2. Ryan is working on a saving money for a number of things including a car, a trip and a tattoo. Team should discuss employment and managing finances. *Linked PFW Agenda:* **Question 2** , **Question 4** , **Question 14** , **Question 19**	Action Plan	See above information regarding earning more money. Ryan would also like to learn to balance his checkbook, access online banking/app on his phone, and develop a savings plan for his trip and tattoo.

- Discussion record: This can be used when more detailed information is needed about an Individualized Item. it should include information staff needs to know to support the person but does not require an action plan.

3. Management of diabetes including increasing managing blood sugar independently and following a diabetic diet. *Linked PFW Agenda:* **Question 13** , **Question 6** , **Question 21**	Discussion Record	Ryan sometimes has difficulty following his diabetic diet when at work, as the food at Culver's is tempting and he sometimes forgets to pack his lunch. Ryan will be assisted to set a recurring alarm on his phone for the evening as a reminder to pack his lunch and another recurring reminder for the morning before he leaves to grab his lunch from the refrigerator. Staff will also assist Ryan to find the Culver's nutritional guide online or in the store to help him make healthier choices in the event he forgets his lunch.

Progress toward outcome: This is pulled forward form the initial creation of the ISP Agenda. The CM should make any additional comments about the outcome progress, etc.

Progress towards Outcome

Desired Outcome	Periodic Progress	Linked ISP Report	Comments
Ryan will lose weight through diet and exercise *(Linked to Action Plan 1)* *Linked to ISP Program:* *Exercise*	Making Progress		Ryan has lost about 10 lbs in the past year. He has become much more active in managing his diabetes and loves to ride his bike around town.
Ryan wants to be competitively employed. *(Linked to Action Plan 2)* *Linked to ISP Program: Job Seeking*	Completed		Ryan has worked Culvers for almost 9 months. He is doing really well and has made some friends at work. Ryan is hoping to learn to work the cash register and take orders, since he loves talking to people.

Required Items: ALL items must be addressed by the team.

- Are personal finances managed by the CSP? - Personal Finances include wages, gifts, trusts, stocks and bonds, inheritance monies, etc. Documentation should include:
    - Why does the person need support to manage personal finances?
    - How is the person involved in managing their finances?
    - Training that has been/is provided, and the timelines for returning control to the person.
    - Include related rights restrictions if applicable.
- Has the team discussed Medication Benefits vs. Risk? Documentation should include the following:
    - Name of the psychotropic medication(s)
    - Side effects of the medication
    - Team discussion regarding how monitoring will occur the participant for major side effects and how concerns will be addressed
    - Team discussion regarding the benefits of the medications vs. risks and that documentation that the team has determined that benefit outweighs the risk.
- Has ANE Participant/Guardian Training occurred annually? Documentation should include the following:
    - Month, Day, Year training occurred
    - Note whether training occurred during ISP meeting, quarterly review, etc.
    - List all those who received training. If training did not occur with participant directly, indicate reason
    - Accommodations which were made for the person's communication style (pictures, ASL, provided in primary language?)
    - Content of the training needs to be attached to the Agenda.
- Has Grievance Training/Procedures occurred annually?

- Month, Day, Year training occurred
  - Note whether training occurred during ISP meeting, quarterly review, etc.,
  - List all those who received training. If training did not occur with participant directly, indicate reason
  - Accommodations which were made for the person's communication style (pictures, ASL, provided in primary language?)
  - Content of the training needs to be attached to the Agenda.
- Has the participant/guardian received training regarding their rights?
  - Month, Day, Year training occurred
  - Note whether training occurred during ISP meeting, quarterly review, etc.,
  - List all those who received training. If training did not occur with participant directly, indicate reason.
  - Accommodations which were made for the person's communication style (pictures, ASL, provided in primary language?)
  - Content of the training needs to be attached to the Agenda.
- Has Medication Self Administration been discussed with the team?
  - Determine if the level of medication administration is appropriate
  - What supports need implemented if the participant expresses a desire to self-administer?
  - If the participant self-administers their medications and has a Scheduled II Controlled Substance, the team must decide the safest way to store and account for the medication and document this in the ISP.
  - Medication Self Administration assessment needs to be attached to the Agenda.
- Has the team discussed the amount of time a participant has alone?
  - Unsupervised time, access to staff, and safe environments must be considered
- Has the participant/guardian been provided with Service Choice Notice?
  - Was the participant provided information about all of the services that are available? Has there been discussion regarding appropriateness of services?
- Has the participant/guardian been provided with Provider Choice Notice?
  - Was the participant provided information about all of the Community Support Providers and all of the Case Management providers in South Dakota?
- Does the participant receive Alternative Services?
  - How did the team determine appropriateness of alternative services? Alternative services must be related to a goal which addresses at least one of the following:
    - Communication
    - Socialization
    - Mobility
    - Health and physical fitness

- Leisure and retirement or both
- Educational and functional skills

- Was the Participant involved in ISP facilitation?
  - Describe how the participant is involved in preparing for and facilitating their own ISP meetings and participation in developing goals and supports. Did the person decide who to invite or not invite?
- Were Team members involved in ISP development? Documentation should include the following:
  - Who the participant invited to be a part of the ISP and how they participated in development of the ISP. Indicate whether the person named is an official member of the team. Attendance at annual or special team meetings does not automatically make a person part of the ongoing team.
  - If team members and/or those most important to the person were not able to be physically present, describe how their input was obtained for development of the ISP. Were creative options for attendance pursued, such as Skype, FaceTime, conference call, etc.?
- Has the participant expressed an interest in obtaining advocacy?
  - Has information been provided to the person about an advocate, their role, and how to obtain an advocate?
- What is the current guardianship status? Do any changes need to be made to guardianship?
  - If Independent Adult, does the person need assistance making decisions? If so, which type of decisions? Is there someone who advocates well for the participant?
  - If Guardianship in place, is the current guardian appropriate? Is the guardian making decisions on behalf of the person or for the person? Is the person included in the decision making process?
  - If current guardianship is deemed by the team to be inappropriate, what follow up will occur to address the concerns? Include in Action Plan section of ISP.
- Has the team reviewed assessments?
  - Which assessments are warranted for the person?
  - Were all assigned assessments completed?
  - Which other assessments might be needed?

There are three ways to address required items:

- Discussion Record: Rather than choosing Action Plan, select Discussion Record, then add notes related to the topic. In the ISP you will then be able complete the “discussion” “decision” and “related to action plan” columns-when selecting the “related to action plan”, you can note which desired outcome and action steps are related to the discussion record item. *Explain that when selecting Action Item, all the contents/discussion are automatically entered as one action item, CM would then need to re-enter as separate steps. DO NOT USE ACTION ITEM section in Required Items.

-

7. Has the team discussed the amount of time a participant has alone?	Discussion Record	Ryan can be in the community, as long as he can contact staff and have a response within 15 minutes. At his apartment, he has contact with staff every 12 hours due to medication administration or other support needs.

- Deferred: This should be selected if the item is not applicable to the person. Examples of items which may be deferred include but are not limited to medication administration, medication risks vs benefits, alternative services, and advocacy.

2. Has the team discussed Medication Benefits vs. risk?	Deferred	Ryan does not take any psychotropic medications. He only takes medications for seizures and diabetes only.

- Issue Resolved: This should be used if the item was addressed and taken care of in its entirety at the ISP meeting. Examples include but are not limited to ANE annual training, grievance training, and rights training.

3. Has ANE Participant/Guardian Training occurred annually?	Issue Resolved	Ryan and his sister were informed of agency policy on ANE 4/29/18. Ryan also received training using a you tube video about protecting himself from various forms of abuse, neglect, and exploitation.

Every required item must have documentation in the comments section regarding the discussion of these items during the ISP.

7. After clicking on the **Save** button, a notification will appear of a ‘saved’ ISP Agenda.

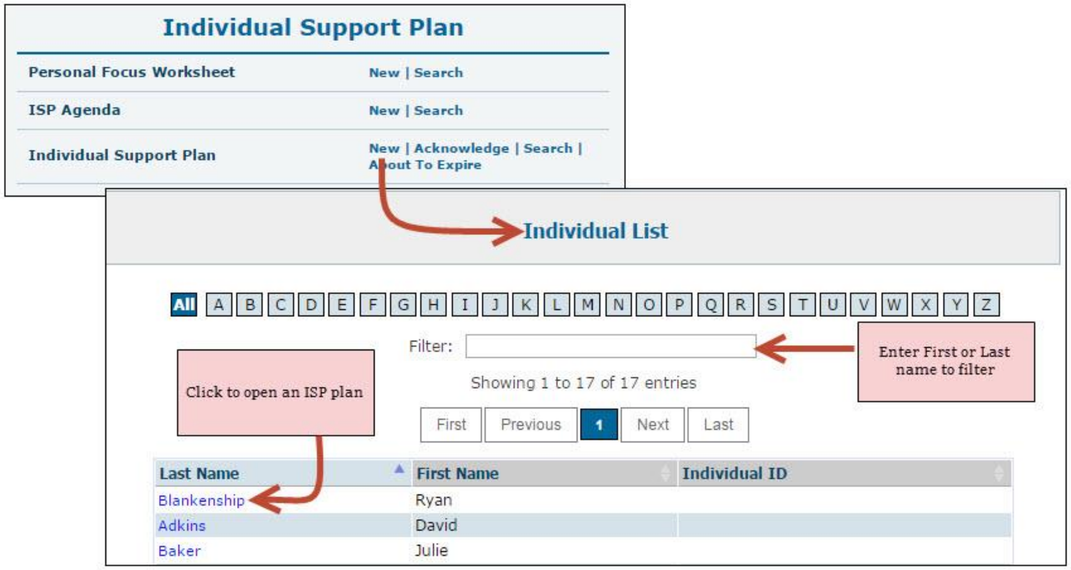
Successfully Saved Meeting Minutes into the ISP Agenda: AGN-TICT-B7J2SRQVS7JFK for Mary Active

Individual Support Plan

The ISP provides an enhanced workflow for planning and documenting Individuals' supports. With the ISP, the user can record an individual's personal details including Risks, Professional Services, Action Plan, Discussion Records, and Service Supports.

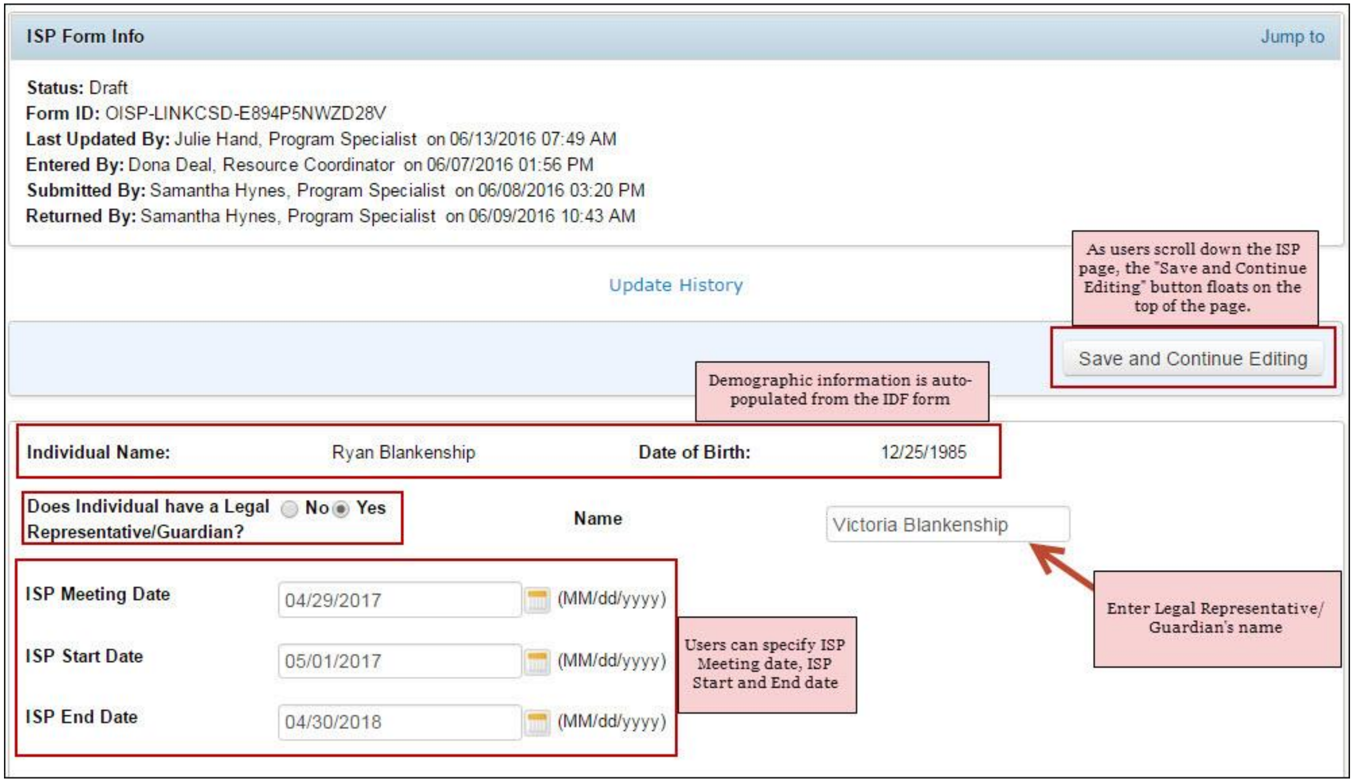
1. Click on the Individual tab from your dashboard. In the Individual Support Plan module, Click on the New link on the 'Individual Support Plan' section to get started with creating the ISP.

The 'Individual List' page will then load. On the 'Individual List' page, click on the last name under the 'Last Name' column to create ISP for the particular Individual.



2. You will be directed to the ISP for that Individual. The status of the ISP will set to 'New' as it is a completely new ISP for that individual. On the ISP, the 'Individual Name,' 'ID Number,' and 'Date of Birth' are auto-populated from the Individual Data Form (IDF) of that Individual.
Choose if the individual has a legal Representative/Guardian by selecting Yes/No. If you choose Yes, then do not forget to mention the name in the 'Name' field that is right beside it. Enter the 'Meeting Date,' 'ISP Start Date' and 'ISP End Date.'

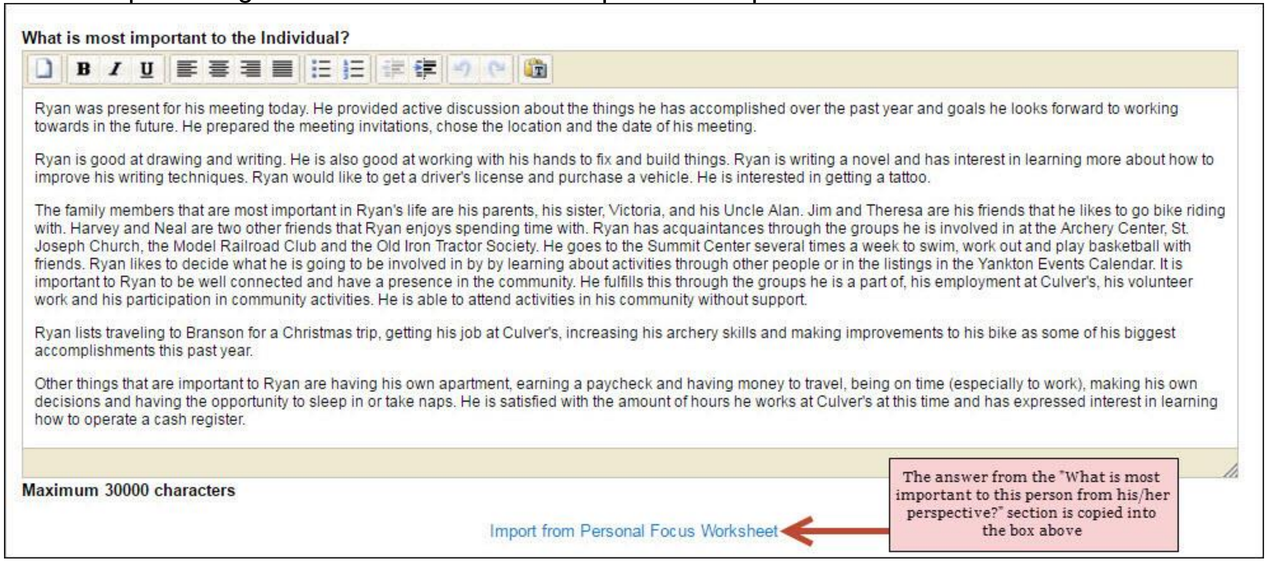
- ISP Start Date should be no later than 15 days after the ISP Meeting Date and indicates the date of implementation of the plan.
- ISP End Date will be 365 days after the ISP Start Date. See example below:
    - ISP Meeting on June 1, 2016
        - ISP Start Date June 16, 2016
        - ISP End Date June 15, 2017 (this allows for the previous plan to be implemented while the 2017 plan is in development)



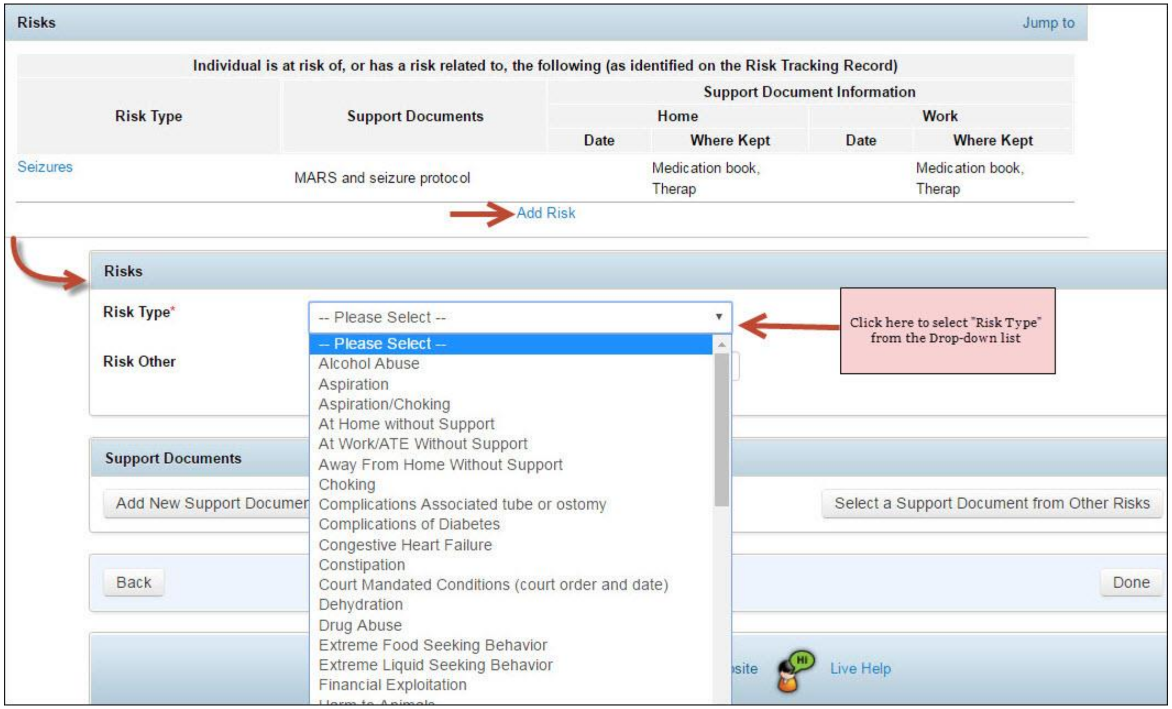
3. In the "**What is most important to the Individual?"** text area, you can import the answer from the PFW of the Individual, specifically the answer to the "**What is most important to this person from his/her perspective?"** question.
Suggested pertinent questions from the PFW:

- Describe the relationships in this person's life. (Question 1: Refer to Relationship Map and Matching Tool)
- Describe what this person enjoys and list his/her interests. (Question 2)
- Describe what this person wants to accomplish in the future. (Question 4)
- List and describe what is most important to this person from his/her perspective (Question 5)
- What does this person want to learn? (Question 19)

This section is also where the Case Manager should capture information related to who was invited to the ISP meeting, who attended, and discussion that occurred throughout the meeting. If people were invited to the meeting but were unable to attend, notes should include how input was gathered and considered in plan development.



4. On the **Risk** section, you may add risks by clicking on the Add Risk link. Here you can add the Risk Type from the Drop-down list which offers a wide range of Risk types. (i.e. medical conditions, supervision, legal issues, behavioral concerns, rights restrictions, safe environments, healthy living). You can also attach associated risk documents that you may have prepared as part of the PCP process (i.e. link to Behavior Support Plan or Rights Restriction)



5. On the **Professional Services Individual Uses/Needs** section, add key professional contacts for the individual by clicking on the Add Professional Services.

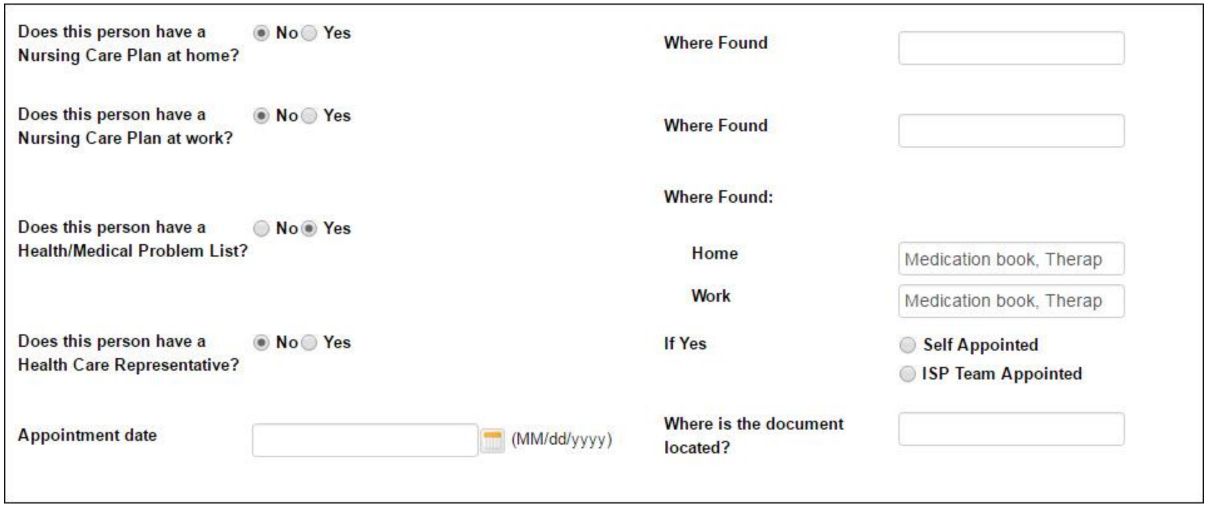
Professional Services Individual Uses/Needs Jump to

Name (Responsible Organization)	Contact Type - Type of Specialist	Contact Information	Specific reasons for this specialist	How Often or Due Date	Where to Record	Notes
Dr. Scott Weber	Primary Physician - General Practice	Yankton Medical Clinic 1104 W. 8th Street, Yankton, SD 605-665-8910	annual physical and general medical care	annually and as-needed	Therap	Exam also includes diabetic well check. Continue meds and diabetic diet as prescribed. Lab work done annually or more often as necessary.
Dr. Richard Barth	- Endocrinologist	Sanford Clinic Diabetes and Thyroid 1305 W. 18th Street Sioux Falls, SD 57105 605-328-8700	check Diabetes	every 6 months	Therap	Your A1C was 6.1, with a target of 7 or below. No recommended changes at this time.
Dr. Jerome Freeman	- Neurology	Sanford Neurology Clinic Vermillion, SD 605-555-1234	Seizures	annually	Therap	Blood work to be repeated in 6 months. Return for annual next year. No recommended changes at this time.
Jessie Scott, DDS	- Dentist	1101 Broadway, Suite 105 Yankton, SD 605-665-2448	dental cleanings and exams	every 6 months		return every 6 months. The general condition of your teeth is good. You received a new partial in October 2010.
Kim Cornoyer	- Psychology	Great Plains Psychological Services 401 S. Carnegie Place Sioux Falls, SD 57106 605-323-2345	individual counseling	monthly or as recommended by counselor and team	Therap	Counseling began in 2014.

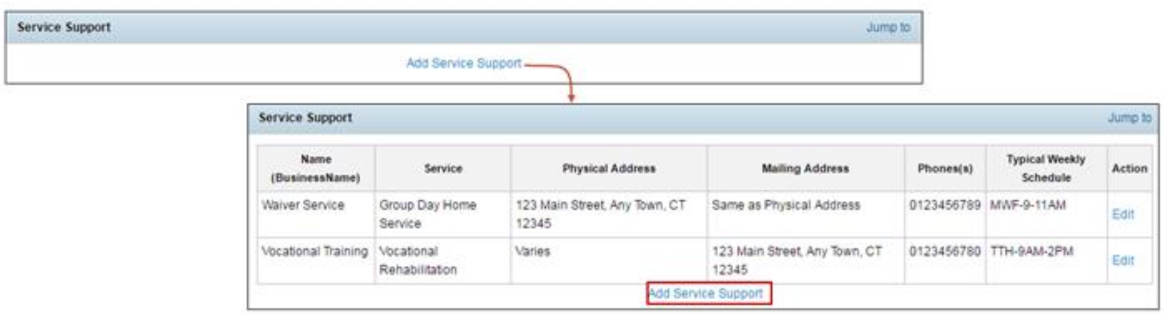
Add Professional Service

Click to add Professional Service information

The fields below are not required within Therap and should be left blank. If the person has a medical Power of Attorney or other designated supportive decision maker, this should be included in the Individual Data Form within Contacts and/or within Discussion Record in the ISP.



6. On the **Service Support** section, click '**Add Service Support**' button to add service support information for the individual.



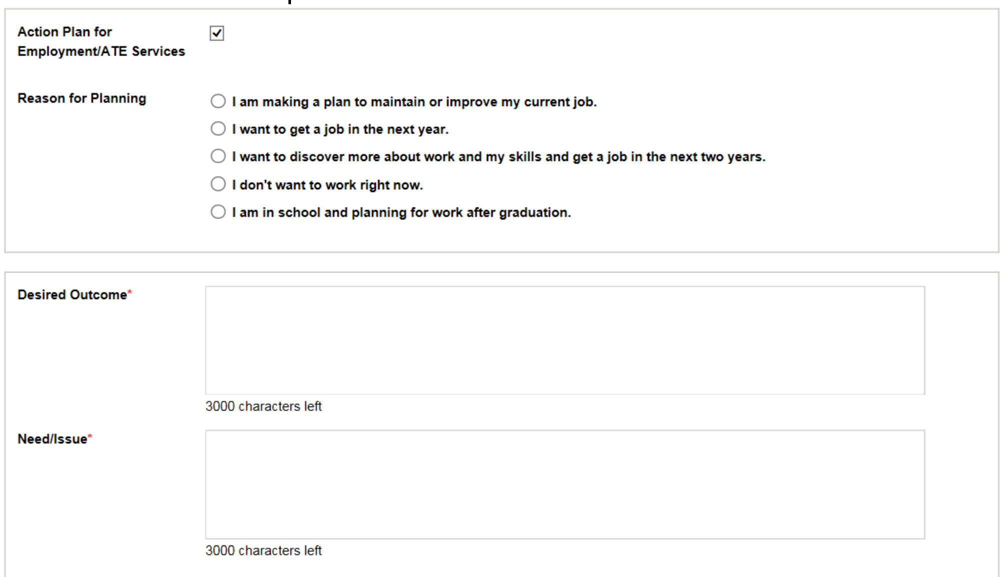
Name (BusinessName)	Service	Physical Address	Mailing Address	Phones(s)	Typical Weekly Schedule	Action
Waiver Service	Group Day Home Service	123 Main Street, Any Town, CT 12345	Same as Physical Address	0123456789	MWF-9-11AM	Edit
Vocational Training	Vocational Rehabilitation	Varies	123 Main Street, Any Town, CT 12345	0123456780	TTH-9AM-2PM	Edit

- List waiver service providers, number of hours per week and how much support is to be provided.
- List other services such as Speech, Hearing, Language; Medical Equipment and Drugs, and Other Medical as deemed appropriate by the team.
- List any other Resources/Funding the person is accessing (Vocational Rehabilitation, Housing Assistance, SNAP, TANF, Independent Living Services, Energy Assistance, Medicare Part D, VA/BIA, Burial Trusts, Renter's Insurance, Life Insurance).

7. The **Action Plan** section in the Individual Support Plan is next. Here all the actions which need to be implemented can be included. Click on the Add Action Plan link in order to add action plans.
The ISP must include at least one goal which should reflect what is important to the person. Include the intended outcome of the goal, ex. “Faye practices her karate **so that** she earns her orange belts and stays fit.” Avoid jargon and language that reflects “power over” rather than “power with.”

- Goals should evolve from year to year based on the experiences the person has had when goals are similar in nature.
- Goals should relate to specific waiver services accessed.
- If the check-box for **Action Plan for Employment/ ATE Services** is selected then a list of options will appear under **Reason for Planning**. Please select an option from the list that appears. The **Reason for Planning** section corresponds to the Person Centered Employment (PCE) Planning Guide. Teams should use the Guide to direct conversation regarding the person’s desired employment outcomes. Participant responses and direction should drive an Action Plan to assist the person to achieve those desired outcomes.

Enter **Desired Outcomes** and **Issues** into the respective areas that are available.

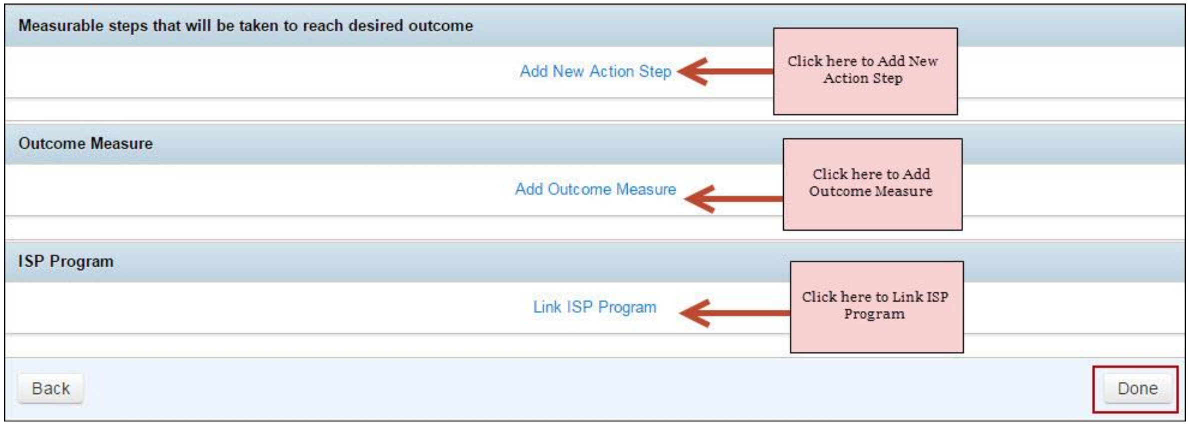

Action Plan for Employment/ATE Services ☑

Reason for Planning
○ I am making a plan to maintain or improve my current job.
○ I want to get a job in the next year.
○ I want to discover more about work and my skills and get a job in the next two years.
○ I don't want to work right now.
○ I am in school and planning for work after graduation.

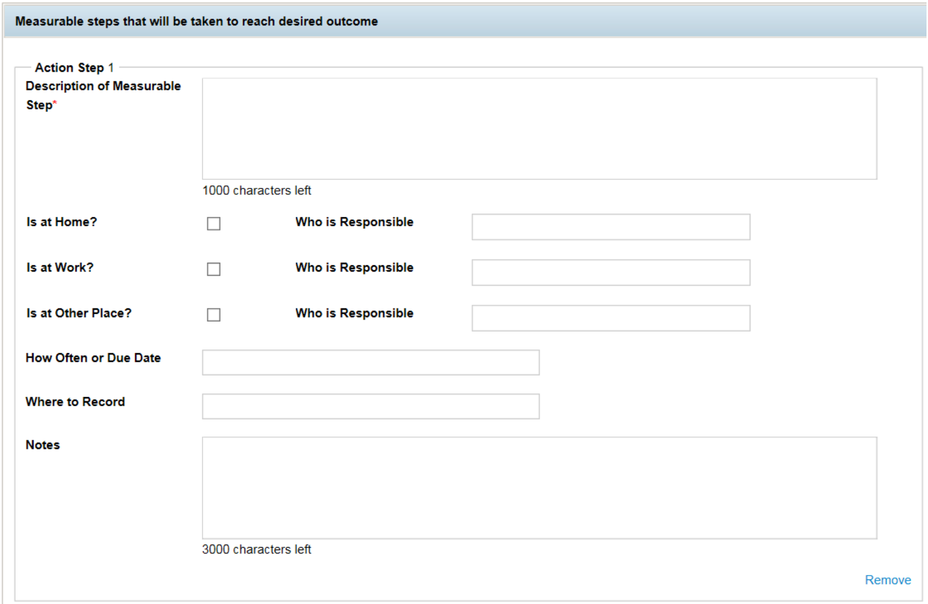
Desired Outcome*
3000 characters left

Need/Issue*
3000 characters left

- Click on the Add New Action Step link in order to add action steps
- Click on the Add Outcome Measure link to select tags for outcome measures



- Action steps should include how the person is involved in reaching the desired outcome. If support staff is solely responsible, the team should consider whether the action item is more appropriately captured in the risk section or discussion record. A blank example is below:



Action Plan Jump to

Action Plan 1

Desired Outcome: Ryan would like to travel the country so that he can visit family, go to races, and visit national attractions.

Need/Issue: Ryan states that he would benefit from assistance to save money and research and plan trips of interest.

Measurable steps that will be taken to reach desired outcome				
Description of Measurable Step	**Who is Responsible**	**How Often or Due Date**	**Where to Record**	**Notes**
Ryan receives assistance from staff to research and plan his trip including saving and budget his money.	**For Home**: Ryan, Emily and Stephanie **For Work**: **For Other**:	ongoing with a target date of 01/2017	Therap S-Comm, checkbook register,	When a trip is planned, Ryan receives assistance with packing his clothes and medications. Ryan has traveled to a variety of places throughout the United States. Some of the trips have involved WWE events, the Daytona 500, NASCAR and Disneyland, to name a few. Ryan has traveled with companies and groups. He has also taken a Greyhound bus on his own to visit his sister in Kansas for Christmas.
Ryan will receive assistance to complete applications with travel companies.	**For Home**: Helen Maurolis **For Work**: Jake Herbert **For Other**:	As needed	Trip Planner	
When a date for Ryan's trip (s) has been determined, he will need to request time off from Culver's	**For Home**: **For Work**: Hannah, Job Coach **For Other**:	Once per trip	Trip Planner	Ryan is required to submit leave requests at work at least two weeks ahead of time. Staff will assist him as needed to complete the requests.

Outcome Measure(s):

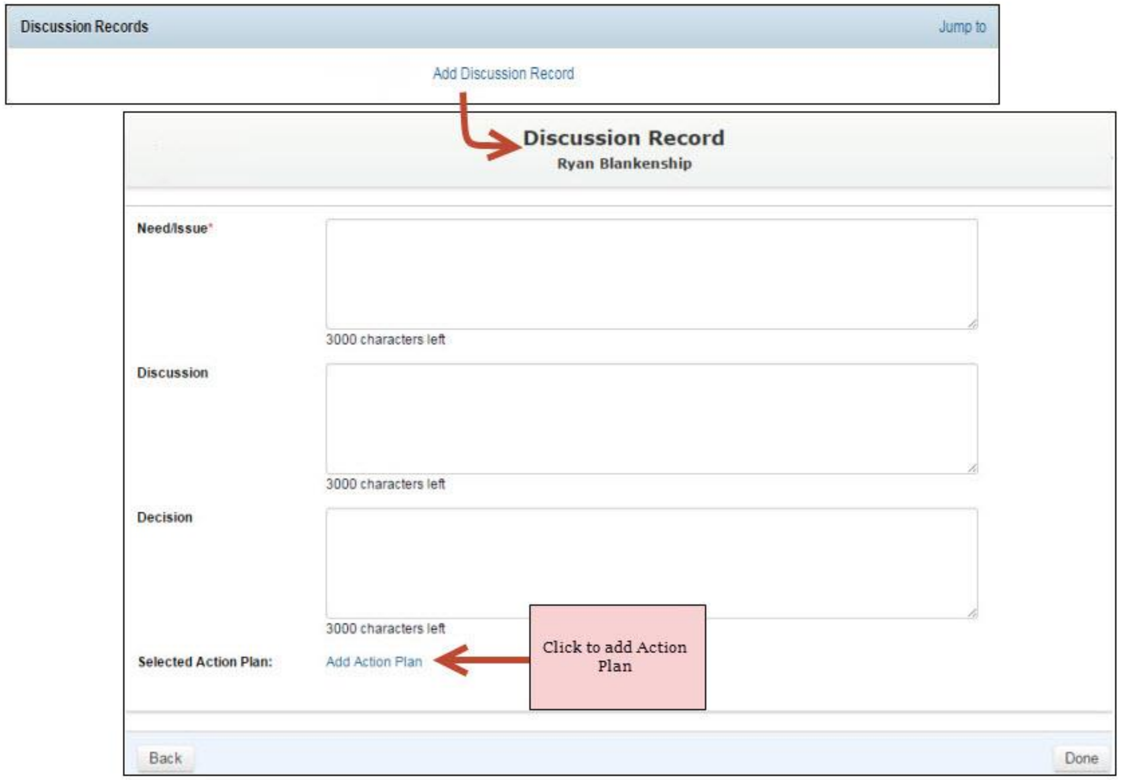
ISP Program:

- Action Plans can be linked to ISP Programs. ISP Programs are detailed descriptions regarding how actions will be implemented and are written by the direct support provider. Not all ISP Programs must be linked to an Action Plan.

- Click on Link ISP to add any existing ISP Programs
- Click on the Done button at the bottom once you have entered all the necessary information

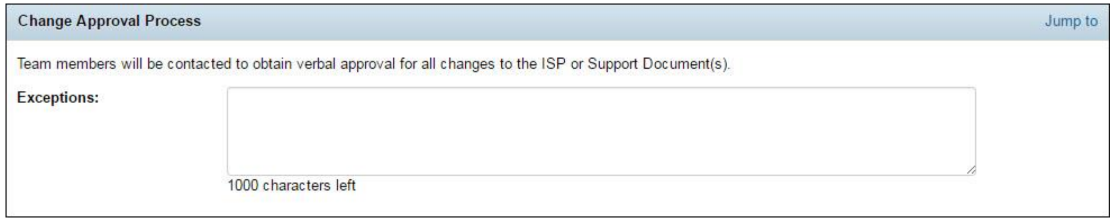
8. A Discussion Record can be created for most any information about the person (i.e. adaptive equipment, technology, self-advocacy training, accessibility, financial status/representative payee, celebrations, achievements). Discussion Records document what staff need to know to support the person. The Discussion Record section can be individualized for each person. Items included in the Discussion Record section could also be included in the Risk section or identified as an Action Plan.
Click on the 'Add Discussion Record' link in order to enter any discussions in progress and decisions taken.

Items that were marked for "Discussion Record" in the individuals and required items will pull into this section. Case Manger will complete the "discussion" "decision" and "related to action plan" columns. When selecting the "related to action plan", you can note which desired outcome and action steps are related to the discussion record item.



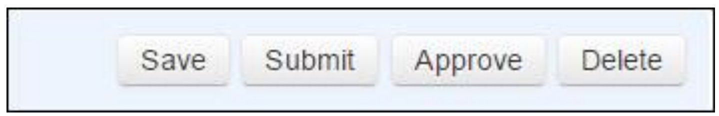
9. In the **External Attachment** section, necessary documents can be attached by clicking on the Add External Attachment link. Attachments could include Fair Hearing Notice (for reduction of services), Social History, ICAP, Assessments, Functional Analysis, other evaluations, etc.

10. In the '**Change Approval Process'** section, any changes made to the ISP that needs approval from the team that is involved in creating the Individual's Support Plan can be documented here before the next meeting.



11. You may choose to **Save**, **Submit**, or **Approve** the ISP by clicking on the **r**espective button located at the bottom of the **Individual Support Plan**.

- Typically, the Case Manager writing the ISP will **Save** or **Submit** the completed plan. The ISP will then be required **Approval,** the ISP can be approved by the CM, CM supervisor or designee. It is best practice to have the ISP approved the CM supervisor or designee.
- Once CM, CM supervisor or designee has approved the ISP, all team members will receive a notification in the Therap message center. All team members must 'Acknowledge' the ISP once they have read it. By acknowledging the ISP, team members agree to provide the supports outlined.



12. Once you have completed the Save, Submit or Approve action on your ISP, you can print it by clicking on the **'Display PDF'** button. As part of the ISP the Case Manager will need to complete the ISP signature sheet and have it signed by all attendees and team members. Please use the signature sheet provided by DDD, <u>DO NOT</u> use the signature sheet in the Therap system. This will help you gather the ISP team's acknowledgement of the person's involvement in planning and balance of preference and needs.

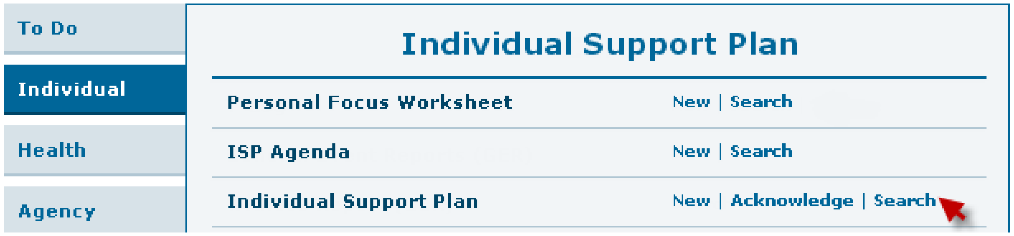
ISP Revisions
Create a Change Form

In order to update an Individual Support Plan form after it is approved, user will need to create a Change Form. Users assigned with ***ISP Plan Update*** role will have access to creating a Change Form.

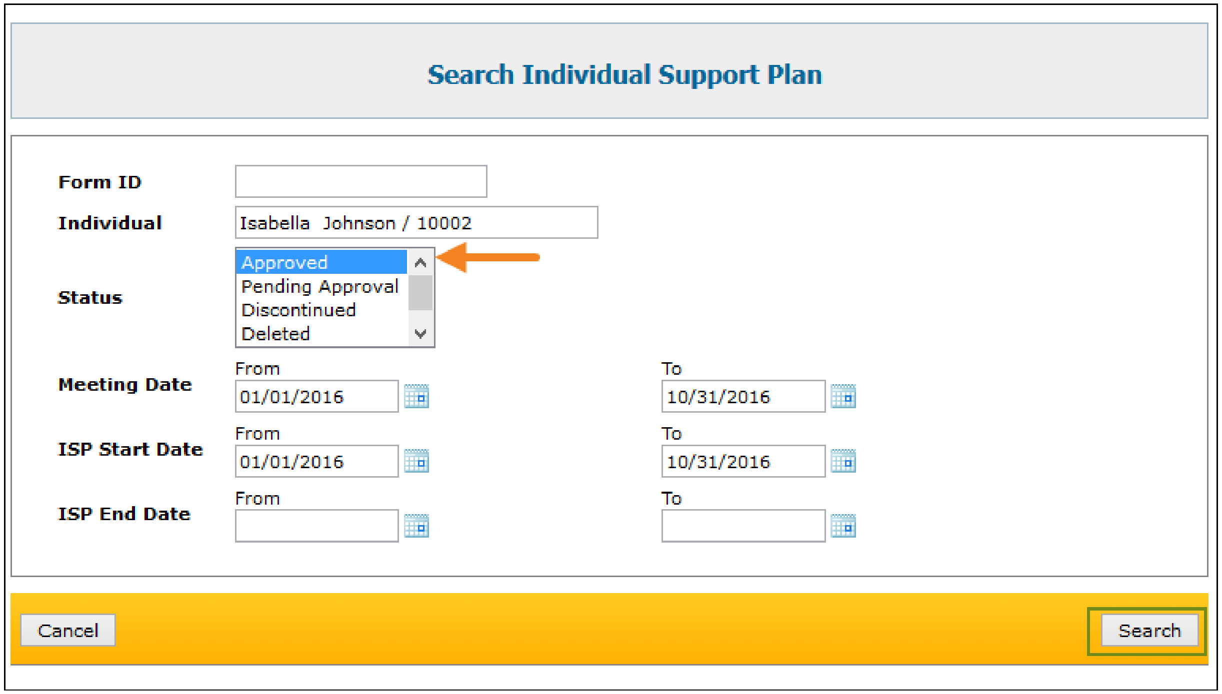
The ISP change form is used to document any changes to the ISP, ISP Agenda, and PFW that occur outside of the annual ISP meeting. Meeting notes, PCT tools, assessments, etc. from the special team meeting can be attached to the Change Form.

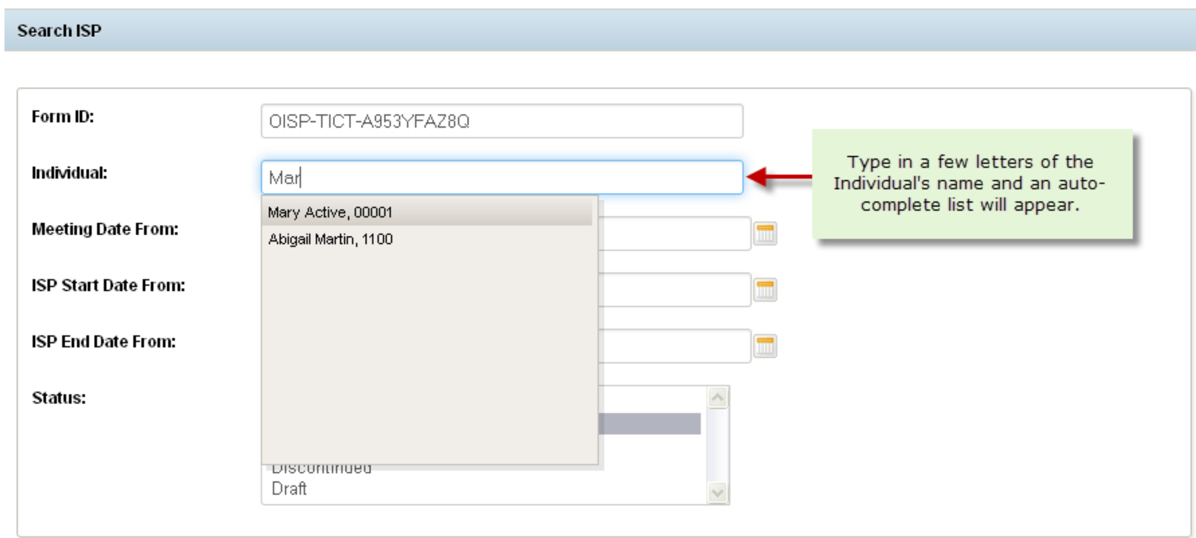
When a change is to be made to an ISP Plan, users will require to create a Change Form for the corresponding ISP Plan. The Change Form can then be acknowledged by the corresponding ISP Team Members who are all the users who have access to a particular Individual through their Caseloads.

1. Click on the **Search** link in the Individual Support Plan section under the Individual tab on your Dashboard.

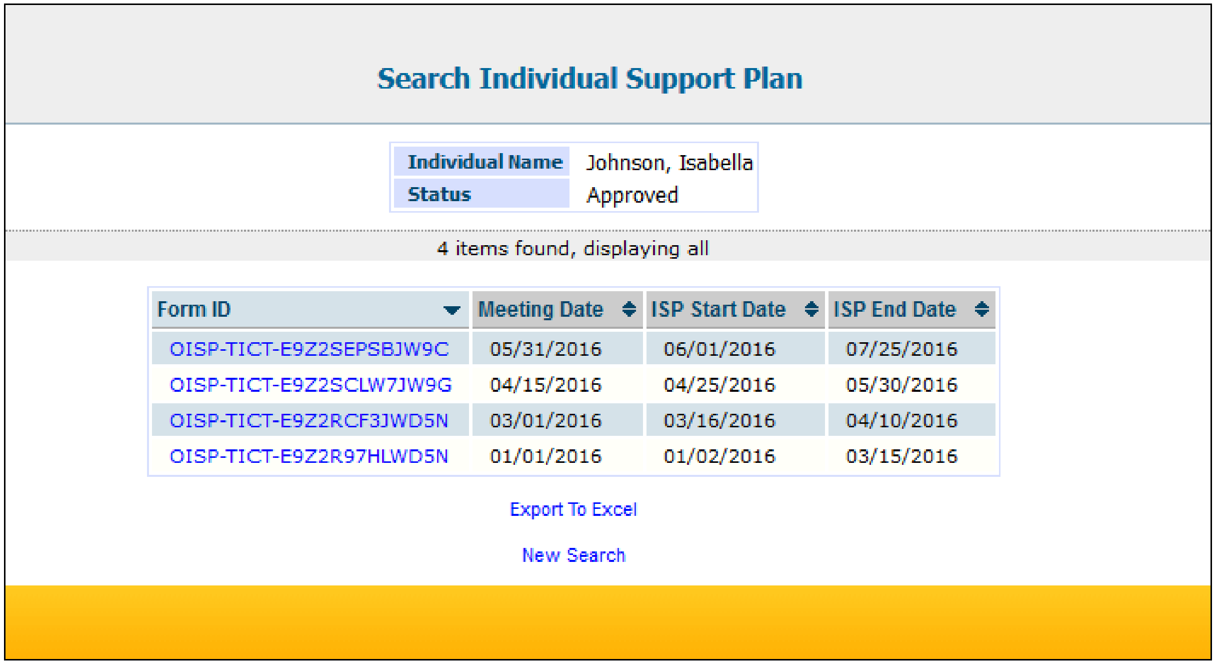


2. On the Search ISP page, you may enter the Form ID of the ISP form, name of the Individual and select the Status as Approved. You may enter other search parameters in order to narrow down the search results. Next, click on the **Search** button to view the search results.


Search Individual Support Plan
Form ID
Individual
Isabella Johnson / 10002
Status
Approved
Pending Approval
Discontinued
Deleted
Meeting Date
From
01/01/2016
To
10/31/2016
ISP Start Date
From
01/01/2016
To
10/31/2016
ISP End Date
From
To
Cancel
Search


Search ISP
Form ID:
OISP-TICT-A953YFAZ8Q
Individual:
Mar
Mary Active, 00001
Abigail Martin, 1100
Meeting Date From:
ISP Start Date From:
ISP End Date From:
Status:
Draft
Type in a few letters of the Individual's name and an auto-complete list will appear.

3. Click to open the ISP Plan that you would like to make changes to from the search results.



Search Individual Support Plan

Individual Name	Johnson, Isabella
Status	Approved

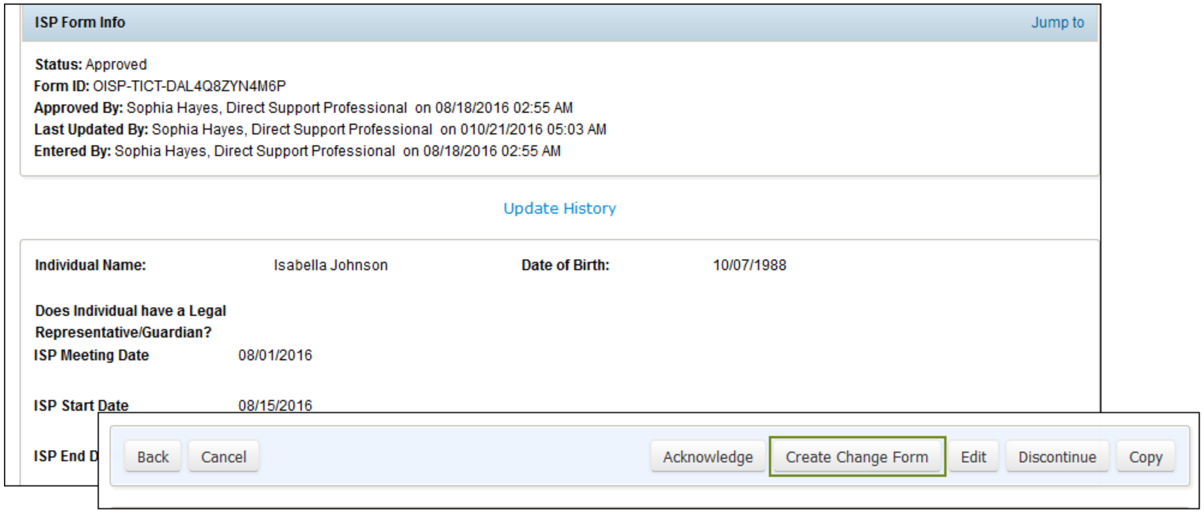
4 items found, displaying all

Form ID	Meeting Date	ISP Start Date	ISP End Date
OISP-TICT-E9Z2SEPSBJW9C	05/31/2016	06/01/2016	07/25/2016
OISP-TICT-E9Z2SCLW7JW9G	04/15/2016	04/25/2016	05/30/2016
OISP-TICT-E9Z2RCF3JWD5N	03/01/2016	03/16/2016	04/10/2016
OISP-TICT-E9Z2R97HLWD5N	01/01/2016	01/02/2016	03/15/2016

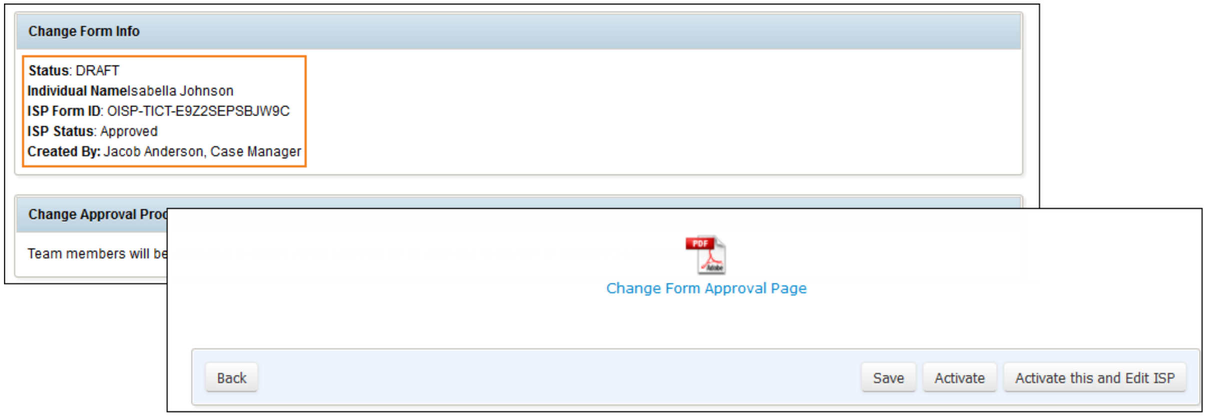
Export To Excel

New Search

4. On the Individual Support Plan, scroll down to the bottom of the form and click on the **Create Change Form** button in order to create a Change Form.



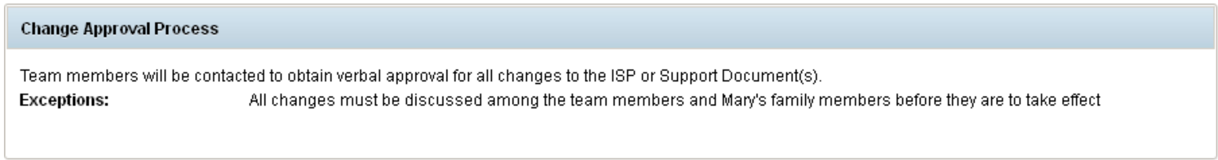
5. Next, you will be directed to the Change Form. Under the Change Form Info area users are able to view the Status of the Change Form, the name of the Individual, the Form ID and status of the corresponding ISP form and by whom this Change Form is created.



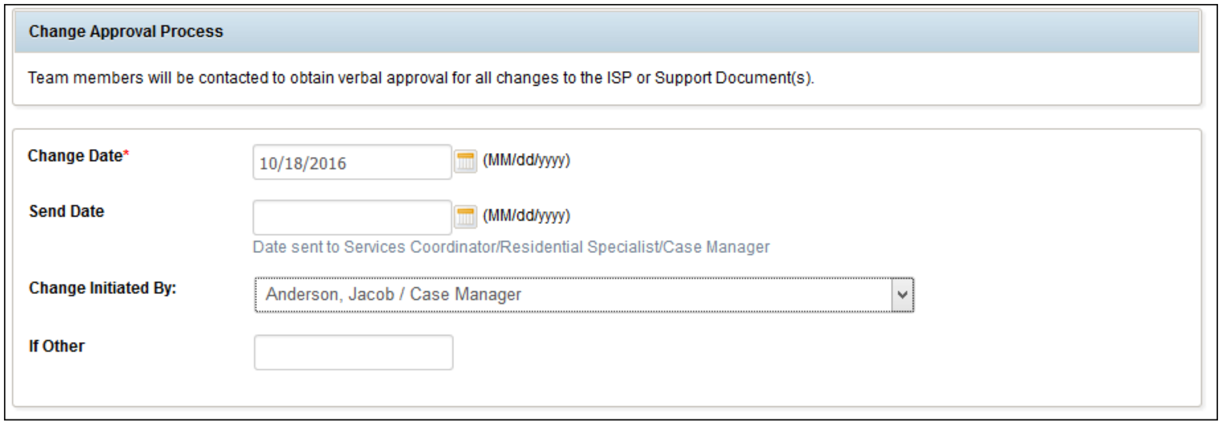
The Change Form consists of the following sections:

Change Approval Process section is pulled from the Change Approval Process section in the associated ISP form. The

Exceptions added to the associated ISP form is also pulled from there.

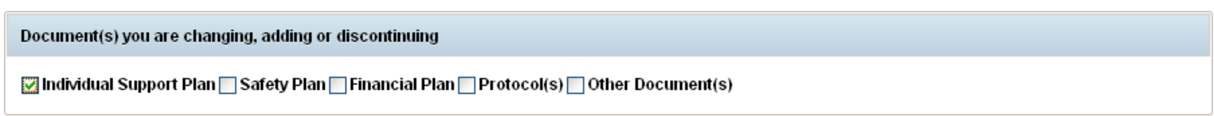


In the next section user can add Change Date, Date sent to CDDP Service Coordinator/Residential Specialist and Change Initiated By.



In order to enter 'If Other', select the Change Initiated By as Select.

In the Document(s) you are changing, adding or discontinuing section users are able to select the check- box(es) from the predefined options that are available. The option that is selected is where the change is going to be made.

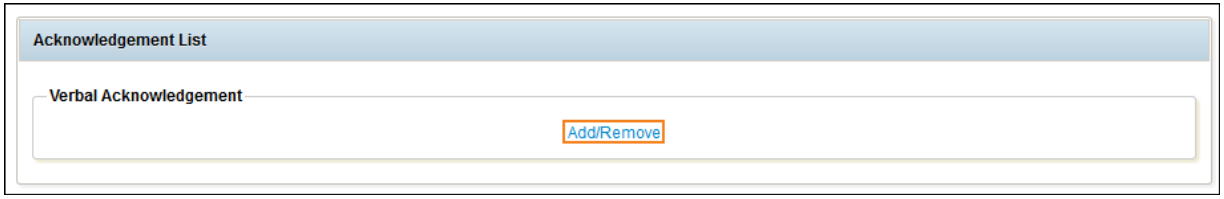


The next section is available for providing details of the changes users will be making. The details can be entered in the

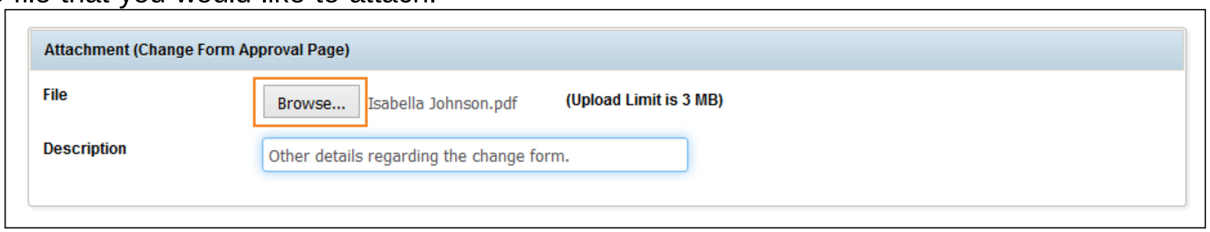
Reason for change, List specific changes, and where is the change documented?

Reason for Change	Another Risk Plan needs to be added. About 2964 characters left
List Specific Change(s)	Add another Risk Plan. About 2974 characters left
Where is the Change Documented?	In the Risk Plan document. About 2974 characters left

The Acknowledgement List section will list the names of the user(s) who has acknowledged the Change Form. Users will be able to select those team members from the list who have verbally acknowledged the changes for the ISP Change Form for an Individual. Users may **Add** or **Remove** users from the list by clicking on the links.



Attachment (Change Form Approval Page) section is available for attaching external documents to the Change Form. Please note that the size of the file that you would like to attach cannot be more than 3 MB. Click on the **Browse** button in order to select the file that you would like to attach.



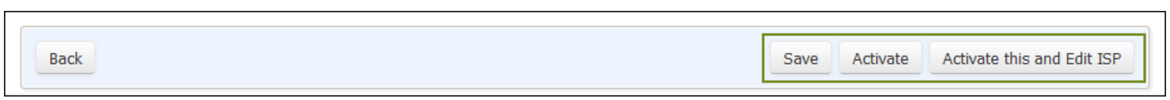
6. As part of the special tem meeting the Case Manager will need to complete the ISP signature sheet and have it signed by all attendees and team members. Please use the signature sheet provided by DDD, DO NOT use the “Change Approval Page” in the Therap system.

7. The following buttons are available at the bottom of the ISP Change Form. The buttons are described as follows:

   Save – This will save the Change Form in ‘Draft’ status.

   Activate – By clicking on this button users will be able to activate the Change Form and may update the ISP later with the changes.

   Activate this and Edit ISP – By clicking on this button users will be able to directly activate the change form and update the associated ISP

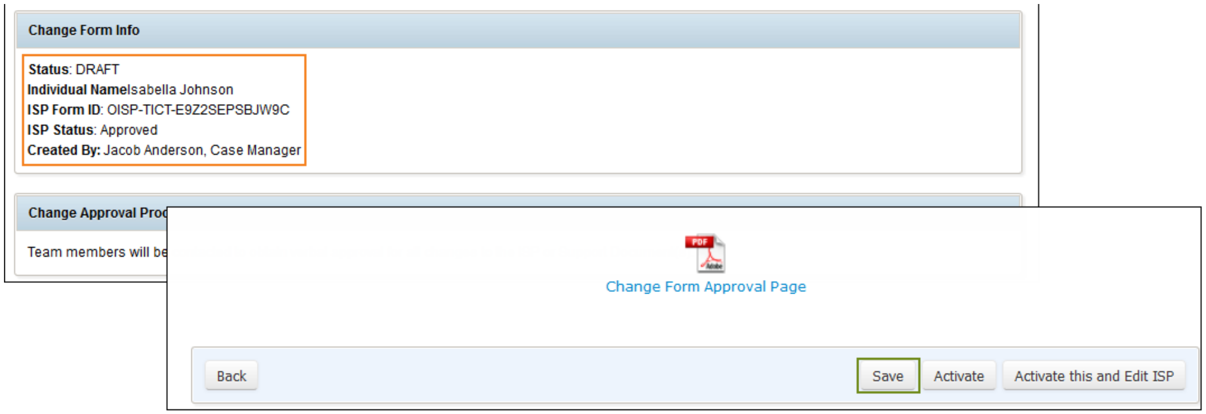


You may click on the **Back** button in order to return to the corresponding approved ISP form.

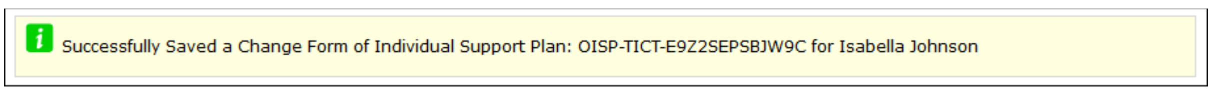
A Change Form can be in three status: Draft, Active and Close.

Save a Change Form

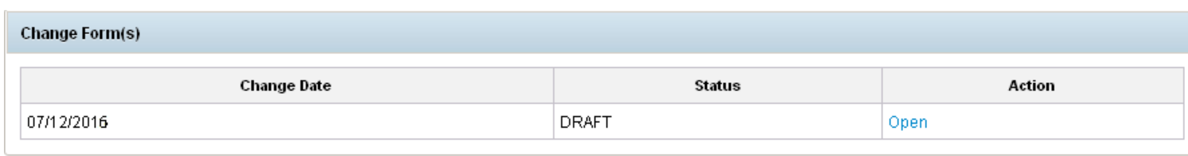
1. Click on the **Save** button located at the bottom of the ISP Change Form in order to save the form.



A success message will appear to confirm that the Change Form has been saved. Click **Done** to close theform or click **Back** to go back to the associated ISP Form.



2. In the Change Form section of the associated ISP Form, the status of the ISP Change Form will be displayed as Draft and Open will be displayed under the Action column.

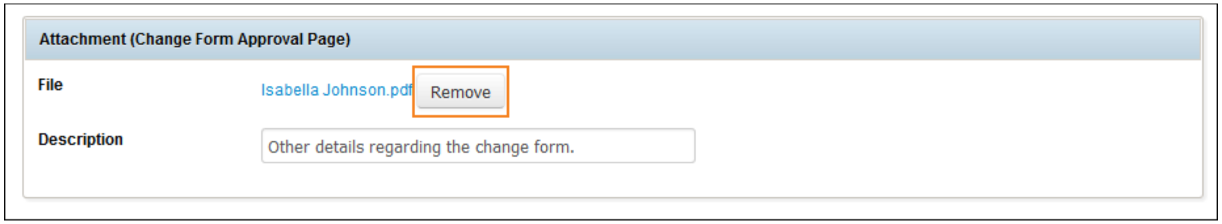


Change Form(s)

Change Date	Status	Action
07/12/2016	DRAFT	Open

3. If you click on **Open** you will be able to view the ISP Change Form in Draft status.

4. On the ISP Change Form, the external attachments can be removed by clicking on the **Remove** button.

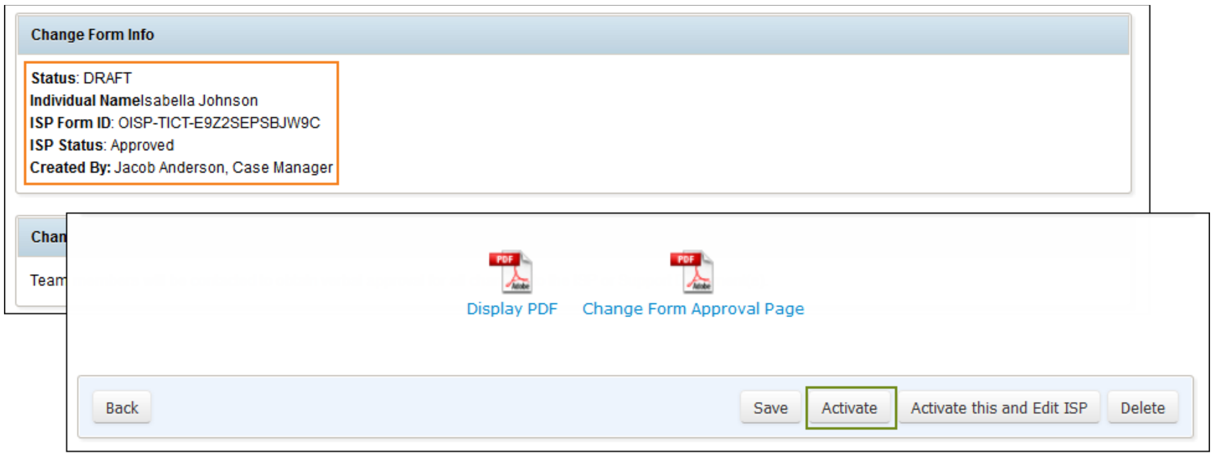


5. You may click on the **Display PDF** link in order to view the PDF of the ISP Change Form.

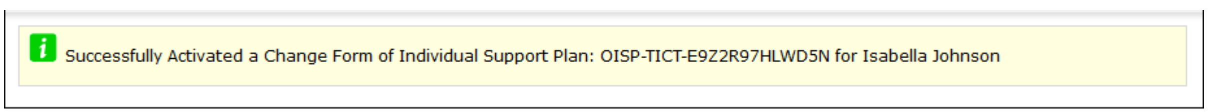
6. You may click on the **Delete** button in order to delete the saved ISP Change Form.

Activate ISP Change Form

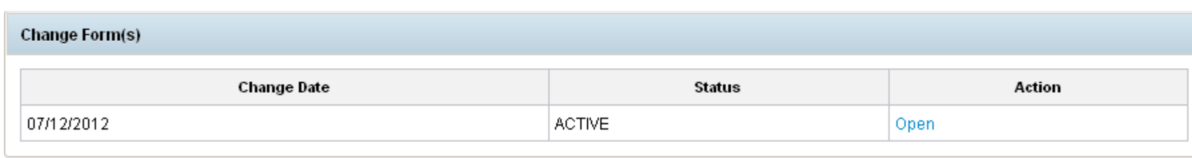
Click on the Activate **button located at the bottom of the ISP Change Form**



A success message will appear to confirm that the Change Form has been activated. Click **Done** to close the form or click **Back** to go back to the associated ISP Form.



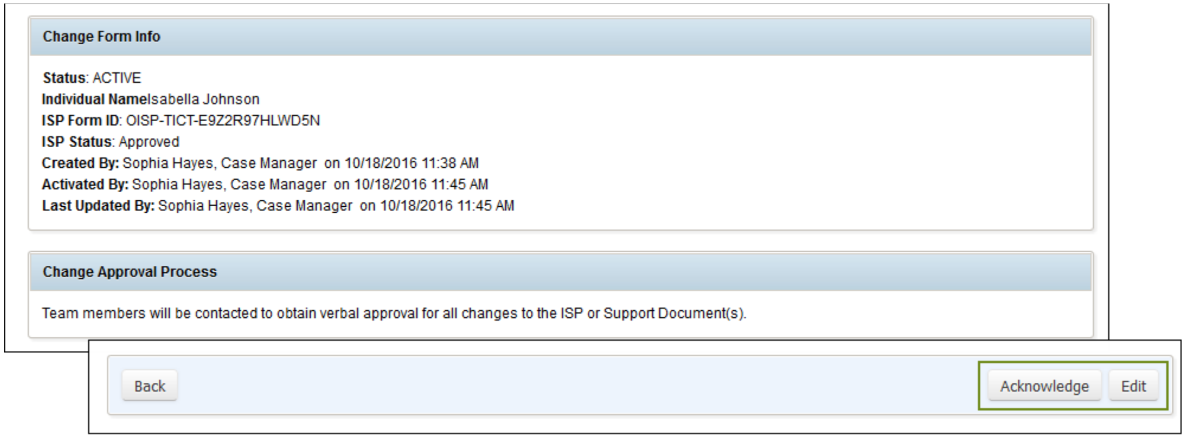
1. In the Change Form section of the associated ISP Form, the status of the ISP Change Form will be displayed as Activate and Open will be displayed under the Action column. You may click on Open in order to view the active ISP Change Form.



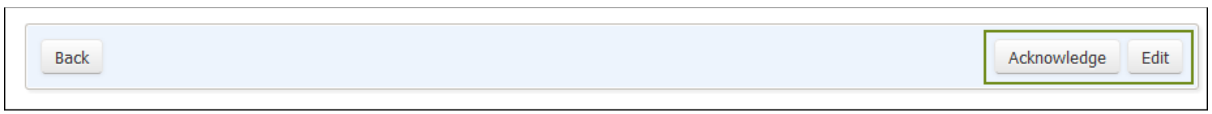
Change Form(s)

Change Date	Status	Action
07/12/2012	ACTIVE	Open

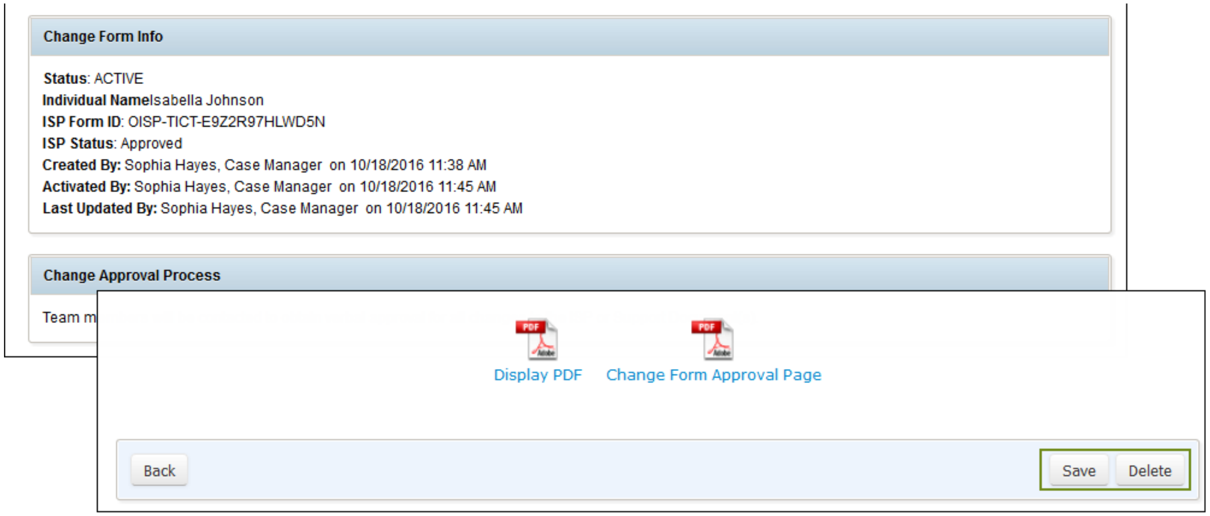
2. You will be directed to the active ISP Change Form. Click on the **Acknowledge** button located at the bottom of the page in order to acknowledge the changes mentioned in the ISP Change Form that will be reflected on the ISP Form.



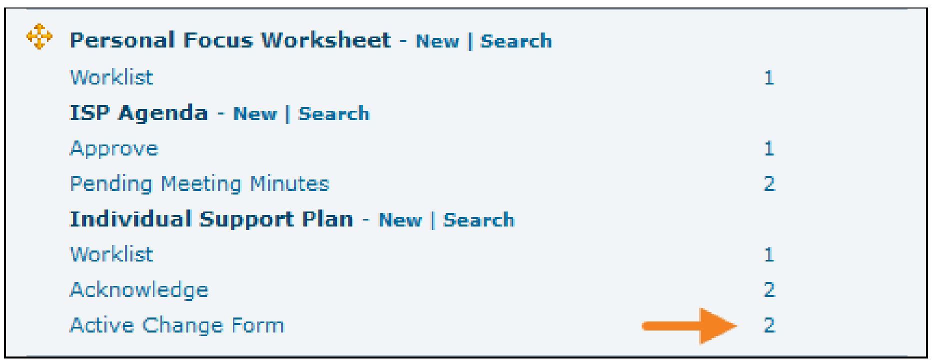
3. You may also click on the **Edit** button which will display the active ISP Change Form in editable mode.



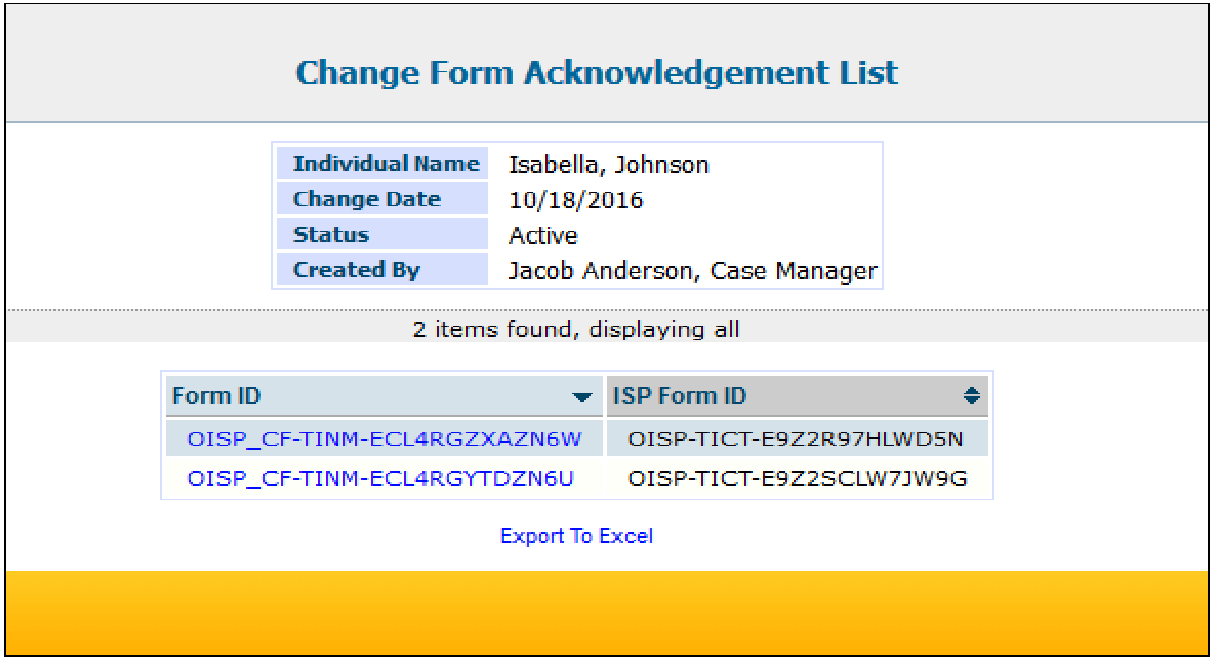
4. You may make the necessary changes and scroll down to the bottom of the page and click on the **Save** button. You may also click on the **Delete** button in order to delete the active ISP Change Form.



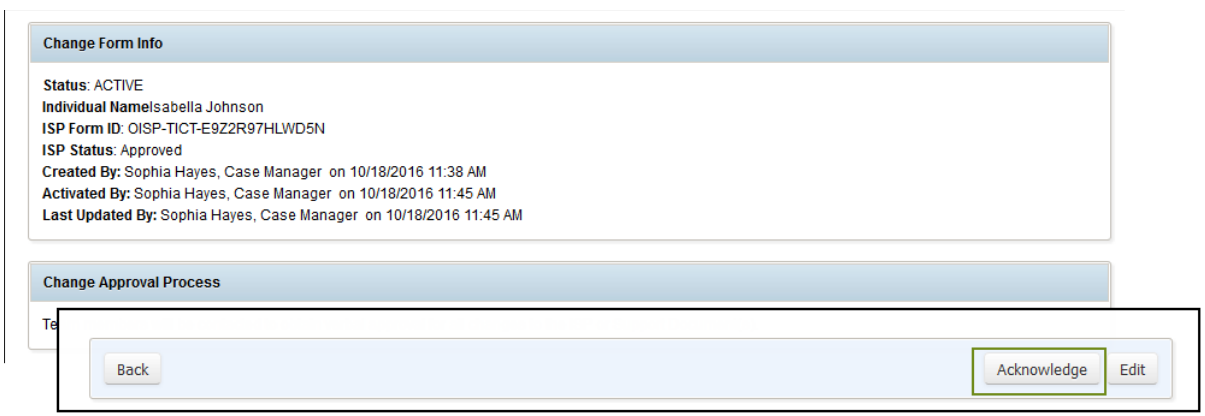
Once an ISP Change Form is activated, the **Active Change Form** link will appear under the Individual Support Plan area in the To Do tab of the Dashboard.



Click on the **Active Change Form** link under the Individual Support Plan area. You will be directed to the Change Form Acknowledgement List page.

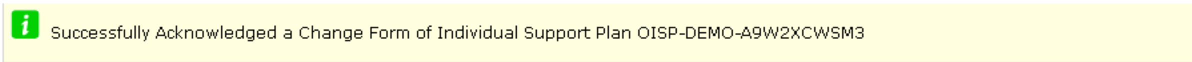


Once you click on the form you will be directed to the active ISP Change Form. Scroll down to the bottom ofthe ISP Change Form and click on the **Acknowledge** button in order to acknowledge the changes to be made to the associated Individual Support Plan.



A success message will appear at the top of the ISP Change Form when a user acknowledges the ISPChange

Form.



The name of the user will be displayed under the Acknowledgement list section on the ISP Change Form.

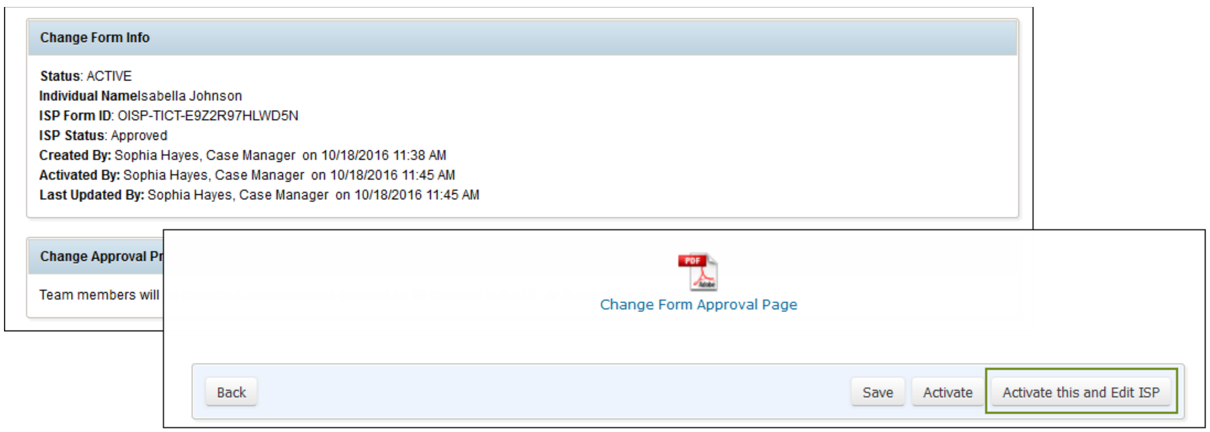
Acknowledgement List

Name and Title	Date	Comments
William Harris, Direct Support Professional	07/15/2016	

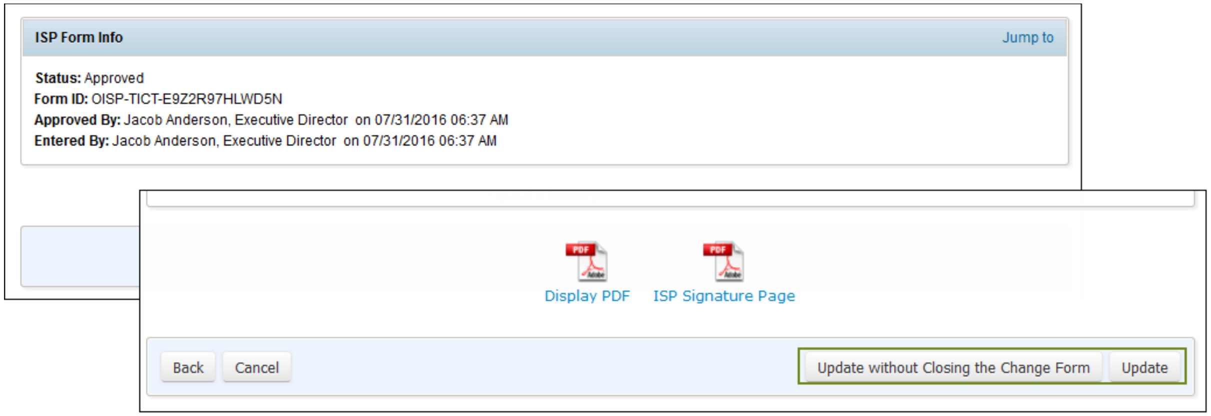
Once an ISP Change Form is acknowledged, counts under **Active Change Form** will be reduced by one.

Activate Change Form and Edit ISP

1. Click on the **Activate this and Edit ISP** button located at the bottom of the ISP Change Form.



2. You will be directed to the Individual Support Plan of the Individual in editable mode. Once you have made changes to the Approved ISP, you may click on the **Update** button to incorporate the changes on the Individual Support Form and close the Change Form. Alternatively, you may choose to save changes but keep that Change Form active for further updates by clicking on the **Update without Closing the Change Form** button. The same ISP Change Form can be used for multiple ISP updates.



3. A success message will be displayed in either case to confirm that the Individual Support Plan form has been updated with the changes.

4. When you open the approved Individual Support Plan which was last updated by the **Update without Closing the Change Form** button, you will notice that the Change Form is displayed in Active status.

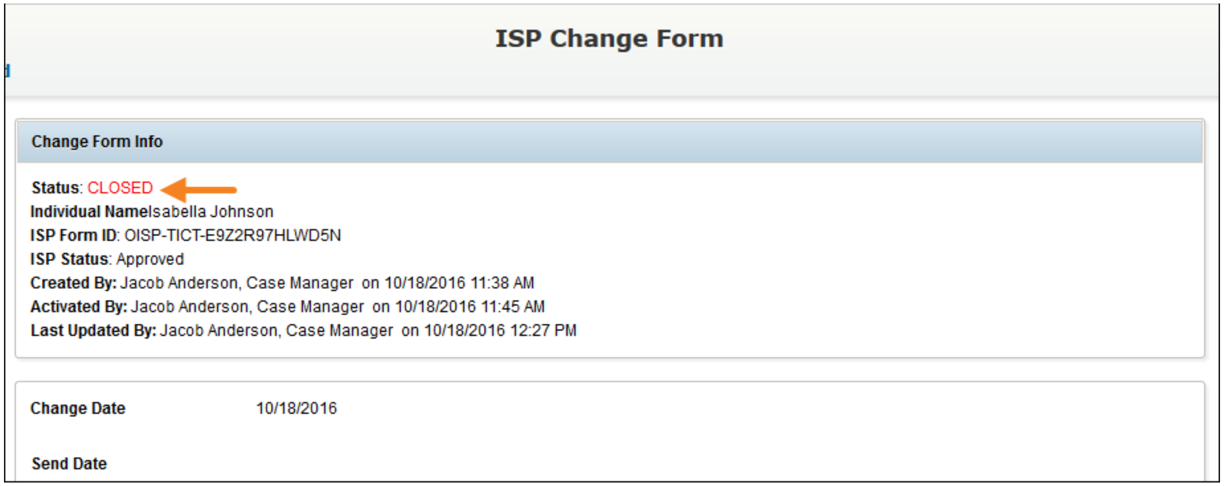
Change Date	Status	Reason for Change	Action
10/18/2016	ACTIVE		Open

5. If the approved Individual Support Plan was last updated by clicking on the **Update** button, you will find the status of the ISP Change Form displayed as Closed.

Change Date	Status	Action
07/15/2012	CLOSED	Open
07/12/2012	ACTIVE	Open

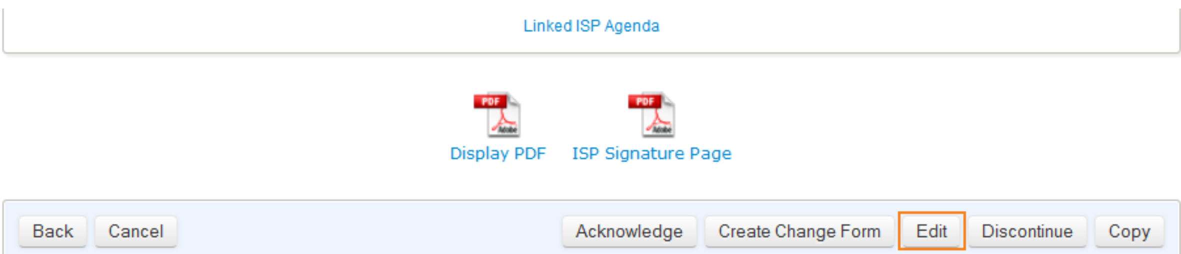
6. Click on the **Open** link in order to open the Closed ISP Change Form. Please note that further changes cannot

be made to this ISP Change Form after the changes have been incorporated on the associated Individual Support Plan.

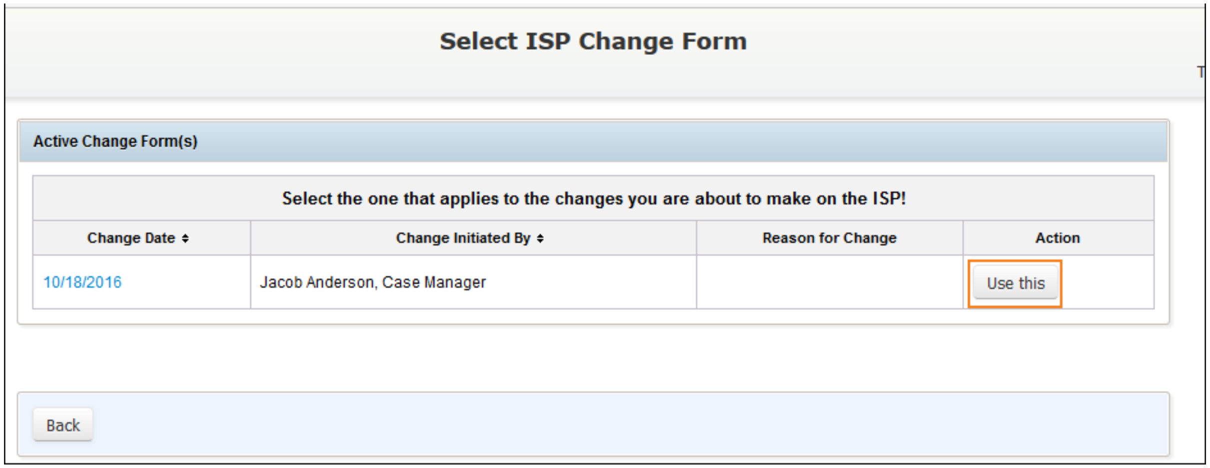


Closing a Change Form

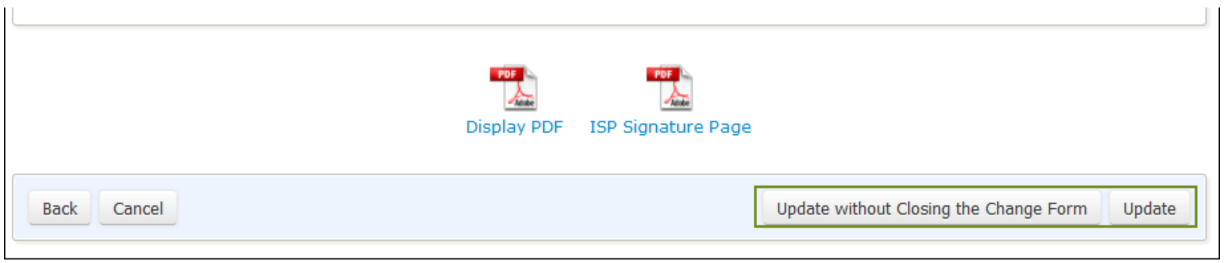
1. Open an Approved ISP and click on the **Edit** button at the bottom of the page.



2. Then, you will see a list of Active Change Forms. Click on the **Use This** button to the right of the Active Change Form that you'd like to close.



3. You will be directed to the Approved ISP in editable format. Scroll to the bottom of the page and click on the **Update** button. This will put the active change form in Closed status.



Please be cautious as any changes made here will be recorded in the updated ISP.

<u>Updating an ISP Agenda</u>

1. Open current ISP Agenda, scroll to the bottom and select "Make a Copy"
2. In the original ISP Agenda, update the end date to be 1 day PRIOR to the team meeting date.
3. Save original ISP Agenda.
4. Open new ISP Agenda, update start date to reflect the date of the team meeting. The end date should now reflect the end of the ISP review period (as previously in the original ISP Agenda).
5. Ensure meeting type "Change in Services" is selected in the new ISP Agenda.
6. Update new ISP Agenda to reflect changes discussed at the team meeting-Individualized Items (would need to be manually entered to reflect purpose of meeting), Progress Towards Outcomes (could link to current ISP and PFW), and Required Items.
7. Save and Approve the ISP Agenda with updates.