**ISP – Individualized Service Plan**

- The **ISP** is a written personal plan, or blueprint, for a person with developmental disabilities that summarizes the help he or she wants and needs to achieve his or her own aspirations in life.
- The system will not verify that assignment to MSC exists before New/Initial ISP can be completed.
- The system will not check if there is an existing ISP on file.
- CHOICES will not validate that the user has chosen the latest ISP. It is up to the user to know when to create an Initial ISP or copy an existing ISP for an ISP Re-write, Review, or Addendum.
- Only a DDSO MSC Coordinator, MSC Supervisor, Agency MSC Coordinator and Agency MSC Supervisor can submit an ISP. All roles within CHOICES can view their own Agencies/DDSOs Individual’s ISP.

- **CHOICES** has been developed to automate the process of completing and transmitting forms and generating certain reports.
- The workflow is *Individual* driven so it is recommended that work begin on any form by selecting the Individual first and then selecting the necessary form or report to view. (Shown later in the document)
- Inside CHOICES there is **NO delete function**. If a mistake is made on a form before saving or submitting, just close and nothing is saved. But once a form is saved, it cannot be deleted.
- Depending on your role in CHOICES some forms and functions may or may not be available to you.

**Locations of ISP forms**

1.) On the left side, under **Workplace**, is the **Forms** section which is the **central** filing location. Click on the ISP link to see the full list of ISP forms in progress or completed and their current status.

![Forms Link](image)

The content pane will display any completed or partially completed and saved ISP forms:
The **View** above is set to **Active ISP**. The **status** of each ISP is viewable:

- **“Saved”** means that the ISP has been saved only and there are no signatures as of yet.
- **“In Process”** means the ISP is locked and has at least one signature; the ISP needs either a MSC Supervisor to sign or submit or both.

Using the dropdown arrow, highlight **Inactive ISP** to view any ISP that has been **Completed** or **Returned**.

**“Completed”** means that the ISP has been signed by both MSC and Supervisor and successfully submitted.

**“Returned”** means the MSC or Supervisor returned the form for editing. The form will need to be opened, and then copied to make appropriate corrections or edits. A returned form will remain inactive; its copy will become the new valid record once completed.

**2.) Also, all forms are also filed under the **Individual** for whom they were created.**

**Create a New ISP (Form)**

To create a new ISP go to **Workplace**, under **People**, click the “**Individuals**” link:
The Individuals section displays everyone that is known to TABS.

In the Individuals section, you can search by last name in either the area where it states **Search for records** or by clicking the first letter of the last name at the bottom of the screen.

**NOTE:** The search can also be done using a TABS ID.

![Image of the Individuals section in TABS]

**TIP:** If you are unsure of how to spell the last name **do not guess**, you will not get a good result; only spell what you know is correct. Or search through a list of the last names beginning with that letter, by clicking on that letter at the bottom of the screen. In this example, it would be the letter “B”.

We are using Harry Benton. Enter his last name in the “Search for records” section, click the **Start Search** button.

A list matching the search displays.
Click on the name to highlight and then double-click to open the Individual’s record.

To ensure you have selected correctly, check the address or any other information displayed that you know and therefore will confirm this is the Individual you need.

To start an ISP for Harry Benton, in left column, under “Details” click “ISP-Individualized Service Plan”

**NOTE:** Before you begin certain forms, you may need to review the Portal Users to ensure a family member or advocate is listed that may want to view the form electronically.

On the left side of the screen under Details, click the Portal Users link to open. For more information on Contacts, please see the Step by Step guide, Portal Users.
The following is the ISP screen:

Currently, there is one ISP listed. To start a new ISP click the **Add New ISP-Individualized Service Plan** button.

This will open a new ISP form, under the **General** tab, for Harry with his name and other pertinent information pre-populated from TABS.

**Continue on to Write the ISP:**

The **General** section has no required fields at this time. The system automatically defaulted to “New/Initial”. You cannot modify this field.
Click on the link for the next section or scroll down to **Narrative**:

Each section is a free text field, simply type the relevant information in the box. Also, you can copy and paste from a Word document.

**Safeguard Section**

The ISP’s section for Safeguards has been modified to include two formats for completing this section.

**Overview**

A new Safeguards section has been created for the ISP and is required if the Individual chooses to self-direct Community Habilitation, Respite, or SEMP. This new safeguards section has 17 safeguards which must be addressed:

<table>
<thead>
<tr>
<th>Safeguard and Description</th>
<th>Name in CHOICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guardianship – I know who my legal guardian is and how to contact him/her.</td>
<td>Guardianship</td>
</tr>
<tr>
<td>Informed Consent for Psychotropic Medication – I give consent for psychotropic medication.</td>
<td>Informed Consent for Psychotropic Medication</td>
</tr>
<tr>
<td>Reporting Incidents – I know how to correctly identify an incident and report the incident to my</td>
<td>Reporting Incidents</td>
</tr>
<tr>
<td>FMS agency and/or MSC.</td>
<td>Budgeting – I manage my money and my budget.</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>Transportation – I travel independently within my community.</td>
<td>Transportation (within community)</td>
</tr>
<tr>
<td>Transportation – I travel independently outside my community</td>
<td>Transportation (outside community)</td>
</tr>
<tr>
<td>Back-up Plan for Daily Needs - I have and can use a backup plan when my regular schedule changes, e.g., staff cancellation, staff is tardy, or staff leaves employment unexpectedly.</td>
<td>Back-up Plan for Daily Needs</td>
</tr>
<tr>
<td>Medication Administration – I am able to correctly self-administer medications.</td>
<td>Medication Administration</td>
</tr>
<tr>
<td>Medical/Health Concerns/Reactions – I am aware of my medical/health issues and needs and manage them by making and keeping appointments as needed, communicating concerns and symptoms, and being mindful of potential risks. Potential health problems could include asthma, allergies, risk of aspiration, ingestion or swallowing difficulties, potential sensitivity to medication, dairy, peanuts, etc.</td>
<td>Medical/Health Concerns/Reactions</td>
</tr>
<tr>
<td>Nutrition – I maintain an adequate diet that meets my nutritional needs, e.g., preventing choking, avoiding food allergies.</td>
<td>Nutrition</td>
</tr>
<tr>
<td>Protective Oversight/Level of Supervision – I maintain my personal safety and am free from self-Injury; I do not threaten the safety or property of others.</td>
<td>Protective Oversight/Level of Supervision</td>
</tr>
<tr>
<td>Fire Safety - I respond safely in a fire including evacuating promptly and calling for help once out of the building.</td>
<td>Fire Safety</td>
</tr>
<tr>
<td>Personal Safety – 1. I respond appropriately in emergencies including following direction from law enforcement or community supports (EMS, fire departments, etc.)</td>
<td>Personal Safety (re: emergencies)</td>
</tr>
<tr>
<td>Personal Safety – 2. I am aware of my surroundings and do not put myself in situations where I do not know where I am or how to return to my home.</td>
<td>Personal Safety (re: surroundings and situations)</td>
</tr>
<tr>
<td>Emergency Preparedness – I have and can carry out emergency plans for sheltering in place and for identifying a plan and location if I need to relocate. I also know situations, such as severe weather, when I</td>
<td>Emergency Preparedness</td>
</tr>
<tr>
<td>Communication Connections – I can communicate with others, such as make phone calls to advocates, contact members of my circle of support, or file complaints/grievances. I can also call others to set up appointments if needed, such as a doctor’s appointment. (Need for a cell phone or land line telephone is included here.)</td>
<td>Communication Connections</td>
</tr>
</tbody>
</table>

If the Individual is not self-directing the above mentioned services, either this new safeguards section, or the original safeguards section (a free-text box) must be completed. Only one of the safeguards sections can be completed.
How to complete the new section for Safeguards

The first format is the free-text box. Please read the red instructions to ensure you know which format to use.

If the individual has **not** chosen self-direct Community Habilitation, Respite or SEMP, then you can complete the free text Safeguard box as usual.
If the individual has chosen any self-direct service, then you must complete the “Type of Safeguard” box.

“Save” the form to enable the “Type of Safeguard” box.

Once the form has been saved, the button, “Generate Safeguards”, will be available.

Click **Generate Safeguards**.

Allow the form to complete filling in the list of safeguard. The note “Finished Creating Safeguards” will appear above the **Generate Safeguards** button.
NOTE: “Does not apply” defaulted into all, Support Level Needed, fields. Upon opening each Safeguard that field will become available for editing.

Double click on the first Safeguard that applies to edit the information. A pop up will open specific to the Safeguard you selected.

The pop up for the, Back-up Plan for Daily Needs, safeguard will display. All fields with a red asterisk (*) must be completed.

Click the drop down arrow to display the selections.

Choose the correct Support Level Needed. Then continue to complete all necessary information for this Safeguard.

Depending on the selection, other fields may become required.
After completing the information for this specific Safeguard, click “Save”.

To move to the next Safeguard, click the blue down arrow, on the right of the box, to automatically move to the next Safeguard.

The next Safeguard box automatically displays. In selecting, “I need support in this area” other fields become required.
Complete all required information and then click, “Save”.

Again, use the blue down arrow to continue to the next Safeguard.

At the end of the current list of Safeguards appearing in the “Type of Safeguard” box, it will be necessary to move to the next page of Safeguards.

The open record is “Emergency Preparedness” and that is the last Safeguard on the first page. The blue down arrow will not work.

Click “Save & Close” to be returned to the ISP Type of Safeguard box.

On the bottom right, of the Type of Safeguard box, is the Page number and the forward (blue) arrow to move to the next page of Safeguards.

Click the arrow to load the next page of Safeguards.
The next page of Safeguards displays, double click & continue completing each, through # 17.

<table>
<thead>
<tr>
<th>Type of Safeguard</th>
<th>Other Safeguard</th>
<th>Support Level Needed</th>
<th>Supports and services needed</th>
<th>Who is responsible for training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back-up Plan for Daily Needs</td>
<td></td>
<td>I do not need support in this area</td>
<td></td>
<td>Staff responsible</td>
</tr>
<tr>
<td>Budgeting</td>
<td></td>
<td>I need support in this area</td>
<td>Type the correct information</td>
<td>Staff responsible</td>
</tr>
<tr>
<td>Communication Connections</td>
<td></td>
<td>I need support in this area</td>
<td>Type the correct information</td>
<td>Staff responsible</td>
</tr>
<tr>
<td>Emergency Preparedness</td>
<td></td>
<td>I need support in this area</td>
<td>Type the correct information</td>
<td>Staff responsible</td>
</tr>
</tbody>
</table>

1 - 4 of 17 (1 selected)
The next link or section, Individual Service Environment, has a forced “Save” after completing the Natural Supports and Community Resources field, which is another free text field.

So, after completing the Natural Supports and Community Resources section, click the “Save” icon in the upper left corner of the form.
NOTE: the sections that were closed are now available after the “Save”. (Compare the graphic below with the one at the bottom of the previous page in which none of the services were open.)
Click inside the box as directed, to activate the correct icons on the ribbon. In this example, the user clicked inside the Medicaid State Plan Services, thus the Add Medicaid State Plan Service Button displayed in the top left corner.

Fill in the information for this Service. Complete all required fields*.

The Additional Information box is optional and a free text field.

Once all information is completed click Save and Close to return to the ISP form. Or click Save & New to continue adding services for that specific plan type.
When completed with one type of Services, move to the next and activate by clicking within that Services box. The ribbon will display the appropriate, “Add... Services” button.

There can be multiple Services under any one Service section.

Delete an added service: click in the box in front of the service, the Delete icon will become active.
After completing all Services necessary, move to the next section, Signatures. The user signed into CHOICES completing this form, is the automatic default for the Agency/DDSO, Service Coordinator, and responsible to sign, once all required information is complete.

Select the Supervisor who will sign the ISP:

Click on the Find icon to open a list.

The Look Up Record box displays:

You can type the name of the person you are searching for in the Search field and then click Search button.

10/6/2014
To select a supervisor, click on the name to check and highlight, and then click “OK” at the bottom of the screen.
The Service Coordinator Supervisor is now selected.
Notice none of the fields are marked as **required fields**, but a signature by the Individual, a Family member or Advocate, is required for the ISP. On the electronic version, you must choose how the signature is to be obtained, via paper or CHOICES Portal.

So the Required Field is actually one of two, **Individual / Family Member or CHOICES Portal User Information**.

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**Individual/Family Member**

- **Has Individual signed paper acknowledging this document?**
- **Date Signed**

- **Has Family Member or Advocate signed paper acknowledging this document?**
- **Date Signed**

- **Name of Family Member or Advocate**

**CHOICES Portal User Information**

- **Name**
- **Relationship To Individual**
- **Show Form in CHOICES Portal?**
- **CHOICES Portal User Electronic Signature**
- **Specify Other Relationship**
- **Does CHOICES Portal User choose not to sign?**

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First is the example of **obtaining a signature via paper**.

**Has Individual signed paper ...?** Depending on the selection, other fields will become required.

In the example below, the selection of “Yes – as …” then the **Date Signed** field becomes required.

**Has Family Member/Advocate signed paper form?** This field is dependent on the answer to the first question, “Has Individual signed paper ...”

Obviously, in this example we can see no further action is required since the note “Individual is self advocate” has automatically filled in and is locked (grayed out).

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If the Individual or Family Member is **unable or unwilling to sign make that selection**.

Then you can type the name of the Family Member or Advocate to whom you are referring.
Or, select whether the form should be made available through **CHOICES** Portal.

Then the Portal User selected will receive an email and can view and sign the form electronically.

**NOTE:** The Portal is an electronic gateway to CHOICES for the individual, family and advocates. They will receive an email stating a form(s) requires their attention and please enter through the Portal. The email will contain only a **TABS ID** as the identifier.

Fill in all required fields. You must click on **Yes** for the Portal User to view and sign the form.

If the Portal User wants to view the form but refuses to sign, make that selection:
Does CHOICES Portal User choose not to sign? – **Yes** – means they choose not to sign.

**Paper Distributions** - This is not mandatory. If you are not recording paper distributions continue to the middle of the following page.

The ISP can record the distribution of paper copies if so desired. **DO NOT SUBMIT** the completed ISP form until after paper distributions have been noted.

The ISP, once **Saved, but NOT submitted**, allows the link for ISP Distributions to be available.

Click on the **ISP Distributions** link:

A new window displays:

Click on **Add New ISP Distribution** button

Fill in the information, and then click “**Save and Close**”.
The one Distribution is now listed in the ISP Distributions along with the distribution for sending the ISP to CHOICES Portal.

If there are more distributions to add, click the Add New ISP Distribution button again and follow the same process.

Any and all distributions that were noted, before submission of the form, will be listed.

NOTE: To go back to the ISP, Click General under the Information section on the left side of the page.
Once the form is completed and all required fields have been entered, the ISP form can either be **Saved** or **Signed**.

In the top left-hand corner of the screen you will find a **Save & Save and Close** button.

![Save](image1)

Saves the ISP – Gives it a **Saved** status, remains open and **View PDF** becomes available

![Save & Close](image2)

Saves the ISP and **Closes** the form - Gives it a **Saved** status

To sign off on the ISP you must first click the **Form Actions** tab at the top of the page.

![Form Actions](image3)

The Service Coordinator must sign the ISP before submission

**NOTE:** This gives the ISP form an "In Process" status.
In this example Service Coordinator, testcay032, will sign.

Error Messages:

An ISP date may not have been selected at the beginning since it could be a day or two until completion. But once the SC Signature is clicked, any required field not completed will be displayed.

Fill in any missing information, and then click **SC Signature** again.

**NOTE:** The following message is only to warn you the ISP will be locked. No further edits or changes to this ISP form will be allowed.
Click OK.

**NOTE:** If the ISP must be reviewed by the Supervisor or others, do not sign the form – only Save & Close. The user will then have to communicate with the Supervisor to review the ISP. Once the ISP is signed, it is locked – no further edits on this ISP would be allowed by the system. But if the Supervisor returns the ISP after reviewing it can be copied and edited.

**Recommendation:** have the business process in place so any and all supervisors who need to review the form prior to the Service Coordinator signing and locking the form can do so.

**NOTE:** If this ISP does have inaccuracies and needs to be corrected after its signed, use the Return function and create a new ISP by “Copy”

Read the statement on the Signature Form, click in the box acknowledging you read the statement, then enter your password and click Submit.

![Signature Form](image1)

Once the Service Coordinator has signed the form, two new buttons become active:

![Form Actions](image2)

**Supervisor Signature** – the form must now be signed by the SC’s Supervisor or

**Return** – if the Supervisor wants further edits, they click Return to send back to the Service Coordinator, this ISP form becomes Inactive.

The Service Coordinator can now “Close” the form, click the “X” in the right corner.
The Service Coordinator’s Supervisor, selected on the ISP, will receive an auto-generated email notifying them that they have an ISP to review.

![Screen Shot](image)

The Service Coordinator Supervisor can review the list of ISPs from the main page of CHOICES or from the Individual’s record.

![Screen Shot](image)

The SC Supervisor can view the form in its electronic version or open a PDF before signing and submitting the ISP.

To View PDF

Once a form has been saved a new button appears “View PDF”, click the button to open the form.
NOTE: Depending on the version of Adobe Reader installed on the computer, the form will either be static or dynamic.

A dialog box may displays: Click **Open** to open the PDF.

The PDF displays.

![Individualized Service Plan](image)

You may have to Maximize the form:

![Maximize Button]

NOTE: You can print the PDF or view it in this format.

To close the PDF, click the ‘X’ in the top right-hand corner of the PDF screen.
Submitting the ISP Form

1.) The SC Supervisor must sign:
TIP: If you are missing any required fields, an error message will display informing you what to do.

2.) The form will close momentarily and then display with the SC Supervisor’s electronic signature and the Submit Form button becomes active.
3.) Click **Submit Form** and the following message displays:

![](image)

4.) Click **OK** and the form closes.

If you were working on the form from the Individual’s screen you can see the **Completed ISP** listed.

![](image)

Returning to the main screen, you can view the Completed ISP, in the list under **Inactive ISP**.

![](image)
Sort the Information in any List

Each list can be sorted by any column.

In this example, the sort was done through the **Form Status** so to view all the completed ISPs.

To see the list alphabetically arranged click on the **Name** button.

To sort the list according to the ISP date, click on the **ISP Date**.