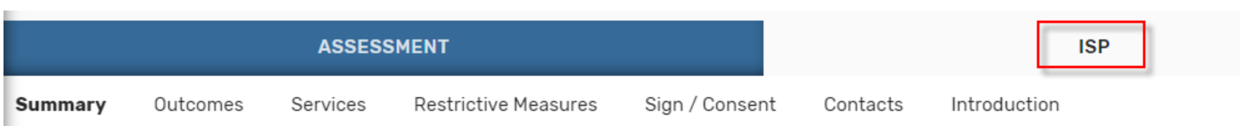
A Guide to Anywhere Plan OhioISP

The Anywhere OhioISP is the plan approved by DODD. This plan contains all information required for uploading to DODD's Salesforce program. This documentation covers the ISP only. Please see Discovery Assessment document for additional information.

List of Topics

- Summary Tab
- Outcome Tab
- Services Tab
- Restrictive Measures Tab
- Sign/Consent Tab
- Contact Tab
- Introduction Tab

When the ISP section is selected, the system will open a series of tabs that make up the ISP.

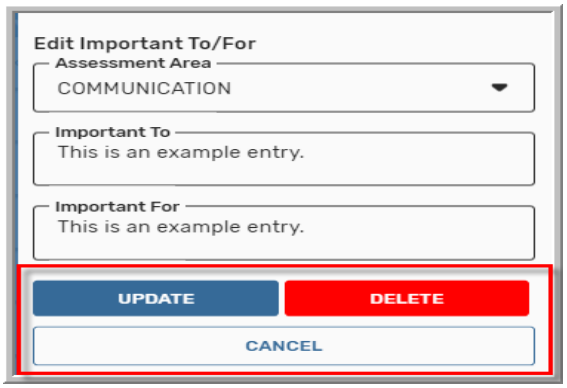


Summary Tab

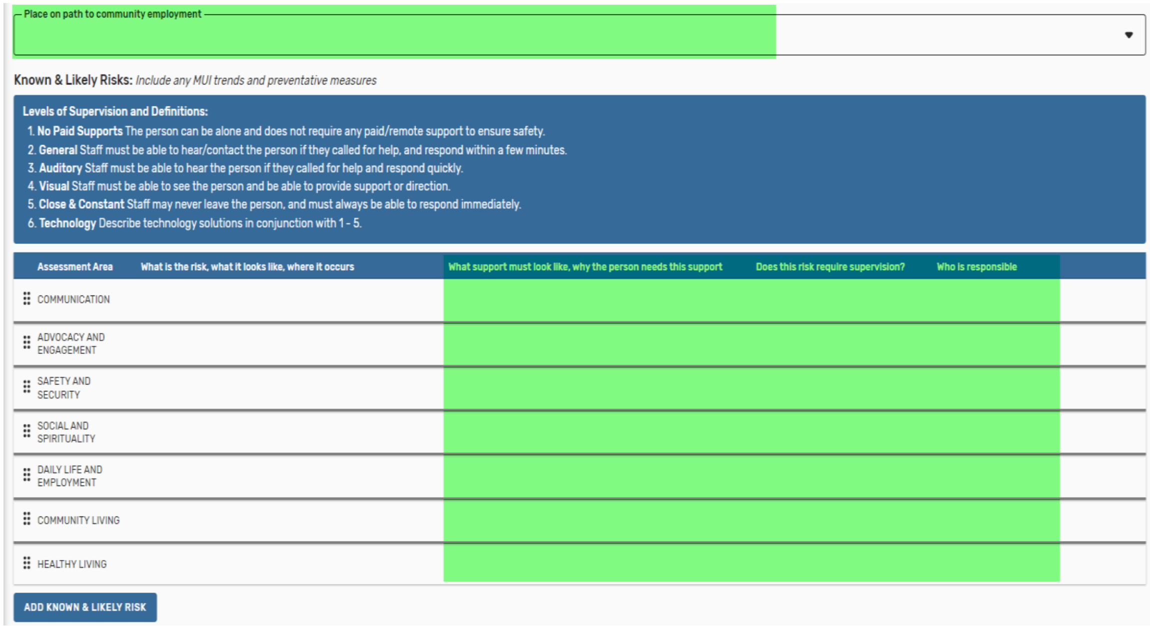
This tab makes up tables created in the Discovery Assessment for:

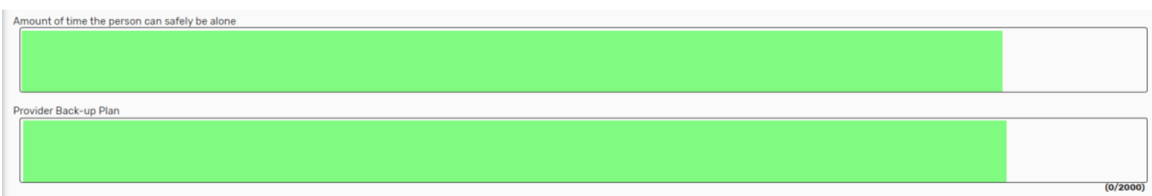
- Important To/ Important For
- Skills and Abilities
- Known and Likely Risks

- If the user completed this information in the Discovery Assessment, then all information would flow directly onto the ISP.
  - Users may add additional lines for each of these areas, if desired. Any information added would flow back onto the Discovery Assessment.
  - Users may choose to review, revise or delete existing entries. This would also flow back to the Discovery Assessment, if those fields are displayed.



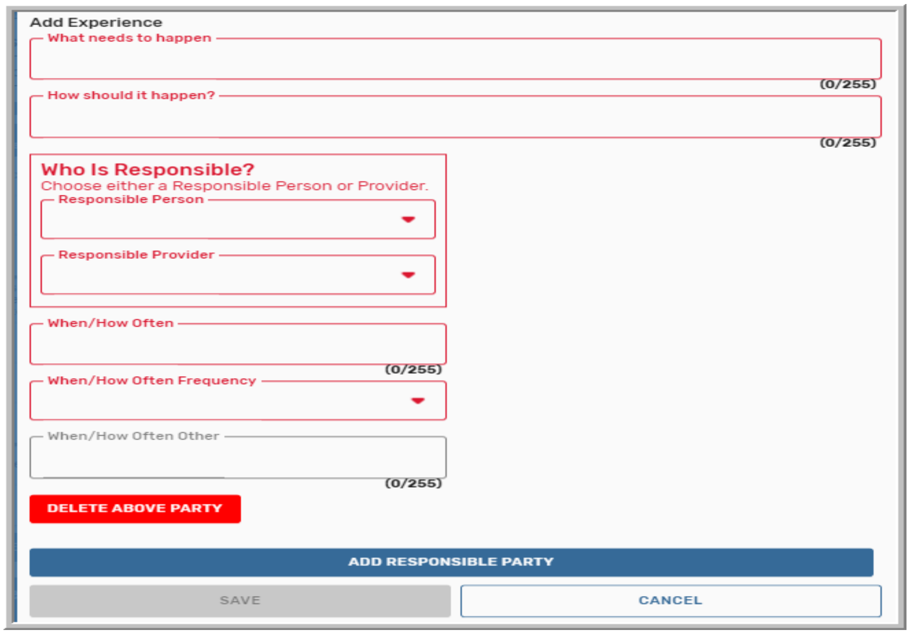
- Users should note that the following areas **will need to be completed** on the Summary tab in the ISP:
  - Place on Path to Community Employment
    - From the dropdown, choose the appropriate answer.
  - Known and Likely Risks
    - From the placeholder entered in the Discovery Assessment, users will need to complete the risks in the ISP.
      - What Support Must Look Like – describe in detail the support needed
      - Level of Support – choose from the options listed on the ISP.
      - Who Supports – This section is populated based on the Team Members defined in Sign/Consent tab. Users will also have an option to pull a provider IF the provider has been assigned in the Services/Supports section.
  - Amount of time a person can be alone
  - Provider Back Up Plan



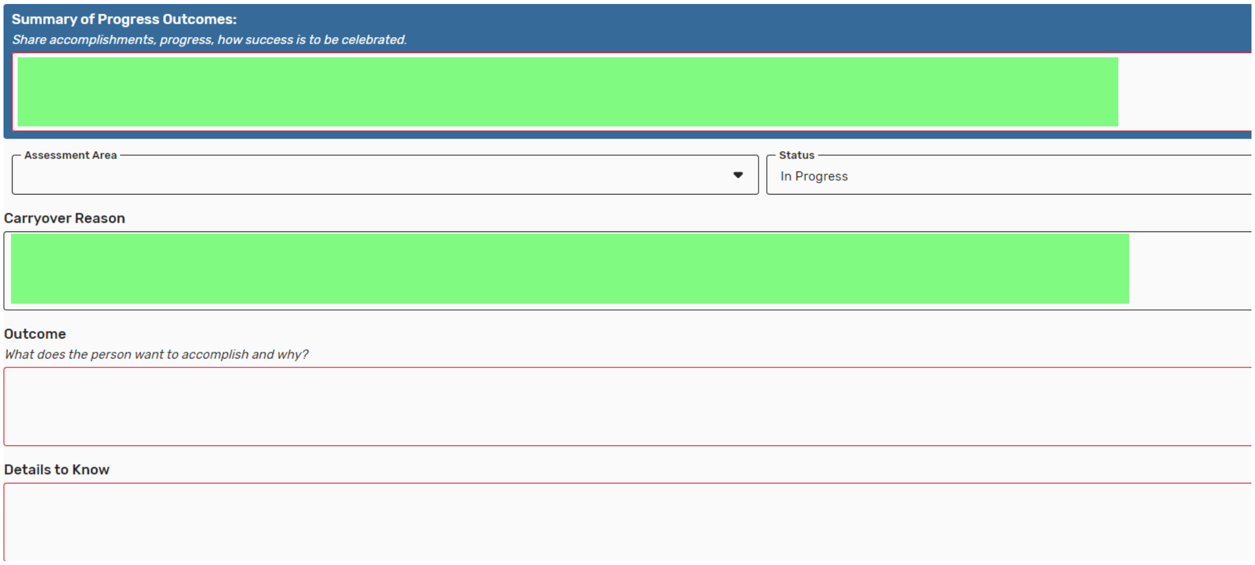


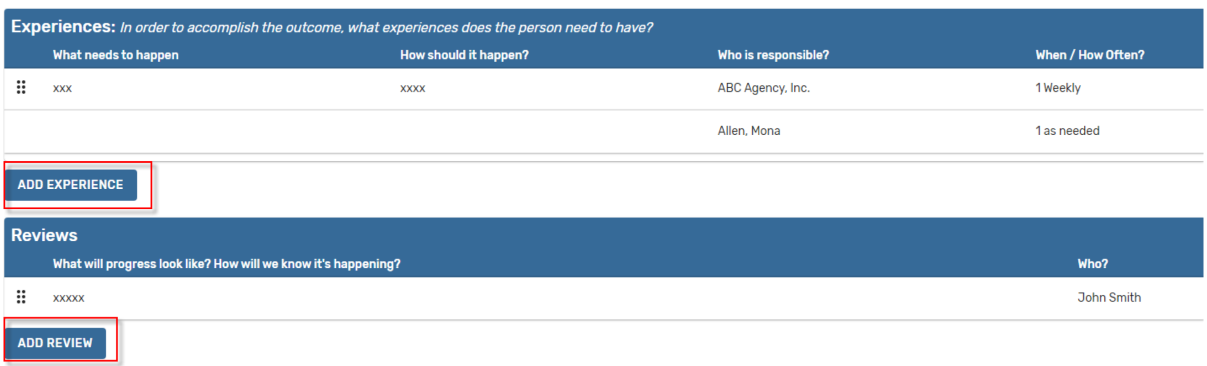
Outcomes Tab

- This tab pulls any Outcomes that were set up initially in the Discovery Assessment.
- Users will need to add:
  - Summary Progress Outcomes
    - This is a text field that defines the accomplishments and success of the last year. This is a compilation of ALL outcomes added to the plan.
  - Experiences – these are specific action steps needed for each outcome.
    - Users can add as many as required
    - The experiences may include providers and/or specific people.
      - Responsible Person is pulled from Sign/Consent tab
      - Responsible Provider is pulled from Gatekeeper/Vendor Info



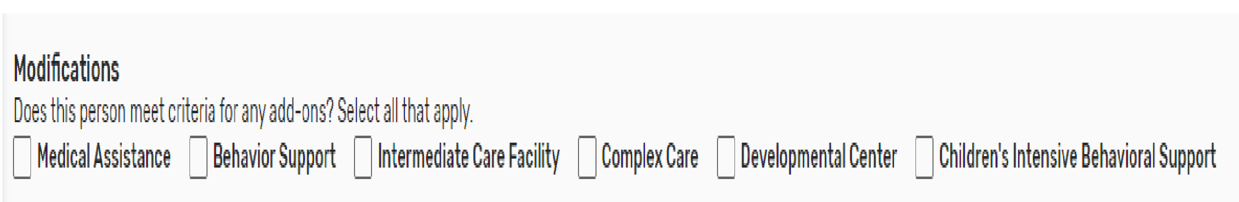
- The Add Responsible Party button will allow users to assign multiple responsible parties to the outcome experience.
    - When selected, an additional Who Is Responsible section will display in the wizard.
    - Users may assign as many responsible parties as needed. There is no limit within these field entries.
- Reviews – these are review specifics per outcome.
    - Who? – will list all team members that are assigned to plan or those not yet assigned to plan. Plans sending to Salesforce require Who Supports to pull from the Sign/Consent page.





Services Tab

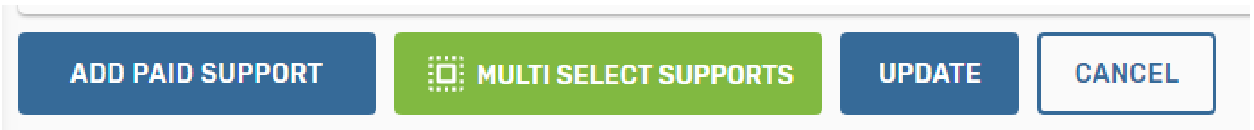
- This tab will display all services that were previously created in the assessment.
  - The Services will display a Paid Supports, Additional Supports, and Professional Referrals table.
    - If the supports and referral wizards were used in the Discovery Assessment, users will need only to check if there are Modifications for the individual



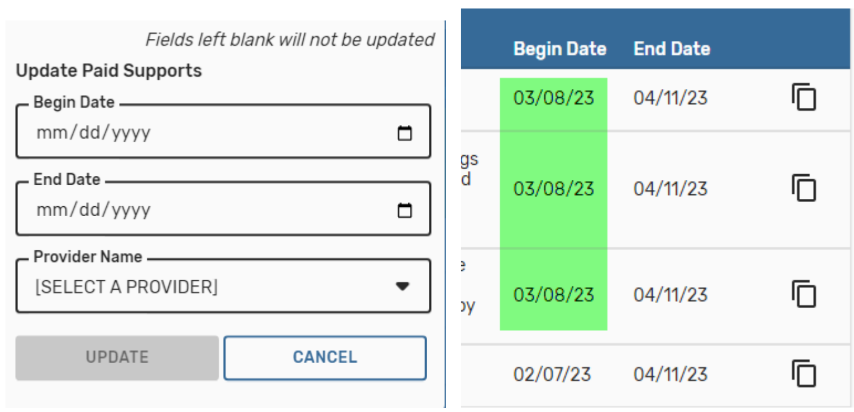
A Guide to Anywhere Plan OhioISP

    - Please note: If a funding source of State Plan Services is chosen, then the Provider field will be grayed out. Simply add the provider's name in the scope of service.

- Occasionally there are instances where service dates need to change due to revisions. The system allows for a change of multiple rows at once for any Paid Services listed.
    - Open Services and click on the 'Multi-Select Supports button.
    - Once highlighted, the user can choose which dates need to be updated.



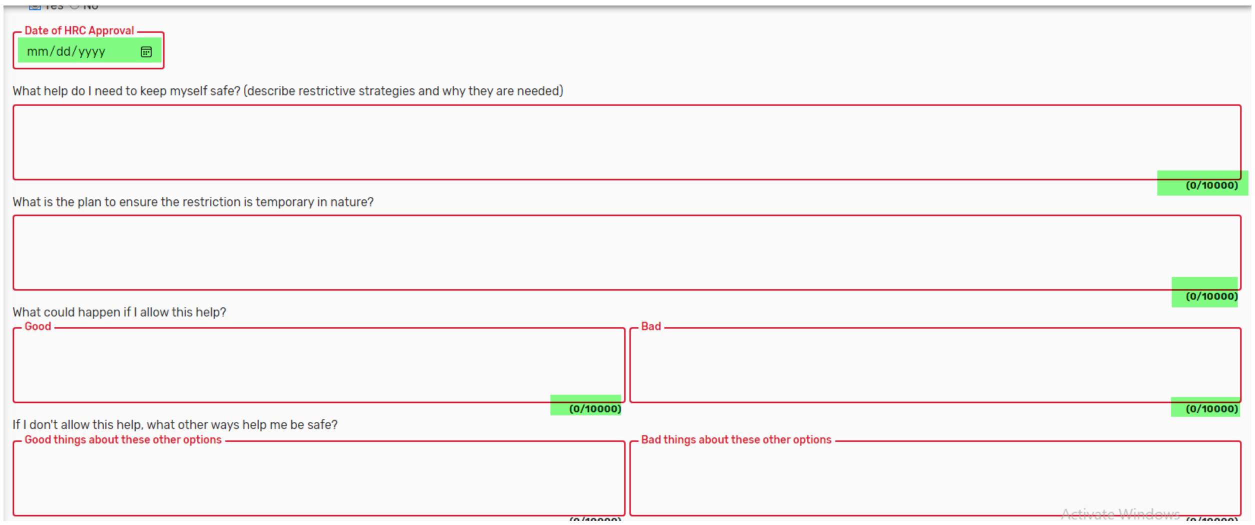
    - Click 'Update' and the system will display a pop up to update dates. Any date kept blank will not change.



    - Users may update Providers also IF the funding AND services are the same on each line chosen to be updated.

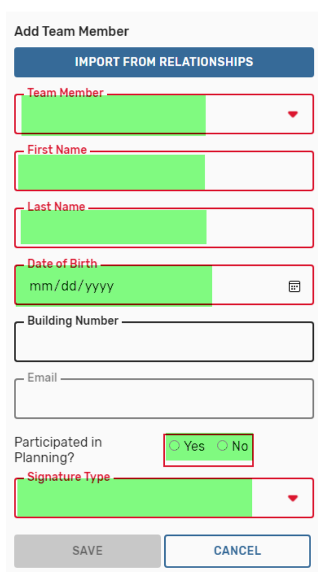
<u>Restrictive Measures Tab</u>

- If Restrictive Measures are identified as 'yes,' the area will expand and require the HRC approval date and various text fields to identify the restrictive measures, if applicable for the individual.
    - **Please note the character limits. Users are not permitted to exceed these limits.**

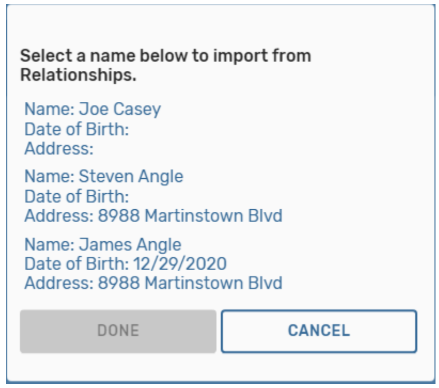


Sign/Consent Tab

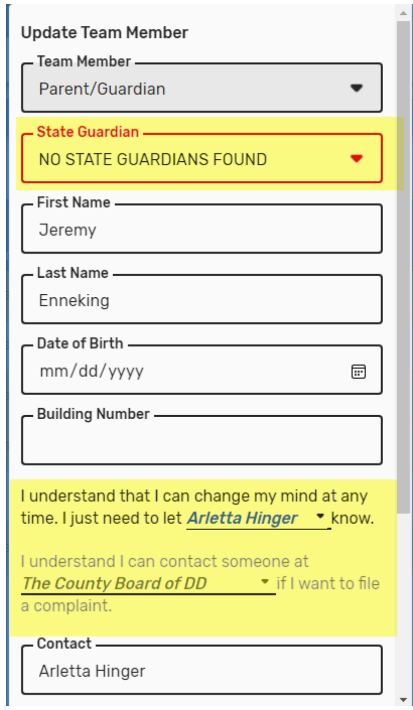
- This tab is intended to show all of the individual's team members. This should be done **FIRST** when building a new plan in the system. Required fields include: First/Last names, Team Member type, Date of Birth, Participated in Planning (Y/N), and Signature Type.
- Click the 'Add Team Member' button. Users should note that there are 2 ways to populate this page, Import from Relationships and Add New Team Member (users must have security for adding new team members).
- **Import from Relationships**
    - If the Team Members are already in Gatekeeper/Relationships:
        - Click the 'Import from Relationships' button.



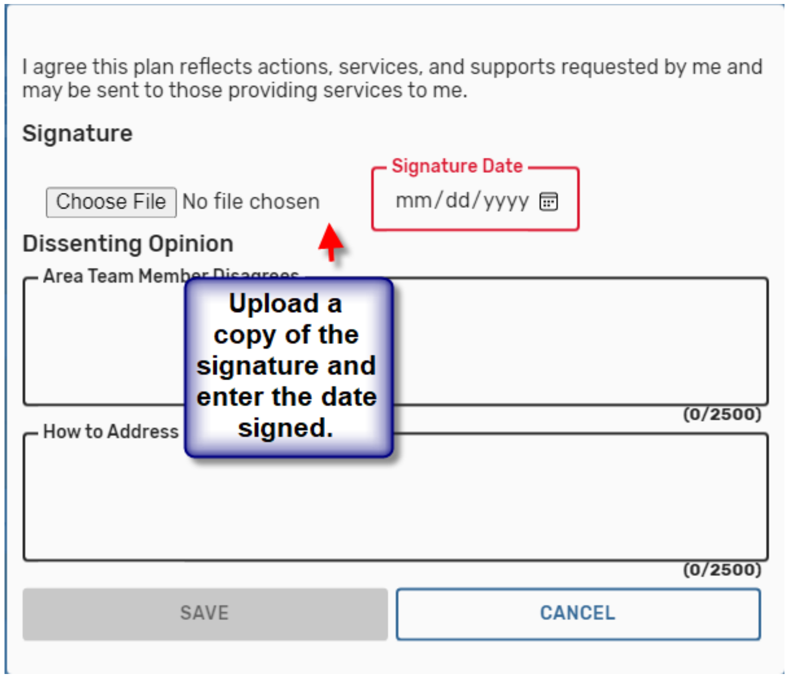
- A list of those available will display. This list will comprise of those that are active during the current span of the plan.

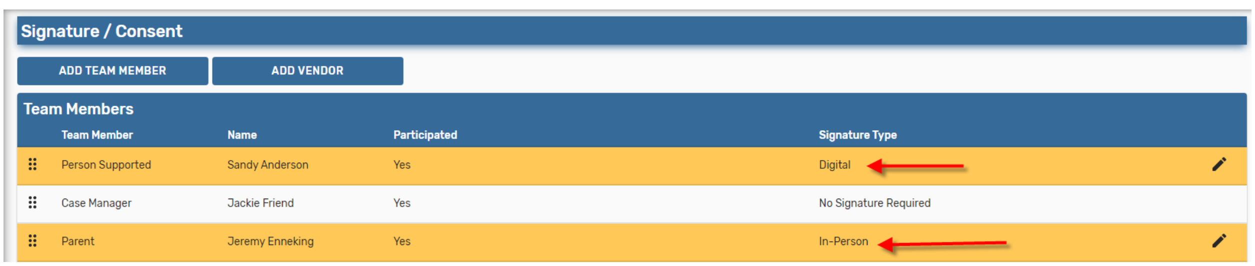


    - Choose a team member. Please note this process is completed one team member at a time.
        - With each choice, users will add
            - The 'Team Member' type
            - If they participated in planning
            - The Signature Type.
        - The Signature Type determines how the signature will be obtained from the team member.
        - There are 3 types. Users should choose one.
            - **Digital Signature** is signing the document through an electronic device in Anywhere,
            - **In-Person Signature** is signing the document after it has been printed or sending via document signing program,
            - **No Signature Required** is used for those team members that do not need to sign the document.
- For Guardians and or Individuals, users will also need to answer the following:
    - State Guardian – as assigned in Salesforce
    - Who to call for changes – defaults to SSA
    - Who to contact at county – defaults to Organization in People.



- Those with the Signature Type of 'No Signature Required' will not highlight and display without the pen icon. If the signature requires consent statements (Individual or Guardian), they will not be required if the person is not signing the plan.
- Once completed, any Signature Type of 'In-Person' will automatically have a button to 'add Attachment.'
  - Click 'choose file' and add the signature and date signed. This is not considered complete until a file is chosen and the date added.

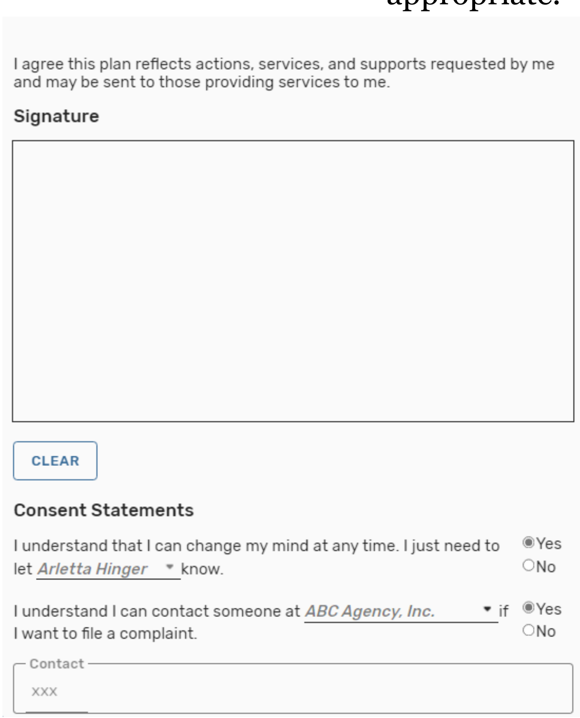


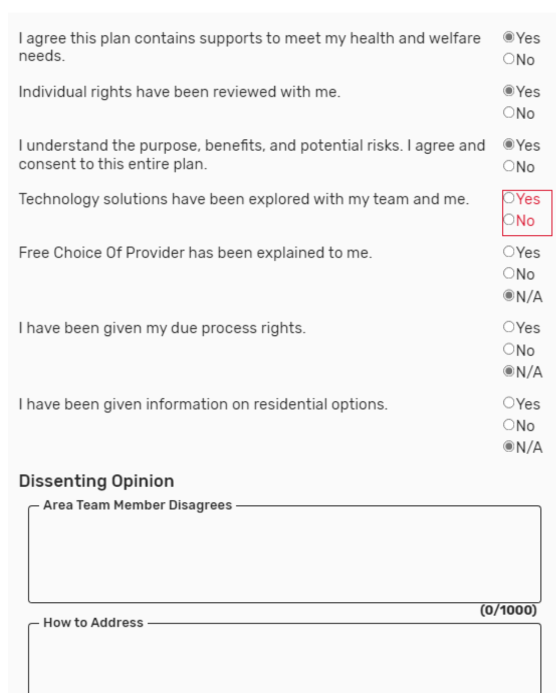


- **Creating a Team Member in the OhioISP**
    - If the Team Members do not exist in Gatekeeper, the user will need to create a new record for him/her.
        - Click to ‘Add Team Member’
            - The user should define the team member’s role. Other is available if the role is not defined in the dropdown. SSAs are known as ‘Case Managers’ in the DODD system
            - **When adding the individual or guardian, the system will need additional information when inserting into the team list.**
        - When the user clicks ‘Done.’ The People record is created in Gatekeeper with a classification of ‘Team Member.’ This record will also be added to the individual’s Relationships in People.
- **Adding a vendor as a team member**

- Team members may be vendors. When clicking on the ‘Add Vendor’ button, users will be able to pull from any vendor listed in the Gatekeeper Vendor Info window.
  - Users will need to define the vendor as Day Provider, Home Provider or Other.

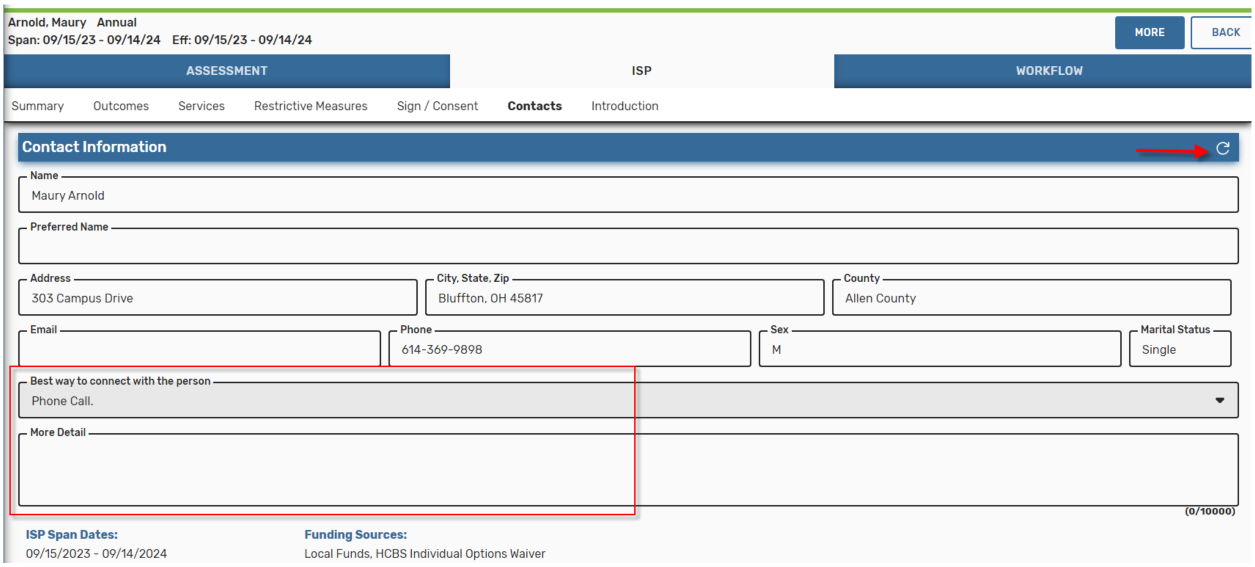
- **Additional Options**
  - **Deleting a team member before obtaining a signature**
    - Click on the ‘trash can’ at the end of the signature line on the Sign/Consent page.
  - **Deleting a team member after the signature is complete**
    - Users may remove a signature line if the user has the ‘Update’ key for the Sign/Consent page.
  - **Updating information in signature lines**
    - Users may update any of the information as long as the plan is in Draft status and signature are not yet complete.
- **Signing the plan**
  - To sign the plan, click on the ‘pen’ icon at the end of the signature line on the Sign/Consent tab.
    - If the team member is the individual or a guardian, there will be a series of questions that must be answered before a signature can be saved.
      - Dissenting Opinions are not required, but may be added if appropriate.





Contacts Tab

- When the page opens, the individual's demographic information will pre-populate with the exception of the Best Way to Connect. Information may be refreshed by clicking on the 'Refresh' button on the top right.



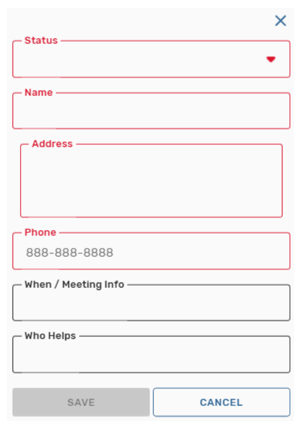
  - Once the user complete the Best Way to Connect from the dropdown.
    - If choosing 'Other,' the More Detail box will be required.
  - ISP Span pulls from the plan, while Funding Sources pull based on the Service Type selected under Paid Supports.

- **<u>Important People</u>**
  - Users can insert Important People to the plan by:
    - Adding manually
    - Importing from Gatekeeper/Relationships
    - Importing from Sign/Consent tab in the OhioISP

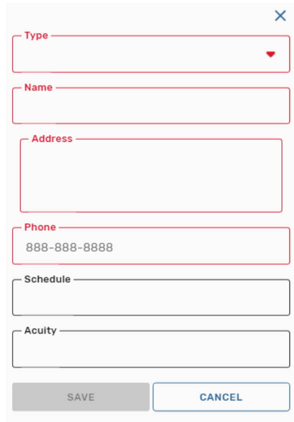
- Manual Add
  - Complete the 'Type' from the dropdown.
  - Complete Name, Address, Email, Phone
    - Please Note –Address and one Phone Number are required for the plan to upload to DODD. A secondary Phone Number is an option but not required.
- Import from Relationships
  - Once the button is chosen, the user will see a list of current people listed in the Relationship tab that are active as of the current date.
  - If those chosen do not have the required information, the user will be required to add these areas before saving can occur. All information is editable once import occurs.
- Import from Sign/Consent Tab
  - Once the button is chosen, the list of those from the Sign/Consent tab will appear.

  - Users can pick from the list who to include on the Important People table.
  - The required information (address/phone) will need to be added unless it is already in the set up in Gatekeeper.

- **<u>Important Clubs, Groups, and Organizations</u>**
  - Users may insert those outside activities for the individual. These include both current activities or those the individual would like to consider.
    - Click 'Add Club/Group/Organization button
    - Fill in the required fields on the wizard and save.



- **<u>Important Places</u>**
  - Users may insert important places for the individual.
    - Click 'Add Places' button
    - Fill in the required fields on the wizard and save.
      - 'Other' may be chosen if the important place is not on the dropdown.



Introduction Tab

- The Introduction tab is created as an overview of the individual. This sheet will be used in event of temporary coverage changes and should ensure that providers grasp an overall understanding of the individual.
- The tab is made up of a picture and 4 questions.
    - Users can choose to add a picture from the Roster Card, add a custom image from a file, or remove a picture that has been added.
        - Clicking on Demographics will display the picture from the Roster Card, if applicable.
        - By clicking on custom image, the user will be adding a picture from an existing file.
        - By choosing neither radio button, the picture will remain as the silhouette image displayed.
    - Users will then answer a series of 4 questions about the individual.
        - Please note the character limits for each field.