



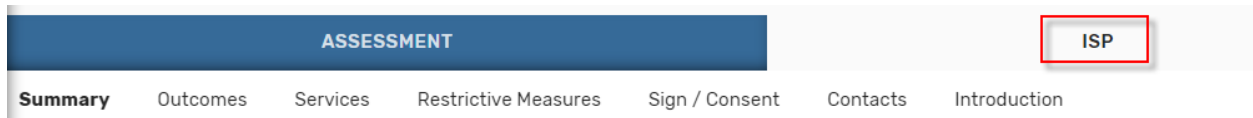
# A Guide to Anywhere Plan OhioISP

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.



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- 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



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Place on path to community employment

**Known & Likely Risks:** Include any MUI trends and preventative measures

**Levels of Supervision and Definitions:**

- No Paid Supports** The person can be alone and does not require any paid/remote support to ensure safety.
- General Staff** must be able to hear/contact the person if they called for help, and respond within a few minutes.
- Auditory Staff** must be able to hear the person if they called for help and respond quickly.
- Visual Staff** must be able to see the person and be able to provide support or direction.
- Close & Constant Staff** may never leave the person, and must always be able to respond immediately.
- Technology** Describe technology solutions in conjunction with 1 - 5.

Assessment Area	What is the risk, what it looks like, where it occurs	What support must look like, why the person needs this support	Does this risk require supervision?	Who is responsible
COMMUNICATION				
ADVOCACY AND ENGAGEMENT				
SAFETY AND SECURITY				
SOCIAL AND SPIRITUALITY				
DAILY LIFE AND EMPLOYMENT				
COMMUNITY LIVING				
HEALTHY LIVING				

ADD KNOWN & LIKELY RISK

Amount of time the person can safely be alone

Provider Back-up Plan

(0/2000)

## 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



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**Add Experience**

- What needs to happen (0/255)

- How should it happen? (0/255)

**Who Is Responsible?**  
Choose either a Responsible Person or Provider.

- Responsible Person

- Responsible Provider

- When/How Often (0/255)

- When/How Often Frequency

- When/How Often Other (0/255)

**DELETE ABOVE PARTY**

**ADD RESPONSIBLE PARTY**

SAVE CANCEL

- 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.



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## Summary of Progress Outcomes: *Share accomplishments, progress, how success is to be celebrated.*

Assessment Area Status  
In Progress

### Carryover Reason

### Outcome *What does the person want to accomplish and why?*

### Details to Know

### Experiences: *In order to accomplish the outcome, what experiences does the person need to have?*

What needs to happen	How should it happen?	Who is responsible?	When / How Often?
☰ xxx	xxxx	ABC Agency, Inc.	1 Weekly
		Allen, Mona	1 as needed

ADD EXPERIENCE

### Reviews

What will progress look like? How will we know it's happening?	Who?
☰ xxxxx	John Smith

ADD REVIEW

## 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

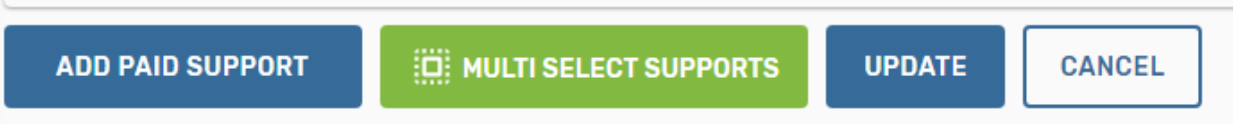
**Modifications**  
Does this person meet criteria for any add-ons? Select all that apply.

Medical Assistance
  Behavior Support
  Intermediate Care Facility
  Complex Care
  Developmental Center
  Children's Intensive Behavioral Support



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- 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.

*Fields left blank will not be updated*

**Update Paid Supports**

Begin Date

End Date

Provider Name

	Begin Date	End Date	
	03/08/23	04/11/23	
gs	03/08/23	04/11/23	
d	03/08/23	04/11/23	
3	03/08/23	04/11/23	
yy	03/08/23	04/11/23	
	02/07/23	04/11/23	

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

## **Restrictive Measures Tab**

- 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.**



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The screenshot shows a web form with the following sections:

- Date of HRC Approval:** A date picker field with the format 'mm/dd/yyyy'.
- What help do I need to keep myself safe? (describe restrictive strategies and why they are needed):** A large text area with a character count '(0/10000)'.
- What is the plan to ensure the restriction is temporary in nature?:** A large text area with a character count '(0/10000)'.
- What could happen if I allow this help?:** Two side-by-side text areas. The left one is labeled 'Good' and the right one is labeled 'Bad'. Both have character counts '(0/10000)'.
- If I don't allow this help, what other ways help me be safe?:** Two side-by-side text areas. The left one is labeled 'Good things about these other options' and the right one is labeled 'Bad things about these other options'. Both have character counts '(0/10000)'.

## 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.

The 'Add Team Member' form includes the following fields and options:

- IMPORT FROM RELATIONSHIPS:** A blue button at the top.
- Team Member:** A dropdown menu.
- First Name:** A text input field.
- Last Name:** A text input field.
- Date of Birth:** A date picker field with the format 'mm/dd/yyyy'.
- Building Number:** A text input field.
- Email:** A text input field.
- Participated in Planning?:** Radio buttons for 'Yes' and 'No'.
- Signature Type:** A dropdown menu.
- SAVE** and **CANCEL** buttons at the bottom.



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

Select a name below to import from Relationships.

Name: Joe Casey  
Date of Birth:  
Address:

Name: Steven Angle  
Date of Birth:  
Address: 8988 Martinstown Blvd

Name: James Angle  
Date of Birth: 12/29/2020  
Address: 8988 Martinstown Blvd

- 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.





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Update Team Member

Team Member  
Parent/Guardian

State Guardian  
NO STATE GUARDIANS FOUND

First Name  
Jeremy

Last Name  
Enneking

Date of Birth  
mm/dd/yyyy

Building Number

I understand that I can change my mind at any time. I just need to let Arletta Hinger know.

I understand I can contact someone at The County Board of DD if I want to file a complaint.

Contact  
Arletta Hinger

- 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.



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I agree this plan reflects actions, services, and supports requested by me and may be sent to those providing services to me.

**Signature**

No file chosen

**Signature Date**  
mm/dd/yyyy

**Dissenting Opinion**

Area Team Member Disagrees

**Upload a copy of the signature and enter the date signed.**

How to Address  (0/2500)

(0/2500)

Signature / Consent			
ADD TEAM MEMBER			
ADD VENDOR			
Team Members			
Team Member	Name	Participated	Signature Type
Person Supported	Sandy Anderson	Yes	Digital
Case Manager	Jackie Friend	Yes	No Signature Required
Parent	Jeremy Enneking	Yes	In-Person

- **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**



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- 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.

I agree this plan reflects actions, services, and supports requested by me and may be sent to those providing services to me.

**Signature**

CLEAR

**Consent Statements**

I understand that I can change my mind at any time. I just need to let *Arletta Hinger* know.  Yes  No

I understand I can contact someone at *ABC Agency, Inc.* if I want to file a complaint.  Yes  No

Contact

I agree this plan contains supports to meet my health and welfare needs.  Yes  No

Individual rights have been reviewed with me.  Yes  No

I understand the purpose, benefits, and potential risks. I agree and consent to this entire plan.  Yes  No

Technology solutions have been explored with my team and me.  Yes  No

Free Choice Of Provider has been explained to me.  Yes  No  N/A

I have been given my due process rights.  Yes  No  N/A

I have been given information on residential options.  Yes  No  N/A

**Dissenting Opinion**

Area Team Member Disagrees

How to Address  (0/1000)



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## 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.

Arnold, Maury Annual  
Span: 09/15/23 - 09/14/24 Eff: 09/15/23 - 09/14/24

ASSESSMENT | ISP | WORKFLOW

Summary | Outcomes | Services | Restrictive Measures | Sign / Consent | **Contacts** | Introduction

**Contact Information** ↻

Name: Maury Arnold

Preferred Name: \_\_\_\_\_

Address: 303 Campus Drive | City, State, Zip: Bluffton, OH 45817 | County: Allen County

Email: \_\_\_\_\_ | Phone: 614-369-9898 | Sex: M | Marital Status: Single

Best way to connect with the person: Phone Call (dropdown menu)

More Detail: \_\_\_\_\_

ISP Span Dates: 09/15/2023 - 09/14/2024 | Funding Sources: Local Funds, HCBS Individual Options Waiver

(0/10000)

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



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The screenshot shows a user profile form with the following fields and buttons:

- Type: Family (dropdown menu)
- IMPORT FROM RELATIONSHIPS (button, highlighted with a red box)
- IMPORT FROM SIGNATURES (button, highlighted with a red box)
- Name: John Anderson
- Address: 123 Highland Blvd. Columbus Ohio 43215
- Email: janders@anymail.com
- Phone: 614-555-8878 (with Ext. field)
- Phone 2: 614-555-2397 (with Ext. field, highlighted with a red box)
- SAVE (button)
- CANCEL (button)

- 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.



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- 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.
- **Important Clubs, Groups, and Organizations**
    - 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.

- **Important Places**
  - 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.



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A form with a close button (X) in the top right corner. It contains the following fields: 'Type' (a dropdown menu), 'Name' (a text input), 'Address' (a larger text input), 'Phone' (a text input with the placeholder '888-888-8888'), 'Schedule' (a text input), and 'Acuity' (a text input). At the bottom are two buttons: 'SAVE' (disabled) and 'CANCEL'.

## 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.

The screenshot shows the 'Introduction' tab interface. At the top is a blue header with the word 'Introduction'. Below it, under the 'Photo' section, there are two radio buttons: 'Use Demographics Photo' (selected) and 'Use Custom Image'. Under 'Use Custom Image', there is a 'Choose Image' button with a 'Choose Files' sub-button and the text 'No file chosen'. To the right of these options is a small photo of a woman. Below the photo section are four text input fields, each with a character limit '(0/2000)' on the right side. The questions are: 'What People Like and Admire About Me', 'A Few Things That Are Important to Me', 'A Few Things That Are Important to Me', and 'Here is How You Can Support Me'.