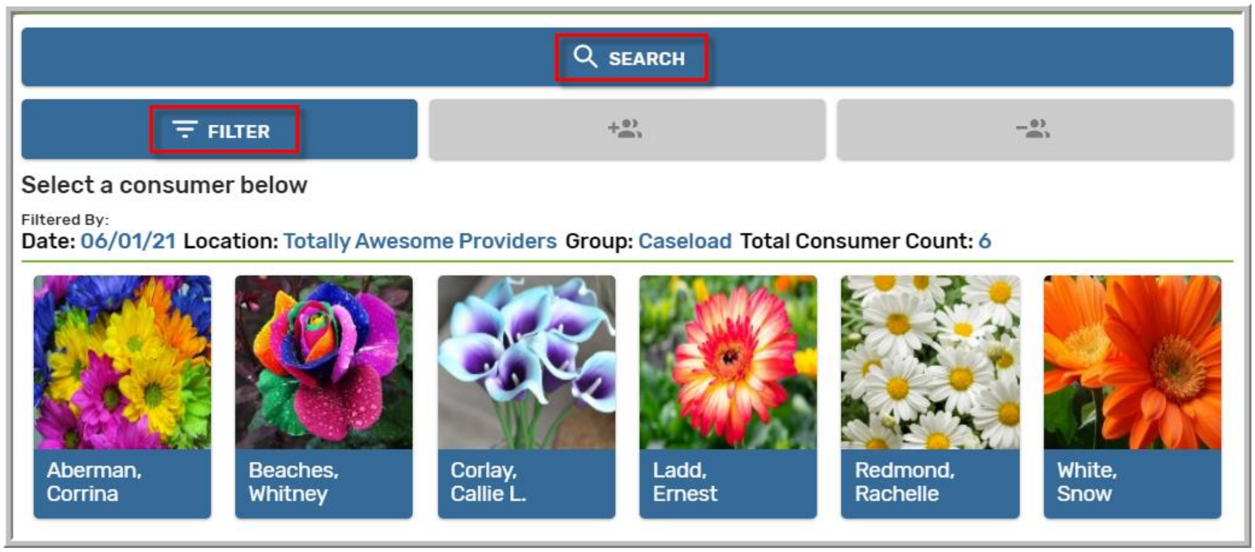
A Guide to Anywhere Plan Overview

How to Insert a Plan

Select the Plan module on the Anywhere Dashboard.

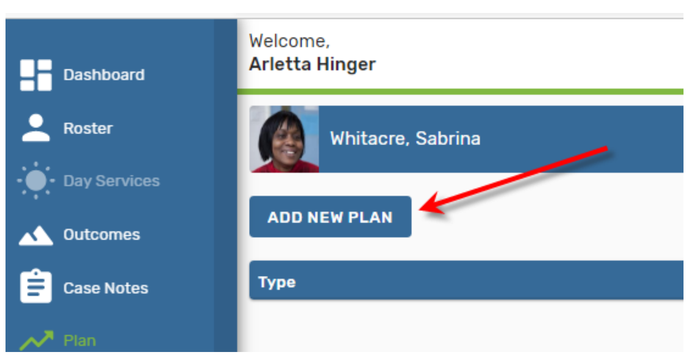
- The window will open to the Roster window.
- If the user has set a roster location default, the consumers assigned to the location will appear in the Roster window.
- The Roster window will display a Search button and Filter button.



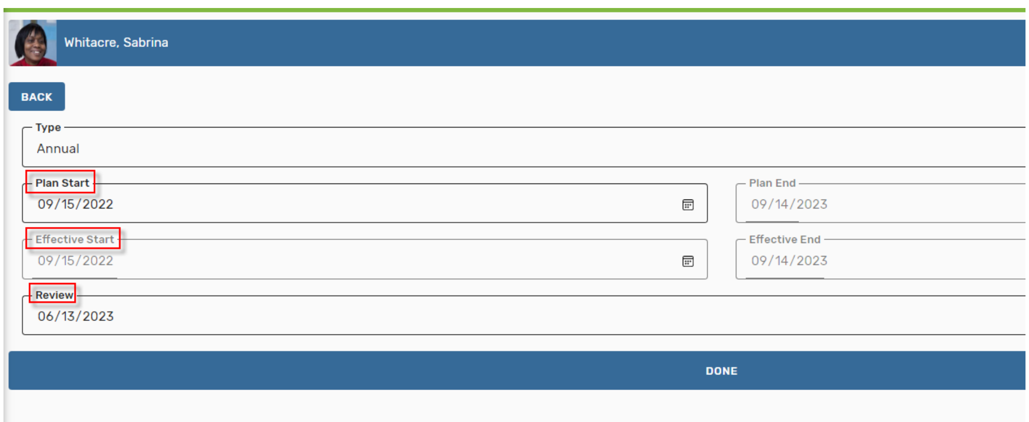
- Select the consumer
  - The name will highlight in green.
  - Select Done.

Please note: Only one consumer can be selected at a time in the plan window.

- Click on 'Add New Plan'



- The window will open to determine what type of plan will be inserted (Annual or Revision). The Annual plan is the only choice with a new consumer.
    - **Annual plans**: Users may adjust the Plan Year Start Date. The Plan Year Start will populate based on the Edit Consumer window in Advisor or a different date may be entered. The Plan Year End Date will always default to one year later.
    - **Review Date**: This field is not used, however DODD has strict rules when uploading, so we have made this field to auto-populate to 1 month before the span end date.
    - **Revision plans**: Users may adjust the Effective Date Start/End dates only.



    - Each consumer must have a Salesforce ID assigned. If they do not have one in Advisor, then we will send a message to Salesforce to assign the ID once the user is transferring to Salesforce.
        - This will be done by Resident number. If there is no Resident number, the user will be unable to insert a plan until the Resident number has been added in Advisor.
    - When the plan has been created, the system will assign the individual served and the QIDP (if assigned) as the first two participants on the Sign/Consent window. The system will notify the user that it has been completed.
- The OhioISP window will open with the following:
    - If inserting a new redetermination or revision, all information from the original plan will copy over.
        - This does NOT include:
            - Signatures
            - Outcomes that have been completed

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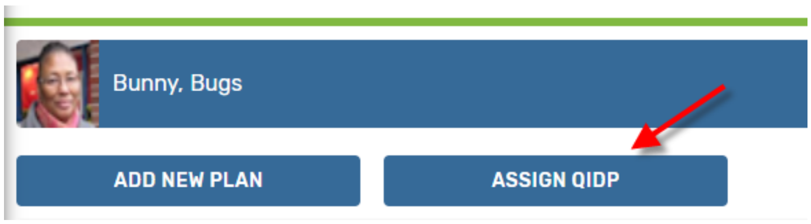
Add or Change a QIDP Caseload

With proper security, users can assign a caseload change to an individual. This information will transfer to Salesforce and is required for uploading the plan.

- Open the Plan Module in Anywhere and choose an individual.
    - Click on the Assign QIDP button.



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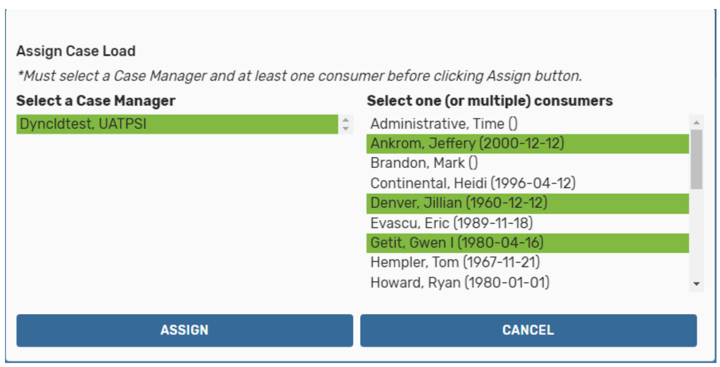
    - A window will open with the QIDPs that have signed into Salesforce on the left and the individuals with Salesforce ID's on the right.
    - Highlight the QIDP, then choose one or more individuals to assign



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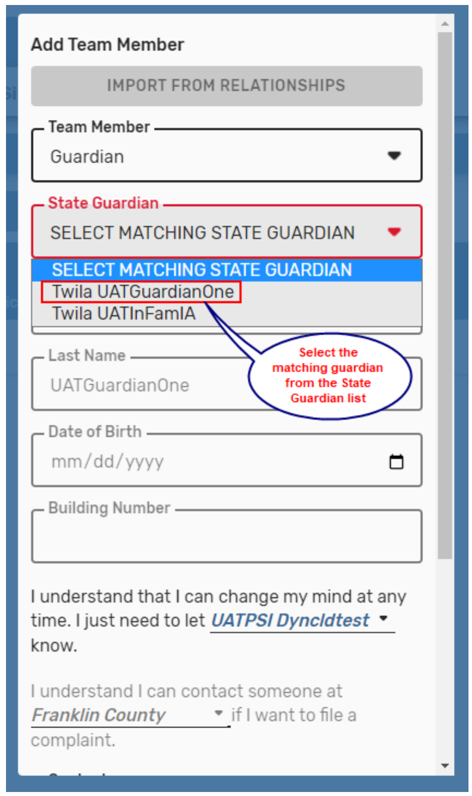
    - Once chosen, Anywhere will send the information directly to Salesforce. The process may take a few minutes.
        - Once approved by Salesforce, the user will receive a confirmation message.

How to Update a Guardian for an Individual

There are times when a Guardian or Parent/Guardian change for individuals. Anywhere is designed to update these Guardians when this occurs based on the Guardian assigned at DODD.

- Go to Sign/Consent tab in the ISP and add a Team Member
- Import from Relationships and choose the Guardian for the individual.

- When the user enters a Team Member type of 'Guardian' or 'Parent/Guardian' the system will determine if this person is assigned in Salesforce.
    - If not, then there will be a dropdown of the choices
    - The ICF will need to contact the resident County Board if the guardian is not in the dropdown.



- If the individual has changed guardians, then the process would be the same for the revision or annual.

Please note: any changes must be completed at DODD first, the ICF must contact DODD if there are changes that have not been updated.

Overview of Plan Functionality

It is important for users to note the functionality of the plan does not change whether in the assessment or the ISP. The list below is an overview of that functionality.

- **Search button**
    - This feature allows users to search for consumers by first name, middle name, or last name.

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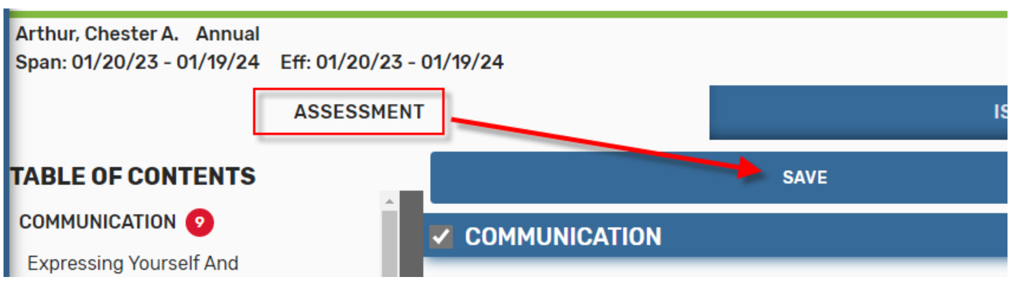
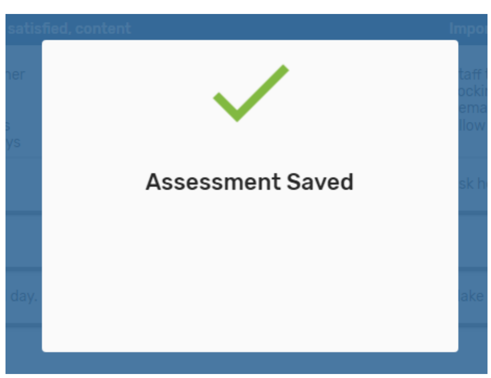
- This search will list any combination of first name, middle name, or last name from the letters typed into search field.
- Once the suggestive typing is completed, select enter.

  - The roster will then display all consumers that meet the search criteria.

- **Filter button**
  - This feature allows users to search for consumers by Date, Location, and Group(s).
    - Users can use one filter or combination of these filters to narrow the search for consumers.
- **Saving your Plan**
  - Users should note that the Assessment does not have auto save capabilities, however when exiting Assessment to another tab the system will autosave. Users need to click the 'Save' button at the top of the Assessment window to save their work. While adding information to the ISP, users DO NOT need to return to Assessment to save. The system will auto-save once you tab from the current field.

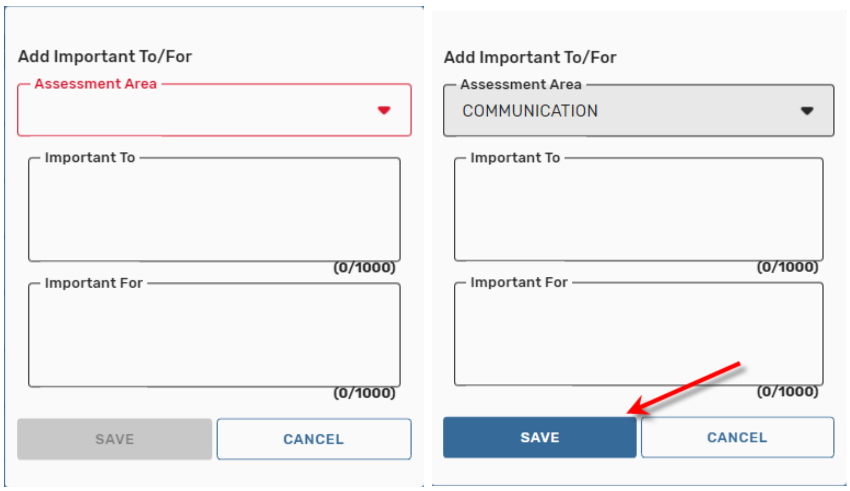


  - When exiting the Assessment area, the system will prompt the user to save.

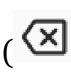


  - The ISP section does have auto save, so users will not see a save button in those sections.

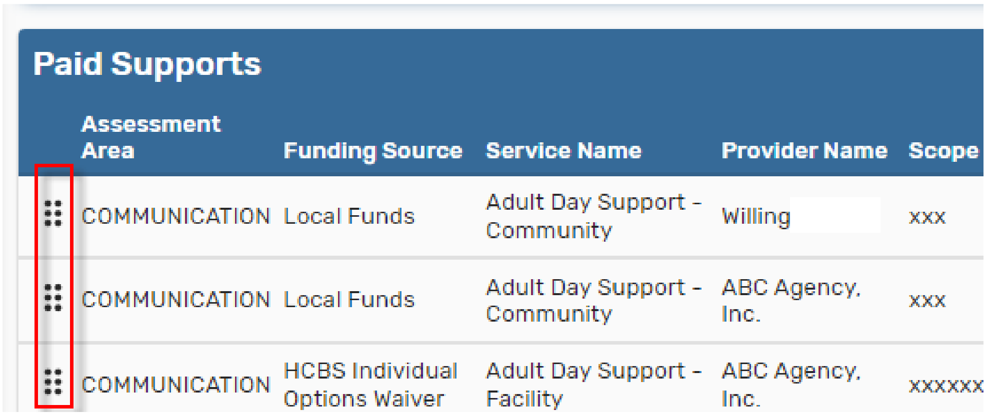
- **Required Answers**
  - Any required answer throughout the plan will be highlighted with a red line around it. Once the answer is inserted, the line will turn to black.



  - Save buttons will be grayed out until all required information is inserted.

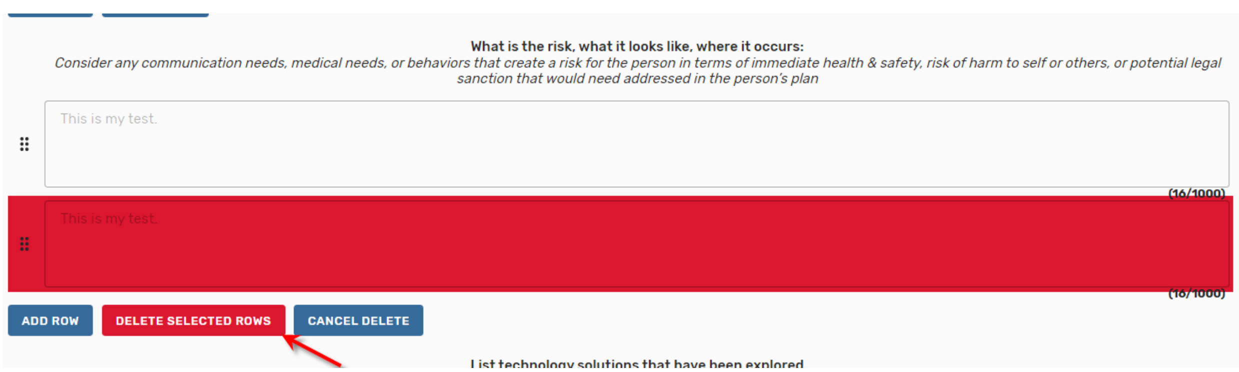
- **Conditional Questions**
  - Throughout the assessment, users will see yes/no answers that may require additional information.
    - Fields are grayed out until the user answers yes/no. At that point, one of the boxes will have a black line around the text box for further information.
    - Users may click the erase () button if neither is appropriate.

- **Re-sorting**
  - The system allows for resorting within a specific assessment area. Users will see a series of 6 dots. Using these dots, the user may drag and drop the lines to a desired location within the same assessment area.



	Assessment Area	Funding Source	Service Name	Provider Name	Scope
	COMMUNICATION	Local Funds	Adult Day Support - Community	Willing	xxx
	COMMUNICATION	Local Funds	Adult Day Support - Community	ABC Agency, Inc.	xxx
	COMMUNICATION	HCBS Individual Options Waiver	Adult Day Support - Facility	ABC Agency, Inc.	xxxxxx

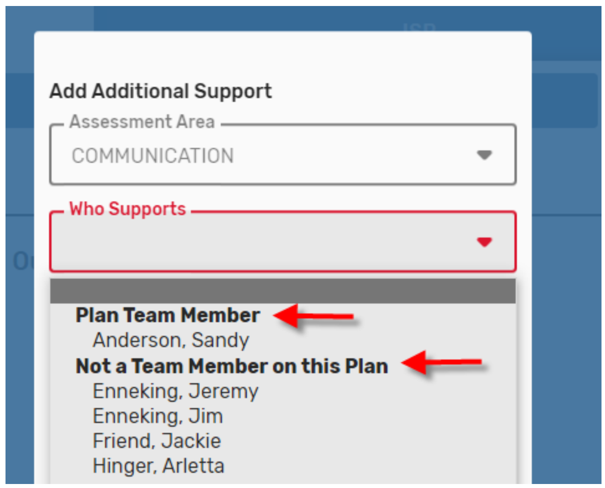
- **Copying a line**
  - In both Service and Supports and Known and Likely Risks, users may copy any line already inserted.
    - Click on the copy icon at the end of the line. Users may change any piece of an existing line.
- **Adding a row in a table**
  - To add additional rows to a table, click 'Add Row.' The line will appear under the original line. Users will have additional character limits for every line added due to the additional boxes.
- **Deleting a row in a table**
  - Rows may be deleted in tables by clicking the 'Delete Row' button. The section will appear grayed out. The user can choose 1 row that needs to be deleted.



Please note: only 1 row at a time may be deleted.

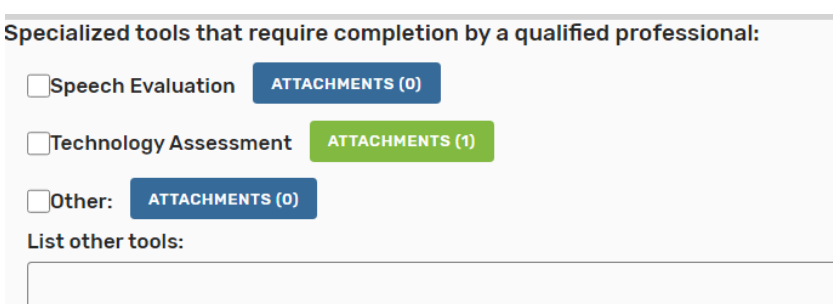
- Click 'Delete Selected Rows' and the line will be removed.
- Users may also click 'Cancel Delete' to stop the process.

- **Assigning 'Who Supports Me'**
  - Users will choose from a dropdown who supports the individual from a list. These will be displayed in 2 categories, Plan Team Member and Not a Team Member on this Plan.
    - **Plan Team Member** – those individuals that are listed on the Sign/Consent page AND tied back to the Relationships in Advisor.
    - **Not a Team Member on this Plan** – those individuals that are on the Relationships tab but not listed on the Sign/Consent tab.

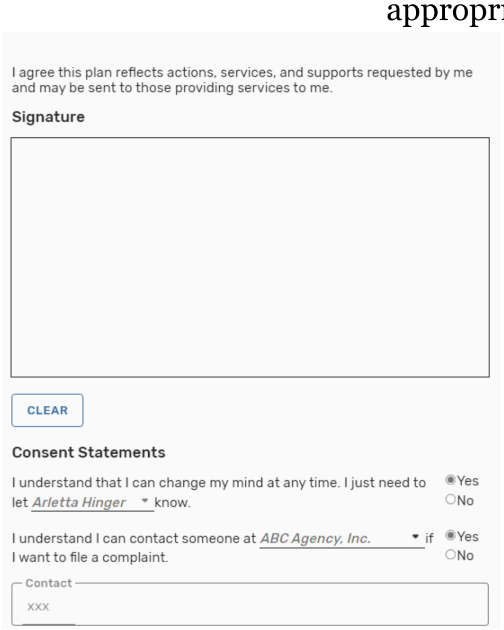


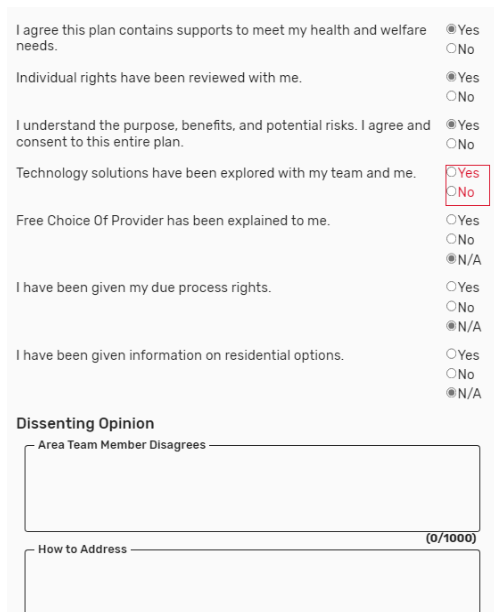
  - Users are able to choose from either list, but only those **ON THE PLAN SIGN/CONSENT PAGE** will be accepted by Salesforce.

- **Adding an attachment**
  - Attachments may be added in the Assessment by click on the Attachment button. Users will identify the location of the document and save it. It will be tied to the plan at that point.
  - The button will turn green once a document is added.

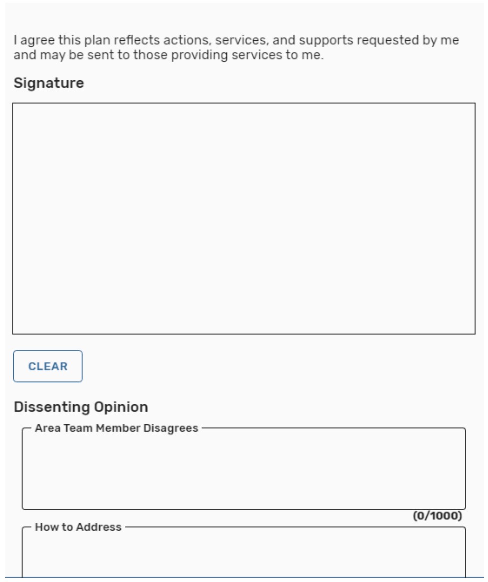


- **Signing the ISP**
  - Currently users may use a device for team members to sign the plan or print off the Signature Page for manual signatures. Users may also send the PDF version through their electronic signature program, if applicable. These signatures are specified on the Sign/Consent page as "Sign Type." (See A Guide to OhioISP for ICF Providers for details)
  - 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.



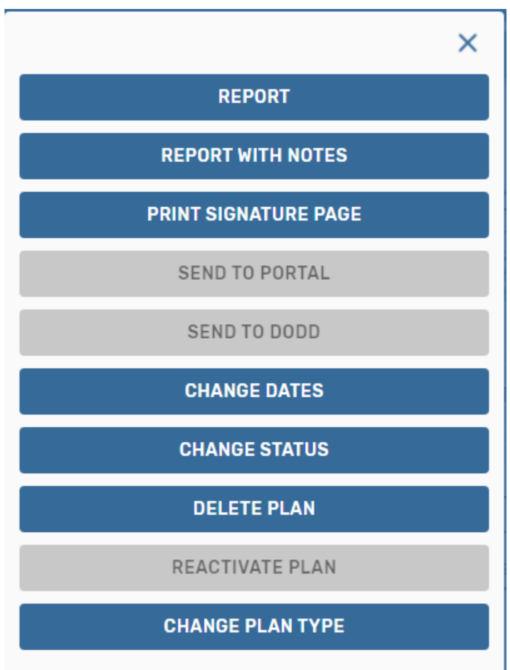


  - Once requirements are met, the Save button will enable for the user to save the information.
- For all other team members, signature completion will result in the highlight to disappear on the signature grid.
- For those with 'No Signature Required,' the line will appear without highlight on the Sign/Consent window.
  - Dissenting Opinions are not required, but may be added if appropriate.
- Those that have a signature type of 'No Signature Required' will display without the highlight.

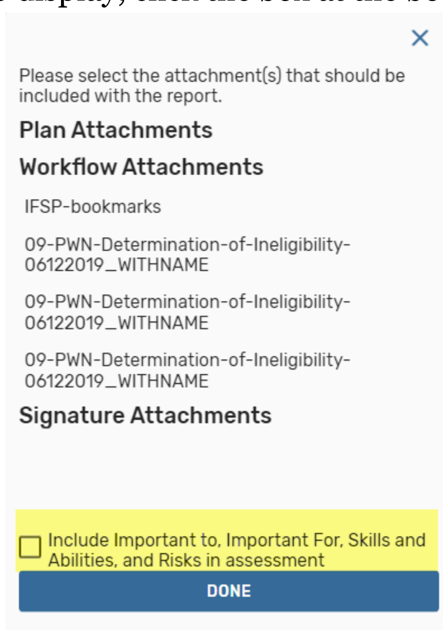


The More Button

- The More Button is a series of settings that are used while creating a plan.



- **Report Button**
  - This is your print plan button. This will generate a PDF of the ISP for the user to print/save/email.
    - Plans that are in Draft Status will have a DRAFT watermark on every page of the plan.
    - Plans that are in Completed Status will only print those questions where answers are provided. All other questions will be hidden.
    - After choosing Report, users the ability to pick/choose which attachments to print with the Plan Report. These attachments are found in the Assessment.
      - If the user does not highlight any lines, then none of the attachments will be included.
    - Users may also choose to hide Summary sections in Assessments since the information is repeated. The system will default to hiding those sections. To display, click the box at the bottom.



    - Any participant that was assigned, ‘No Signature Required’ will display as this on the Plan report signature page.

- **Report with Notes**
  - This button is used to print a plan with white space. This is utilized for those working on a new plan for a new span. The user will see the answers from the previous year and white space to add notes for the current year.

  - This report will also allow the user to choose to add Plan attachments. The user may choose to exclude all attachments by not highlighting any attachment lines.
- **Send to DODD**
  - With proper security, this button gives users the ability to send plans to Salesforce. There is set up that needs to be in place before this is functionality is turned on for a county board.
  - After choosing Send to DODD, users have the ability to pick/choose which attachments to send with the Plan Report. These attachments are found in both the OISP and Signature attachments.
    - If the user does not highlight any lines, then none of the attachments will be included.
- **Signature Page**
  - Users will print the following in the exact order as listed:
    - Any restrictive measures
    - Consent statements with individual/guardian name at top
    - Signature Page
    - Dissenting opinions
- **Change Dates**
  - This button allows users to change the dates in place on the plan.
    - For Annuals, users may change the Plan Year Start date or Review Date only.
    - For Revisions, users may change the Effective Start/End dates only.
- **Change Status**
  - This button controls the status of the plan. Users may choose between Draft and Complete.
    - If Draft Status, users may update the plan, but will see all questions including those unanswered and the watermark when printing.
    - If Complete Status, users will find a locked down plan but printing will only include those fields with answers.

- **Delete Plan**
  - To delete a plan, click this option and answer yes. **Please note: there is no reversal once the user clicks 'yes' in this window. The plan cannot be retrieved but will need to be rebuilt.**
  - Users must have security to do this.
- **Reactivate Plan**
  - This button will be grayed out for any active or current plans. Once the plan is outside of the span date, the plan will automatically inactivate.

  - When this occurs, open the locked down plan and choose Reactivate Plan button. The plan will open.
- **Change Plan Type**
  - This button allows the user to change from an 'Annual' to 'Revision' or vice versa.

*This document was written with the assumption that the security for this module/function is already in place. For additional information, please see the related set-up guide or contact your systems administrator.