How to Client Individual Support Plan (ISP)  
Date Information in eXPRS  
(*v3; 7/25/2018*)

eXPRS has implemented a new feature in an individual’s VIEW CLIENT profile page that allows for the tracking of their Individual Support Plan (ISP) date information.

While only informational at this time, the individual’s ISP Date information entered into eXPRS will be utilized in future system functionality as a validation edit point for Plan of Care and/or other service limits to align with ODDS policy guidelines, as well as CMS individual plan requirements.

Some things to note about entering ISP Date information in eXPRS.

- ISP Date segments for INITIAL ISPs can have a date range that is a longer than 365 days. The ISP End Date can be the last day of the month of the ISP Start Date, the next year.

```
ISP Dates Add

<table>
<thead>
<tr>
<th>ISP Type</th>
<th>ISP Signed Date</th>
<th>ISP Start Date</th>
<th>ISP End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial</td>
<td>6/30/16</td>
<td>7/12/2016</td>
<td>7/31/2017</td>
</tr>
</tbody>
</table>

Save  | Reset  | Cancel
```

- ISP Date segments for ANNUAL ISPs **cannot exceed 12 months** from the ISP Start Date (ie: annual segments are limited to 1 year).

```
ISP Dates Add

Validation Error! You must correct the following error(s) before proceeding:

ISP End Date has to be within 12 months of the ISP Start Date for Annual Service Type.

ISP Dates Add

<table>
<thead>
<tr>
<th>ISP Type</th>
<th>ISP Signed Date</th>
<th>ISP Start Date</th>
<th>ISP End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual</td>
<td>7/30/2017</td>
<td>8/3/2017</td>
<td>8/31/2018</td>
</tr>
</tbody>
</table>

Save  | Reset  | Cancel
```
• ISP Date segments cannot have dates that overlap another ISP date segment.

• ISP Date segments can be shorter than 1 year.

• Date gaps between different ISP Date segments is allowed.

For additional information & ODDS policy direction regarding entry and utilization of the ISP Date information, please see <transmittal or worker guide>.

How to enter ISP Date information in eXPRS:

1. Login to eXPRS. Users will need to be logged in as (Local Authority) for CDDPs,
or as the (Contractor) for Brokerages.

2. From the left-hand menu, click on **CLIENT ➔ VIEW CLIENT** to find the individual’s View Client profile page.

3. In the **View Client** page, enter the individual’s prime number in the **Client Prime** field & then click **FIND** to search.
4. From the results list shown below the search fields, click on the blue **LAST NAME** of the individual to open their profile record.

![Image showing a search results list with a blue link for the last name.]

5. With the individual’s profile page open, scroll down & expand the **Individual Support Plan (ISP) Dates** section in the middle of the page. Click **ADD** to add ISP Date segment information.

![Image showing the Individual Support Plan (ISP) Dates section with an 'Add' button highlighted.]
6. You will be taken to a new page called **ISP Dates Add** to enter the ISP date segment information. Add the data for the information requested.

- **ISP Type** = select the type of ISP for the segment from the dropdown.
  - **Initial** = the first ISP for the individual
  - **Annual** = subsequent annual ISPs for the individual

- **ISP Signed Date** = the date the ISP team signed the ISP
- **ISP Start Date** = the effective or start date of that ISP
- **ISP End Date** = the last date that ISP is effective

Click **SAVE** to save the ISP date segment data. You will be returned to the **View Client** page, and the ISP segment data entered should now appear in that section.
7. To add additional ISP date segments, click **ADD** or repeat steps #1 – 5 above. When entering a new segment that follows an **Initial** ISP segment, the system will auto-fill the ISP Type to **Annual** & pre-populate the **ISP Date Range**. These fields can be edited, as needed, before the segment is saved. **Please note the ISP date range limitations on page 1 of this guide.**

8. Over time, as the individual has additional ISPs, the ISP Dates section of their **View Client** profile page will show their ISP history.
   - The system default is to display ISP segment history back 3 years & forward 1 year from the current date.
   - If users wish to view more date segment history, they can edit the dates in the **Display Segments for Dates:** fields to view ISP Date segments for any date range desired.
9. To view the details of an ISP Date segment, click on Log at the far right.

10. To edit an ISP Date segment to change the *ISP End Date*, click on **EDIT**.

This will open that segment record to allow updates to the *ISP End Date*.

Click **SAVE** to save any changes made.
11. Click on **REMOVE** to remove an ISP segment that may have been entered in error.

The segment will then be removed from the ISP Section.