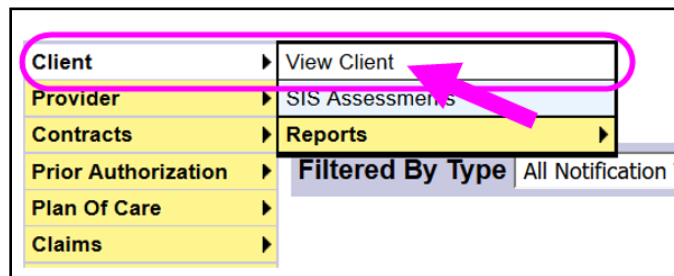


Adding an Individual Support Plan Date to a Person's Record

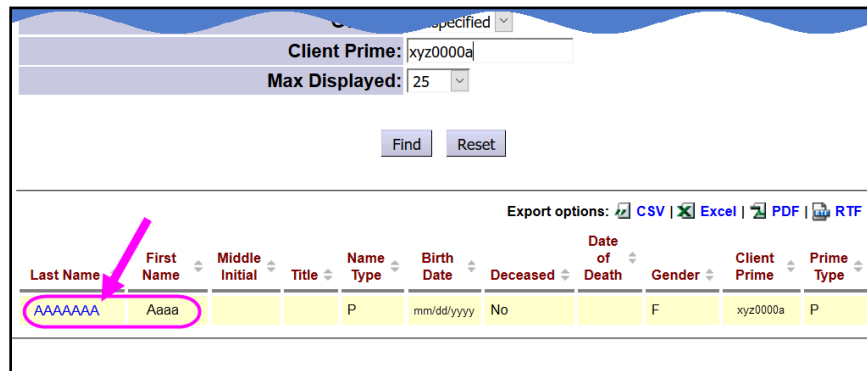
Users can enter a person's Individual Support Plan date information on the **View Client** page. At this time, the data entered is informational only.

How to Add the ISP Date

1. From the left-hand menu, Select **Client > View Client**.



2. Search for the individual and select their record from the results list



3. On the **Client** page, Select the **Individual Support Plan (ISP) Dates > Add** button.

Client

Legal Last Name:	AAAAAAA
Legal First Name:	Aaaa
Legal Middle Initial:	
Legal Title:	
Preferred Last Name:	AAAAAAA
Preferred First Name:	Aaaa
Preferred Middle Initial:	
Preferred Title:	
Birth Date:	mm/dd/yyyy
Deceased:	No
Date of Death:	
Gender:	F
Client Prime:	xyz0000a
Prime Type:	P

▶ Aliases
 ▶ DD Eligibility
 ▶ Level of Care
 ▼ Individual Support Plan (ISP) Dates
 Display Segments for Dates: Begin: 7/24/2015 End: 7/24/2019 Find
 Nothing found to display.
 Add
 ▶ Service Eligibility
 ▶ Aid Eligibility

4. On the **ISP Dates Add** page, enter the ISP date segment information.

ISP Dates Add

ISP Type	Initial	ISP Signed Date	
ISP Start Date	Select...	ISP End Date	7/31/2019

Save Initial Reset Cancel

- **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

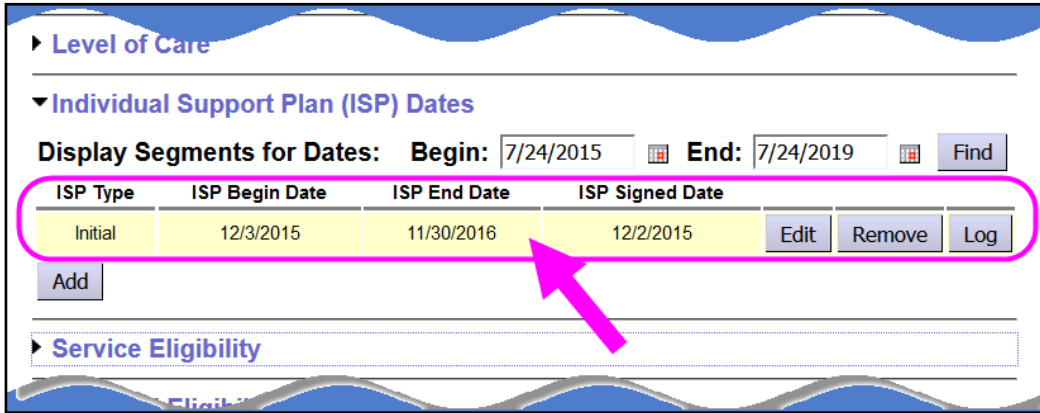
ISP Dates Add

ISP Type	Initial	ISP Signed Date	12/2/15
ISP Start Date	12/3/2015	ISP End Date	11/30/16

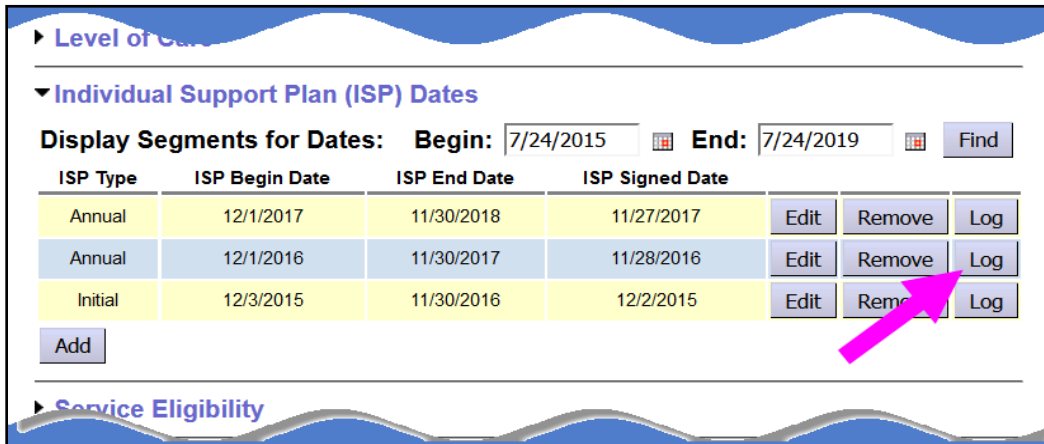
Save Reset Cancel

- **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

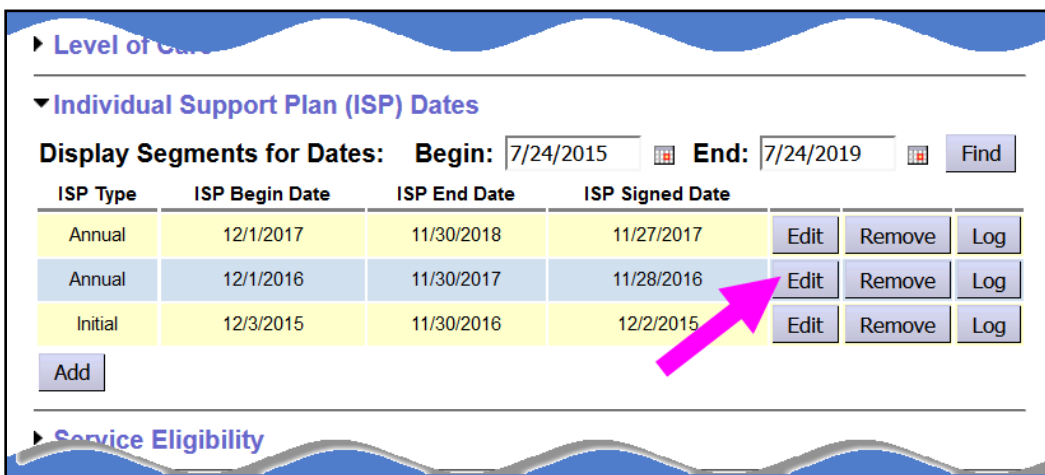
5. Click **Save**. On the **View Client** page, the ISP segment data now appears.



6. To view the details of an ISP Date segment, click on **Log** at the far right.



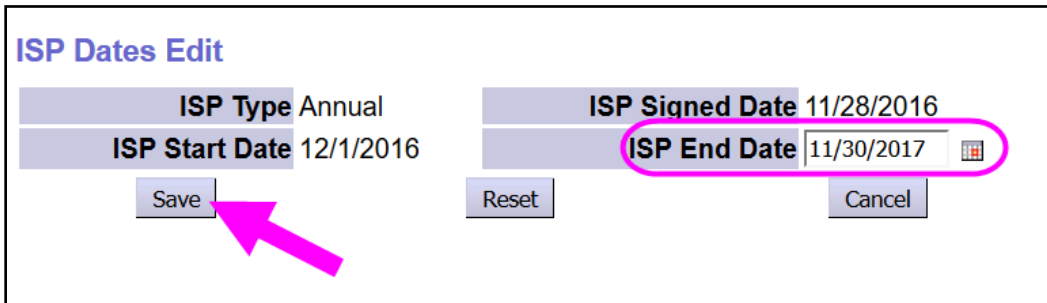
7. To edit an ISP Date segment to change the **ISP End Date**, click on **Edit**.



8. Make any modifications needed and select **Save**.

ISP Dates Edit

ISP Type	Annual	ISP Signed Date	11/28/2016
ISP Start Date	12/1/2016	ISP End Date	11/30/2017



9. Click on **Remove** to remove an ISP segment that may have been entered in error.

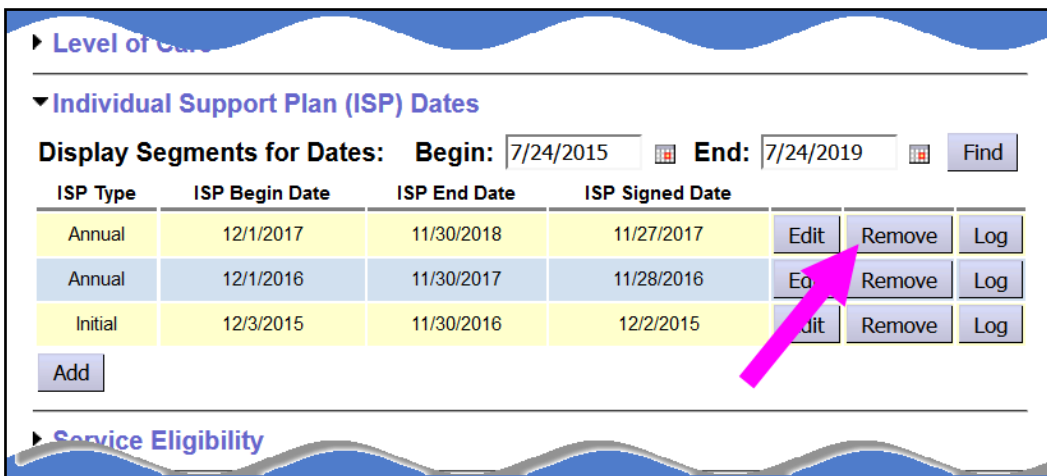
► **Level of Care**

▼ **Individual Support Plan (ISP) Dates**

Display Segments for Dates: **Begin:** 7/24/2015 **End:** 7/24/2019

ISP Type	ISP Begin Date	ISP End Date	ISP Signed Date			
Annual	12/1/2017	11/30/2018	11/27/2017	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>	<input type="button" value="Log"/>
Annual	12/1/2016	11/30/2017	11/28/2016	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>	<input type="button" value="Log"/>
Initial	12/3/2015	11/30/2016	12/2/2015	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>	<input type="button" value="Log"/>

► **Service Eligibility**



Appendix A: Details about the Individual Support Plan

An Initial Individual Support Plan can have a date range that is longer than 365 days. The **ISP End Date** can be the last day of the month in the following year. In the example below, plan started on 7/12/2016, so the end date can be the last day of the month the following year, 7/31/2017.

ISP Dates Add

ISP Type	Initial	ISP Signed Date	6/30/16
ISP Start Date	7/12/2016	ISP End Date	7/31/2017

Save Reset Cancel

Date segments for **Annual** plans cannot exceed 12 months from the Start Date.

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 Type	Annual	ISP Signed Date	7/30/2017
ISP Start Date	8/3/2017	ISP End Date	8/31/2018

Save Reset Cancel

ISP Date segments **cannot have dates that overlap** another ISP date segment.

ISP Dates Add

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

ISP Date Range Dates can't overlap with an active ISP Date Range record.

ISP Type	Annual	ISP Signed Date	11/24/2017
ISP Start Date	11/28/2017	ISP End Date	10/31/2018

Save Reset Cancel

ISP Date segments can be shorter than 1 year.

▼ Individual Support Plan (ISP) Dates

Display Segments for Dates: Begin: 7/25/2019 Find

Less than 1 year.

ISP Type	ISP Begin Date	ISP End Date	ISP Signed Date			
Annual	5/5/2017	3/31/2018	5/1/2017	Edit	Remove	Log

Add

Date gaps between different ISP Date segments is allowed.

▼ Individual Support Plan (ISP) Dates

Display Segments for Dates: Begin: Find

Date gap between ISP segments.

ISP Type	ISP Begin Date	ISP End Date	ISP Signed Date			
Annual	4/19/2018	3/31/2019	4/12/2018	Edit	Remove	Log
Annual	5/5/2017	3/31/2018	5/1/2017	Edit	Remove	Log

Add

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 Date segments for any date range desired.

DD Eng

▶ Level of Care

▼ Individual Support Plan (ISP) Dates

Display Segments for Dates: Begin: 7/24/2015 End: 7/24/2019 Find

ISP Type	ISP Begin Date	ISP End Date	ISP Signed Date			
Annual	12/1/2017	11/30/2018	11/27/2017	Edit	Remove	Log
Annual	12/1/2016	11/30/2017	11/28/2016	Edit	Remove	Log
Initial	12/3/2015	11/30/2016	12/2/2015	Edit	Remove	Log

Add

▶ Service Eligibility

▶ Medicaid Eligibility