**Creating an Initial Habilitation Plan**

**Note:** Create IPOPs and ISP Programs prior to completing this process.

**Note:** If there is a **NEW** admission to the program their initial habilitation plan **must** be dated for their start date. At their 30 day review you will implement this policy and use the first of the month start date (See Page 5)

**SEMP Note:** If an individual does not have ISP meetings, then the Service Plan meeting date will be the date the Job Coach meets with the individual and reviews the plan.

* Go to **“Dashboard”**
* **Click** on **“Individual”** (2nd tab on the left of screen)
* Scroll down to the ISP and Habilitation Plan section
* In the Habilitation Plan section **Click** **“New”**
* Select the **Program Name**
* Select the **Individual Name**

*-The Habilitation Plan Framework will now populate on the screen*

*SECTION 1: General Information*

* **Hab. Plan Date:** Enter the **Start Date** of the individual
* **End Date:** Leave blank
* **Type of Habilitation Service:** Select Habilitation Service that you are creating a plan for.
* **IRA Type:** **Residential Only:** All sites are **“Supervised IRA”** except the *Apartment Program* which is **“Supportive IRA”**
* **SEMP Service Type:** **SEMP Only:** Use the drop down to select appropriate service type
* **Service Plan Meeting Date:** Enter the date of the ISP meeting
* **Frequency of Service:**
	+ **Residential, Day Hab & Site Based Pre-Voc -** Daily (with the exception of the *Apartment Program* being Monthly)
	+ **FSS, SEMP, Pathways & Community Based Pre-Voc**- Hourly
	+ **Access-VR & OMH** -Monthly
* **Time Period of Service:**
	+ **Residential, Day Hab., FSS, Access-VR & OMH** - Ongoing
	+ **Site Based Pre-Voc , Community Based Pre-Voc** **&** **SEMP**- Ongoing as authorized
	+ **Pathways**- Time limited 12 month/278 hours/ whichever comes first
* **Assessments Reviewed:** Leave blank

*SECTION 2: Skill Acquisition & Retention*

* **Click “Add/Remove Valued Outcome(s)**
* **Click "Add more "**
* Enter valued outcome & repeat process by clicking **"Add more"** until all valued outcomes have been added
* **Click “Done”**
* Under 1st valued outcome listed; **Click "Add Staff Action(s) from ISP Program"**
* Select all ISP Programs to be captured under that valued outcome
* **Click “Done”**
	+ **Complete the above 3 steps for each Valued Outcome listed.**

*SECTION 3: Safeguards*

* **Residential, Day Hab., Site Based Pre-Voc & Community Based Pre-Voc -** Skip this section
* **FSS, SEMP & Pathways**- **Comments Section:** Enter any safeguards relevant to job site/ service provided
* **SEMP** Programs ***(This step is for after Approval ONLY!)***- **Click “Add File”, Click “Browse”** & select the individual sign off page
	+ Description: Type “Individual Sign off”
	+ **Click “Upload”**
* **FSS-** **Click “Add File”**, **Click “Browse”** & select the FSS Service Plan Information Form
	+ Description: Type “FSS Service Plan Information Form
	+ **Click “Upload”**

*SECTION 4: IPOP & Safeguard List*

* **FSS, SEMP, Pathways**- Skip this section
* **Residential**- **Click "Add/Remove IPOP & Safeguards Link"**
* Check the boxes corresponding with the **General IPOP link** & **Residential IPOP link**
* **Click “Done”**
* **Day Hab., Site Based Pre-Voc & Community Based Pre-Voc** - **Click "Add/Remove IPOP & Safeguards Link"**
* Check the boxes corresponding with the **General IPOP link** & **Day Program Safeguard link**
* **Click “Done”**

*SECTION 5: Comments*

* **Residential-**Type **"Anticipated next review date"** and enter date. Add the following statement: *“(Insert individual’s name) will typically use their leave days to spend time with family and/or friends and for vacation purposes.”*
* **Day Hab.** – Type **“Last Review Date”** and enter date (enter N/A if this does not apply) & **"Anticipated next review date"** and enter date.
* **FSS-** FSS will add the following statement: **“Location of services provided** (insert individual’s home address)”. Type **"Anticipated next review date"** and enter date.
* **SEMP-** Will enter the following information into this section: Effective date of service, Type of placement, Employment start date, Hourly wage, Last review date, Anticipated next review date, List all allowable services.
* **Pathways-** Will enter the following information into this section: Effective date of service, Last review date, Anticipated next review date, List all allowable services.
* **Site Based Pre-Voc & Community Based Pre-Voc -** Type **“Last Review Date”** and enter date (enter N/A if this does not apply) & **"Anticipated next review date"** and enter date. \*\*For **Site Based Pre-Voc** insert in the following statement **“This plan is for Site Based Pre-voc”**
* **Click “Save”**- If not complete or if you’d like the opportunity to review later- prior to approving.
* **Click “Approve”**- Once you have reviewed the plan in its entirety and you are satisfied with its content.
* **For SEMP & Pathways**—Click “**Submit**” when you are ready for your plan to be reviewed and approved.

**Making a Minor Change to the Habilitation Plan between ISP Meetings**

NOTE: ***Do not*** remove ISP Programs from the Habilitation Plan between ISP Meetings

**Example:** If you are discontinuing a goal and starting another under the same Valued Outcome.

* Go to **“Dashboard”**
* **Click** on **“Individual”** (2nd tab on the left of screen)
* Scroll down to the ISP and Habilitation Plan section
* In the Habilitation Plan section **Click “Search”**
* Type the **individual’s name**
* **Click “Search”**
* Select the Habilitation Plan you wish to update
* **Click** on the blue hyperlink **“Click Here”** at top of page to Show the Dynamic Document
* Make the necessary change *(addition of ISP Program(s))*
* Scroll Down to **Update Summary Section**
* **Summary Type:** Select **“General Summary”**
	+ *NOTE: Do NOT use Six Month Review or Significant Change*
* **Summary:** Identify the change being made and the reason for the change
* **Click “Update”**

**Creating a New Habilitation Plan Following an ISP Meeting**

* Go to **“Dashboard”**
* **Click** on **“Individual”** (2nd tab on the left of screen)
* Scroll down to the ISP and Habilitation Plan section
* In the Habilitation Plan section **Click “Search”**
* Type the **individual’s name**
* **Click “Search”**
* Select the Habilitation Plan you wish to update
* **Click** on the blue hyperlink **“Click Here”** at top of page to Show the Dynamic Document
* **End Date:** Defined as the last day of the month that the ISP meeting was held
* Scroll Down to **Update Summary Section**
* **Summary Type:** Select **“General Summary”**
	+ *NOTE: Do NOT use Six Month Review or Significant Change*
* **Summary:** Identify that the end date was added following the individual’s ISP Meeting.
* **Click “Update”**

**THEN:**

* Go to **“Dashboard”**
* **Click** on **“Individual”** (2nd tab on the left of screen)
* Scroll down to the ISP and Habilitation Plan section
* In the Habilitation Plan section **Click “Search”**
* Type the **individual’s name**
* **Click “Search”**
* Select the Habilitation Plan you wish to update
* **Click** on the blue hyperlink **“Click Here”** at top of page to Show the Dynamic Document
* Scroll to the bottom of the page and **Click “Copy”**
* **Click “OK”**

*-The Habilitation Plan Framework will now populate on the screen with information from the previous Habilitation Plan.-*

*SECTION 1: General Information*

* **Hab. Plan Date:** Enter the 1st of the following month
* **End Date:** Leave blank
* **Type of Habilitation Service:** Select Habilitation Service that you are creating a plan for.
* **IRA Type:** **Residential Only:** All sites are **“Supervised IRA”** except the *Apartment Program* which is **“Supportive IRA”**
* **SEMP Service Type:** **SEMP Only:** Use the drop down to select appropriate service type
* **Service Plan Meeting Date:** Enter the date of the ISP meeting
* **Frequency of Service:**
	+ **Residential, Day Hab. & Site Based Pre-Voc -** Daily (with the exception of the *Apartment Program* being Monthly)
	+ **FSS, SEMP, Pathways & Community Based Pre-Voc**- Hourly
	+ **Access-VR & OMH** -Monthly
* **Time Period of Service:**
	+ **Residential, Day Hab., FSS, Access-VR & OMH** - Ongoing
	+ **SEMP, Site Based Pre-Voc & Community Based Pre-Voc** - Ongoing as authorized
	+ **Pathways**- Time limited 12 month/278 hours/ whichever comes first
* **Assessments Reviewed:** Leave blank

*SECTION 2: Skill Acquisition & Retention*

* **Click “Add/Remove Valued Outcome(s)**
* **Uncheck** any Valued Outcomes that will not be carrying over to the new Habilitation Plan.
* **Click "Add more"** if new Valued Outcome(s) need to be added to the new Habilitation Plan.
	+ Enter valued outcome & repeat process by clicking **"Add more"** until all new valued outcomes have been added
* **Click “Done”**
* Under each valued outcome listed; **Click "Add Staff Action(s) from ISP Program"**
* **Uncheck** any ISP Programs that will not be carrying over to the new Habilitation Plan.
* **Check** all ISP Programs to be captured under that valued outcome
* **Click “Done”**

*SECTION 3: Safeguards*

* **Residential ,Day Hab., Site Based Pre-Voc & Community Based Pre-Voc -** Skip this section
* **FSS, SEMP & Pathways**- **Comments Section:** Review all safeguards relevant to job site/ service provided making revisions if necessary
* **SEMP** Programs ***(This step is for after Approval ONLY!)***- **Click “Remove”** next to the old attached file
	+ **Click “Add File”, Click “Browse”** & select the individual sign off page
	+ Description: Type “Individual Sign off”
	+ **Click “Upload”**
* **FSS-** Ensure the FSS Service Plan Information Form is uploaded.

*SECTION 4: IPOP & Safeguard List*

* **FSS, SEMP, Pathways**- Skip this section
* **Residential**- Ensure that the General IPOP & Residential IPOP are linked.
* **Day Hab., Site Based Pre-Voc & Community Based Pre-Voc** - Ensure that the General IPOP & Day Program Safeguard are linked.

*SECTION 5: Comments*

* **Residential-**Type **“Last Habilitation Plan Review Date”** and enter date, **"Anticipated next review date"** and enter date. Add the following statement: *“(Insert individual’s name) will typically use their leave days to spend time with family and/or friends and for vacation purposes.”*  **Complete the Six Month Summary** to include the following; progression/regression of all ISP Programs specifying individual specific details in relation to the ISP Programs. Highlight any ISP Programs that are being discontinued (including discontinuation date) as well as any newly created ISP Programs to begin with the implementation of the new Hab. Plan.
* **Day Hab.** – Type **“Last Habilitation Plan Review Date”** and enter date, **"Anticipated next review date"** and enter date. **Complete the Six Month Summary** to include the following; progression/regression of all ISP Programs specifying individual specific details in relation to the ISP Programs. Highlight any ISP Programs that are being discontinued (including discontinuation date) as well as any newly created ISP Programs to begin with the implementation of the new Hab. Plan.
* **Site Based Pre-Voc & Community Based Pre-Voc -** Type **“Last Habilitation Plan Review Date”** and enter date, **"Anticipated next review date"** and enter date. \*\*For **Site Based Pre-Voc** insert in the following statement **“This plan is for Site Based Pre-voc” Complete the Six Month Summary** (Following instructions above)
* **FSS-** FSS will add the following statement: **“Location of services provided** (insert individual’s home address)”. Type **“Last Habilitation Plan Review Date”** and enter date, Type **"Anticipated next review date"** and enter date. Type in the **Update Summary** that will include progression/regression and important details.
* **SEMP-** Will enter the following information into this section: Effective date of service, Type of placement, Employment start date, Hourly wage, Last review date, Anticipated next review date, List all allowable services.
* **Pathways-** Will enter the following information into this section: Effective date of service, Last review date, Anticipated next review date, List all allowable services.
* **Click “Save”**- If not complete or if you’d like the opportunity to review later- prior to approving.
* **Click “Approve”**- Once you have reviewed the plan in its entirety and you are satisfied with its content.
* **For SEMP & Pathways**—Click “**Submit**” when you are ready for your plan to be reviewed and approved.

**Discontinuing an old Habilitation Plan**

Note: Only Discontinue an old plan once a new plan has been created and is approved and you are done utilizing the old plan.

* Go to **“Dashboard”**
* **Click** on **“Individual”** (2nd tab on the left of screen)
* Scroll down to the ISP and Habilitation Plan section
* In the Habilitation Plan section **Click “Search”**
* Type the **individual’s name**
* **Click “Search”**
* Select the Habilitation Plan you wish to discontinue
* **Click** on the blue hyperlink **“Click Here”** at top of page to Show the Dynamic Document
* Scroll down to the **“Update Summary”** section
* Mark the **“General”** bubble
* In the comment box enter “ISP occurred on (date of ISP), New Hab Plan created.”
* **Click “Discontinue”**
* A box will appear letting you know to check your end date before discontinuing. Once you make sure everything is okay, **Click “Okay”** in the text box.