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

- 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/ *(Less than 1 year.)* 2019 Find

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: Beg *(Date gap between ISP segments.)* Find

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

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:

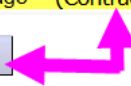1. Login to eXPRS. Users will need to be logged in as (Local Authority) for CDDPs,

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

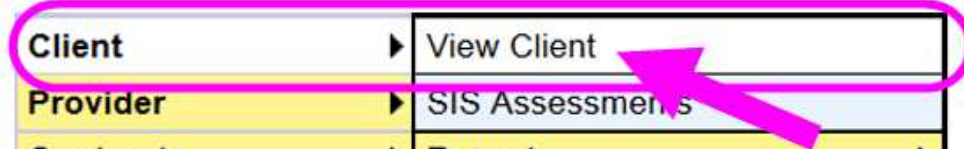|	
Login Name:	userID
Password:	••••••••
Organization/Program Area:	County (Local Authority) ⌄

Forgot your password?   Submit

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.

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.

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.*

ISP Dates Add

ISP Type	Annual ⌄	**ISP Signed Date**	11/28/16
ISP Start Date	12/1/2016	**ISP End Date**	11/30/2017

Save   Reset   Cancel

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.

▶ 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**

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.