

CREATE NEW ISP AGENDA

1. To create a New ISP Agenda, click on the **New** link in the **ISP Agenda** section in the Individual tab of your Dashboard, then select the Individual by clicking on the **Select** link on the same row as Individual's name in the **Individual List** page.

To Do	Individual Support Plan	
Individual	Personal Focus Worksheet	New Search
Health	ISP Agenda	New Search
Agency	Individual Support Plan	New Acknowledge Search

2. You will see the full ISP Agenda with the Name and/or ID of the Individual, Status of the Form, and a Unique Form ID. Then you can select **ISP Meeting Date**, **Review Period Start Date**, and the **Meeting Type**.

Individual List

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Filter:

Showing 1 to 18 of 18 entries

Last Name	First Name	Individual ID
Sally	Smith	

Form Info

Individual Name: Lorrie Adams
 Status: New
 Form ID: AGN-BDMT-CDD4K5CF5MULT
[Show Form Activity](#)

ISP Meeting Date (MM/dd/yyyy)

Review Period Start Date (MM/dd/yyyy)

Meeting Type
Users can select the Meeting Type from the options available in this menu

--Select--

--Select--

Annual

Change of Services

General

Intake

Quarterly Review

Six Monthly Review

Transition

3. By clicking on the **Add** button in the **Individualized Items** section, you can edit the Individualized Agenda Topic. You can add Discussion topics in the text field to guide your discourse. Agenda Topics can be added from an Individual's PFW as well.

Individualized Items

Add

Edit Individualized Agenda Topic

Discussion Topics*

See listed below. Other discussion topics are:

- Her Safety in the Community

About 2917 characters left

PFW Agenda Topics

[Show All PFW Agenda](#)

- Question 1: Relationship with her parents.
- Question 3: Her dislike of Painting nowadays.
- Question 6: Her capacity to follow instructions
- Question 13: As she is soon to be involved in Community Based Services, it would be helpful if she can attend some training sessions.

Cancel Done

4. To discuss desired outcomes, you can **Add Action Plans from ISP as Outcome** or **Add Other Outcome** in the **Progress Towards Outcome** section of ISP Agenda.

Progress towards Outcome

Add Action Plans from ISP as Outcome Add Other Outcome

Individual Service Plan List

Form ID s	ISP Start Date	ISP End Date	Status	Action
0ISP-TICT-B7920BDCB4MEX	05/14/2013	06/28/2013	Approved	Select

Click here to link ISP Programs

Progress towards Outcome

Description*

Effectively working in the Community

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Periodic Progress Maintaining

Linked ISP Report Link ISP Report

Cancel Done

- After adding Action Plans from ISP and/or Other Outcomes, **Progress Towards Outcome** section shows Desired Outcomes, Periodic Progress, and Linked ISP Reports, if any.

Progress towards Outcome			
Desired Outcome	Periodic Progress	Linked ISP Report	Action
Will be discussed <i>(Linked to Action Plan 1)</i> <i>Linked to ISP Program: Sketching</i>	Completed		Edit
Effectively working in the Community	Maintaining		Edit

- You can select additional questions, or **Required Items**, to your ISP Agenda to discuss during the ISP Meeting.

Required Items	
<input type="button" value="Add/Remove"/>	

Required Items

Select All

- Does this person want to self-administer medications?
- Does this person need a Health Care Representative?
- Are there any unfinished tasks from the RTR or Support Documents that are not yet completed?
- Are there any Support Documents that interfere with what's most important TO this person?
- Are there any Support Documents that interfere with what's most important to this person?
- Does any team member have an objection to any Support Document listed on the ISP Risks page?
- Does this person need financial planning or benefits counseling in order to maximize resources?
- Is this person at risk of exceeding financial resource limits?
- Are there any variances requiring team approval?
- Are the hours of Employment/ATE less than the standard unit of service?
- Are the hours of school less than entitled?

- After you have filled out all the sections of the ISP Agenda, you can either **Create**, **Submit**, or **Approve**, depending on your requirement.

<input type="button" value="Back"/> <input type="button" value="Cancel"/>	<input type="button" value="Create"/> <input type="button" value="Submit"/> <input type="button" value="Approve"/>
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Recording Meeting Minutes

- When the ISP meeting is in progress, you can record minutes on the ISP Agenda by using the 'Record Meeting Minutes' feature. Click on the **Search** link in the **ISP Agenda** section in the Individual tab of your Dashboard.

To Do	Individual Support Plan	
Individual	Personal Focus Worksheet	New Search
Health	ISP Agenda	New Search
Agency	Individual Support Plan	New Acknowledge Search

- You will arrive to the **ISP Agenda List** page. Click on the particular form for which you would like to Record Meeting Minutes.

Search ISP Agenda

Status: Approved

6 items found, displaying all

Form ID	Individual Name	Meeting Date	Start Date	End Date	Meeting Minutes Recorded?
AGN-TICT-DAC4SYSKZGD8Q	Active, Mary	05/01/2015	06/10/2015	08/01/2015	Yes
AGN-TICT-DAB4U74XW4M6S	Active, Mary	08/08/2015	08/04/2015	08/14/2015	No
AGN-TICT-D6N556FZM496E	Lee, Alyssa	04/01/2015	04/02/2015	04/02/2015	Yes
AGN-TICT-CDC4U9NZ7ZN6A	Johnson, Elijah	01/26/2015	01/27/2015	11/15/2015	Yes
AGN-TICT-C9K4QV4UV7J7W	Johnson, Isabella	07/01/2013	07/02/2013	01/02/2014	No
AGN-TICT-B9V2E3F3M8VB	Wright, Andrew	07/01/2013	07/02/2013	07/04/2013	Yes

[Export To Excel](#)
[New Search](#)

- On the ISP Agenda, scroll down to the bottom of the page and click on the 'Record ISP Meeting Minutes' button.

Back Cancel Copy Edit Discontinue Record ISP Meeting Minutes

- A warning message will display notifying that the **ISP Agenda can no longer be edited** once the Meeting Minutes are recorded. Click **OK** to proceed.
- Then you can add comments for 'Individualized Items' and upload external attachments to the ISP Agenda.



Individualized Items

Title	Action Taken	Comments
1. May obtaining and keeping community-based job <i>Linked PFW Agenda: Question 1</i>	--Select-- <input type="button" value="v"/>	The meeting was successful... <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; background-color: #ffe6e6;"> Add Comments to each Individualized Items here </div>

Progress towards Outcome

Required Items

External Attachment

Name	Description	File Size	Action
tasks.txt		0 bytes	<input type="button" value="Remove"/>

Total size of all the files attached cannot be more than 10 MB.

Upload New File No file chosen

Description

You can attach files here. Attached files can be removed from the list of attachments

6. Once you are done Recording Meeting Minutes, click on the **Save** button.

Display PDF

Once you are done, click the 'Save' button