Summary of changes to the Oregon ISP forms

*This document summarizes important changes in content and functionality introduced by the new Adobe PDF version of the Oregon ISP forms.*

*Other helpful resources:*

* *Access the new forms at* [*www.OregonISP.org/forms*](http://www.OregonISP.org/forms) *on or after 5/1/2017.*
* *Learn more about Adobe PDF software at* [*www.OregonISP.org/forms/adobe*](http://www.OregonISP.org/forms/adobe)*.*

# Person Centered Information

**Word and PDF versions:** The Person Centered Information is available in both Word and PDF versions.

**Updates throughout:** All of the prompt text and supporting questions have been revised and refined throughout the document.

**Person’s name and preferred pronoun:** On the PDF versions of this form, the person’s name and preferred pronoun will appear throughout the document.

**Youth version:** The Person Centered information form is now offered in a version tailored to Youth. Supporting questions and prompt text have been tailored to youth, including questions geared toward very young children, early adolescents, and transition-age youth. The youth version also includes a field to include the young person’s date of birth.

**Family and/or Legal Guardian perspective:** A new box has been added to each topic to record the perspective of the youth’s family and/or guardian. On the PDF versions of the Adult form, the family and/or legal guardian’s perspective may be toggled on or off, based on the person’s preference about who is involved in planning.

**Relationship map:** The relationship map has been simplified.

**Characteristics of people who support the person best:** This topic now has a place to record the person’s perspective as well as additional input, if needed.

**Contributors:** The list of contributors is now separated to clearly indicate who contributed to the person’s perspective, who contributed to the family and/or guardian’s perspective (if any), and who contributed to the additional input.

# Risk Identification Tool

**SC/PA follow-up:** The response option of ‘Possible’ has been revised to ‘SC/PA follow-up’ to indicate that the services coordinator or personal agent will be following up on this potential risk. Guidance for using this checkbox remains consistent with the previous instructions for checking ‘Possible.’ Consider marking this box if evidence of the risk being present is unavailable, inconclusive, or the person declines to discuss the issue. Providers who feel a risk may be present but are unsure should always discuss the issue with the person’s Services Coordinator or Personal Agent.

**Collapsible sections:** In the PDF versions of this document, entire sections (e.g. Health/Medical, Safety, Financial, Mental Health, or Behavior) may be collapsed if there are no risks present in that section. The sections may be easily restored later, if needed.

**Some built-in “logic” for the first five risks:** If any of the risk factors outside of the “evaluation box” are marked as present, the risk is marked ‘Yes’ automatically.

# ISP Meeting Agenda

There are no significant changes to this document. It is considered an optional tool to support the planning process.

# Individual Support Plan

***The new PDF version will be required for use by SC/PAs. Timelines for required use will be announced by ODDS, allowing time for CDDPs and Brokerages to obtain the necessary software. It may be used as soon as you have Adobe Reader DC or Adobe Acrobat DC software.*** *Learn more about obtaining the right software at* [*www.OregonISP.org/forms/adobe*](http://www.OregonISP.org/forms/adobe)*.*

**No more need to use the 2016 ISP Attachment:** Once you implement the new PDF version of the ISP, the ISP Attachment that was provided in 2016 will no longer be necessary.

**On-screen help text:** There is additional help text provided for the user on-screen when completing the form. Instructions can be found in purple text on the screen or in the form of a little purple icon 🛈. The help text can be toggled on or off at the top of the PDF document.

**One-page profile:** If the SC/PA is supporting the person to develop multiple one-page profiles, you may click a button at the bottom of the form to add additional profiles. If the person, family or provider(s) have developed separate profiles and the included profile is not needed, check the provided box to remove the blank profile from the document and be sure to file the profiles on top of the completed ISP.

**Desired outcomes:** The desired outcomes section has been reformatted based on feedback from the field. You can easily add additional outcomes, add more key steps/goals under each outcome, and reorder them if needed.

**Career development plan (CDP):** The entire CDP has been restructured to guide the user through required content. Start by indicating whether the person is a transition-age youth, a working age adult, or someone for whom a CDP is not required (definition provided). Then necessary sections of the document appear. Desired Employment Outcomes or the Decision Not to Explore Employment (DNE) will appear as needed, depending on choices made.

**Chosen case management services:** Fields have been modified throughout this section.

**Additional case management services:** For children with primary case management provided through the Children’s Intensive In-home Services (CIIS) or Children’s Residential services, there is an option to add additional case management services. This provides a clear way to communicate the roles and responsibilities that a local CDDP services coordinator has with the child and family. ODDS case management staff are encouraged to communicate directly with the CDDP SC during the development of the plan so that this section can be completed in partnership.

**Informal supports:** The term ‘natural supports’ was renamed to informal supports based on perspectives shared by families and advocates. SC/PAs are reminded to describe any informal supports or community resources that are used to meet a need that was identified through the required needs assessment.

**Easy to remove unneeded sections:** Any type of service that the person does not use may be easily removed from the plan. Later, if the person decides to access that service, it can be easily restored.

**Easier to find available services:** Start by selecting the chosen service element, then a list of available services in that setting will open up.

**Authorizing the same service for a different number of hours across different dates:** It may be useful to authorize a different number of hours on different date ranges for the same service (e.g. when a different number of hours are authorized during the summer for a child in school.)

**Family Supports Services:** This service has been added to the Oregon ISP. It may be used instead of the current Family Support Plan, if desired.

**K plan residential services:** There is a new choice to indicate if a supported living setting is provider-owned or operated. When choosing to live in a residential setting, the person has the right to choose between a private bedroom or a shared bedroom. There is now a place to record this choice.

**Risk management plan:** There are additional questions asked about safeguarding interventions and safeguarding equipment. If the person lives in a provider-owned or operated setting, additional questions appear asking about individually-based limitations (IBLs) on HCBS residential setting protections. On-screen help text provides guidance to SC/PAs, including definitions and expectations from ODDS.

**Differences:** If there are no known differences between the contents of the plan and what the person or any other ISP contributor wants, there are checkboxes available to indicate this and collapse these sections.

**Legal relationships:** If there are no legal relationships in the person’s life, there is a checkbox available to indicate this and collapse this section. Revised options in this section include:

* Parent(s) of minor child who retain parental rights
* Legal guardian
* Designated representative for service planning
* Common Law Employer (formerly Employer of Record)
* Health Care Representative
* Representative Payee
* Conservator
* Power of Attorney
* Any other legal documents on file limiting personal decision making

**Acknowledgments:** This section has been extensively revised. Services coordinators and personal agents are encouraged to review this section carefully, including the on-screen instruction text. Questions now include the following:

* Describe the supports the person needs to understand their rights or to understand this plan, if any.
* Did the SC/PA offer options about available case management providers?
* Describe the options offered about settings where the person can live and receive supports. This must include non-disability specific options. *(Further instructions and examples are provided)*
* Describe the options offered about settings where the person can receive employment or day services. This must include non-disability specific, community-based options. *(Further instructions and examples are provided)*
* Did the SC/PA review the services available to the person?
* Does the ISP reflect the services the person chooses and the outcomes the person wants to work toward?
* Did the SC/PA offer options about available providers to deliver chosen services?
* If the person’s family provides supports, does this ISP reflect what is needed for the family to effectively provide supports?
* Has the person been provided information about the planning process and how to request changes and updates to the ISP?
* Was the person given the opportunity to choose the location of their ISP meeting?
* Was the person given the opportunity to choose who participated in their ISP development?
* Did the person receive notification of their DHS rights?
* Does this ISP reflect Independence, Integration and Productivity?

**Agreements:** The plan now indicates that, for providers, “a signed Provider Service Agreement” may be used instead of a signature on this page. Rows can be added or removed as needed. An alternate format statement has been added to the bottom of the plan.

**File attachments:** On the Professional PDF version, SC/PAs may attach other documents to this file, creating a bundle which can be saved together in one location. This may be helpful for storing all related ISP documents, such as copies of Person Centered Information received from others, Risk Identification Tool, an agenda if used, and even a copy of the results of the needs assessment. This file attachment feature is optional and is not required to be used. CDDPs and brokerages are encouraged to review the feature and decide how if its use may be helpful within their documentation and record-keeping practices.

# Change Form

There are no significant changes to this document or to how it is to be used.