

Importing data from a previous version of the ISP

Before you import data...



The SC/PA who will be writing the new plan needs a licensed copy of Adobe Acrobat DC. Importing can only be done into the Pro version of the ISP. After data has been imported into the Pro form, the document can only be edited and saved using Adobe Acrobat DC.

What are the steps to import data?

1. Open the previous year's ISP and click the "Export" icon at the top of the first page.
2. Save the .xml data file on your computer in a place you can easily find it.
3. Open a blank, new, "Pro" version of the ISP form. (*Download from OregonISP.org.*)
4. Click the "Import" icon at the top of the first page.
5. Navigate to the folder where you saved the .xml data file for last year's plan and click OK.
6. Carefully review every page of the ISP and follow the tips noted below.

For detailed export/import instructions, read FAQ #17 published here:

<https://apps.state.or.us/Forms/Served/se4118f.docx>

Tips when importing

The ISP form has sections of content that hide or reveal based on other selections made. In most cases, the import process reveals all the right sections of content. However, in some predictable places, data imports into the plan but it is hidden and needs to be revealed by the user.

Double-check the following sections after import is complete:

Desired employment outcomes

- If you previously selected 'Employment services' as a way to support a desired employment outcome, re-select 'Employment services.' This will make the employment services drop-down reappear on that desired outcome page.

Chosen Services

- If a service code line is missing, re-select the 'Service element' from the drop-down. You will then see the hidden service code.

Legal relationships

- Names may be incomplete or missing. Re-select each relationship type and make sure the right name and information appears.

Acknowledgements

- Notes may not import. You will need to review them for accuracy.