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>> Good morning ladies and gentlemen, we are so glad you're with us. Thank you so much for joining us for this -- this Webinar broadcast and introduction to the new ISP forms.

This is Alan Lytle from OTAC. I'm joined today by my colleague, Danelle are you there.

>> I am, good morning everyone, thank you for joining us.

And also, I'm joined today by Marilee Bell from the office of developmental services hi Marilee.

>> Are you with us Marilee?

>> Good morning, sorry about that [chuckling]. Hello everyone.

>> Good morning, we are glad you are with us as well. Also with us is Jeni from DHS -- OHA publications team.

>> Good morning.

>> Jeni has been working with us in a large part of the brains behind the development of the new PDF forms we will be taking a lot at throughout the conversation today. Thank you so much for joining us Jeni.

And to get started, we wanted to invite everybody to locate the go to Webinar control panel that's on your screen. Locate that and important thing on that control panel will be a questions box. We invite your questions throughout the Webinar today. We may be able to respond to many of your questions online, live today. That's our hope. However there may be other questions we don't have time to get to today. We look forward to really seeing an updated FAQ document after this Webinar to address any remaining questions that may -- that we might not be able to get to today.

We wanted to take a quick moment who see who is here. Who is able to join us today. So I'm going to launch a quick poll. Many of you joined us in a Webinar before. So a little poll is now on your screen. Go ahead and click on the screen to indicate when you provide or receive services in an in-home setting or you provide residential services. You provide residential care in a foster care setting. Or you provide employment services or day supports.

And final option is case management folks.

And we will also include in that case management section any state staff who may be present in joining us on the Webinar today. Go ahead and check the box that most closely matches your role and your interaction with ISP process and we appreciate everybody whose taking the opportunity to join us. You are see a number of folks have responded. Looks like 88% of the 325 people with us live have responded to this poll. So let's take a quick look at to the results.

38% case management and the 22% employment services and day support and in provide residential and foster care. Thank you all for joining us. I hope there's something in here for all of you. And we do look forward to hearing your feedback at the end of this Webinar.

Okay.

Next up.

Well, why are we here today? And why have the ISP form been updated? Well, many of you by this point have heard about home and community based setting requirements or HCBS. The new HCBS requirements have led us as a state to think about how we can make sure that we are affording everyone who accesses services the rights that they are entitled to. And make sure that everyone is living in a situation that works best for them. And that they are free to access the community in a way that works for them.

So, there are some new expectations built into the new ISP form related to HCBS requirements that we will be going through in more detail.

The new forms also give some improved documentation of choices that will offered to the person. And there are some other improvements throughout the documents, some improvements in how the documents flow, how it feels to actually complete the document, there's better guidance through some of the areas such as the career development plan and acknowledgments of the ISP to name a few.

And I thought Marilee would have additional comments.

>> Thanks Alan. When we went to this notion of one ISP going from 11 different ISPs to 1, we knew there was going to be some quirks along the way. And so, as a team and as a community we agreed that after rolling out the first year we would take time to see what was working and what was not working s and adapt where we could to make modifications to the ISP and supporting forms. To better reflect what you guys were experiences out there in the field. So it's with a lot of gratitude you gave us feedback. And part of impetus for why we took another stab at updating forms.

>> Thank you Marilee. What is being updated now? We have new versions of the following forms that are all scheduled for release on this coming Monday, May 1st. You guys are getting an advanced

look. New versions of the person centered information. The risk identification tool, that options ISP meeting agenda as well as of course the individual support plan itself. And there's also an updated version of the change form as well.

So all of these 5, kind of core forms of the ISP process are being updated and provided now in PDF format.

Let's talk timelines.

One of the things I'm most excited about recent developments and recent announcement from ODS is all forms are provided for optional use now.

So this gives everyone a chance to acquire the necessary software to use the new forms. Figure out how they work and to begin using them as soon as your able to access the correct software.

If there are challenges in getting the right software, share that feedback back. And what you will see as you work through, you can continue to use the existing documents. Until eventually ODDS will announce a date by which all new and renewing plans must use the new versions of the forms. So if at that point it would be as plans come due that new documents would be prepared using the new materials.

So what are we providing right now? New PDF forms. There's new PDF versions of the 5 forms I just mentioned. And those PDF forms are going to be provided in two different versions. There's a reader version that you will hear us talk about throughout the day. This is intended for everyone. It's available for everyone. It requires free software in order to use. Which we will cover. There's also a pro version. This is a special enhanced version, really intended primarily for case management staff and anyone that has a licensed copy of Adobe act bat DC. The case management entities like CDC asks brokerages have a ability to request licensed copies of Adobe version so they can use the pro version.

There's two key pro versions that are handy in the future especially. But for right now anyone can use the reader version and once you're into the reader version, we will cover some benefits of being in the new PDF format.

We also wanted to share that we will continue to offer the person centered information document in both the new PDF format as well as the Microsoft Word format. What we learned through a recent pilot of these forms with a large group of folks. We had around 50 folks that tested and tried or reviewed and shared feedback on these documents. And one key piece of feedback we heard about, the person centered information in particular, there's some folks in different parts of the state who really love to embed rich, rich content into the person centered information. Things like photos or even building a table into the sections of the person centered information. We saw examples of people in the communications person centered information center that embedded a person communication chart saying this is how the person communicates and what we think this means.

And so if you wants to be able to use even more advanced features like embedding photos throughout the person centered information and tables in the document the Microsoft Word he version might be best for you. And both versions will be considered acceptable and open for use.

So why did ODDS make this move to the PDF format?

There are a couple of benefits. And I'd like to invite Jeni from publications and design specialist talk about why it makes sense to move to PDF form now.

>> I would love to. So as Alan mentioned this is a PDF format will work with free software which means it's available to everyone. Much more accessible since not everyone has Word or can afford to have Word. That's a great plus right there. So with the great accessibility this means the PDF format lives ADA compliant with help desk and screen reader support and it object service the 14 point font size for ADA requirement.

For the added services streamlining the development of the plan there's really great options. Personalized content you can add a person's name and pro you nouns through the entire form personally so every sentence is catered to that person. The purple help text that we are familiar with in Word but you can show or hide that text in a click of a button to ever instead of going through the options to height the options as Word had. And you can hover over I shaped I cons to see hover text for particular moments that need particular detail and guidance.

There's also a new level of guided activity. For instance sections knots applicable can be collapsed or hidden or deleted based on information that the user enters. And the user can also be guided by pop up boxes that explains when something doesn't apply or collapse when it doesn't apply.

This will help user avoid entering information in areas that are not accessible. And this will also minimize the form length so you don't have to print unnecessary sections that take up extra space.

There's also easy table adjustment. You can easily add or remove rows or sections with the click on of a plus or minus button and you can move rows into the order you want. And there's reset button that clears and resets the form with one click. And there's still spell checking and rich text format availability.

As far as pro features go, those are only available as Alan mentioned in the Adobe act bat DC. Not the reader version but the licensed version. That's data import and export and data entered into the current versions of the form can be exported and imported into resanitier versions of the form which is relieving massive amounts of cut asking pasting. And data is transferable between different format types like sending data from the risk section in the form so you don't have to enter them twice. That's not available yet but something on the radar as something we are looking at developing.

And file attachments that allows us to attach different files of any type of the ISP and allows the capacity for a submit button in the future so that if ODDS develops case management database of some kind, an external database we will have a submit button that uploads the data into the database.

So with the exception of spell check and rich text formatting almost none of the are formats are possible in the Word form so these are really great improvements that we are really pleased to be bringing to you.

>> Thank you Jeni for summarizing all of the points is and we will be demonstrating each of the features and highlighting those as we walk through the documents today.

So, an important first step in accessing and using these new PDF documents is to obtain the free software Adobe reader DC.

And I want to just pause and really emphasize the importance of getting the correct software here. I have to tell you, when I first started, when we first walked down this path of PDF for the new ISP forms, I thought I already got a couple of different PDF readers on my computer no problem.

But when I tried opening the forms in other PDF readers I found some odd things happen. For starters, for most PDF readers you actually get a little warning message actually you're in the wrong version you have to grab a different version. It is possible you might open it in a different PDF reader and the form might look like it's open and it's going the look a little wacky. In one of my PDF readers I found con at any time was falling off the page and didn't look right.

So a really important step is to make sure you're installing Adobe reader DC. It's software available a at this web link at Oregon ISP.org and all of the content is also posted at Oregon ISP.org the entirely slide show will be posted at Oregon ISP.org. And everyone can get the software Adobe reader DC. And the counties can get licensed copies of Adobe Acrobat DC through -- it will have importing data from previous versions and to be able to add file if attachments which we will on cover. And ODDS will give instructions how to obtain licensed copies very soon. They are just working out the process right now.

I thought I would just show you on my screen what it looks like when you start to install Adobe reader DC.

It is free software. And with all respect to Adobe for offering free software in order to offer free software they do offer you some optional offers. And we just wanted to highlight a couple of these option am offers that truly are optional. We want you to carefully radio view the options as they may not make sense for you.

Personally when I install it I uncheck each of the check boxes I uncheck this boxes, I uncheck each optional offers. Because I don't need any extra software on my computer. I don't need additional security software and I don't need help managing my pass wards.

With all due respect to Adobe we wanted you to care supply these options and uncheck anything you don't want.

Once you unchecked anything you don't want go ahead and click the install now. And the instructions on the screen guide you the rest of the way.

Now if you have any problems as you're installing, check out the support resources be available through Adobe. There's also a frequently asked questions document and FAQ document that's published by DHS publication team. It's got tips for installing the software and using the new PDF forms. You can find all of the content at Oregon ISP. Org.

Well, with that, we are going to actually walk through the changes. If you would like the follow along on your own, I'll encourage you to download the summary of changes handout I'm going photograph thereat now in the Webinar control panel. And it's also available at Oregon ISP.org.

I'm going to go heads and pass the screen over to Danelle and Danelle is going to be demonstrating the new documents and will be able to continue to watch the slide show as well.

>> Okay, so let me get it up here for you.

We will pause for just a second to let that second screen pop up.

I'm going the walk you through so that we can demonstrate some of the things that we have been talking about. And let's see, I think my second screen should pop up here. So I can -- okay great.

All right, so let's just walk through the summary of exchanges. And we can demonstrate some great things that Jeni was talking about when she was summarizing the changes.

Next slide. The person centered information. As we have been talking, and you know, in the introduction we did talk about the fact that you can get the person centered information form both in the PDF or Microsoft Word for versions. And Alan --

>> And that --

>> And reason why you might be wanting to use Microsoft Word version go ahead Alan.

>> And folks can also continue to use the 2015 version, the original version of patient centered information as well.

>> Some new features all of the PDF versions have. I will use the person centered information form to demonstrate some functionality that is true with all of the forms. First thing you see at to the top of the form, the top left you see what is are the function icons. These are the function icons where you see the little hand. The first one here, this is the export feature. You will also see the printing form feature. This is a little help bubble instruction icon and then to reset the forms.

All of the forms are personalized and there's an a form feature. I'm starting as you can see, I'll talk more in a minute before you there's a toggle for youth and adult. I'll start with the adult. If I type my name in here, I need to spell my name right. And tab over. If

I include the person's preferred name here, you see, you notice how the instructions here, in the gray works as well as the purple text now has my name inserted.

>> Danelle can we pause for a second and zoom in on the person centered information document.

>> I sure can.

Try control plus.

>> That's exactly what I did. Thank you for that. And is that better? Is that a little bit easier to read now.

>> Yes.

>> Thank you.

>> I'll greet my name so you guys can see what I did. See how here this gray box has the word person in it. But right when you put someone's preferred name in, it will change that person to the person's preferred name. Now it's a little more personalized. And going one step further you see there's a preferred pronoun option now. I prefer the pronoun she. If I selected she, you notice how that the preferred pronoun, this is also true in the purple text below, it now switches to she or hers throughout. That's a nice feature to personalize the form. This is true with all of the forms we are presenting today.

>> One thing I love about that is that it actually -- that you won't have to see some of that when it prints. So there's a lot of stuff cluttering the top of the form on the screen. So you can -- so that you can make some decisions as you're filling out the document. But when you print it, it will be much more streamlined and you don't have to see all of that stuff.

>> Absolutely. It really looks great when it's printed.

The next thing I wanted to point out is a cool little feature that again is going to be true with all of the documents. And I want to demonstrate it by actually hiding what we call the purple help text. This is the purple help text throughout that many of you are familiar with. And right here at the top of the form you see that you can use these radial buttons to toggle from show help text or show help text and if I hit hide you notice the purple text has gone away.

I wanted to do this to Democrat are straight this function here. With the PDF form if you hit your control E, I'll do that right now. I'll hit control E. I'm actually, this is one little trick you have to be within what we call the rich text field. You see I clicked in the rich text field. This form field text property shows up. You can see that's in the top of my screen. This is very useful for you when you are wanting to format your text. So you will be able to -- and you will notice here in the rich text that I can use the bold. And I'm going to -- I'm going to write a little in there. And you see if I select that and hit a different type of font, you can do different projects that you like. And I can increase the side of the fonts and bold the font and do different functions with it. And that's true with any of the fields and rich text fields the ISP fields you will see in of the fields are not rich text fields and you will be able to see the difference because this control, or the form field text properties box will gray out. I will show that to you when we get to the ISP. And there are definitely a couple of shorter fields that are plain text and you can't change or format those particular fields like you can with the rich text fields.

>> Now Danelle what happens if you start the type a long paragraph

of text in there?

>> So you will notice if I started saying Danelle ...

>> If we just --

>> I put one sentence and then say I you pushed enter and I'm going do some push enter. Write some things push enter e see how the things I have typed seem like they have gone away. I only see the line that I just most recently typed. But if I click out of the box, now you can see it all. That's one little trick. Know when you begin typing in the field, some hover of the things will the begin to seem as though the they are going away. Some of the lines of text. But the minute you click out it will reveal itself.

>> It basically just will only resize the field when you click out of it.

So it will stay at the size that it is while you're typing and resize when you click out.

Great, what is on our next slide?

>> All right.

>> So can we embed photos or tables in the PDF version.

>> In this PDF version you can't embed photos and tables. That's one of the reasons we wanted to offer you the MS Word version. So for those of you really utilizing pictures and wanting to put tables in like Alan talked about with the communication. Part. Use the MS word versions like you did with the features. We want to remind you there's an adult and youth version of the form. I'll demonstrate that here in just a moment. But when using the MS Word version you have two separate forms. There's not the abilities to toggle and again I'll show you what I mean by toggling in a minute. With you with the

MS Word version you have two separate forms U one that is an adult versions and one that's an youth version.

>> So advantages and disadvantages to using each. And we encourage you to check out the options of each and see which is going to work best for you.

>> Great, I'll reset this form quickly. If you notice if you go the reset the form it brings up a warning for you. So you know this will permanently clear the form. I'll do this for purposes of demonstration because I want us to get back to a clean form. And you will see now it's reset.

Now the form does -- it does default the youth. I'll start with adult first of all. And again, we do have -- let me just select this.

We talked about preferred name we talked about the preferred pronoun, he be/she.

And that is both the adult versions. And whatever the person chooses you can select that here in thing to else.

So we are on the adult version but I want to show you with the youth version a couple of difference between the adult and youth version.

In order to do this as well, I think I'll start out with the purple text showing and then I'll hide that in a moment so we can demonstrate a few things.

If you toggle over to the youth version which I will do now, you will notice that a couple of things pop up. The first thing is the data birth.

The date of birth shows up for a youth and for an adult it goes away. That's an important piece that stakeholders, people working with kids they wanted to show that data birth does appear if the person is a youth.

Okay. And one other feature, this is where I'll hide the purple text for a moment. So you will notice if are toggled to youth version this is a way to capture the family or youth's perspective when we want to call out especially for youth. When a person's family or guardian is really involved in planning we want to make these perspectives clear. This is information that mom or dad or some other close family member or the person's guardian has given. But of course the additional input is also included throughout.

For the adults though, you will notice, I'll scroll up here and toggle back to adult, if you are on the adult version you notice that family or guardian perspective doesn't default to being shown. But you can always show it if you wish. If you see here, where it says family guardian perspective, show or hide, you can always click show and you notice the family or guardian perspective reveals itself.

This way, if the person is very close to their family, if their family or guardian is very much a part of the planning process and the person has chosen to call out their family or guardians perspective the person has the option to do that.

So it's really going to depend on the person and what they prefer.

All right, so the next thing I wanted to point out was the relationship map. So the relationship map has been simplified. Let's get down to the relationship map. You notice here the relationship map has really been simplified. And again this is something we done in response to stakeholder feedback. You will notice that a lot of the options have sort of been taken away. So what we can focus on now are those people who are closest to the person and then others who are in the person's life. For instance, you know people at work, school or in the community. You will see that as one of the rows here.

There might be a couple of people at work that are especially close to the person they go to for help and had they ask questions. And there may be other people at work that the person isn't as close to but are important to keep on the radar that we want to know, that the person has a relationship at work. So it really depends on the person and who are those people that are closest to them and others in the person's life.

Same with family, for instance mom and dad might be in this particular column. And then it might be a grandmother or a cousin. Someone else that might be in this column.

And it really just depends on the person, what is going to show up in any of these categories. We really just wanted the simplify it a little bit. So we can see who is in is a person's life and who are those people closest to the person.

The next update, in the person's centered information is the characteristics of people who support this person. You know in the past, and you may have noticed this, on -- in this particular section there was only room for one perspective. And you know it was sort of all of the perspectives were in one -- one text field. And stakeholder feedback and especially through the pilot we got some feedback about what the perspectives were not broken out in this section a as well. So we have added like in the other sections, the person's perspective, the family or guardians perspective for youth or adults that choose to include that. And the additional inputs. So we can really be clear about the different perspectives for this section as well.

And then finally, at the end of the form, you know contributors have always been at the end of the form.

But now, you will notice, that it's broken out again, in order to really capture the different -- the different perspectives from different contributors.

So when family and guardians perspective is selected, whether it's because you having to he would to the youth version or because you've chosen the person has chosen to show that perspective, the contributors to family and guardians perspective will reveal itself as you can see here.

Now if I had selected not to show the families or guardians perspective in the adult version or youth version then this particular contributor for family perspective will not show at the bottom of the form.

The other thing that we have added, is did anyone else contribute? Their perspective on behalf of this person. So in situations where someone else might have been making a best guest or through observations helping us to understand the person's perspective, then we can always include that person's name here. And you would just say yes. And you will notice that another box will reveal itself. So you can add that person. And their relationship to the person whose ISP you're developing.

Okay. I do want to point out that you know, we want to strength uneven more the clarity around people's perspectives and who contributed their perspectives. So pay special attention to who contributors are. And their percent -- and their different perspective. So we are clear where that information is coming from.

>> I wanted to really highlight here, the importance of the careful respect to who is contributing on behalf of the person.

So, we actually asked the question, did anyone else contribute their perspective on behalf of this person? So if you answer that no, that little section will disappear. And if you answer it yes, then carefully describe who contributed directly to the person's perspective throughout the document.

And this just reinforces the importance of carefully and respectfully gathering the person's perspective and acknowledging who is supporting the person to record their perspective.

And it's okay to engage others in helping -- helping you error your perspective, we just want to be France parent about that and list that clearly here on that document.

>> Okay.

>> Also you will notice at the end of each of these documents, right on the bottom of Danelle's screen there, you can see there's new standard language that comes in from DHS. There are reminders you can get the document in other languages. Large print, Braille or other formats. And there's information there about how to -- how to request that.

We -- as we understand it and I posted a response to this in the chat window, that -- that there will be a translations -- translation request coming in to -- for a number of languages.

So as soon as those are available, we will be making those live at Oregon ISP as well.

>> Great let's shift to risk identification tool.

Okay, again, this is just a reminder that the risk identification tool will also be available in both the PDF or Microsoft Word version. I may continue to using the 2015 version of the risk dent fiction tool. So you can continue to use the tool you have been using or you can choose to switch over to the PDF version.

So I just want to point out, one big change with the risk identifying tool is the term possible has now been changed to SCPA follow up. And you will see that right here. SCPA follow up. In the past, it was the term possible was used and it got a little confusing for people what possible really meant. So, the guidance hasn't changed. The guidance around are possible remains the same. It's just the term has changed the really reflect a little bit more of the reason that you would select that option.

And I will just remind you that when you do select SCPA follow-up, that means there's evidence that the -- there's evidence of -- the evidence of risk is unavailable it's inclusive or the person or family might just decline to discuss something. And so if providers feel that something needs SCPA follow up, they really need to talk to the service coordinator or personal agent about that. So anytime a provider thinks a risk is present but they are not sure talk to the personal serve coordinator or personal agent about that.

The other really cool feature about the PDF form is that you can -- when you select no risk identified, in this section, so I'll just demonstrate that now. If you click on that, a little warning box will come up. It lets you know this will permanently delete all of the data in that section. This is the health and medical section of course. And it will ask you if you want the continue. And you can either say yes or no. If you select yes, that whole section will collapse. The that's true for each section, safety section and so on. So if there aren't any risks present in the person's life in that particular section, you can easily collapse it. Again, they are easily restored just by clicking that button again. And you will restore those sections.

So I wanted to point out some cool logic. And I'll demonstrate that here with aspiration.

So, we have built in some logic just to make it a little more easily to use the tool and to come to, you know to come to know whether a risk is present or not present in a person's life.

It helps guide you through.

So if I selected A here, the person has a diagnosis of dysphasia. You notice that automatically selects the yes radial button. And this is true, this is -- this really hasn't changed but it helps you through the logic of the form. It's helps you select yes so you don't need to go any further. If I selected any of the others outside of the box, outside that evaluation box, you will see each time that will automatically select that yes radial button. As we know, if any of these things, A through F are present any of the risks factors are present in the person's life that makes an automatic yes.

>> Danelle a number of folks are asking good zooming. So I want to take a moment about -- and point out how -- for everybody, how your Webinar control panel works. If Danelle you leave your screen displaying the full page width and everybody, look at your Webinar control panel, everyone has different sizes of screens. Some people have larger screens some people have smaller jeans. In the Webinar

control panel there's a little zoom option a little drop down that lets you control the zoom of your own screen. You can room and right in on risk identification if you like. Once you zoom in you can use your mouse and scroll towards the edge of the screen and it will move the screen to the left or right or up or down. So you can move around and see the parts that you want.

So everybody, zooming is definitely in your control.

Thanks Danelle.

>> Okay, so I just want to show that to you one more time for those of you who are zooming so you can really see it. If I select A, now we see that the yes radial button next on risk present has automatically been selected.

Okay.

>> Great.

>> Okay, so we will transition now over to the next form.

And we hope some of those changes with the risk tool will be useful for you all. I'm just going to put my screen back to one monitor here quickly.

>> While Danelle is adjusting her screen I'll respond to a couple if on questions that came in. Just a reminder that every -- all of these forms are available in a reader version and a pro version. You can absolutely use the reader version for all of these forms.

>> Great.

So there aren't significant changes with the ISP meeting agenda. The thing about the agenda that I do want to point out is that you can add or take away rows just like with all the other forms that we will go through today. But the meeting agenda still remains optional.

It's an optional tool that you can use if it works for you. As we know, with agendas and this meeting agenda they help to instructor a meeting and the other great thing about the agenda is that it gives people a opportunity to make sure that things they want to talk about in the meeting gets brought up. It also gives the section here on the ISP to describe any action to be taken and it's also a useful tool to record agreements made at the meeting.

So we encourage you to use the ISP meeting agenda when it works for you and is useful for you in meetings. But it does remain an optional tool.

And then the change form. Again, you can continue to use the 2015 version of the change form, but it is available in both PDF and Microsoft Word he version.

The change form also hasn't changed much. It still looks the same but you can add and remove rows easily in order to add more contributors names or people's names that need to be notified.

And you can continue to use the Word version or this new PDF version. Whatever suits you.

All right. So now let's look at the individual support plan. And again, I'm going to quickly go back to 2 screen so you can see it.

>> So, I just want to remind you, with the ISP, it's available in the PDF version only. So, you ODDS will be announcing a date by which the new PDF form has to be used but we will have it available May 1st so you can start using it, get used to it, you know make sure you have the right software before you begin using it. But we really wanted to have it out there for you so you can start looking at it and get familiar with it.

So service coordinators and personal agents they are the offerers of the ISPs so the things we will go through today I don't keep reminding you it's the service coordinators personal responsibility or the search agents personal responsibilities but we wanted to put that information out, the provides they don't create this documents.

So once you do start using the new PDF version of the ISP, you know longer need to use the ISP attachment. That 2016 ISP attachment that we have been using over the last year that's going to be no longer required once you use the PDF version because we have incorporated those things in the ISP attachments we have incorporated those into the any ISP form. The service coordinators and are agents can continue to use it and the attachment until you get the software and start using the new PDF version. If you are not going to switch over yet continue to use that attachment until you switch over to the new PDF version.

So there is these -- this extra help desk throughout the document. We have done it in two different ways. There's purple text. You are all familiar with the purple text you can see the purple text right here at the top of the form. Like this, with the other forms, you show or hide the purple text. On the ISP form itself there's section where the purple text helps guide you and give you information. There's also little eye help icons a circle with an I you hover over them and get additional help throughout the form. Look for the help bubbles, the little help icons as you're moving through the form.

And I'll point them out, as we get to a couple.

All right, so as we know, the one page profile is the first page of the ISP. And one cool feature is that you can add or remove multiple

1 page profiles. So, I will demonstrate that for you. If you click on the one page profile it's a great big green button and you notice there's two one page profiles right here to screen. You can easily remove the one page profile. Youwill remove the one right above and any time you can remove a section you will get the warnings so you don't accidentally delete something that you worked hard the include in a form. You notice the warning comes up and I can select yes or no. I'm going the select yes. And you notice the one page profile has been removed.

Now there also might be times when you want to attach a one page profile that the person's he created themselves with their family, you might of used a different format because as we know you can use any format for the one page profile as long as you answer the three questions. Also provides are working hard to 4th develop one page profiles with people and turn them into service accord senators and service agents. If there's a separate one page profile to put on the front page of the ISP and not use the one that is defaulted as the one page profile in the ISP, there's a little button right up here at the top that says one page profiles attach to the font front of this document. If I click that, a warning comes up and I can select yes. And the one page profile that is defaulted on the ISP goes away completely. That way if you attach another to the front you are not wasting that space you are not having to have that one page profile there when printing it. It's cleaner and you notice when the one page profile the desired outcomes move up to the front page of the ISP. Then if I want the bring it back, I can easily restore that one page profile by clicking on the box again.

So next desired outcomes. I wanted to point out that we have reformatted desired outcomes.

This comes from stakeholder feedback. You notice the desired outcomes is across the top of the form. What supports the this as well is across the top. And the key steps are numbered so it's nice you have numbered key steps.

I'd like to demonstrate adding and remove being rows. So along the right side adding or removing rows. You see plus and minuses and up and down arrows.

So, if I wanted the delete this step 1 I can do that easily by just hitting the minus. It will bring up the warning. I hit yes and you see that has gone away.

I can also add, as many steps as I want.

If you do have a step in the middle, let's say you want to make step three step two, you can use those arrow buttons to move something up or down. If I hit up, now step three is step two. And this is just a way to make it easier for you to reorder things if you decide it makes more sense to reorder steps in a certain way, you can easily add or remove any of the steps at any time. If you do remove a step remember the warning will come up and you will lose anything you include in that step. So be careful to read the warnings as they come up.

>> Yeah, I've noticed the warnings. And I noticed that there's a warning that comes up every time you click a minus like that.

One thing that people who use Microsoft Word might be used to is having an undo button. You can undo certain things like adding when you're typing text into a field, however if you remove a section, there's no undo do for removing is a section. So that's why we have always made a pop up come up like this. So it will just warn you, are you sure you want to delete that? You can't undo it. So you will lose any content that you have typed in that area.

>> Okay. So the career development plan, we are really excited about the updates with the career development plan.

We have been able to include a lot of logic into the career development plan so it's really going to be able to guide icers through the required content puffs and I'll just demonstrate that by going through each choice. So you will see it across the top here. You can choose one. The person is going to be either a transition age youth, a working age adult, or no career development plan.

And I just want to read the definitions of those. And you can see the definitions here show up in purple text.

So if the person is transition age, that means you put this option for those that are still in school, under IDEA and are 14 to 22 years old. This section may be completed for those younger than 14 who are in transition planning. So if you selected that, you will get those questions that you need to answer for a person who is transition planning.

And there again is this purple text to help guide you throughout.

Each choice, whether you're selecting transition age youth or working adults or no career development plan you will be asked that question around the highest level completed and you want to answer that question for everyone and if the person has exited school you add in the expected date of exit.

I want to show you a cool feature here. I may not be graduating from school for 10 years perhaps. So to make it easier for you, when you first open up the calendar he you see the month we are in. And if I select a date it just puts the date in there. But however if you click up here on the actual month and date, year, you see it switches to all the months. So you can easily select say June or July if that's when the person was going to graduate school.

But you, if you click the 2017 it brings up all of the years. So you can easily scroll up to 2025. November of 2025. Select a date. It's just a little trick to kind of help you get to those years that are far in advance. This is just a little thing I wanted to point out to you.

Okay, so the last question for transition aged youth is the student. And what their choice is around working and so you're going to answer the question, the person is attending school and wants to work now. Then you would be expected to develop -- desired employment outcomes. The person is attending school and wants to maintain advance in their current jobs. Again, develop the desired outcomes or the person is attending school and receiving support somewhere. So you choose the selection that is for the person you're developing the plan for.

I'm going the go to no career development plan fitter. So I can demonstrate working age adults. So if you did select no career development plan, you see here the definition is right here below so you know which one you should be selecting. If you select no career development plan, that means if you use this option, for youth underage 14 who do not wanted a career development plan, or for people that are at least 60 years old or who will be 60 years this year, who do not want the use a OODS employment service and do not want a career development plan. Even if the person is over 60 we want to remember they still have the choice they can still have a job and still have a career development plan if they choose to do sew. If you select the option and the option is clear for the person we select the highest education level completed to date. And you give a reason for no career development plan. The reason is going to be A, the person is underage 14 and doesn't want a career development plan at that time, or B, the person is over 60 years old or will be 60 this year and doesn't want to access services and doesn't want a career development plan at this time.

So working age adult section you click that and it comes up for working age you adults.

And the definitions there for working age adults you want to use this option for people that have exited school services. Typically they are 18 years old but those as young as 16 may fall under the category. So that purple text helps you to make the addition about what option to choose.

If you do select working age adults you see here again, you're going to answer that highest grade level completed. You are going the select whether the person is currently receiving VR services, wants VR services or some other option perhaps, you know they are waiting for VR services, they are in the middle of that process. If that is true you can make notes what that looks like.

And then you are going to go on to describe the person's current employment status. And then what they want to do now by selecting either A or B.

So let's first start with A. You can see here you have option A, the person is currently working in competitive employment. And or B, the person is currently not working in competitive employment.

So if you select A, there will be a warning. Just in case you have already selected B and put some information in there, and perhaps you accidentally selected A, this warning will come up to let you know that anything you put in the other selection will be deleted. So just make sure that you read the warnings as they come up and select the appropriate option.

So now that I've selected A, you see the things, the questions you need to answer by selecting A automatically come you you mean for you. Again, that logic is built in to make it a little easier for you to know what the are requirements, what is expected. If you do select A it's going to ask me what I want to do next.

So how many -- so I'll read A again. Currently working in competitive integrated employment or small group employment. If that's true we need to answer how many hours and competitive integrated employment. How many hours a week does the person want to work in either competitive and integrated employment or small group employment. And you can easily enter the hours there. And you want to ask how many hours a week does the person want to work in competitive employment. It's maybe the same amount of ours, it may be different. Make sure the person's choice is captured there.

I'll point out the ticks is helpful. It helps to reminds you much the person wants the on have multiple jobs in competitive employment that the answer above, that we just answered the total number of hours they average the person's work week. So that purple text is helpful to remind you of things you need to include.

So, number 3 here is this year, so this ISP year, the person wants to, and you want to check all that apply.

They may want to retain their current job, advance this their current job, explore interests in individual integrated employment through employment path discovery or other time limited service. Get a new job, get an additional job or perhaps they are interested in retiring. So you will notice, as I was clicking on those buttons things were happening down here. I'm going to unselect them all really quickly.

And show you another cool thing that included.

So if the person is interested in working, and let's say they want to get a job.

When you hit get a job, the desire employment act outcomes reveals themselves. We know if the person wants to get a job and wants to use ODDS services we want to create an desired out come for them. So that expired outcome will reveal itself so you know it helps to guide you so you need to complete the desired employment outcomes. Say the person is currently working, but they are no longer interested. So you will see at the bottom they are no longer interested in working.

This warning will come up. It says this will uncheck any other options selected above. Do you want to continue? As you know the person can't have desired employment outcomes and be using the OODS funded serves and, also, have a decision not to explore employment.

This is guiding you through to know you can't have both options so it will deselect any of the options above and then what will come up is the decision not to explore employment.

So this helps to guide you to know, that now you must complete the decision not to explore employment. Because the person has chosen not to explore employment in the future now or in the future.

>> And of course the person can always exchange their mind on that decision.

>> Then I want you to show you option B. Option B is that the person is not currently working. The warning will come up so that anything you have put in option A will go away. So if we select option B, then the questions that you need to answer for option B will come up. And they are a little bit different. So if the person is currently not working in had competitive integrated employment or small group employment, what will they choose next? Do they want to get competitive integrated employment? If so how many hours. Do they want get small group employment? If so how many hours a week. Do they want to explore interest in integrated employment? Do they want to retire or not explore integrated employment.

You see he next to eve each of the options it gives you hints on what you are expected to do next. If the person is going the choose not explore integrated option you are expected to achieve a option not to explore employment.

I will demonstrate this once more. If the person wants to get individual or competitive integrated employment, you are going to be expected to put the number of hours and you will notice that right when I hit the get competitive employment button the desired outcomes and desired employment outcomes revealed themselves.

This helped to guide you to know I'm expected to complete the desired outcome employment section.

If I had selected not explore integrated employment, at this point, the decision not to explore employment section will reveal itself.

And this helps you to know that you are going to do one or the other. Either complete you desired outcomes. Or explore desired employment based on what the person's choices are. The decision not to explore employment this particular version is like the version that was in the attachment. So if you are going the switch over to using the PDF version you don't need the use the attachment anymore. And when you're working through this, are you will notice that this is identical to the decision not the explore employment that you have been used to using in the attachment, in the ISP attachment.

Okay.

So let's move on to case management services.

There's also some really cool additional features that we have added to case management are services based on some stakeholder feedback. And the pinch u first thing I wanted to show you was we have added the options above. So if the person has chosen CIIS. So that's children in-home intensive services or children's residential programs, I'll select that so you can see there's an option for the person to choose additional case management service in their local area. So give you a little context if a person is using CIIS services they will have a CIIS service coordinator. But they also have is the option to have a local service coordinator at their county. In this way, by adding the additional case management services we are able to easily reflect the responsibilities or the things that the CIIS serves coordinator will do or the things that the additional case management services will do. It helps to really indicate those things here on the ISP so people can make those agreements in advance and, also, it's a way to encourage ODDS staff to communicate directly to

CDDP service coordinator during the development of the plan. And working together in partnership to make sure that the plan includes all of those things what the person has chosen and so that the person will know what the expect throughout the year.

And I think -- and Marilee did you want to mention anything else between the collaboration between the ODDS and CIS service coordinator.

>> First I want to say you did a great job Danelle. Over the years, it's just been confusing sometimes about who is on first with what, and so this request was brought forward as a way to better delineate which service coordinator is taking lead. And what are the activities and responsibilities of that. And as well as the secondary case management provider. So we are excited to see how it plays out.

>> Thank you, and one thing I wanted to point out too, is the purple text here's helps the service coordinator to know, what might some of the anticipated case management services during the year look like. And I'm going the drop down so you can see the purple text at the top. So you have to select a type and the purple text will show up so you can see some of the options in here. And it says under anticipated case management. And some examples. And some examples might include. That's just a way to help guide the services coordinator. The person completing this form of what are some of the things that the primary and additional case management service coordinator might be helping the person out with throughout the year.

Oops.

So informal supports have been or natural supports rather has been renamed informal supports.

And we made this change based on the stakeholders feedback from specifically families that really wanted -- or preferred the term informal supports. So we really wanted to make sure that we are strengthening this sections. We wants to remember to describe any of the support needs that the person that has identified by the needs assessment somewhere in the ISP and if the person isn't choosing a paid Medicaid service to meet those identified support needs, the informal support section is a great plate to capture that information and hopefully over this next year we are really strengthen identifying natural informal supports in a person's life but also strengthening them. So where we feel there's not a lot of informality or community resources available to the person how can we identify to me meet some supports that have been identified through the needs assessment in the person's life.

The other thing that is really cool about the PDF, and you know it was a little tricky adding and removing sections in the Word document and I think people got better at it through the year, but the PDF document and I'll scroll a little bit down here. The PDF document makes it much easier to add and remove sections. You can see here with chosen state plan personal care if the person wants use that you can easily click a button and it will reveal itself. And clicking that button again, will make it go away.

You always get the warnings to remind you not to delete a sections unless you really want to. Because anything you have entered will be deleted.

Okay. The other cool thing and I'll use K plan services to demonstrate this. So in the past, in the Word document when you were choosing a service element you had to scroll through all of the service elements and all of services for each service element and it was kind of tricky.

Now you will notice if you selected a service element. Let's select service element 149 support services for adults. Once you select a service element the service code then drops down. You see when I select that the service code drop down and now the only services that will be in the drop down are those services that are relevant to service element 149. So it won't be all of the services you can get in any serves settings just the services, the K plan services that you can choose if you choose brokerage serves. That's true throughout. Waiver services are the same way. If you selected a waiver service in a particular service setting then only those services that are available in that setting will show in the drop down. That's kind of nice.

You can always type directly into the fields. So if there's a service code that is added or new or you find that something is missing, you can always type directly into that field just like with the Word document.

The other feature that we have added that I'm really excited about is adding additional date ranges.

So let's says we are talking about a kiddo that is in school and living at home with mom and dad. And they are going the choose attendant care, ADL service. They may have a different number of hours of attendant care they need in the summer when they are not going to school that they don't need in the school here. This is common with young kids. Now what you will do, you can add another date range and you can see here with the plus and minus throughout the forms when adding rows you can add multiple date ranges. In the past if this service was identical in the summer and winter hours services coordinators adds a whole new block and it cast was confusing for families now you can show a certain numbers of hours in the summer and certain number of hours in the winter time and so on.

That will a nice feature to save time and, also, it will be easier for families to view and understand the form.

We have also added family support. So let's scroll back up to family support.

I'll hide this so it's not in our way.

Family support has been added as a nice optional feature. Certainly if someone has a family support is using family support services, they can either choose to use the family support plan, the current family support plan instead or the Oregon ISP. If you click on family support there's awarning that if the person chosen family support services they are only available to children under 18 and adding family support serves removes K plan services and waiver services you can't use both. That's areas minder to anyone that is billing filling out this form.

>> I think Marilee was going to offer a comment about family support services.

>> Hi, yeah, this came as a result of people who were receiving family support services. And wanted some recognition in the plan in process that those services are present. They can choose to use this form if they want. Or continue to use the family support plan.

So.

>> Great thank you.

Okay.

>> Marilee I was wondering, if you could, Marilee could you also address the question of waiver verses non wavered case management. We have a couple of questions that popped in about that.

>> I was actually when you called on me I was typing a response.

>> Great.

>> One thing we learned from people using this is that this was a very confusing place for determining -- for helping people understand the difference between a wavered and non wavered case management service. So after some conversations with folks internally and externally, the level of care is now being revised so it's the place where you're going to be identifying and offering the choices for wavered and non wavered services and K services.

It assignment helpful when we worked with stakeholders than to use this place in the case management service where the place you identify the frequency of your contact. There's other behind the scenes work going on. I think that some information went out about 8 or 9 months ago. But if it's something that we need the clarify through the FAQ that Alan has been references, we can sure do that. Hopefully that helps.

>> Thank you Marilee. I just, I came back up to chosen case management services because I did miss pointing that out to all of you. You you will notice now with case management serves that drop down for waiver, non waiver case management is gone now. That's what we are referring to. Thank you very much.

Okay. So let's go down to K plan residential services. I want to point on it a couple of things that have been added. We will get down there. So, if you click there. You will notice it will open it up. So when you come to the form it will default to having sections closed. So all of the chosen services sections will be defaulted to close unless you click to un-- to reveal them I guess. So they are not closed. And the thing I wanted to point out about the K plan residential services is the extra question here. So one of the questions we need to be asking a personal to meet services requirements if they have a private room or shared room if they are living in residential setting. So this indicates we asked the person the question and they made the choice. If this turn made the selection for a this private room you can click a radial button. It's a radial button so you can't click on both. You click on the radial button and then we indicate the choice by clicking on the radial button. Open the service settings options and notice that supported living, this is a little different. In the past ate was supported living DD 1 listed. Now we indicated and want to call out whether the supporting living setting that the person is living in is either their own home or a provider owned and operated. That's important because that's going to make a difference of some of the questions that we answer on the risk management plan. We know that we have some extra questions that we are going to ask individually based limitations. So we want to select whether the person is living in a provider owned or operated setting or not because that will make a difference of whether or not we need to answer that question about individually based limitations, and we'll get to that in a second when we look at the risk management plan. So yes, just make sure if a person is living that supported living setting that you select the right option, either own home or provider owned and operated. Okay.

So moving on to the risk management plan. There has been some additions to the management plan. All right.

>> We have 10 minutes left in the broadcast.

>> All right. Let me go. It's been reformatted a little bit to help you move through it. You can remove risk. You can say the person doesn't have any risk in their life if you wish or you can add as many additional risks as you wish, and I'm pushing the minus when I meant to push the plus. We have had these additional questions. So to questions, does the question plan any safeguarding interventions. We're going to answer yes or no to that question for everybody who has an ISP. So regardless of what setting they are living in, and I'm going to read that quickly, so read yours, that protected themselves or others through supportive measures, may be known -- so PBI and organ system OIA. So all safeguards must be based on a functional behavior assessment and documented in an approved positive behavior support plan. You answer yes or no to that. If you answer yes, you attach an IBL to the ISP. And does the person have any safeguarding equipment. If you answer yes, you are going to be expected to attach that form. Also, again in purple text is safeguarding equipment. So please read those carefully when you get to the form so you're clear on what safeguarding equipment and what safeguarding interventions are. So before --

>> Yeah. About safeguarding equipment. When I first heard about it, I was concerned if somebody simply had equipment such as a wheelchair or a walker that somehow we would have to complete an IBL form. But that is not the case and the definition includes these words

that meets the threshold of restraint. And so it then goes on to define what restraint is. So you see that purple text at the bottom of that description that coach us toward safeguarding equipment that is, that the person cannot easily remove and the person demonstrates resistance to that item or device following the application. So important to really familiarize with your language, and I know folks such as Rose are doing trainings more specifically related to this issue. So this is, if this is your first time hearing this language, this is an exposure to it and you can get further information from the DD services.

>> Great. Thank you. The other two questions here that we want to point out, and it's this one here. Are any individually based limitations on HCBS residential settings accepted and are any proposed. So you see these two questions. The reason they have revealed them on the form is because I selected them in the residential K plan. I selected a residential service that the person is living in, and that's why these questions are revealed themselves. If I selected a setting that wasn't a residential, they won't be on the form. So you only see them if you're expected to answer them, and you will be expected to answer whether there are any limitations and the person's life accepted any limitations or if there's been any proposed but not accepted. And if you answer yes to either one of those questions, you will be expected to attach that form and the purple text to remind what those protections are, and you can see them clearly here on the screen.

Okay. So legal relationships have been updated. So they have been updated and you can see them on the screen. They have been updated to reflect the legal relationship that we use in Oregon. When you open the form, you'll see that you can select legal relationship, and then it will pop up if it's a legal guardian, the person's name, and that's true for each type of legal relationship. It would have another box that pops up if you're expected to answer any other additional questions around the scope of authority or the appointment date and if it was self appointed and so on. Again, if there's no legal relationship, you can collapse it and it will go away.

And finally the acknowledgment page. So again the acknowledgments, the questions have been incorporated into the ISP. If you use the PDF form, you don't need to use that. The questions that are -- the logic is in the form. So the questions that you come to and acknowledgment page will be based on whether you selected residential setting. If there are questions that are on the form, they are expected to be answered for the person that you're developing the form for. Did the person, did the SP options about available case providers describe the options that are offered to receive support. This is non-disability options. You're going to describe the options offered about setting where the person can receive employment or day services. This must include options. That cannot be -- if the person is not using that. You can select not applicable if that's relevant to the person, and then so on. Did the services coordinate to the person, does the ISP reflect the services chosen, and the rest of the questions are what you are currently seeing in the ISP. I wanted to point those out that changed. You select yes or no. If you do select no to any of these questions, then at the bottom of the screen here you'll be expected to describe why you answered no. If you don't answer no to any question, that box will go away.

So again, the logic is if there's something on the screen it means you need to be answering it, something you answered in a particular way, or because of the person's choice above.

Okay. And the file attachments. It isn't on this form. That's in the pro version. Did you want to talk more about that, Allan?

>> Okay. The note came into -- I was muted. Pardon me. Jennie, we are out of time to demonstrate the file attachment feature, but we will mention that this is a feature that's available to those who have the Acrobat DC, and it allows you to bundle files onto the ISP such as the person's information, risk identification. It's a storage tool. Jennie, you had a way to describe it for me.

>> Sure. When you print the email, the attachment doesn't automatically print, but you can access the specific documents that are attached and print those separately, and there's an attachment menu. You attach the file and you can choose to open, save or delete those attachments.

>> Thank you for that. And Jennie had kindly agreed to do a detailed walk through of the pro features of the document, and we'll be doing that and we'll be embedding that into an online training module highlighting the ISP that we're going to release in June. So we will be doing that walk-through, and that should give time to case management folks to get some access to that pro software.

So in wrap-up today, folks, we want -- the forms will be published by May 1st, and as a little bonus for today we're happy to say that the person centered information PDF version, the reader and pro are now posted live at Oregon ISP.org. If you would like to get your hands on them, hand over and download the PDF to get started and don't forget to doublecheck those instructions about installing Adobe Acrobat Reader. That Adobe Reader DC is necessary in order to use these PDF forms and is absolutely essential. So do read our pages for additional instructions on that. If we missed any questions in the web webinar window today, we will release new questions based on the requests. Thank you so much for your questions and of course for your time today.

You will receive a follow-up email after this webinar. It will go out a little later this afternoon. An email is the only verification that we can provide. If you had multiple people at your location, do hang on to that email if you need a couple of verification attendance and any other document you may maintain locally. And so thank you so much for your time After this webinar there a short evaluation with three questions. Please respond to that evaluation for us. We appreciate it. And thank you again so much. Marilee, Jennie, Danielle, thank you so much.

>> Thanks.

>> Thank you.

>> Bye, everybody.

>> Bye.