

# ISP Process Checklist

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## Before Meeting: 4 months ahead of ISP start date

### *First*

- Email the team and start coordinating the date for the meeting.

### *Once meeting date is established:*

- send a confirmation email to the team and attach the following (if applicable) (See draft email at the end of this document as example):
  - ISP Provider Worksheets
  - Addressing Enhanced Needs Forms (acuity)
  - Current ISP, PCPT, and NJCAT
  - HIPAA (filled in as much as possible)
  - Prevocational Continuation forms (if prevoc is in the plan for 2 years and provider wants to continue)
  - Request (if applicable): BSP, Therapy scripts, Annual physical/dental, Medication list
- Document that these forms were sent in iRecord.
- Note: It is best practice to obtain these documents prior to meeting.**

### *Then*

- Read through NJCAT & old PCPT/ISP.
- Ensure current ISP and PCPT are person-centered

### *Create*

- Questions for the team to discuss at the meeting (use ISP/PCPT and Pre-reviews).
- An ISP folder using existing format in individual's server folder for easy access to all ISP docs.
- Outlook calendar reminder of when outcomes will open (2 months prior to start of ISP).

### *Collect:*

- All required documents prior to meeting. Including: completed ISP worksheets from group home and/or day program, AENFs, BSP, HIPPA, Physical, Dental etc.
  - Review the returned documents to ensure they are fully completed.**
  - Upload completed documents to iRecord
- Calendar of scheduled days off from day hab

### *Review & Update:*

- All information from provider worksheets to iRecord.
- Medications: add any new meds/delete discontinued meds.

## At the Meeting: 3 months ahead of ISP start date

### *First*

- Have team members introduce themselves and their role, make a list with this info

#### *ISP Signature Sheet*

- Ask team to sign sheet (if in person)
- Enter all names directly into sheet (if virtual)
- Remember to include individual (or their choice to not attend). It is their meeting!

#### *Review & Discuss*

- PCPT with team to collect more information
- ISP with team to collect more information
- The details noted on the worksheets. Ensure it matches all details noted in the ISP (especially adaptive equipment & diet orders)
- Demographics with the team
- Outcomes that make sense for the client & for the provider
- Contacts for guardian, Day program manager/GH manager and any other contacts that will be useful
- Discuss current services and the need to continue/discontinue/add services.

#### *Remember*

- Take updated photo of individual for iRecord

### **Immediately After Meeting Ends**

#### *Upload*

- ISP meeting signature sheet.

#### *Create*

- NJISP Meeting note in iRecord
  - Include:
    - The summary of the meeting
    - All in attendance
    - The outcomes that were decided upon.
- Mental Health Form
  - Sign
  - Save in Server
- F3 or F6 (if needs to be updated)

#### *Update*

- Contacts in iRecord
- Content changes discussed at meeting. Add to both ISP and PCPT

### **On Day Plan opens in iRecord: 60 days before start date**

#### *Enter*

- Outcomes/services
- Planning Team members (including all who attended meeting)

#### *Confirm*

- All edits noted on Pre-reviews have been completed

*Send*

- Draft SDRs, ISP, PCPT to program managers for review. (Should be sent as attachment via email).

*Document*

- That draft SDRs and ISP were sent
- That the SDR and ISP drafts were approved by providers. Include the name of person, agency, and title of who approved them
- Note: Send a reminder if you don't receive the approval, and document follow ups.**
  - However, don't wait longer than 3 days to continue with plan approval.

**Three days after plan opens in iRecord**

- Send ISP for signature to individual or guardian
  - Document that plan was sent for signature.
  - If not received immediately, ensure all follow up attempts are documented in iRecord.
- Remember: Revise the anniversary plan and add in any goods and services if needed **after** plan approval.

## **ANNUAL PLAN DOCS NEEDED FOR EXSISTING INDIVIDUALS**

- HIPAA
- Annual Physical and Dental forms (for those living in a provider managed home)
- Addressing Enhanced Needs Form (Acuity Form) \*\*If individual has an Acuity
- Behavioral Plan, if needed
- Therapy scripts, if needed
- ISP Provider Worksheets, both residential and day, if needed
- Live-In Caregiver Arrestation (if applicable and not already uploaded)
- Billable rate confirmation (if applicable and not already uploaded)
- ISP Sign in Sheet
- MH Prescreen
- F3/F6
- Signed ISP Draft
- ISP Review Checklist, saved to individual's ISP folder

## **DOCUMENTS NEEDED FOR NEW INDIVIDUALS/FIRST PLAN OR TRANSFER**

- Same as above
- PEA (if applicable)
- Guardianship documentation (if not already uploaded)

## Example Email:

Hello everyone.

Joe Smo's ISP meeting will take place remotely on May 24th at 10:30am. The link to join the meeting is below. I have attached Joe's current ISP, NJCAT, AENFs, and PCPT. Please look them over ahead of time and make notes of any changes. You can certainly send them to me ahead of time or discuss during the meeting.

Mary: Please complete the attached HIPPA form and return to me.  
**Guardian**

Laura/Jacob: Please send me an ISP Worksheet (with needed behavioral support units included), a current list of medications, and a current list of doctors. I have attached the AENF, please complete your part and return that to me. Please also send a copy of Joe's annual physical and annual dental.

**Residential provider (if you need any other info ahead of time you should ask here. Like maybe info about housing assistance, insurance info, etc.)**

Lisa: Please send me an updated BIP and/or report. **Agency Behavioral Supports provider**

Cathy: Please send me an ISP Worksheet (with needed support services included). Please also send the list of holidays that program is closed. I have attached the AENF, please complete your part and return that to me. **(Day Program Provider)**

Please let me know if anything else is needed! Thank you!

**Include zoom link if not occurring in person. Make sure to attach the current ISP and PCPT, and any other forms that apply. You should also enter a case note reflecting that this was all sent/requested to the team.**