

The Implementation Plan

Introduction

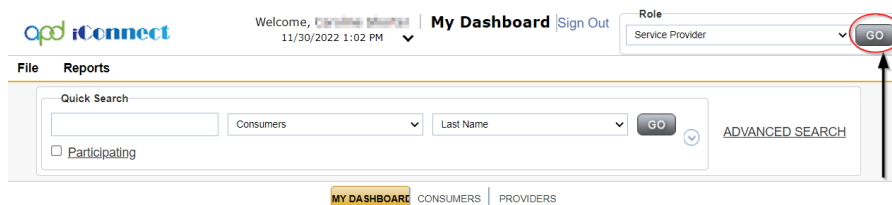
Supported Living, Residential Habilitation Providers, Life Skills Development 3 and Life Skills Development 4 are required to create an Implementation Plan at the time the provider receives an initial authorization to provide services and, annually, as a direct result of the development of the new Person-Centered Support Plan.

How to use this job aid: This job aid provides detailed instructions on how to complete the required fields of the Implementation Plan form but does not instruct the user on what information to include in each of these fields.

Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) for specific documentation requirements. Services provided after the implementation of iConnect must be added to iConnect prior to billing. Once a service is live in iConnect, the contracted vendor monitoring handbook compliance will look for documentation in iConnect.

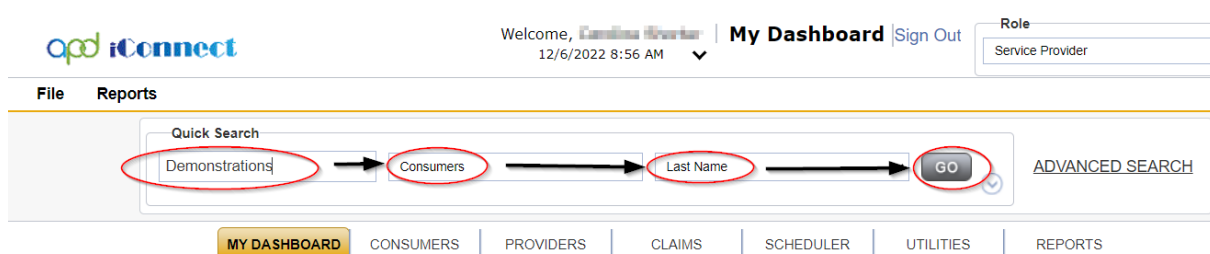
Completing the Implementation Plan form with detailed images

1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go**.



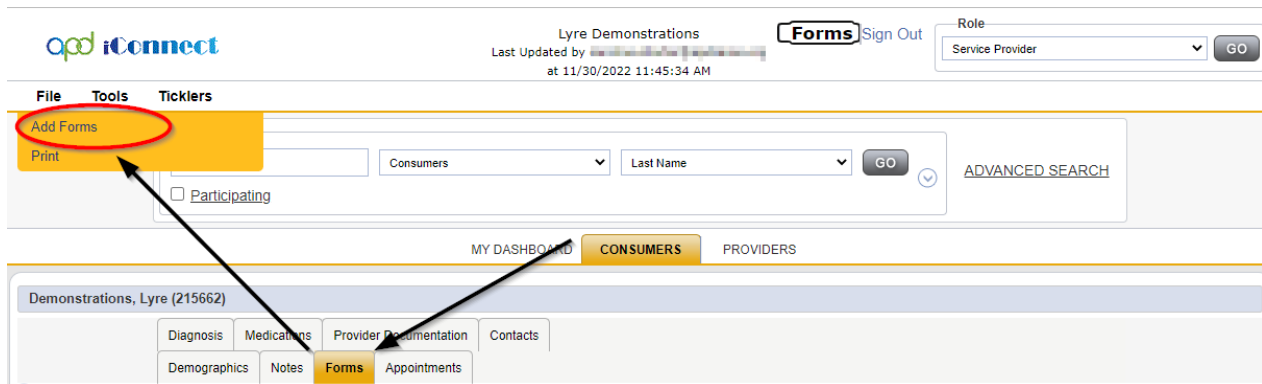
The screenshot shows the iConnect dashboard. At the top right, there is a 'Role' dropdown menu currently set to 'Service Provider'. A red circle highlights the 'GO' button next to the dropdown. Below this, there is a search area with a 'Quick Search' section containing three input fields: a text field, a dropdown menu set to 'Consumers', and another dropdown menu set to 'Last Name'. A 'GO' button is next to these fields. Below the search area, there are navigation tabs: 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS'.

2. Navigate to the Consumer's record.
 - a. Type the consumer's last name in the Quick Search text field (first field on the left).
 - b. Ensure that the second field contains Consumers, third field contains last name and click "Go".



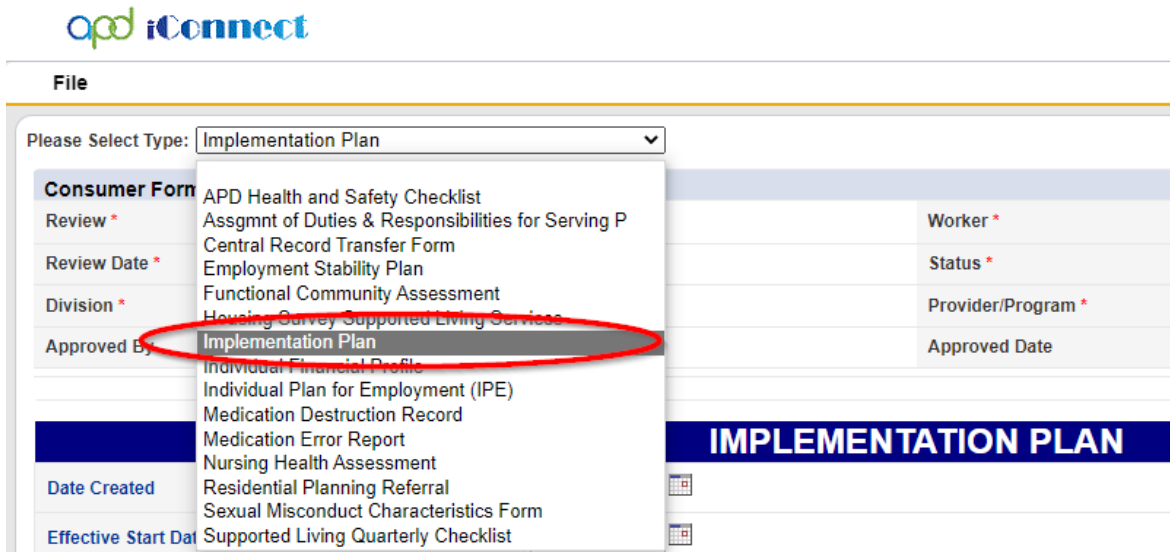
This screenshot shows the same iConnect dashboard as the previous one, but with the search fields filled. The 'Quick Search' section has three input fields: the first contains 'Demonstrations', the second is a dropdown set to 'Consumers', and the third is a dropdown set to 'Last Name'. The 'GO' button is circled in red. Below the search area, there are navigation tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'CLAIMS', 'SCHEDULER', 'UTILITIES', and 'REPORTS'.

3. Click the **Form** tab > click **File** > **Add Form**.



4. The Form Details page is displayed. Update the following fields:

- Please Select Type = **Implementation Plan**.



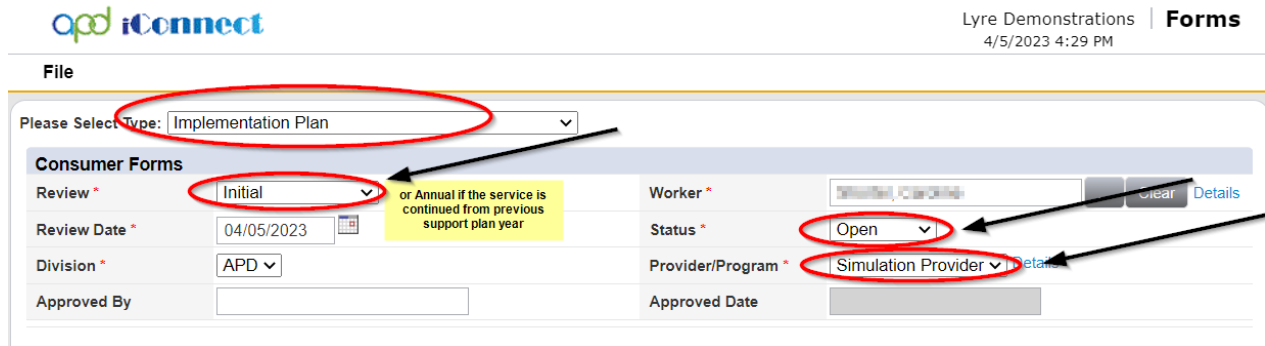
- Review = Initial for the first Implementation Plan. Annual for all subsequent Implementation Plans.
- Review Date = defaults to today.
- Division = defaults to APD.
- Worker = Self.
- Status = **Open** status during support plan year. The provider will need to update this plan throughout the year.

Complete status at end of the support plan year.

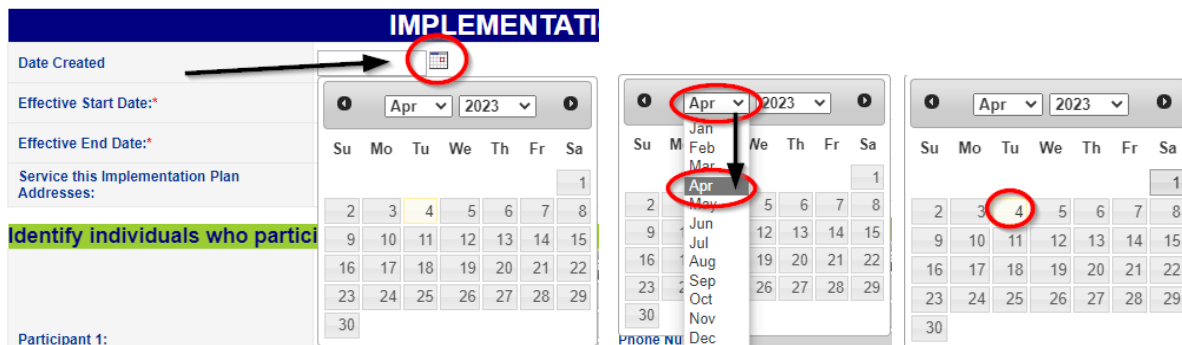
Remember that updates will be made directly within this form each quarter, so if you are creating this implementation plan at the beginning of the Support Plan year, save the form in **Open** status.

g. Provider/Program = Select the name of the provider.

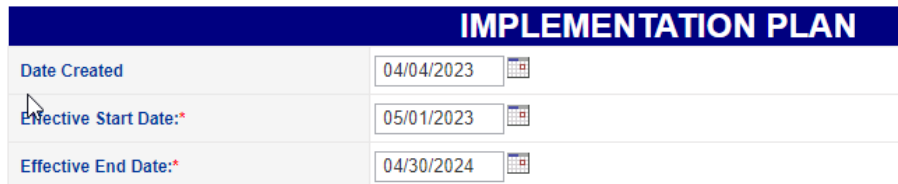
Tip: If there is no Provider/Program available in the dropdown menu, please contact the Waiver Support Coordinator to have a Provider Selection Record Added to this consumer's record.



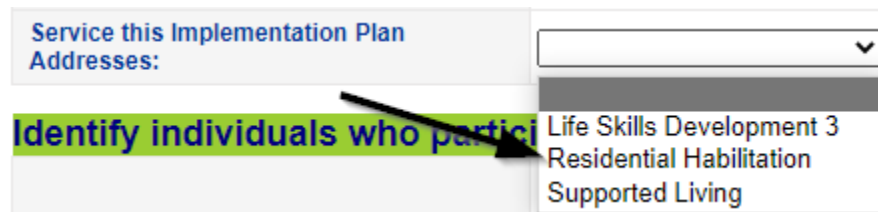
5. Date Created, Effective Start Date, and Effective End Date: Use the Calendar icons to select the date. The date will not change until the date is selected in the calendar menu.



i. Repeat these actions for all fields requiring date selections.



6. Service this Implementation Plan Addresses = Select the Service being rendered.



7. Participants 1 through 4: Include those who participated in the development of the implementation plan:

a. **Add New Relation:** Click this button to add a participant to the implementation plan and the consumer’s list of contacts. The participant search window opens.

i. Conduct a search by updating the following fields:

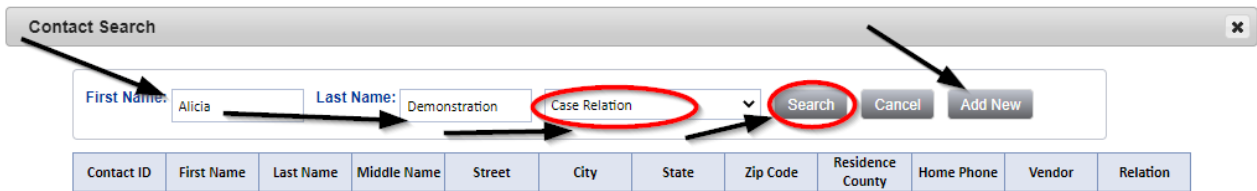
i. First Name and Last Name.

ii. Select **Case Relation** from the drop down menu.

a. Do not use the other Relations available, iConnect is set up to only use Case Relations.

iii. Click Search.

iv. If no participants are returned, click Add New.



ii. The New Relation window opens, update the following fields:

i. Relation Category = Always select Case Relation.

ii. Relationship = Select as applicable.

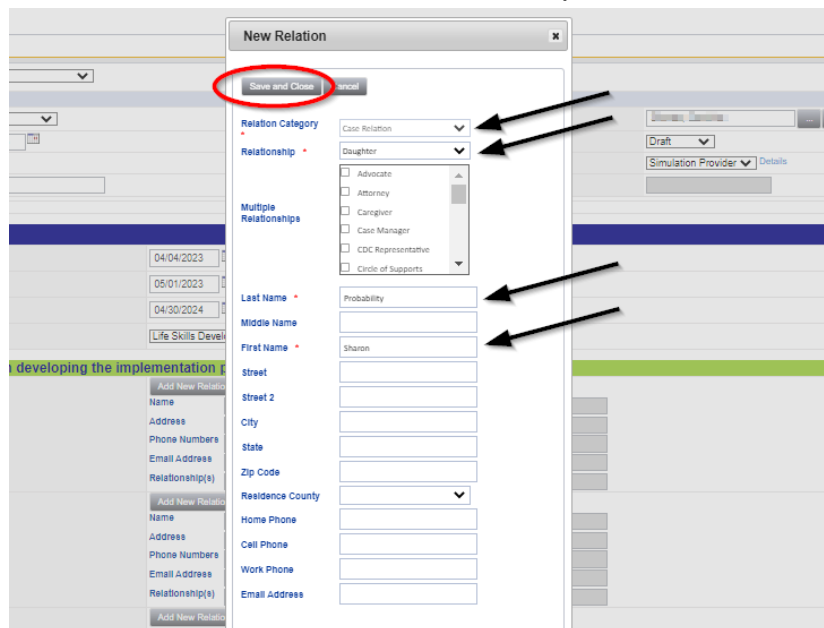
iii. Multiple Relationships = Select as applicable.

iv. Last Name.

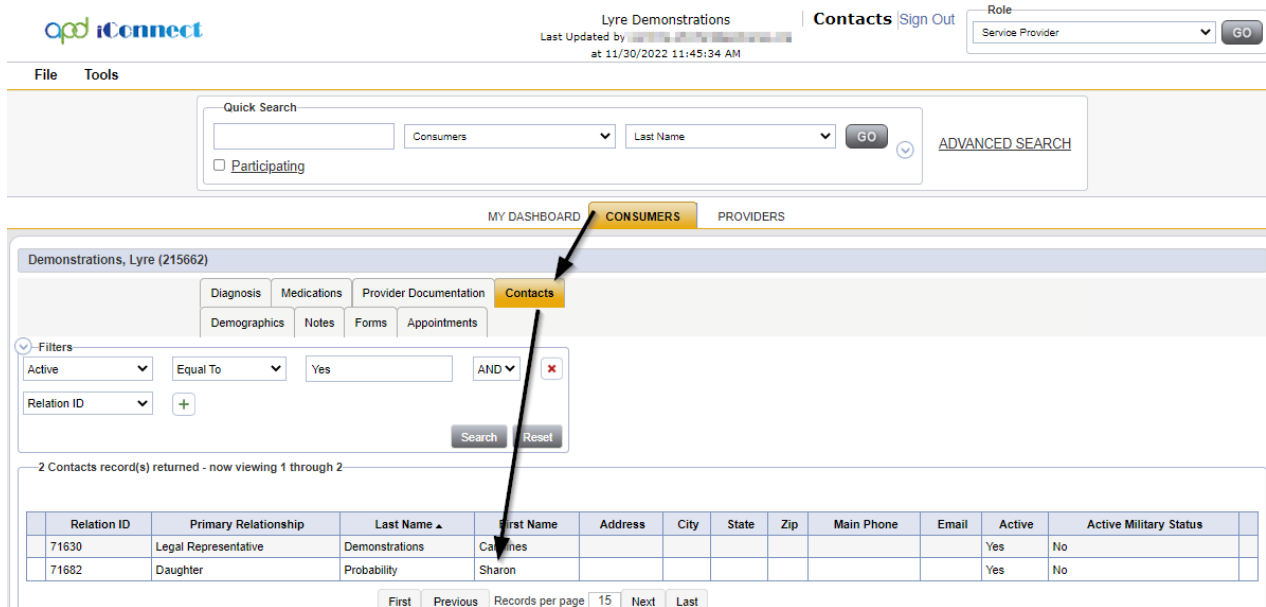
v. First Name.

vi. Update any available contact information in addition to the above listed fields.

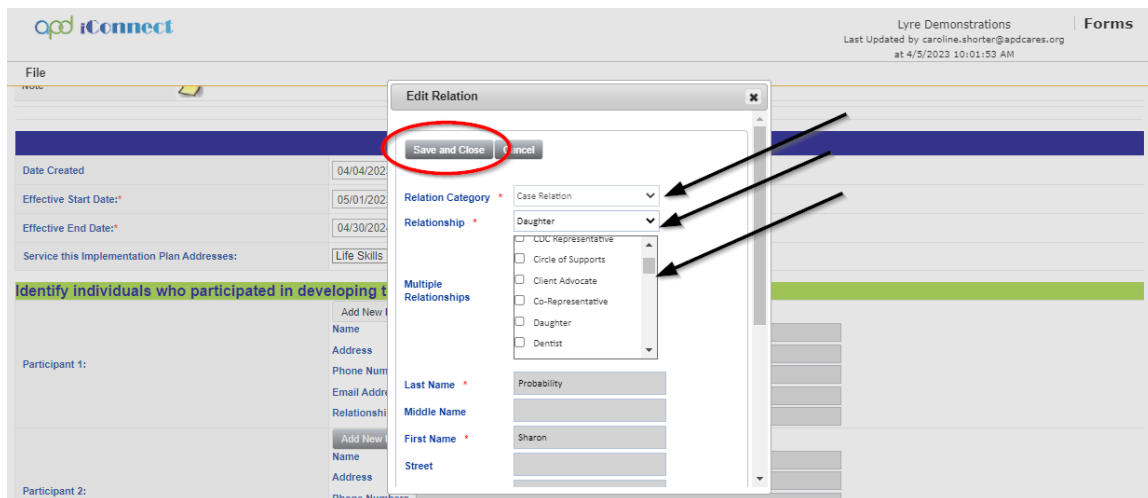
iii. Click the **Save and Close** button on the top left side of the window to include this information on the Implementation Plan.



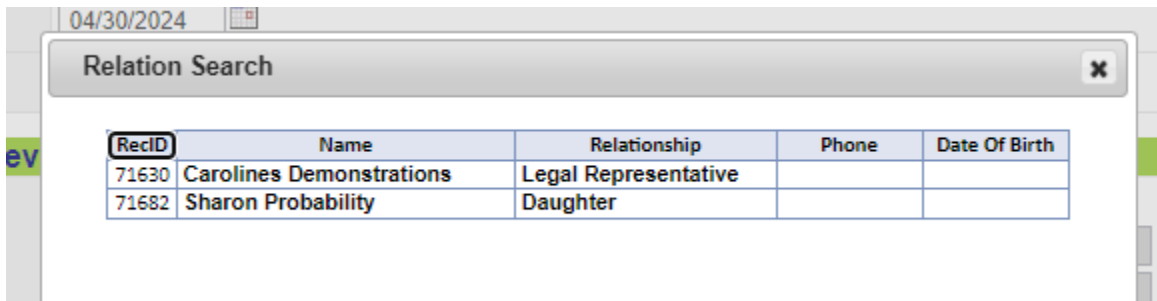
Avoid entering duplicate contacts by conducting the Contact Search correctly or reviewing the Consumer's Contact Tab (see screenshot, Once the Implementation Plan form is saved, you will notice that the new relation added within the Implementation Plan will also be visible within the Consumer's Contact Tab).



- b. **Edit Relation:** Click this button to update the participant details. The Edit Relation window appears. Update the following fields:
- Relation Category = Always select Case Relation.
 - Relationship = Select as applicable.
 - Multiple Relationships = Select as applicable.
 - All other fields are shaded in gray and not editable.
 - Click the **Save and Close** button on the top left side of the window to include this information on the Implementation Plan.



- c. **Search Existing Relations:** Click this button to add a participant to the implementation plan from the existing list of consumer's contacts. The Relation search window opens.



- i. Click on the name of the contact that should be listed as a participant in the Implementation Plan.
- ii. The information will populate in the participant section of the Implementation Plan.



- d. **Clear:** Click this button to remove the selected participant from the Implementation Plan

8. Services/Goals Section

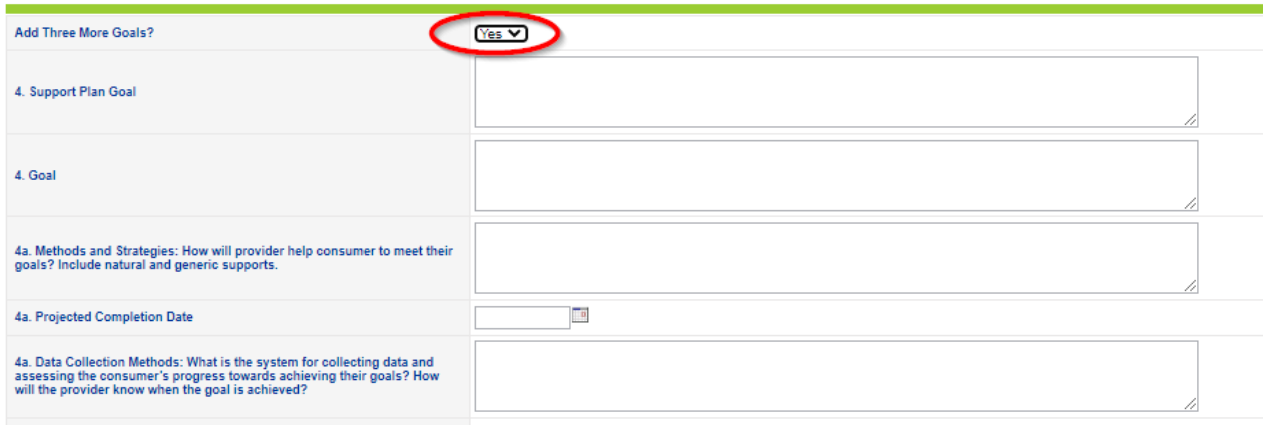
- a. Complete the following information:
- b. Type into the Text boxes to answer the Support Plan Goal, Goal, Methods and Strategies #a-d and Data Collection Methods #a-d.
- c. Use the Calendar icon to fill in the applicable dates for the Projected Completion Date and Date Quarterly Progress 1-4 Reported.
 - i. *Remember that the Implementation Plan should be updated throughout the year, these fields do not need to be completed all at once. Ensure that the form is saved in Open Status (found at the top)*
- d. Quarterly Progress Report 1-4 = Select the applicable option from the dropdown menus. *The Quarterly Update fields on the Implementation plans are **NOT REQUIRED** to be filled for any service group.*

Services/Goals	
1. Support Plan Goal	Text Box for Support Plan Goals
1. Goal	Text Box Goals
1a. Methods and Strategies: How will provider help consumer to meet their goals? Include natural and generic supports.	Text Box for Methods and Strategies
1a. Projected Completion Date	04/30/2024
1a. Data Collection Methods: What is the system for collecting data and assessing the consumer's progress towards achieving their goals? How will the provider know when the goal is achieved?	Text Box for Data Collection Methods
1a. Quarterly Progress Report 1	<input type="text"/>
1a. Date Quarterly Progress 1 Reported	<input type="text"/>
1a. Quarterly Progress Report 2	<input type="text"/>
1a. Date Quarterly Progress 2 Reported	<input type="text"/>
1a. Quarterly Progress Report 3	<input type="text"/>
1a. Date Quarterly Progress 3 Reported	<input type="text"/>
1a. Quarterly Progress Report 4	<input type="text"/>
1a. Date Quarterly Progress 4 Reported	<input type="text"/>
Add 1b Methods and Strategies	<input type="button" value="Add"/>

- e. If there are more than one method and strategies to help the consumer meet their goals, Answer Yes to the Add 1b/c/d... buttons to increase the quantity of information that may be incorporated into each goal.

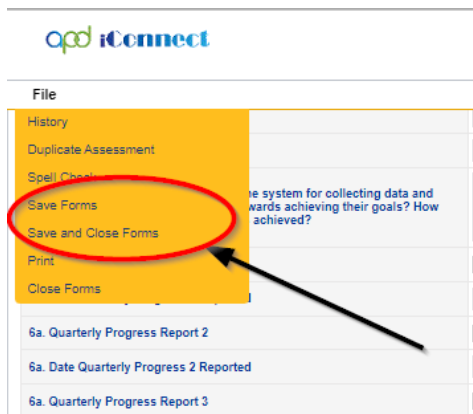
Add 1b Methods and Strategies	<input type="button" value="Yes"/>
1b. Methods and Strategies: How will provider help consumer to meet their goals? Include natural and generic supports.	Text Box
1b. Projected Completion Date	<input type="text"/>
1b. Data Collection Methods: What is the system for collecting data and assessing the consumer's progress towards achieving their goals? How will the provider know when the goal is achieved?	Text Box
1b. Quarterly Progress Report 1	<input type="text"/>
1b. Date Quarterly Progress 1 Reported	<input type="text"/>
1b. Quarterly Progress Report 2	<input type="text"/>
1b. Date Quarterly Progress 2 Reported	<input type="text"/>
1b. Quarterly Progress Report 3	<input type="text"/>
1b. Date Quarterly Progress 3 Reported	<input type="text"/>
1b. Quarterly Progress Report 4	<input type="text"/>
1b. Date Quarterly Progress 4 Reported	<input type="text"/>

- f. Repeat steps a – e for 2nd and 3rd Goals.
- g. If additional goals are needed, answer Yes to Add Three More Goals and complete the subsequent sections.



The screenshot shows a form with several sections. At the top right, there is a dropdown menu with 'Yes' selected, which is circled in red. Below this are several text input fields for '4. Support Plan Goal', '4. Goal', '4a. Methods and Strategies: How will provider help consumer to meet their goals? Include natural and generic supports.', '4a. Projected Completion Date', and '4a. Data Collection Methods: What is the system for collecting data and assessing the consumer's progress towards achieving their goals? How will the provider know when the goal is achieved?'.

9. File > **Save** or **Save and Close Form**.



10. If the Implementation Plan needs to be printed, File > **Print**.