Policy Transmittal
Developmental Disabilities Services

Lilia Teninty

Authorized signature

Number: APD-PT-18-051
Issue date: 12/7/2018

Topic: Developmental Disabilities
Due date: 12/31/2019

Transmitting (check the box that best applies):

- [ ] New policy
- [ ] Policy change
- [ ] Policy clarification
- [ ] Executive letter
- [ ] Administrative Rule
- [ ] Manual update
- [ ] Other:

Applies to (check all that apply):

- [ ] All DHS employees
- [ ] County Mental Health Directors
- [ ] Area Agencies on Aging: {Select type}
- [ ] Health Services
- [ ] Aging and People with Disabilities
- [ ] Office of Developmental Disabilities Services (ODDS)
- [ ] Self Sufficiency Programs
- [ ] ODDS Children’s Intensive In Home Services
- [ ] County DD program managers
- [ ] ODDS Children’s Residential Services
- [ ] Stabilization and Crisis Unit (SACU)
- [ ] Child Welfare Programs
- [ ] Other (please specify): Brokerage Directors, Services Coordinators, Personal Agents

Policy/rule title: Entering ISP dates in eXPRS
Effective date: 1/1/2019

Discussion/interpretation:
ODDS continues to enhance the functionality of eXPRS to align with ODDS policies.

Currently, eXPRS uses the fiscal year (July 1-June 30) for calculating annual service limits. This includes calculating absences from residential settings, relief care, and other yearly/annual unit type.

ODDS policy uses the person’s Individual Support Plan (ISP) year to calculate annual limitations.

In order to calculate annual limitations based on a person’s ISP year eXPRS will need to have ISP dates for all individuals.
ODDS will enhance the eXPRS system to ISP years to determine annual dates. Additional guidance will notify CMEs and providers when the system enhancements support the use of ISP year for annual limitations.

**Implementation/transition instructions:**
ISP date fields on the VIEW CLIENT page in eXPRS are available now for entry. For individuals who do not have any services authorized in Plan of Care (POC) and have ISPs starting on or after 1/1/2019 must have ISP dates entered on the VIEW CLIENT page. All individuals without a POC with an ISP must have their ISP dates entered by 12/31/2019. The ISP dates must be updated for individuals without a POC annually using this process.

This impacts people enrolled in the following services and DO NOT have POC services:
- DD50 24 Hour Residential
- DD51 Supported Living
- DD142 Kid’s Residential

ISP dates entered in eXPRS must reflect the authorized dates recorded on the ISP.

There are two categories used in eXPRS to define the ISP
- **Initial ISP:** The person’s first ISP or one that occurs after a period of not having an ISP.
- **Annual ISP:** ISPs that directly follow the previous ISP.

ISP entries can be edited. Shortening the ISP end date is limited to specific circumstances
- Person requests to end all services authorized by the ISP and wants an annual plan (see **NOTE**)
- Person exits ODDS case management and all other ODDS funded services
- Person loses Medicaid Title XIX Benefit package and wants an annual plan (see **NOTE**)
- As allowed by OAR 411-415-0070(2)(c)
- ODDS has approved a shortened ISP period by exception.

**NOTE:** If desired, a person without funded ODDS services can have an ISP and maintain their ISP dates.

For all people who have services authorized in POC, ODDS will enhance eXPRS to populate the ISP Date fields on the VIEW CLIENT page from the Create Plan of Care page. Additional details about that process will be released in separate guidance.
Training/communication plan:
ODDS has created a “How To” guide for instruction on how to enter the ISP dates in eXPRS. The guide is attached here for step-by-step guidance on entering the ISP dates.

Monthly transmittal call in (third Thursday every month, 2pm, 877-873-8017, guest code #772325, please try to send questions in advance to ODDS.INFO@state.or.us)

Related policy and guidance:
- Annual ISP Authorization Periods
- Initial ISP Authorization Period
- Mid-Year ISP Changes

Local/branch action required:
ISP dates for individuals enrolled in DD50, DD51, and DD142 who do not have services authorized in a Plan of Care must be entered in eXPRS for all ISPs starting 1/1/2019 or later. ISP dates must be entered in eXPRS for all authorized ISPs by 12/31/2019.

Field/stakeholder review: ☒ Yes ☐ No
If yes, reviewed by: Engagement and Innovation website

If you have any questions about this policy, contact:
Contact(s): Chrissy Fuchs
Email: chrissy.fuchs@state.or.us
How to Client Individual Support Plan (ISP)
Date Information in eXPRS
(v3; 7/25/2018)

eXPRS has implemented a new feature in an individual’s VIEW CLIENT profile page that allows for the tracking of their Individual Support Plan (ISP) date information.

While only informational at this time, the individual’s ISP Date information entered into eXPRS will be utilized in future system functionality as a validation edit point for Plan of Care and/or other service limits to align with ODDS policy guidelines, as well as CMS individual plan requirements.

Some things to note about entering ISP Date information in eXPRS.

- ISP Date segments for **INITIAL** ISPs can have a date range that is a longer than 365 days. The **ISP End Date** can be the last day of the month of the **ISP Start Date**, the next year.

- ISP Date segments for **ANNUAL** ISPs **cannot exceed 12 months** from the **ISP Start Date** (ie: annual segments are limited to 1 year).
• ISP Date segments cannot have dates that overlap another ISP date segment.

• ISP Date segments can be shorter than 1 year.

• Date gaps between different ISP Date segments is allowed.

For additional information & ODDS policy direction regarding entry and utilization of the ISP Date information, please see <transmittal or worker guide>.

**How to enter ISP Date information in eXPRS:**

1. Login to eXPRS. Users will need to be logged in as (Local Authority) for CDDPs,
or as the (Contractor) for Brokerages.

2. From the left-hand menu, click on **CLIENT ➝ VIEW CLIENT** to find the individual’s View Client profile page.

3. In the **View Client** page, enter the individual’s prime number in the **Client Prime** field & then click **FIND** to search.
4. From the results list shown below the search fields, click on the blue **LAST NAME** of the individual to open their profile record.

![Screenshot of search results](image1.png)

5. With the individual’s profile page open, scroll down & expand the **Individual Support Plan (ISP) Dates** section in the middle of the page. Click **ADD** to add ISP Date segment information.

![Screenshot of profile page](image2.png)
6. You will be taken to a new page called **ISP Dates Add** to enter the ISP date segment information. Add the data for the information requested.

- **ISP Type** = select the type of ISP for the segment from the dropdown.
  - **Initial** = the first ISP for the individual
  - **Annual** = subsequent annual ISPs for the individual

- **ISP Signed Date** = the date the ISP team signed the ISP
- **ISP Start Date** = the effective or start date of that ISP
- **ISP End Date** = the last date that ISP is effective

Click **SAVE** to save the ISP date segment data. You will be returned to the **View Client** page, and the ISP segment data entered should now appear in that section.
7. To add additional ISP date segments, click **ADD** or repeat steps #1 – 5 above. When entering a new segment that follows an **Initial** ISP segment, the system will auto-fill the ISP Type to **Annual** & pre-populate the **ISP Date Range**. These fields can be edited, as needed, before the segment is saved. **Please note the ISP date range limitations on page 1 of this guide.**

![ISP Dates Add](image)

8. Over time, as the individual has additional ISPs, the ISP Dates section of their **View Client** profile page will show their ISP history.
   - The system default is to display ISP segment history back 3 years & forward 1 year from the current date.
   - If users wish to view more date segment history, they can edit the dates in the **Display Segments for Dates**: fields to view ISP Date segments for any date range desired.

![ISP Dates Display](image)
9. To view the details of an ISP Date segment, click on Log at the far right.

10. To edit an ISP Date segment to change the ISP End Date, click on EDIT.

This will open that segment record to allow updates to the ISP End Date.

Click SAVE to save any changes made.
11. Click on **REMOVE** to remove an ISP segment that may have been entered in error.

The segment will then be removed from the ISP Section.