Independent Living Plan (ILP)

AWARDS INSTRUCTION SHEET

AWARDS makes available to programs a variety of service plan formats, including an Independent Living Plan (ILP). The ILP was developed specifically for family shelters (designated as Tier II shelters) that report to New York City's Department of Homeless Services, and that have a frequent (bi-weekly) review schedule. Once a program is configured to use the ILP, it is accessed using the Service Plans feature in the AWARDS Services module.

REQUIRED PERMISSIONS

Permissions required to access and use ILP service plans are as follows:

- Chart Access – You must have chart access for the program associated with the client for whom the ILP is to be worked with or viewed.
- Data Entry / Access – You must have the "Display Any Chart Records Buttons" and "Display Services Chart Record Button" permissions in order to access the Services module from which ILPs are accessed.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the ILP service plan option. Specific topics covered are:

ENTERING OR UPDATING AN INITIAL INDEPENDENT LIVING PLAN

To enter or update an initial ILP, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.
2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the initial plan is to be entered or updated.
3. Click the **Database** drop-down arrow and select "Data Entry."
4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the initial of the consumer's last name. An asterisk (*) in this field will include all consumers in the selection process.
5. If the initial plan to be updated is for a former (discharged) consumer, click the **Roster Archives** check box.
6. Click **Service Plans**. The *Service Plan Consumer Selection* page is displayed.
7. Click the **Consumer** drop-down arrow and select the consumer for whom the initial plan is being entered or updated.

8. Click **CONTINUE**. The *Individual Service Plan Index* page is displayed. This page contains a list of existing plans scheduled for the selected consumer.

   If an initial plan schedule record must be entered or updated, continue with step **9**.

   If an existing initial plan is to be worked on and it is not necessary to enter or update a schedule record, continue with step **13**.

   In most cases an initial plan will have been scheduled for the consumer during the admission process. The ILP is currently configured to be due 10 days after admission, with the first review due 24 days after admission and subsequent reviews due every 14 days thereafter.

9. Click **Update Schedule**. The *Individual Service Plan Review Schedule* page is displayed.

10. To update an existing schedule record, make changes to the review schedule fields/options as necessary. To enter a new schedule record, configure the blank **NEXT** or **BACK FILL** review schedule fields/options:

    - **Due Date –** In this field type the date on which the initial plan development must be done (in mm/dd/yy format).

    - **Plan Type –** Click this drop-down arrow and select "Initial Plan."

    - **Reviewer –** Click this drop-down arrow and select the staff member responsible for working on the initial plan.

    - **Done –** Click this drop-down arrow and select "Yes" or "No" to indicate whether the initial plan has been completed.

    - **Done Date –** In this field type the date on which the initial plan was completed (if applicable).

11. Click **UPDATE SCHEDULE**. The schedule record is saved and the updated *Individual Service Plan Schedule* page is displayed.

12. Click **CONTINUE**. The updated *Individual Service Plan Index* page is displayed.

13. Click the **Selected** radio button next to the initial plan.

14. Click **CONTINUE**. The *Initial Plan* page is displayed.

15. At the top of the page, enter or make changes to the values in the **PA Status** and **Housing Certified** fields.

    These fields are linked to the consumer's entitlements records. Each time a change is made to the PA Status field on the ILP, a new record is created under entitlements. The ILP will hold all PA Status history changes for each plan. The first time the Housing Certified field is filled out, a record will be created under entitlements, but not thereafter. The ILP does not hold Housing Certified history, so if a change is made to this field, the change is displayed in all previous ILPs.

    After finishing the initial ILP (or after making changes to these fields in subsequent reviews), you should go to the Entitlements module and fill in the missing fields for these records (Amount, Expiration Date) so that the data entry is complete there.

16. In the "Add New Services" portion of the page, configure the following fields/options:

    - **Client's First Name –** Select the family members for whom this Service Need is relevant.

Household members and the head of household are available for selection here.

- **Service Need –** Click this drop-down arrow and select the Service Need type.

- **Task Description (Client/Staff Responsibility) –** In this text box, type the description of the task and the related client and staff responsibilities.

- **Service Provider/Agency –** In this text box, enter the service provider or agency associated with this task.

- **Start Date/Target Date –** Click the Start Date drop-down arrow and select the date on which the Service/Need is to begin. You will be given a date range that begins with the initial plan date and ends with the next review date. Fill in the Target Date as appropriate.

17. In the "Check Documents Needed" section at the bottom of the page, make the appropriate selections, filling in the text field for "Other" if relevant.

18. Click **CONTINUE**. The initial plan information is saved, and a read-only report version of the initial plan is displayed.

    *To make additional changes to the initial plan at this time, click **DATA ENTRY** to return to the* Initial Independent Living Plan *update page.*

The process of entering/updating an initial ILP is now complete.

To view the plan in report mode, complete with client and staff signature lines, open the Individual Service Plan Index *page. From there, click the underlined due date of the plan you want to print. The plan then opens in report mode with a read-only compliance section and signature lines instead of navigation buttons at the bottom of the page.*

ENTERING OR UPDATING AN ILP BI-WEEKLY REVIEW

To enter or update an ILP bi-weekly review, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the bi-weekly review is to be entered or updated.

3. Click the **Database** drop-down arrow and select "Data Entry."

4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the initial of the consumer's last name. An asterisk (*) in this field will include all consumers in the selection process.

5. If the bi-weekly review to be entered or updated is for a former (discharged) consumer, click the **Roster Archives** check box.

6. Click **Service Plans**. The *Service Plan Consumer Selection* page is displayed.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the bi-weekly review is to be entered or updated.

8. Click **CONTINUE**. The *Individual Service Plan Index* page is displayed. This page contains a list of existing plans scheduled for the selected consumer.

If a bi-weekly review schedule record must be entered or updated, continue with step **9**.

If an existing bi-weekly review is to be worked on and it is not necessary to enter or update a schedule record, continue with step **13**.

The first ILP bi-weekly review is automatically scheduled for the consumer when his or her initial plan is opened and updated for the first time. Subsequent reviews are automatically scheduled for a consumer when his/her previous review is opened and updated for the first time.

9. Click **Update Schedule**. The *Individual Service Plan Review Schedule* page is displayed.

10. To update an existing schedule record, make changes to the review schedule fields/options as necessary. To enter a new schedule record, configure the blank **NEXT** or **BACK FILL** review schedule fields/options:

    - **Due Date –** In this field type the date on which the bi-weekly review must be done (in mm/dd/yy format).

    - **Plan Type –** Click this drop-down arrow and select "Bi-Weekly Review."

    - **Reviewer –** Click this drop-down arrow and select the staff member responsible for working on the bi-weekly review.

    - **Done –** Click this drop-down arrow and select "Yes" or "No" to indicate whether the bi-weekly review has been completed.

    - **Done Date –** If applicable, in this field type the date on which the bi-weekly review was completed (in mm/dd/yy format).

11. Click **UPDATE SCHEDULE**. The schedule record is saved, and the updated *Individual Service Plan Schedule* page is displayed.

12. Click **CONTINUE**. The updated *Individual Service Plan Index* page is displayed.

13. Click the **Selected** radio button next to the periodic service plan review to be worked on.

14. Click **CONTINUE**. The *Plan Review* page is displayed.

15. If needed, make changes to the values in the **PA Status** and **Housing Certified** fields.

    These fields are linked to the consumer's entitlements records. Each time a change is made to the PA Status field on the ILP, a new record is created under entitlements. The ILP will hold all PA Status history changes for each plan. The first time the Housing Certified field is filled out, a record will be created under entitlements, but not thereafter. The ILP does not hold Housing Certified history, so if a change is made to this field, the change is displayed in all previous ILPs.

16. Review the progress on all existing service/needs by configuring the following fields/options:

    - **Status –** Click this drop-down arrow and select "Active," "Completed," "Discontinued" or "Not Completed for each service/need.

      Any service/need designated as "Active" is carried over to the next plan. Any service/need designated as "Completed," "Discontinued" or "Not Completed" is not carried over into future plans.

    - **Completion Date –** In this field, enter a completion date for those service/needs marked as "Completed," "Discontinued" or "Not Completed." If no completion date is entered for these statuses, AWARDS will automatically insert the day before the next scheduled review.

"Active" service/needs should not be given a completion date.

17. Click **CONTINUE**. The review information is saved and a read-only report version of the ILP is displayed.

18. To make additional changes to the review at this time, including the addition of new services, click **DATA ENTRY**. The data entry page is re-displayed.

19. To add new service needs, scroll to the bottom of the page to the "Add New Services" section. Then following the same steps used to add a new service/need in an initial ILP. This includes entry of "Client's First Name," Service Need," "Task Description," "Service Provider/Agency," and "Start Date/Target Date."

20. In the "Check Documents Needed" section at the bottom of the page, make the appropriate selections, filling in the text field for "Other" if relevant.

21. Click **CONTINUE**. The review information is saved, and a read-only report version of the ILP is displayed.

    *To make additional changes to the bi-weekly review at this time, click **DATA ENTRY** to return to the* Bi-Weekly Review *update page.*

The process of entering/updating a bi-weekly review is now complete.

To view the plan in report mode, complete with client and staff signature lines, open the Individual Service Plan Index *page. From there, click the underlined due date of the plan you want to print. The plan then opens in report mode with a read-only compliance section and signature lines instead of navigation buttons at the bottom of the page.*