

Staff Action Plans: Document Upload Guide

This document outlines the process for finalizing and signing a Staff Action Plan.

- (1) From the Dashboard for a Participant, select the Staff Action Plan tab.

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Dashboard Budget Documents **Staff Action Plan** Hab Plan Contacts

Dashboard For Thomas Thompson Demo

MEDICAID
\$0.00
spent out of \$48,768.80
100% Remaining

OTPS
\$0.00
spent out of \$1,350.00
100% Remaining

REMAINING PERCENTAGES

COMHAB	100%
BROKERAGE	100%
COMMUNITY CLASSES	100%
MEMBERSHIPS	100%

Viewing Budget for: 2018-07-01 - 2019-06-30

- (2) Click the Draft Plan button.

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Current Staff Action Plan For Thomas Thompson DEMO

This is the current Staff Action Plan and is not editable.

- (3) Finalize the plan
 1. Select an option for Care Coordination Organization.
 2. Fill in Review Date and Distribution Date.
 3. Click **Finalize**.

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Draft Staff Action Plan For Thomas Thompson DEMO

This Staff Action Plan is in draft mode and is editable.

Participant Name
Thomas Thompson DEMO

Medicaid CIN
TT00000T

Care Coordination Organization
1 Please select...

Dates
2 mm/dd/yyyy Review Date
mm/dd/yyyy Distribution Date

3 Finalize Delete Download Draft PDF

OUTCOMES COMPLETED
CLICK TO VIEW

PLAN SAFEGUARDS COMPLETED
CLICK TO VIEW

SD SAFEGUARDS COMPLETED
CLICK TO VIEW

Staff Action Plans: Document Upload Guide

(4) Add broker signature

1. Sign or type a signature for Broker Signature.
2. Click **Save Signature**.

The screenshot shows a web interface for adding a signature. At the top, there is a 'Signature Method' section with two tabs: 'Sign' and 'Type'. Below this, the 'Broker Signature' area displays a handwritten signature. Underneath the signature, there is a line of text that says 'Sign above with your finger or mouse'. At the bottom of this section, there are two buttons: 'Clear' and 'Save Signature'. The 'Save Signature' button is highlighted with a red rectangular box. Below the signature area, there are three buttons: 'Approve', 'Cancel', and 'Download Draft PDF'.

(5) Get Participant Signature:

There are two options for this: an electronic signature, or print and sign.

• Option 1: Electronic Signature

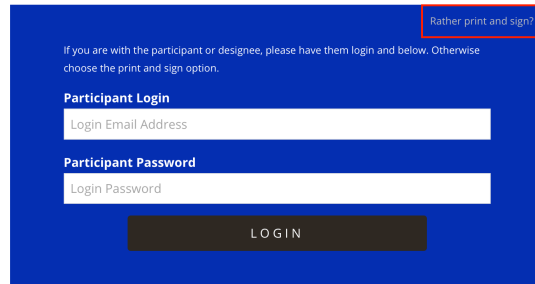
1. If the Participant has login credentials to the portal and are present, they can enter their credentials in the form fields to validate.

The screenshot shows a 'Participant Login' form. At the top, there is a 'Broker Signature' area with a handwritten signature and a small text below it: 'Johnny Broker DEMO, title: Support Broker signed on June 11, 2019 @ 14:46'. Below this, there is a blue box with the text 'Rather print and sign?' and 'If you are with the participant or designee, please have them login and below. Otherwise choose the print and sign option.' The form has two input fields: 'Participant Login' with 'Login Email Address' and 'Participant Password' with 'Login Password'. Below these fields is a 'LOGIN' button. At the bottom of the page, there are three buttons: 'Approve', 'Cancel', and 'Download Draft PDF'.

Staff Action Plans: Document Upload Guide

- **Option 2: Print and Sign**

2. If the participant does not have login credentials to the portal or is not present, select **Rather print and sign?**.



Rather print and sign?

If you are with the participant or designee, please have them login and below. Otherwise choose the print and sign option.

Participant Login

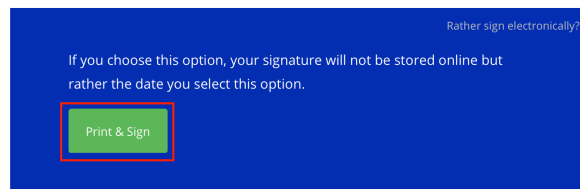
Login Email Address

Participant Password

Login Password

LOGIN

3. Click **Print & Sign**.

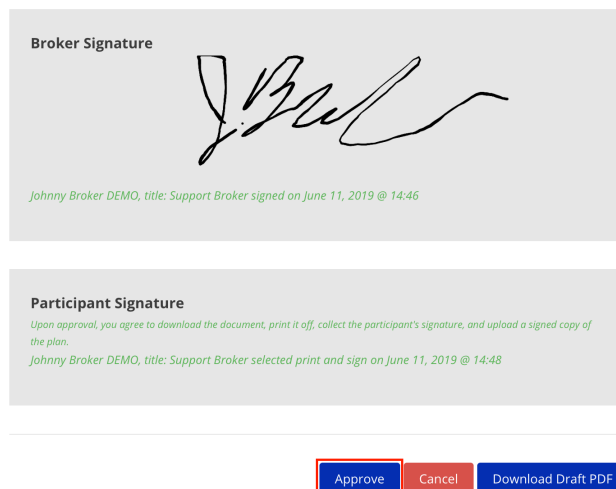


Rather sign electronically?

If you choose this option, your signature will not be stored online but rather the date you select this option.

Print & Sign

4. Click **Approve**.



Broker Signature

J. Broder

Johnny Broder DEMO, title: Support Broker signed on June 11, 2019 @ 14:46

Participant Signature

Upon approval, you agree to download the document, print it off, collect the participant's signature, and upload a signed copy of the plan.

Johnny Broder DEMO, title: Support Broker selected print and sign on June 11, 2019 @ 14:48

Approve Cancel Download Draft PDF

Staff Action Plans: Document Upload Guide

5. Click **Download PDF to Sign**.

Participant Name
Thomas Thompson DEMO

Medicaid CIN
TT00000T

Care Coordination Organization
Care Design NY

Dates
06/11/2019 06/12/2019
Review Date Distribution Date

[Download PDF to Sign](#) [Upload Signed Plan](#)

6. Print the PDF.

7. Have the Participant or Advocate sign the printed plan.

(6) Upload Signed Plan

1. Scan the signed plan.
2. From the Current Staff Action Plan page in the portal, click **Upload Signed Plan**.

Current Staff Action Plan For Thomas Thompson DEMO [Current Plan](#) [Create New](#)
This is the current Staff Action Plan and is not editable.


Participant Name
Thomas Thompson DEMO


Medicaid CIN
TT00000T


Care Coordination Organization
Care Design NY

Dates
06/11/2019 06/12/2019
Review Date Distribution Date

[Download PDF to Sign](#) [Upload Signed Plan](#)

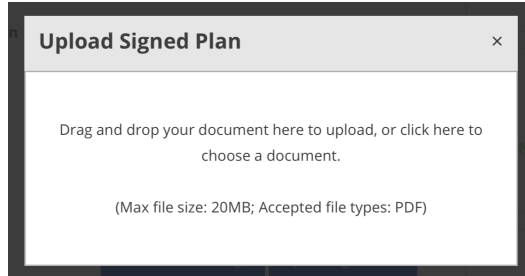

OUTCOMES COMPLETED
CLICK TO VIEW


PLAN SAFEGUARDS COMPLETED
CLICK TO VIEW


SD SAFEGUARDS COMPLETED
CLICK TO VIEW

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3. Drag and drop or click to select the scanned document.




(7) Download Signed Plan

1. To download the signed plan that was uploaded, click **Download Signed Plan**.



Current Staff Action Plan For Thomas Thompson DEMO [Current Plan](#) [Create New](#)

This is the current Staff Action Plan and is not editable.

Document uploaded successfully!

Participant Name Thomas Thompson DEMO	 OUTCOMES COMPLETED CLICK TO VIEW
Medicaid CIN TT00000T	
Care Coordination Organization Care Design NY	
Dates 06/11/2019 06/12/2019 <small>Review Date Distribution Date</small>	

[Download PDF to Sign](#) [Download Signed Plan](#)

 PLAN SAFEGUARDS COMPLETED CLICK TO VIEW
 SD SAFEGUARDS COMPLETED CLICK TO VIEW