TECHNICAL BULLETIN

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<th>TB 20-02</th>
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<td>Date:</td>
<td>09/10/2019</td>
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<td>Subject:</td>
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**Purpose:** To clarify the format required for the Individual Service Plan (ISP) submission.

**Background:** Previously, DDD required plan writers to use a certain format for plans and required certain standard goals to be addressed in each plan. With a focus on person-centered planning, these requirements for ISP and CDP submissions are no longer valid. Plans with standardized, “cookie cutter” types of goals have begun to be sent back for revision to person-centered goals.

**Information:**

Effective November 1, 2019, any plans submitted using the old format will not be accepted, and any plan that includes a separate career development plan will not be accepted.

New ISPs should be developed through a documented person-centered planning process. Employment must be addressed in an individual’s ISP. Plans will be returned for clarification if they do not specify the desired number of hours per week the individual would like to work or if they contain generic employment goals, such as but not limited to, “John Doe will secure employment in an integrated setting making minimum wage”.

All plans must include the ISP Attachment Form for Benefits Planning and Employment (see attached). Retired individuals or those who do not want to work still need to address employment in their plan through this form. Those who want to continue working or find a job, must have specific, person-centered employment goals, which must include the person’s desired weekly hours and must specify the types of settings or employers the person wants to pursue. For those who are not sure about work or are not ready for a job search, the employment-related goal(s) must specify actions to support their journey towards employment, such as health stabilization or improving stability in the community.

Plan writers may use any plan format that addresses all of the following areas.

**Required Plan Content:**

1. **Individual Choices:** What is important to the individual and what is important for the individual.

2. **Strengths and Barriers:** Strengths and barriers are listed in a way that will assist individuals to meet his/her goals.

3. **Relationships and Community:** Individual’s social support network is addressed beyond paid staff, and supports for maintaining/developing relationships are addressed, as needed.
4. **Person Centered Basis of Plan:** Evidence of Person-Centered Planning is used to inform the goals and outcomes of the ISP.

5. **Skill Development:** Areas of needed skill development are addressed, and/or skills the individual has acquired and wants to use in goals are detailed. This section also includes safety-related skills, for example, understanding how to evacuate at work, online/telephone safety, or travel training.

6. **Addressing Risk:** The ISP details areas of potential risk associated with the individual’s choices or goals and addresses how the risk will be approached and mitigated. This section should NOT include areas that are not a risk for the individual, such as “Jane Doe can regulate water temperature”.

7. **Education and Work Experience:** Education and/or certificate programs are listed. Employment experiences are detailed where applicable. Community-based non-work experience that support work goals, such as volunteering, must be included.

8. **Clearly Identified Goals and Objectives:** Specific person-centered goals are detailed, meaningful and reflective of personal interests and preferences and specific steps to be taken to reach the goals are outlined with achievable timelines.

9. **Vocational Goals and Related Services:** One of the goals must address vocational and related services in detail with achievable timelines and include the number of weekly hours the individual desires to work. All vocational interests and goals should be listed, including those that appear more aspirational. Steps should be detailed that will help the individual establish objectives to achieve their goals and for providers to design supports in a way meaningful to the individual.

10. **Responsibilities:** The plan details the responsible parties for each step of each goal/outcome.

11. **Services & Supports Needed to Attain Goals:** Services and supports needed to attain goals are captured in a way that is specific to the individual’s needs and preferences.

12. **Accommodations Needed:** Accommodations needed to be successful are captured in a way that is specific to the individual. Assistive Technology is listed if applicable.

13. **Transportation & Supports Needed:** How the individual will get to and from work and other activities is captured.

14. **Benefits Planning:** The plan indicates what benefits planning information the individual received, and whether a benefits plan has been completed or declined.

15. **ISP Submission Date:** Submitted at least 45 days before due date.

16. **Signature Page:** The individual and all parties involved in the completion of the ISP signed.

17. **Attachments:** The ISP Attachment Form for Benefits Planning and Employment must be included. Other attachments may be included as needed.

**Other References:** Sample ISP plans.

**Version Control and Change History:**

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<thead>
<tr>
<th>Version</th>
<th>Effective Date</th>
<th>Rescinded Date</th>
<th>Amendment/Update</th>
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<td>2.0</td>
<td>9/10/19</td>
<td>current</td>
<td>Update</td>
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<td>1.0</td>
<td>8/22/18</td>
<td>8/9/2019</td>
<td>Original Version</td>
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What information on Social Security Work Incentives, have you received? This includes information a family member or rep payee received on your behalf. Check all that apply.

I received (check all that apply):
- SSA Working While Disabled Pamphlet
- Myths & Facts: Social Security Benefits & Work
- Sherlock Plan information

I attended (check all that apply):
- A group work incentive information session
- An individual counseling session for a benefits plan

Do you have a benefits plan written by a Certified Work Incentives Counselor (CWIC)?
- Yes____
- No____
If YES, date of plan: ___________
If NO, do you have a decline on file? ______

Working age adults (age 18+) must choose one of the following statements:

- I am employed and choose to: Check all that apply.
  - Retain current integrated job.
  - Advance in current integrated job (more hours, raise, new skills, promotion, etc.)
  - Get a new integrated job.
  - Get an additional integrated job.
  - Maintain a job in a non-integrated employment setting.
    - Complete separate Request for Variance for Segregated Employment and submit separately.

- I am Retired – I am at least 62 or will be this ISP year.
  - Employment goals are not required, but plan must address retirement activities.

- I am currently not working in integrated employment, but I’m interested and choose to: Check all that apply.
  - I want to obtain integrated employment.
  - Explore interests in integrated employment through an Employment Path, Discovery, or other time-limited service.
  - I’m enrolled in Post-Secondary Education or a Vocational Training Program.
  - Not pursue integrated employment at this time due to need to stabilize health (including behavioral health).
  - Other: please explain_________________________________________________________

- I am not interested in employment
  - Complete Request for Variance for Day Only Services and submit separately.

Status with Office of Rehabilitation Services (ORS)

- I am currently receiving ORS Services
- I went to ORS in the past, now closed
- I want a referral to ORS
- Other/Not Applicable, please explain: