

Staff Action Plan 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.

ISS INDEPENDENT SUPPORT SERVICES INC. *Make your Own Path*

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

Dashboard For Thomas Thompson Demo

MEDICAID \$0.00 spent out of \$68,768.80 100% 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 [Detail View »](#)

2. Click the **Draft Plan** button.

ISS INDEPENDENT SUPPORT SERVICES INC. *Make your Own Path*

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

Current Staff Action Plan For Thomas Thompson DEMO

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

Current Plan **Draft Plan**

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

Draft Staff Action Plan For Thomas Thompson DEMO

Current Plan **Draft Plan**

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

4. Add broker signature

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

Signature Method

Sign Type

Broker Signature

Sign above with your finger or mouse

Clear

Save Signature

Approve

Cancel

Download Draft PDF

5. Get Participant Signature:

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

1. Option 1: Electronic Signature

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



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

Participant Password

LOGIN

2. Option 2: Print and Sign

1. 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

Participant Password

LOGIN

2. 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

3. Click **Approve**.

Broker Signature



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

Approve

Cancel

Download Draft PDF

4. 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




5. Print the PDF.
6. Have the Participant or Advocate sign the printed plan.

6. Upload the 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	 OUTCOMES COMPLETED CLICK TO VIEW	
Medicaid CIN TT00000T		
Care Coordination Organization Care Design NY		
Dates 06/11/2019 Review Date	06/12/2019 Distribution Date	 PLAN SAFEGUARDS COMPLETED CLICK TO VIEW
Download PDF to Sign Upload Signed Plan		
		 SD SAFEGUARDS COMPLETED CLICK TO VIEW

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

Upload Signed Plan

Drag and drop your document here to upload, or click here to choose a document.

(Max file size: 20MB; Accepted file types: PDF)

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

Medicaid CIN

TT00000T

Care Coordination Organization

Care Design NY

Dates

06/11/2019

Review Date

06/12/2019

Distribution Date



OUTCOMES COMPLETED

[CLICK TO VIEW](#)



PLAN SAFEGUARDS COMPLETED

[CLICK TO VIEW](#)



SD SAFEGUARDS COMPLETED

[CLICK TO VIEW](#)

[Download PDF to Sign](#)

[Download Signed Plan](#)

🔄 Revision #1

★ Created 30 November 2020 21:57:21 by Admin

✎ Updated 14 December 2024 01:37:23 by Admin