Government of Alberta
Human Services

PDD Outcome Plan Inputting Instructions V1.0 Apr2018
for CCISD Release 4.0

Version 1
April 2018

Deliverable Information

Revision History

Version Number	Revision Date	Summary of Changes :Author
1.0	May 9, 2016	Initial Draft – Bev Bayda
1.1	May 18, 2016	Updates based on feedback from PDD and IBM
1.2	Sept 15, 2016	Updated based with more information from UAT
1.8	Oct 1, 2016	Update based on R3.1 Design Specification
1.9	Feb 17, 2017	Update based on R3.1.1 Design Specification
2.0	Mar 15, 2017	Review and update Process Flow and PDD Outcome Plan PDF
3.0	Apr. 1, 2018	Updated screenshots to reflect Mobius V.7 changes
1.0	Apr. 6, 2018	Name changed to PDD Outcome Plan Inputting Instructions Apr2018 V1.0 Apr2018.docx (Eraldo Fontes asst'd with formatting)

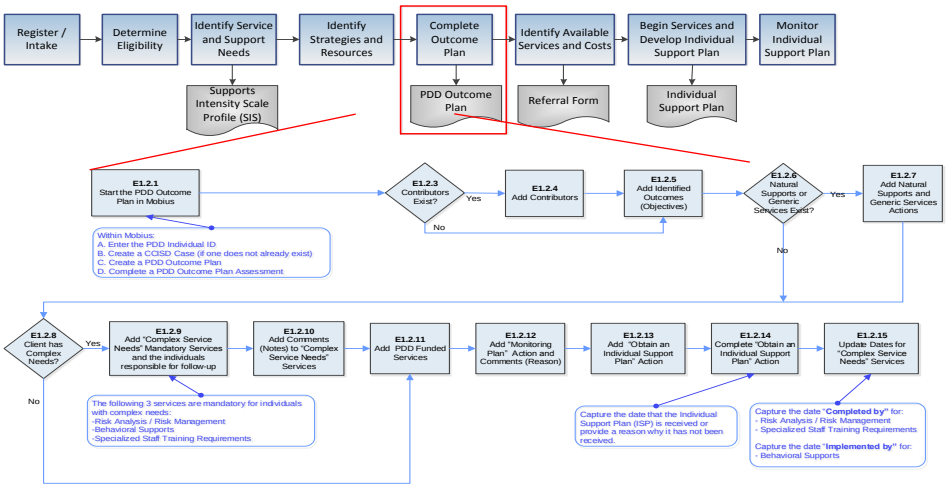
Table of Contents

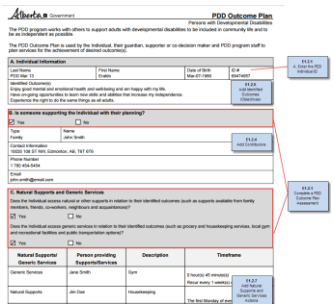
1 Introduction

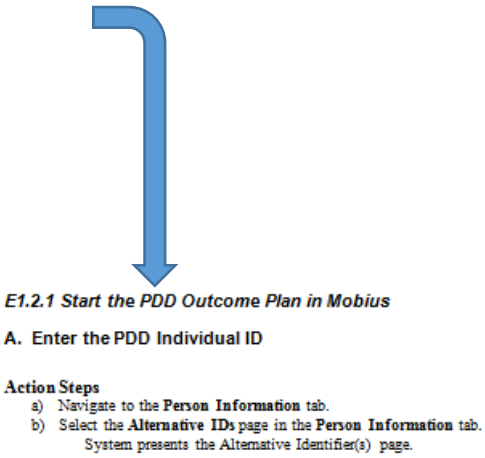
Purpose

This document provides:

1. An introduction and background on the PDD Outcome Plan
2. The process flow for completing a PDD Outcome Plan
3. PDD Outcome Plan form mapped to actions from the process flow
4. Step-by-step instructions on how to perform each of the actions in the process flow







Details on the functionality provided to create, view, print and close a PDD Outcome Plan in Mobius are described in the DP14.01 PDD Outcome Plan Design Specification. Business guidelines for performing outcome planning will be documented in Module 2 of the PDD staff training.

Audience

The intended audience for this document includes PDD Subject Matter Experts, and the technical team and was not originally designed with front line staff in mind. Mobius users (staff using Mobius) should disregard the Source information as this is more relevant to the technical team's use.

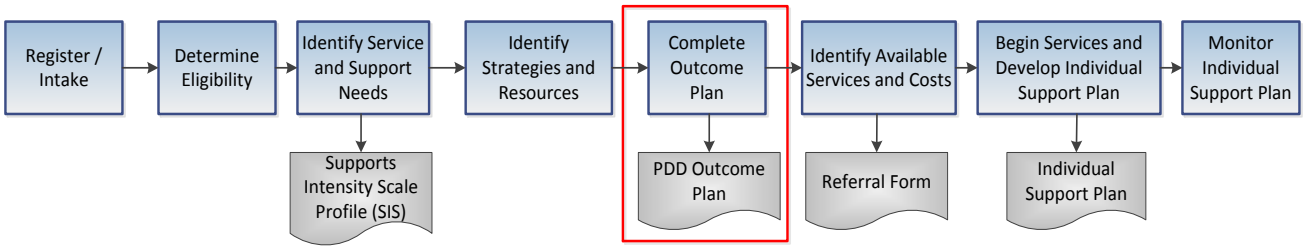
Background

The PDD Outcome Plan provides a summary of an individual's identified outcomes, support needs and services. It is developed by the PDD case worker with input from the individual and

stakeholders involved in his/her life. The case worker reviews, updates or creates a new PDD Outcome Plan as required. A copy of the plan is provided to the individual / guardian and the Service Provider. The Service Provider uses the PDD Outcome plan as one of the inputs for the development of the Individual Support Plan.

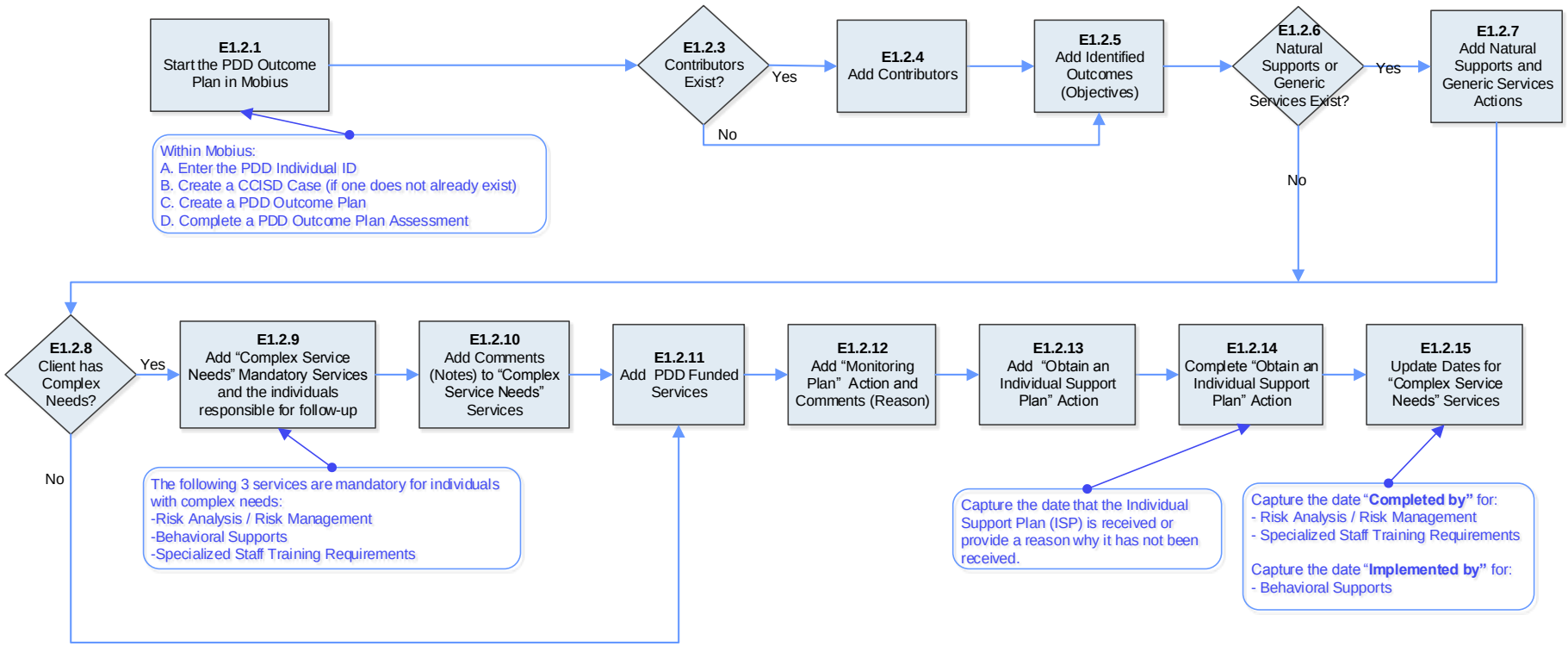
The PDD Outcome Plan was implemented in April 2017 and due to a CURAM Mobius V.7 upgrade this document was updated to reflect the related changes.

The following diagram shows where the PDD Outcome Plan falls within the PDD business process.



2 Process Flow

The actions to complete a PDD Outcome Plan in Mobius are illustrated in the process flow below.



3 PDD Outcome Plan Form

Each action within the process flow has been mapped to a section of the PDD Outcome Plan form.

Alberta Government

PDD Outcome Plan

Persons with Developmental Disabilities

The PDD program works with others to support adults with developmental disabilities to be included in community life and to be as independent as possible.

The PDD Outcome Plan is used by the Individual, their guardian, supporter or co-decision maker and PDD program staff to plan services for the achievement of desired outcome(s).

A. Individual Information

Last Name	First Name	Date of Birth	ID #
PDD Mar 13	Eraldo	Mar-07-1980	69474957

E1.2.1 A. Enter the PDD individual ID

Identified Outcome(s)
Enjoy good mental and emotional health and well-being and am happy with my life.
Have on-going opportunities to learn new skills and abilities that increase my independence.
Experience the right to do the same things as all adults.

E1.2.5 Add Identified Outcomes (Objectives)

B. Is someone supporting the Individual with their planning?

☑ Yes ☐ No

Type	Name
Family	John Smith

E1.2.4 Add Contributors

Contact Information
10035 108 ST NW, Edmonton, AB, T6T 6T6

Phone Number
1 780 454-5454

Email
john.smith@email.com

E1.2.1 Complete a PDD Outcome Plan Assessment

C. Natural Supports and Generic Services

Does the Individual access natural or other supports in relation to their identified outcomes (such as supports available from family members, friends, co-workers, neighbours and acquaintances)?

☑ Yes ☐ No

Does the Individual access generic services in relation to their identified outcomes (such as grocery and housekeeping services, local gym and recreational facilities and public transportation options)?

☑ Yes ☐ No

Natural Supports/ Generic Services	Person providing Supports/Services	Description	Timeframe
Generic Services	Jane Smith	Gym	0 hour(s) 45 minute(s) Recur every 1 week(s) on Monday.
Natural Supports	Jim Doe	Housekeeping	The first Monday of every 1 month(s).

E1.2.7 Add Natural Supports and Generic Services Actions

E1.2.7 (c) Reason box on the Details page of New Action Modal

E1.2.7 (b) New Action field in New Action Modal

D. Does the Individual have Complex Service Needs?

☑ Yes ☐ No

Adults with complex service needs are defined as Individuals who are eligible for services from the PDD program and pose a significant risk, and/or are destructive, to themselves, others or property. They require intensive services and have, or have had a history of one or more of the following diagnoses or life experiences:

- A mental health disorder;
- Termination from services due to challenging behaviors;
- Specialized treatment for psychiatric and/or behavioral issues;
- Multi-system involvement;
- Incarceration(s) or criminal justice involvement; and/or
- Chronic substance abuse/dependency problems.

Required Service	Person Responsible for follow-up	Comments	Date Implemented/ Completed By
☑ Risk Analysis / Risk Management	Mary Risk Free	Service Risk Comment	Jun-12-2017
☑ Behavioral Supports	[illegible]	[illegible]	[illegible]
☑ Specialized Staff Training Requ[illegible]	[illegible] Trainer	[illegible]	Apr-26-2017

E1.2.9
Add "Complex Service Needs" Mandatory Services and the individuals responsible for follow-up in the Reason Box

E1.2.10
Add Comments (Notes) to "Complex Service Needs" Services via New Comment or New Note.

E1.2.15
Update dates for "Complex Service Needs" Services

E. Description of PDD Funded Services

Identified Outcome	Service Type	Date services will be required?	Quality of Life Domains	How will services be provided?
Enjoy good mental and emotional health and well-being and am happy with my life.	Employment preparation	Mar-14-2017	☐ Emotional Well-Being ☐ Interpersonal Relations ☑ Material Well-Being ☐ Personal Development ☐ Physical Well-Being ☐ Rights ☐ Self Determination ☑ Social Inclusion	Funded Service Employment Preparation

E1.2.11
Add PDD Funded Services

E1.2.11
Add PDD Funded Services

E1.2.1
Complete a PDD Outcome Plan Assessment

F. Monitoring Plan

PDD regional staff will have a minimum of one annual face-to-face meeting with the Individual and their guardian, plus every 3 months (e.g. face-to-face, phone, email).
The Service Provider and/or Family Managed Services Administrator will provide a written update every 3 months.

E1.2.12
Add "Monitoring Plan" Action

G. Summary of Individual's Information

This is the additional information entered in the Reason field when the Monitoring Plan action is added to the PDD replaced the standard text presented by the system.

E1.2.12
Add "Monitoring Plan" Comments (Reason)

H. Individual Support Plan (Required within 90 days)

☑ Received Apr-10-2017

☐ Not Received

E1.2.13
Add "Obtain an Individual Support Plan" Action

E1.2.14
Complete "Obtain an Individual Support Plan" Action

PDD Caseworker: Eraldo Fontes
Phone Number:
Date: Mar-13-2017
Email: Eraldo.Fontes@gov.ab.ca

Section 8
Change Case Worker – for a PDD Outcome Plan

4 Step-by-Step Instructions

Step-by-step instructions are provided in this section for each of the process flow actions.

As of the Mobius Release 3.4 which occurred on Dec. 11, 2017, the tab names and order were changed to accommodate the CCISD Common Outcome Plan. Tabs not applicable to the PDD Outcome Plan have been greyed out.

E1.2.1 Start the PDD Outcome Plan in Mobius

A. Enter the PDD Individual ID

(PDD Outcome Plan PDF form section A, Individual Information.)

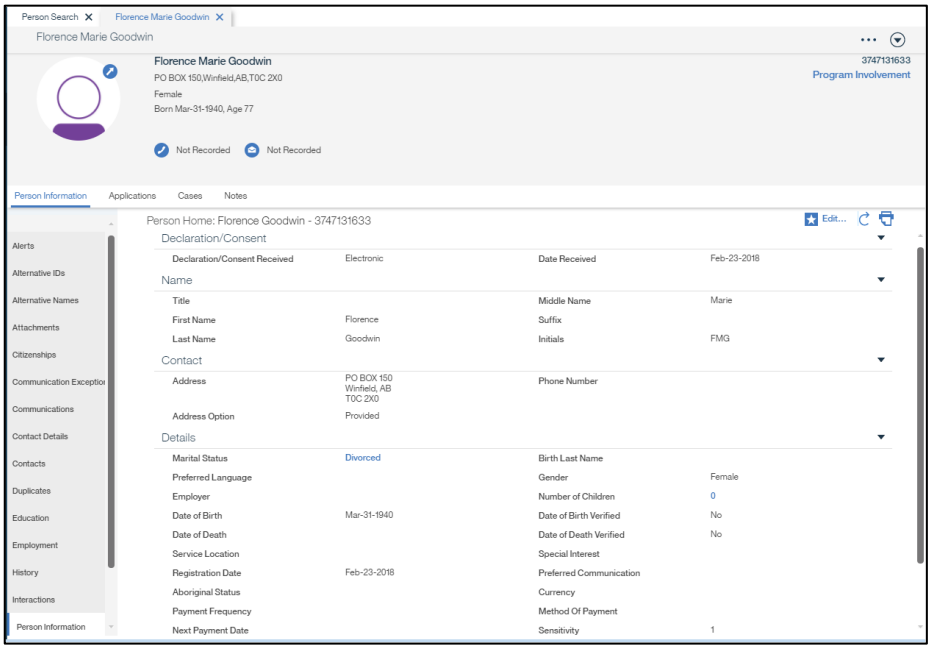
The PDD Individual ID (i.e. the CSS ID) must be recorded in Mobius before the PDD Outcome Plan can be printed or closed.

Notes:

- The PDD Individual ID is the only Alternative ID in Mobius printed on the PDD Outcome Plan.
- A PDD Individual ID which is cancelled or has a “To” date in the past will not be printed on the PDD Outcome Plan.
- The PDD Individual ID is not considered a public identifier; therefore workers are not able to use this in the search criteria. (The PDD Individual ID is stored in the Enterprise Data Base from CSS, but not from Mobius.)
- An incorrect PDD ID can be entered. If this occurs there is a report in the Outcome Plan Infomart Reports to look up the name of individual who the PDD ID has been incorrectly associated with. (http://edm-goa-sql-353/Reports/Pages/Report.aspx?ItemPath=%2fPublic%2fPDD%2fOutcome+Plan+Reports%2fLookup+PDDID)

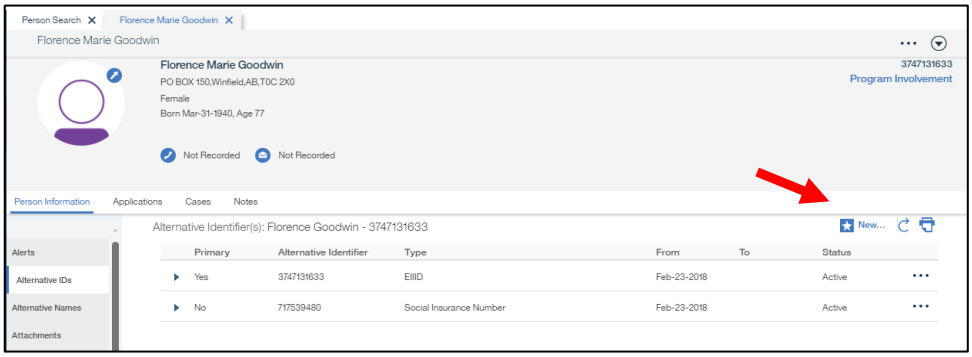
Start

- User (Staff using Mobius) is on the Person home page.



Action Steps
SOURCE: DP14.01.UC.01 Step 1: Internal User enters an Alternative ID

a) Navigate to the **Person Information** tab.
b) Select the **Alternative IDs** option in the left navigation pane under the **Person Information** tab.
System presents the Alternative Identifier(s) page.



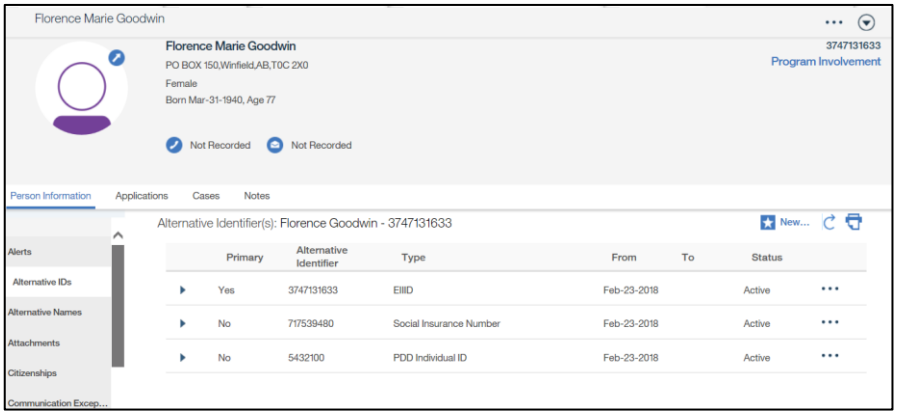
c) Select the **New** button.
System presents the Create Alternative Identifier modal dialog.

d) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP*
Alternative Identifier	M	Enter the client's PDD Individual ID.	Yes
Type	M	Select the **PDD Individual ID** dropdown value.	No
From	M	PDD is not using this field, do not change the value. Default: today's date	No
To	O	PDD is not using this field - leave blank.	No
Comments	O	PDD is not using this field- leave blank.	No

*OP – stands for the PDD Outcome Plan

e) Select the **Save** button.
System displays the Alternative Identifier in the Alternative Identifier(s) page.



B. Create a CCISD Case

The CCISD case is the Mobius container (similar to the green folder used in the PDD paper file) for storing all the client's Outcome Plans.

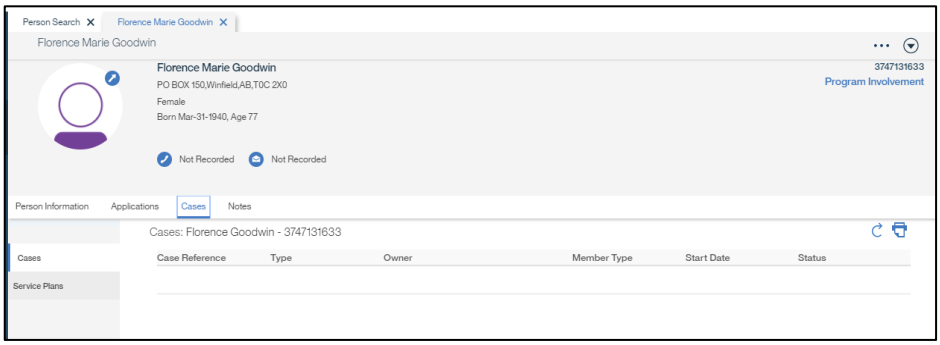
If a CCISD Case already exists, use that one. Do not create a second CCISD Case!

Start

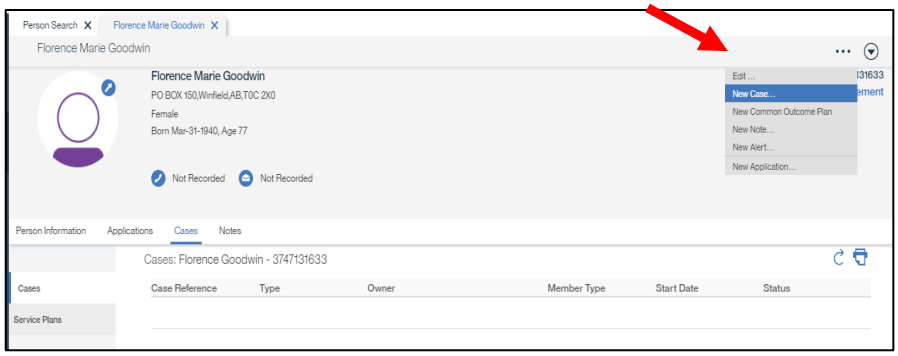
- User is on the person home page and select the Cases tab.

Action Steps

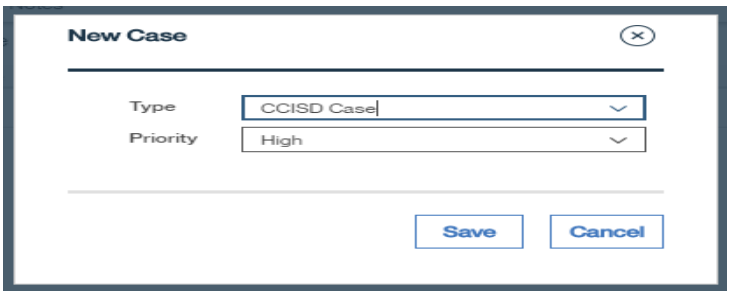
SOURCE: DP14.01.UC.01 Step 2: Internal User Creates a CCSID Case for the Individual



a) Select **New Case** from the person home page tab **Actions** menu.



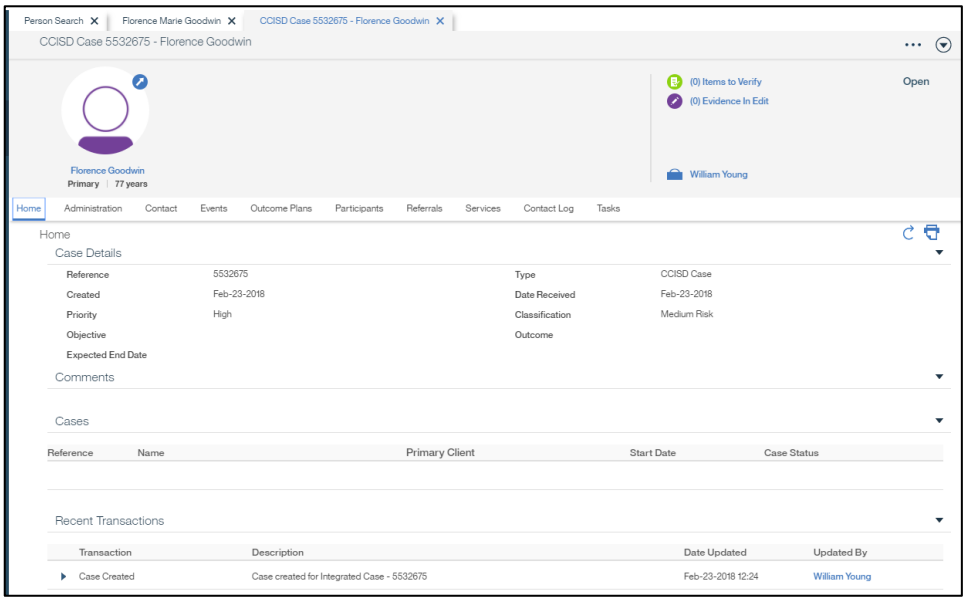
System presents the New Case modal dialog.



b) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Type	M	Select the **CCISD Case** dropdown value**.**	No
Priority	M	PDD is not using this field– do not change the value. Default: high	No

c) Select the **Save** button.
System presents the CCISD Case home page in a new tab.



C. Create a PDD Outcome Plan

The PDD Outcome Plan is the Mobius container for storing information for a single PDD Outcome Plan. If an “Open” PDD Outcome Plan already exists, the system will not allow the creation of a new PDD Outcome Plan.

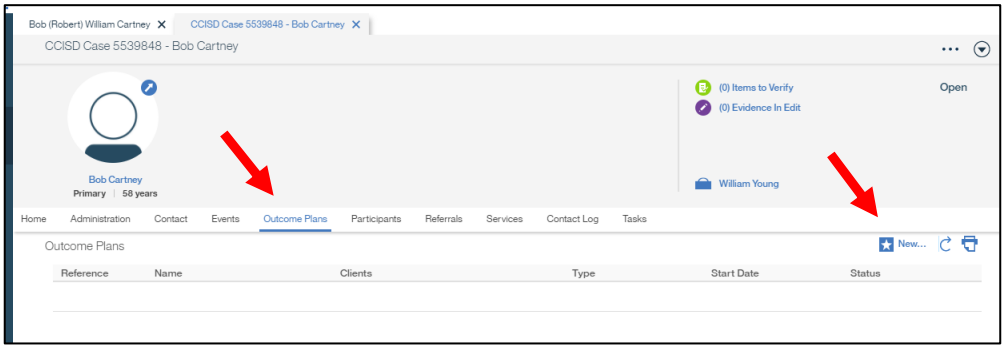
Start

- User is on the person’s CCISD Case home page.

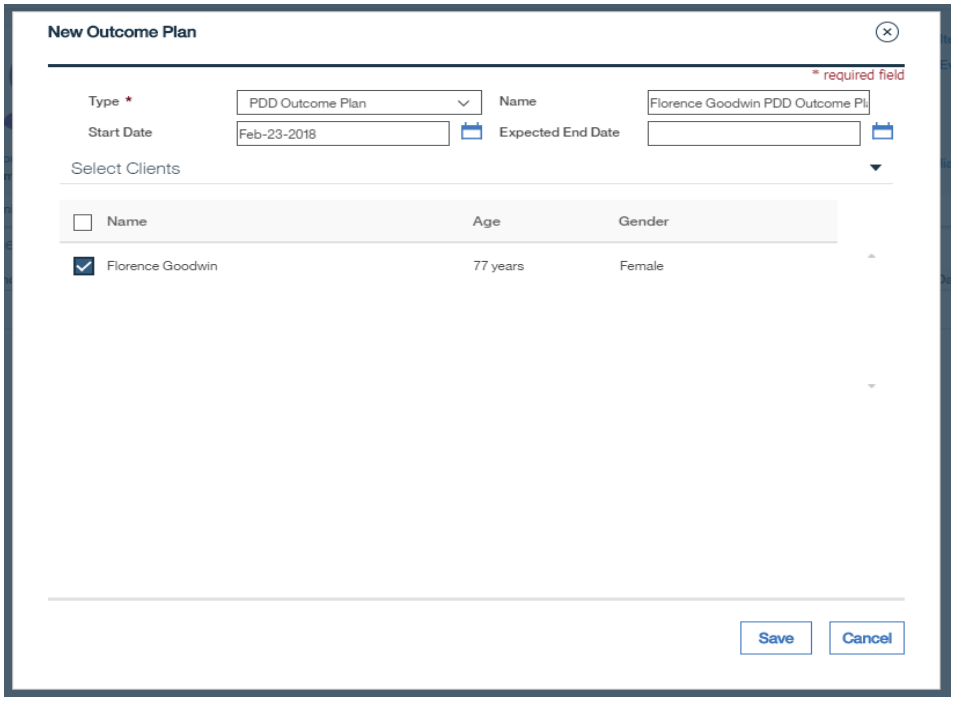
Action Steps

SOURCE: DP14.01.UC.01 Step 3: Internal User Creates a PDD Outcome Plan for the Individual

a) Select the **Outcome Plans** tab from the person's CCISD Case home page.
System presents the Outcome Plans page.



b) Select the **New** button.
System presents the New Outcome Plan modal dialog.

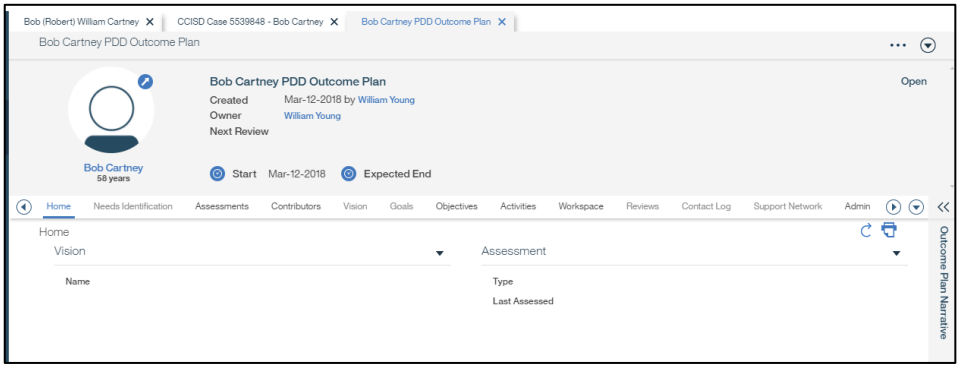


c) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Type	M	Select the **PDD Outcome Plan** dropdown value	No
Name	M	Enter a name for the PDD Outcome Plan. The naming convention is: ***<Firstname Lastname>* PDD Outcome Plan** Example: Celia Buttershaw PDD Outcome Plan. Use this naming convention for all PDD Outcome Plans for the same individual. When multiple PDD Outcome Plans exist for an individual, the most recent may be identified from by the Start Date.	No
Start Date	M	Enter the date the PDD Outcome Plan is completed with the individual / representative. This date is displayed on the last page of the PDD Outcome Plan PDF. Default: today's date	Yes
Expected End Date	O	PDD is not using this field - leave blank.	No
Select Clients	M	Check the box next to the client's name. All members added to the case will be listed. The PDD business practice is to have only one member for each CCISD Case.	Yes

d) Select **Save.**

System presents the outcome plan home page in a new application tab. As of Dec. 11, 2017, when Release 3.4 occurred the tabs were changed to accommodate the CCISD Common Outcome Plan. Tabs not applicable to the PDD Outcome Plan have been greyed out.



D. Complete a PDD Outcome Plan Assessment

The PDD Outcome Plan Assessment is completed in order to set up the components (Factors and Ratings) of the PDD Outcome Plan within Mobius. Please go to 8. Reassessment, if an Assessment needs to be modified.

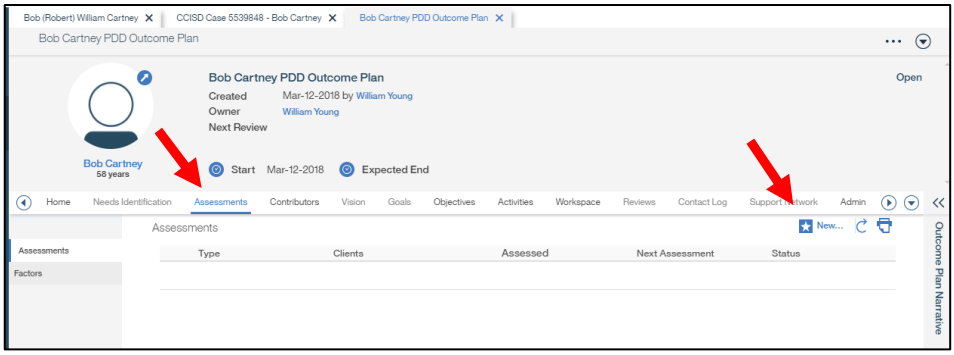
Ratings (for each Factor) are used by Mobius to:
- identify recommended actions and
- run validations prior to printing and closing a PDD Outcome Plan.

Assessment questions	Factor	Rating
• Is someone supporting the individual with their plan?	Outcome Plan Contributors	Yes/No
• Does the individual access natural or other supports (e.g. family members, friends, co-workers, neighbours and acquaintances)?	Access to Natural Supports	Yes/No
• Does the individual access generic service (such as grocery and housekeeping services, local gym and recreational facilities and public transportation options?	Access to Generic Services	Yes/No
• Does the individual have Complex Service needs?	Complex Service Needs	Yes/No
<Quality of Life Domains> • Is Emotional Well-Being a focus for the Individual? • Is Interpersonal Relations a focus for the Individual? • Is Material Well-Being a focus for the Individual? • Is Personal Development a focus for the Individual? • Is Physical Well-Being a focus for the Individual? • Is Rights a focus for the Individual? • Is Self Determination a focus for the Individual? • Is Social Inclusion a focus for the Individual?	<Any one of the 8 QoLD factors Emotional Well-Being* Interpersonal Relations* Material Well-Being* Personal Development* Physical Well-Being* Rights* Self Determination* Social Inclusion*	Focus/Not a Focus
• What is the monitoring requirement for the Individual?	More often than every 3 months Every 3 months Every 6 months Every 12 months (Face-to-face) Every 12 months (Phone or email)	Not Applicable

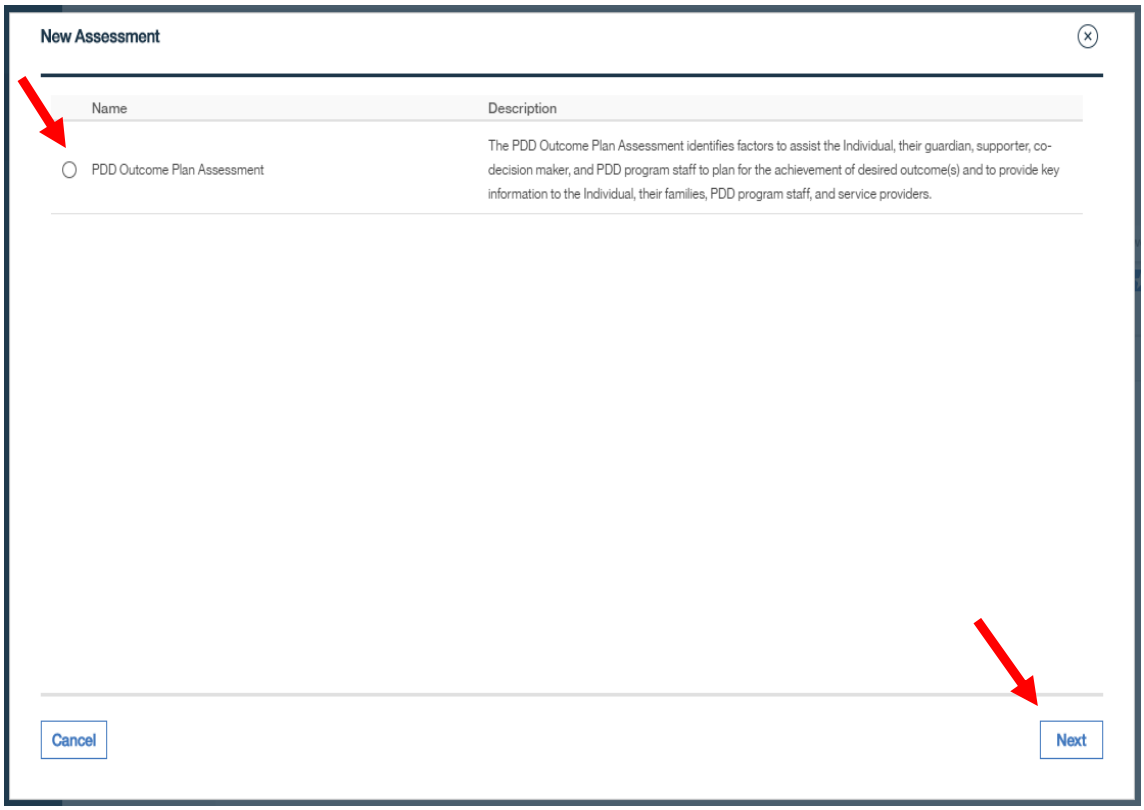
Start
- User is on the person's PDD Outcome Plan home page

Action Steps
SOURCE: DP14.01.UC.02 Step 10: Internal User runs a PDD Outcome Plan Assessment

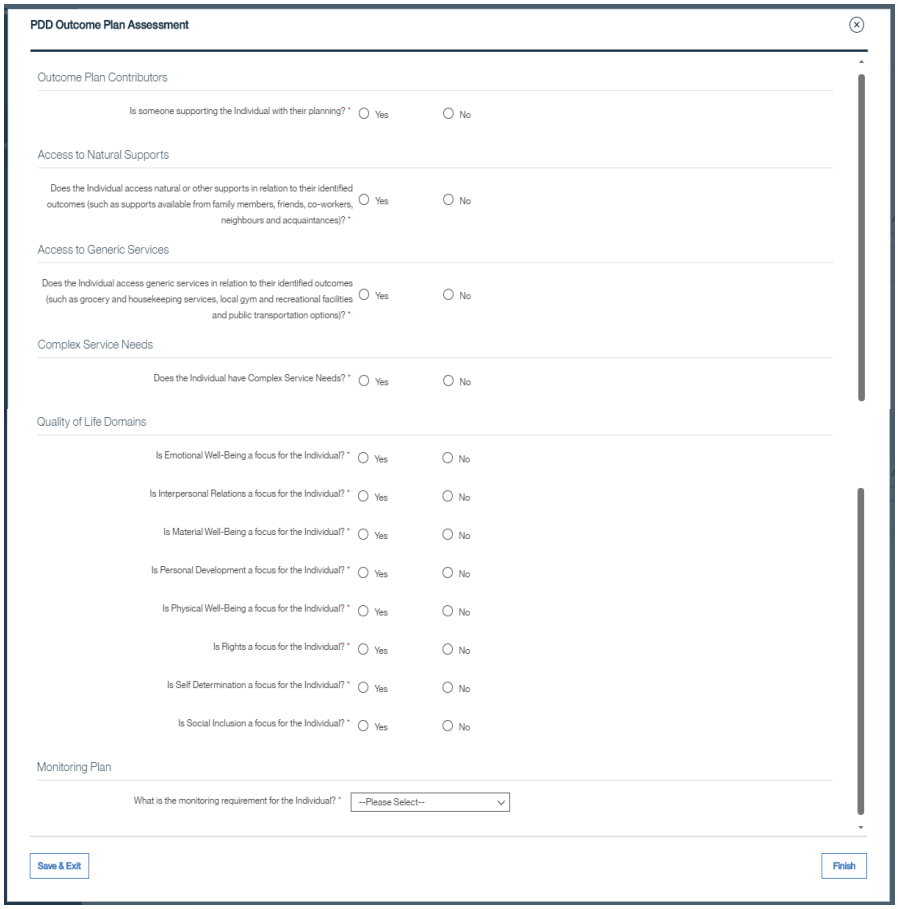
a) Select the **Assessments** tab.
System presents the Assessments page.



b) Select the **New** button.
System presents the New Assessment modal dialog with the Name and Description of the available Assessments.



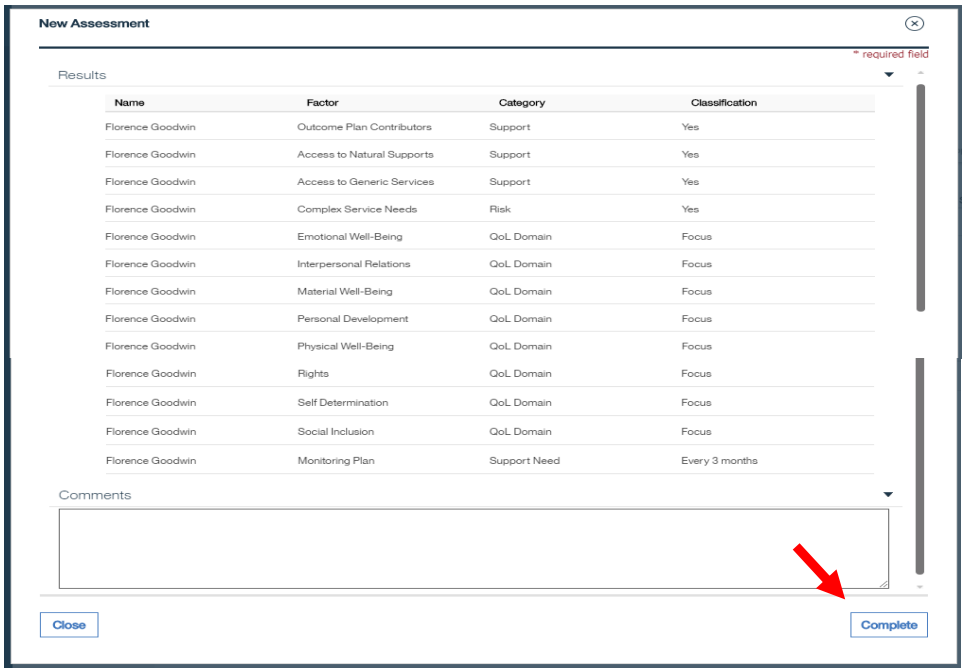
c) Select the **PDD Outcome Plan Assessment** and select the **Next** button.
d) Complete the assessment questionnaire.



e) Select the **Finish** button.

System determines the Factors, Categories, and Classifications based on the responses.

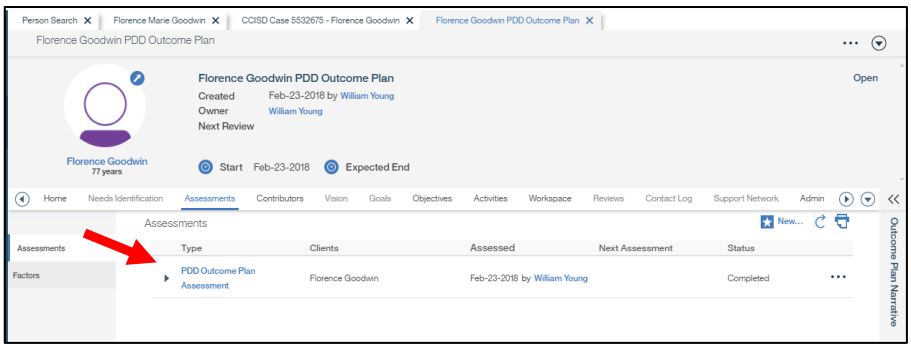
System presents the New Assessment modal dialog with assessment results.



f) Do not populate any fields

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Comments	O	PDD is not using this field – leave blank.	No

g) Select the **Complete** button to finish the Assessment.
System displays the completed assessment. System adds Factors to the PDD Outcome Plan with Ratings specified by assessment responses. In order to see the Factors, click on the "Arrow" to expand it.



E1.2.4 Add Contributors

(PDD Outcome Plan form section B. <u>Is someone supporting the individual with their planning?</u>)

Contributors are the individuals who participate in the development of the client's PDD Outcome Plan and stay involved beyond Outcome planning. Contributors participate in meetings with the Service Provider to discuss services and/or the development of the Individual Support Plan. Individuals not involved beyond the development of the PDD Outcome Plan are not captured as contributors.

There are two types of contributors:

1. **Registered** – Persons registered in Mobius with existing Relationships to the individual who have an "Active" status and not end-dated ("To" date empty) and a Relationship type of:
    - Supporter
    - Co-Decision Maker
    - Private Guardian
    - Private Trustee
    - Aunt, Child, Cousin, Dependent Child, Foster Child, Foster Parent, Grandchild, Grandparent, Nephew, Niece, Parent (Biological/adoptive), Parent of Dependent Child, Sibling, Spouse/Partner, Step Child, Step Parent, Uncle → displayed as Family
    - No Relation, Other Relation → displayed as Friend
    - Excludes the following Relationship Types:
        - Assisted Person, Person represented by a Private Guardian, Person represented by a Private Trustee, Person represented by a Public Guardian, Person represented by a Public Trustee, Public Guardian, Public Trustee, Supported Person
        - Prospect Persons in an existing Relationships with the (Outcome Plan) Person are not presented for selection as a Contributor on the Outcome Plan, but an

information message is displayed to indicate the existence of Relationship(s) with Prospect Person(s)

2. **Unregistered** – Persons not registered in Mobius
   - A Public Guardian and/or Public Trustee involved beyond the outcome planning conversation are entered as unregistered contributors, so that the actual name of the OPGT is captured.
   - Family and Friends not already registered in Mobius are captured as Unregistered Contributors.
   - Always check to see if a person is registered in Mobius before entering them as an Unregistered Contributor.

Notes:

- A Contributor that is a private legal entity must be registered in Mobius. That is: Supporter, Co-Decision Maker, Private Guardian, Private Trustee, Public Guardian and Public Trustee.
- Once a Registered Contributor has been added to the PDD Outcome Plan, they will remain – even if the Relationship record (that existed when the Registered Contributor was added to the PDD Outcome Plan) has changed (to another type or Person) or has been deleted.
- Demographic data of Registered Contributors automatically updates when a change is made to a Contributor's Person record.
- Registered Persons in more than one existing Relationship will be presented more than once for selection
- Registered Person that has previously been added as an Active Contributor will not appear in the list for selection again.

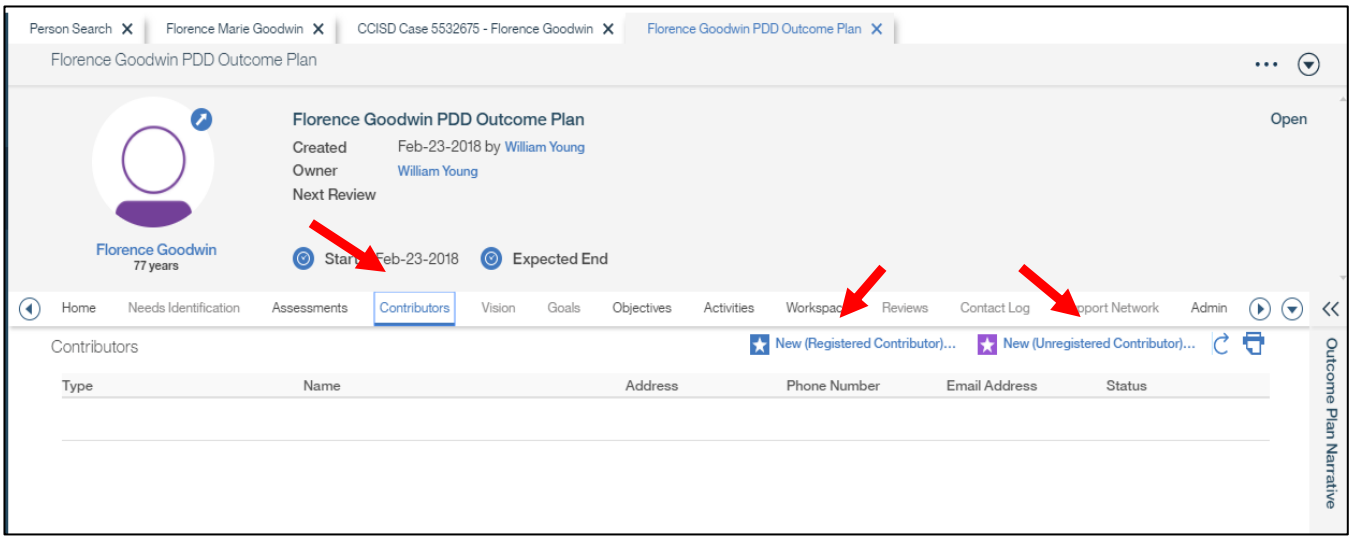
Start

- User is on the person's outcome plan home page

Action Steps

SOURCE: DP14.01.UC.02 Step 12: Internal User adds one or more Contributors to the PDD Outcome Plan

a) Select the **Contributors** tab.
System presents the Contributors page.



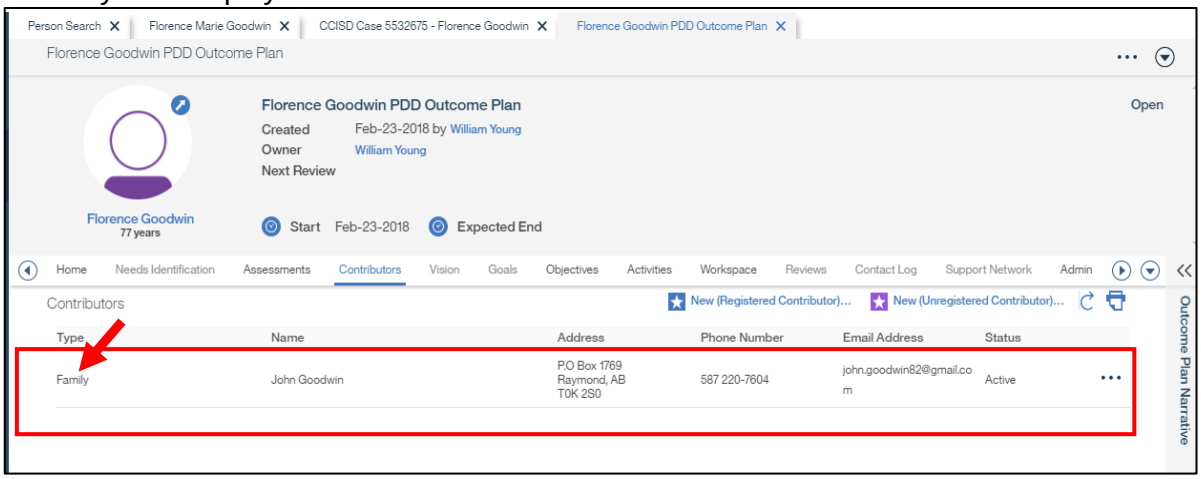
Registered Contributors

b) Select the **New (Registered Contributor)** button.
System presents the New Registered Contributor modal dialog.

- The following demographic information is displayed
  - **Type** – there's 3 types of Contributor (Family, Friend or Organization)
  - **First Name** and **Last Name** – Registered (Legal) Name.
  - **Address** – Mailing address; if multiple, the Active record with latest From Date and no (or future) To Date is displayed. Residential address is never displayed.
  - **Phone Number** – Home phone number; if multiple; the Active record with latest From Date and no (or future) To Date is displayed. The Work, Cell. TTY, FAX, Other, Messages numbers are never displayed.
  - **Email Address** – Personal email address; if multiple, the Active record with latest From Date and no (or future) To Date. The business email address is never displayed.
- Registered Persons in more than one existing Relationship will be presented more than once for selection, in the sort order specified above
- Registered Person that has previously been added as an Active Contributor will not appear in the list for selection again.

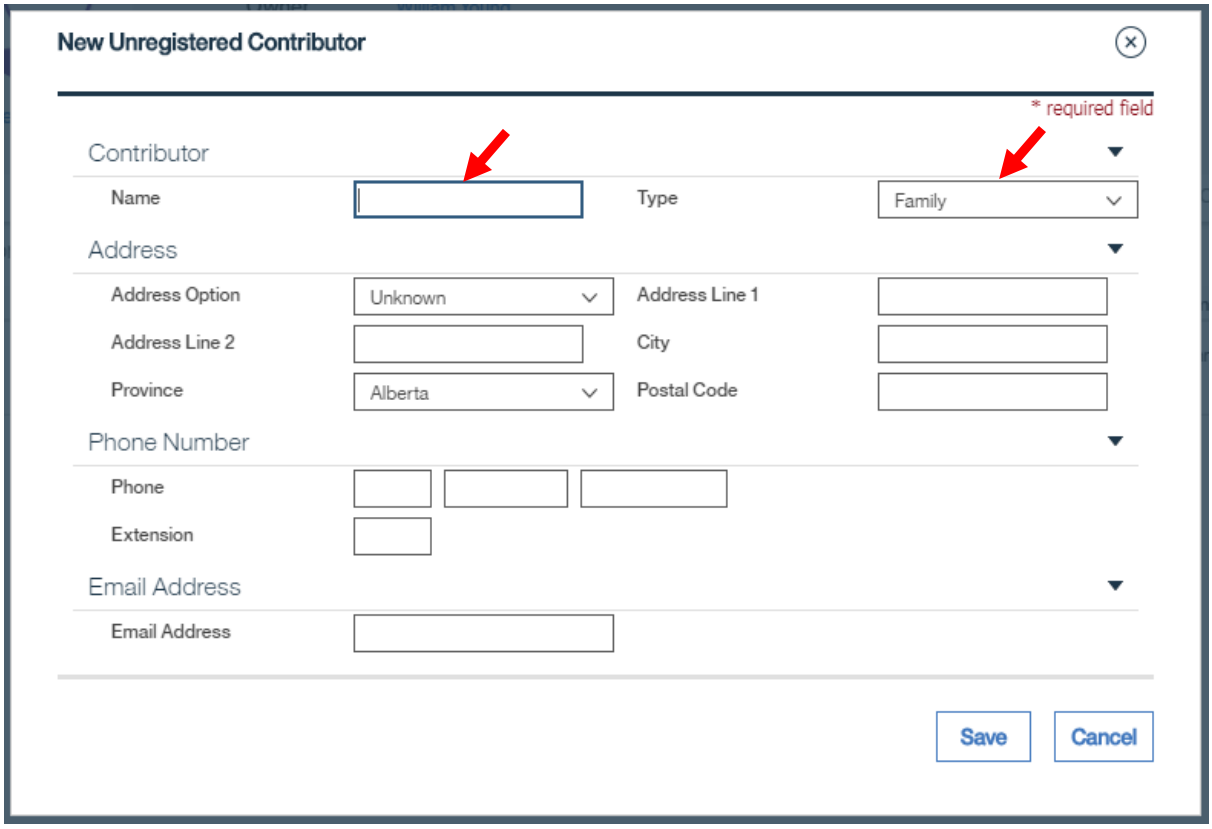
Note: The list of contributors will appear if a relationship exists in the system between the client and another individual. If no names appear on the screen above, refer to the section SETTING UP A RELATIONSHIP in this document.

c) Select **one or more Contributors** and select the **Save** button.
Note: At least one Contributor must be selected.
System displays the new Contributor in the Contributors list.



Unregistered Contributors

a) Select the **New (Unregistered Contributor)** button.
System presents the New Unregistered Contributor modal dialog.



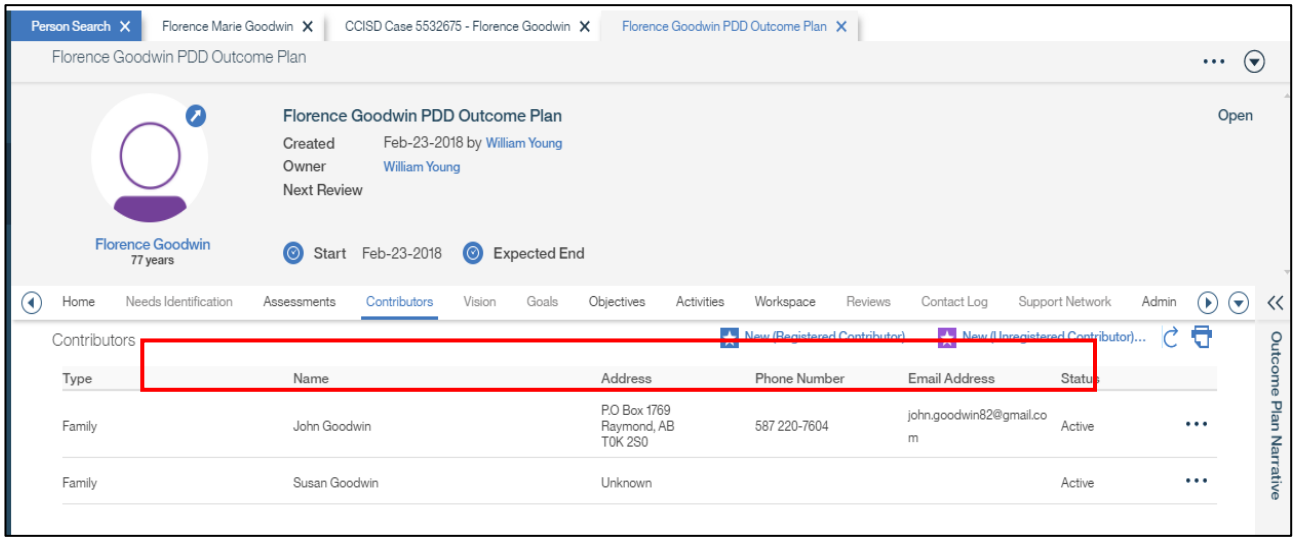
Note: Name, and Type are mandatory fields but are not identified with an asterisk.

b) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Type	M	Select one of the 3 types of relationships: - Family- refers to aunt/uncle, cousin, child, dependent child, foster/step child, foster/step parent, grandchild, grandparent, nephew, niece, parent (biological/adoptive), parent of dependent child, sibling, spouse/partner, etc. - Friend - refers to personal relationships such as a neighbour or coach. - Organization - refers to professional relationships such as a teacher, social worker, etc.	Yes
Name	M	Enter the First and Last Name of the contributor.	Yes

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
		If the Contributor is a Public Trustee or Public Guardian representative enter "(OPGT)" after their name. Example: Jan Frost (OPGT).	
Address Option	M	Select an address description from the dropdown list: no fixed address, out of country, provided, unknown.	Yes
Address Line 1	O	Enter the Contributor's address	Yes
Address Line 2	O	Enter the Contributor's address	Yes
City	O	Enter the Contributor's city	Yes
Province	O	Enter the Contributor's province	Yes
Postal Code	O	Enter the Contributor's postal code	Yes
Phone Number	O	Enter the contact phone number of the Contributor 1 – Country Code (Optional) 2 – Area Code (Mandatory only if phone number is populated) 3 – Phone number (Optional) 	Yes
Extension	O	Enter the Contributor's phone extension	Yes
Email Address	O	Enter the email address of the Contributor	Yes

c) Select the **Save** button. System displays the new Contributor in the Contributors list.



E1.2.5 Add Identified Outcomes (Objectives)

(PDD Outcome Plan form section A. Individual Information)

Capture the client's desired outcomes.

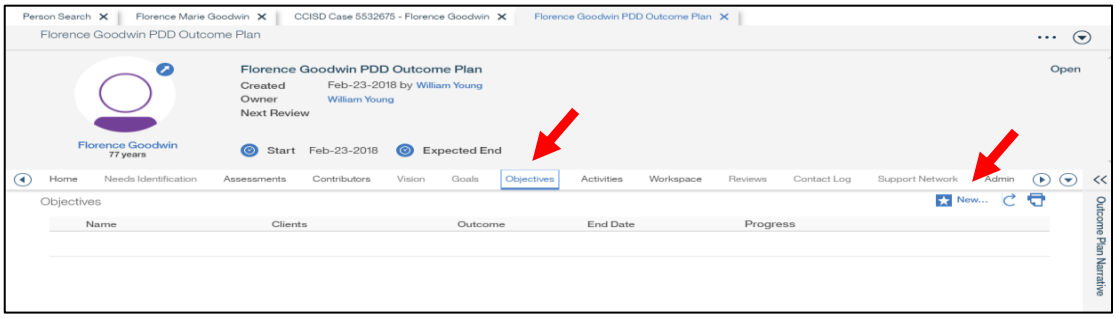
Start

- User is on the person's outcome plan home page

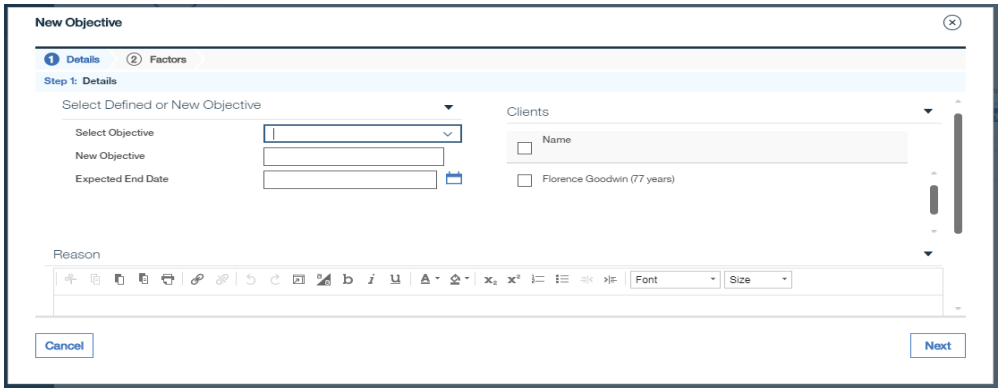
Action Steps

SOURCE: DP14.01.UC.02 Step 13: Internal User adds one or more Objectives to the PDD Outcome Plan

a) Select the **Objectives** tab.
System presents the Objectives page.



b) Select the **New** button. System presents the Details page in the New Objective modal dialog.

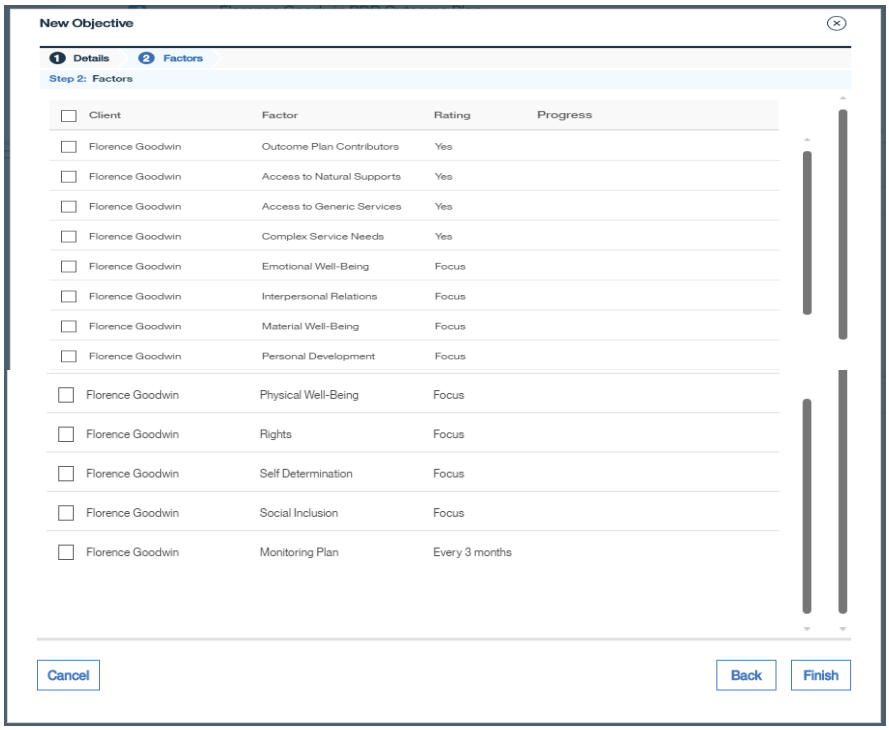


c) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Select Objective - or - New Objective	M	Select one of the predefined identified outcomes from the dropdown list: - Enjoy good mental and emotional health and well-being and am happy with my life. -Enjoy good physical health that lets me do the things I want. -Experience opportunities to tell people what I think and want, they listen and work with me to achieve them. -Experience the right to do the same things as all adults. -Have a stable income that gives me enough money to meet my basic needs and buy and do the things I want. -Have on-going opportunities to learn new skills arid abilities that increase my independence. -Have opportunities to participate in and contribute to community life, events and activities that are of interest to me. -Have relationships with others that are important to me such as family, friends and peers. - or – Enter a New Objective/(identified outcome) An objective can be either selected from the drop down or entered as a New Objective, but not both. Each Objective must be entered separately as a New.	Yes
Expected End Date	O	PDD is not using this date field - leave blank.	No
Client	M	Check the box next to the client's name.	Yes
Reason	O	Enter information about the outcome such as a reason why the outcome may not be supported. This field is optional and will not be printed on the PDD Outcome Plan. i.e. AB Mental Health is addressing this outcome, PDD does not support enclave participation, etc.	No

d) Select the **Next** button.

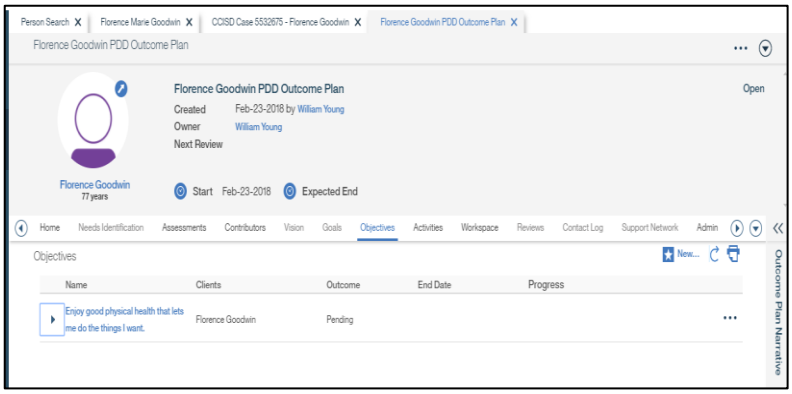
System presents the Factors page in the New Objective modal dialog. All outcome plan factors and their ratings are displayed



e) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Factors	O	Select the Quality of Life Domains (factors) of Focus and relevant to the identified outcome (objective). -The Quality of Life Domains (factors) that are printed on the PDD Outcome Plan are those selected as a "Focus" during the PDD Outcome Plan assessment. Factors rated as "Not a Focus" will not be printed **even** if they are linked to an outcome (objective). -For an outcome (objective) to be printed in line with the PDD Funded Services section of the PDD Outcome Plan it must have the same factor(s) (Quality of Life Domain) as the PDD Funded Service.	No

f) Select the **Finish** button. System displays the new objective with an outcome of "pending" in the Objectives list.



E1.2.7 Add Natural Supports and Generic Services Actions

(PDD Outcome Plan form sectionC. Natural Supports and Generic Services)

Capture the natural supports and generic services that are **already** in place.

Natural Supports are those supports available through family members, friends, co-workers, neighbours and acquaintances by providing important friendship and community connections natural to everyday life.

Generic Services may include grocery and housekeeping services, local gym and recreational facilities, and public transportation options.

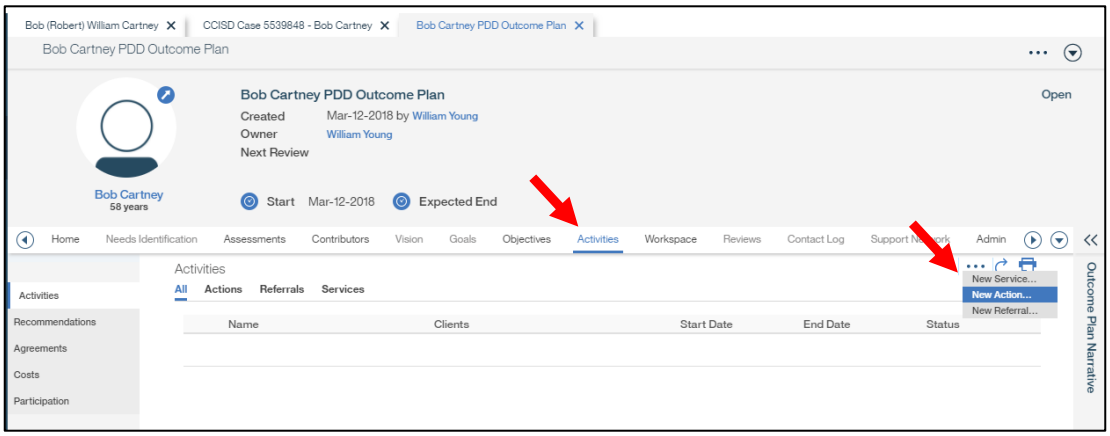
Start

- User is on the person's outcome plan home page.

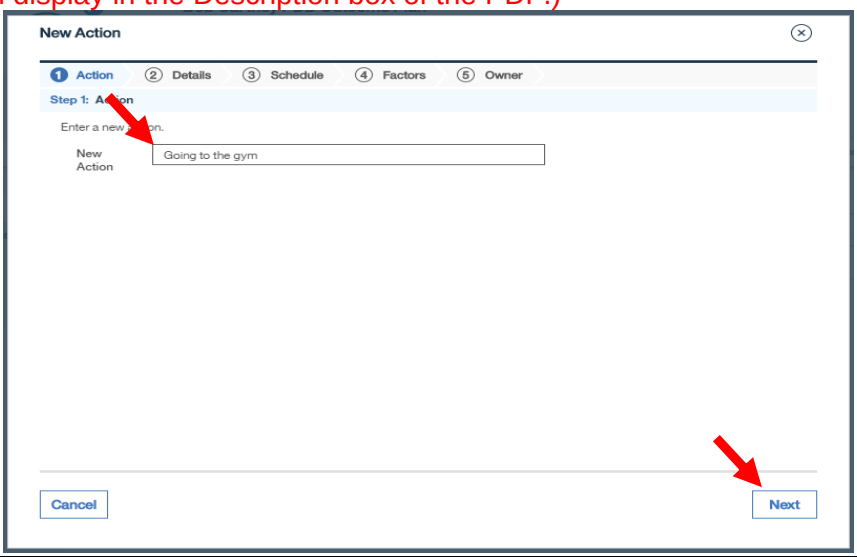
Action Steps

SOURCE: DP14.01.UC.02 Step 15: Internal User adds one or more user-defined Actions the PDD Outcome Plan

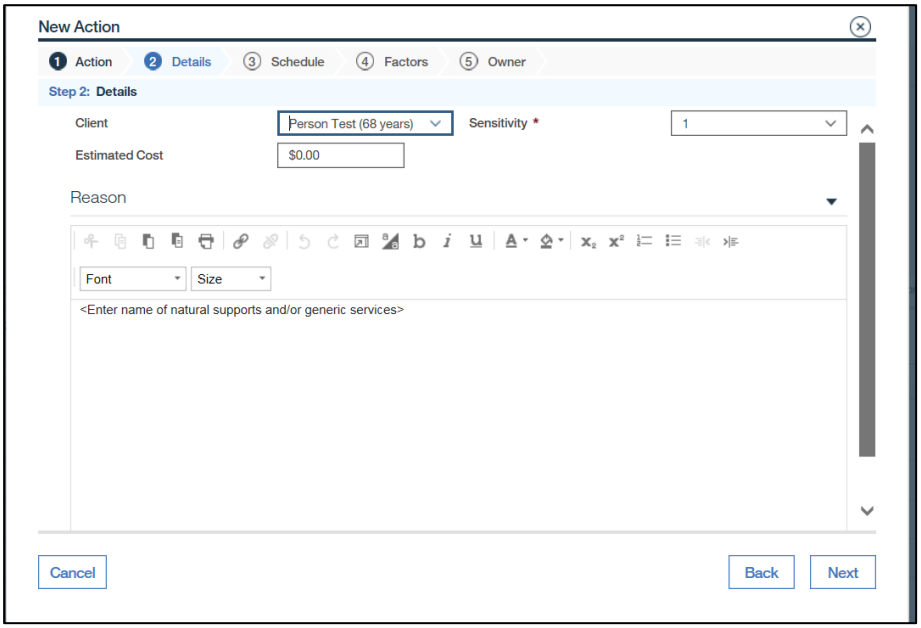
a) Select the **Activities** tab.



b) Select the **New Action** from the Action drop down list. Enter the *New Action* then click *Next*. (This will display in the Description box of the PDF.)



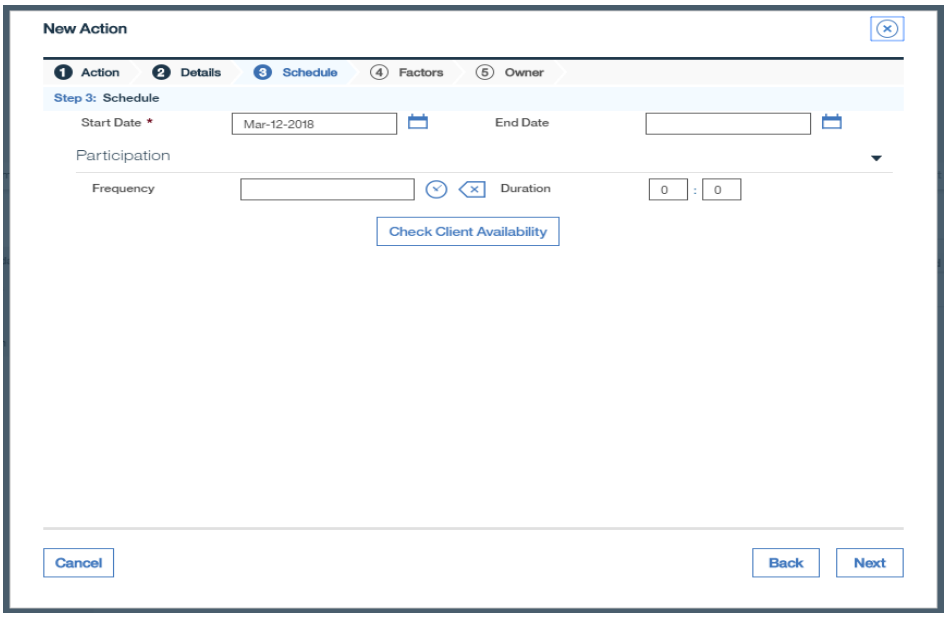
c) System presents the *Details* page in the New Action modal dialog.



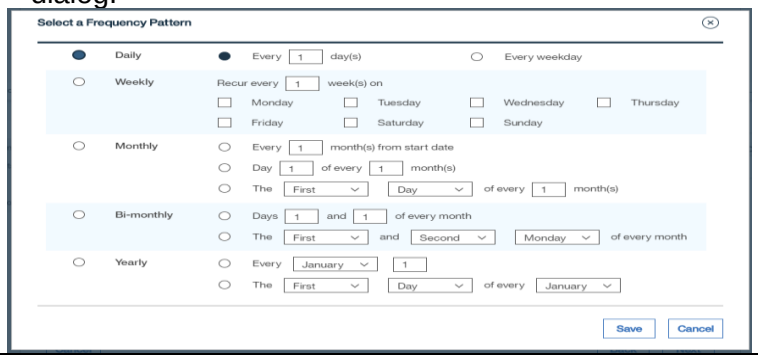
d) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Client	M	Select the individual's name from the dropdown list.	Yes
Sensitivity	M	Restricts access to the data - do not change the value. Default: 1	No
Estimated Cost	O	PDD is not using this field - leave blank. Default: $0.00	No
Reason	O	Enter the name of the person or organization providing the generic service or natural support. Example: Health for You, AAA Cleaning (This displays in the Person providing Supports/Services box on the PDF.)	Yes

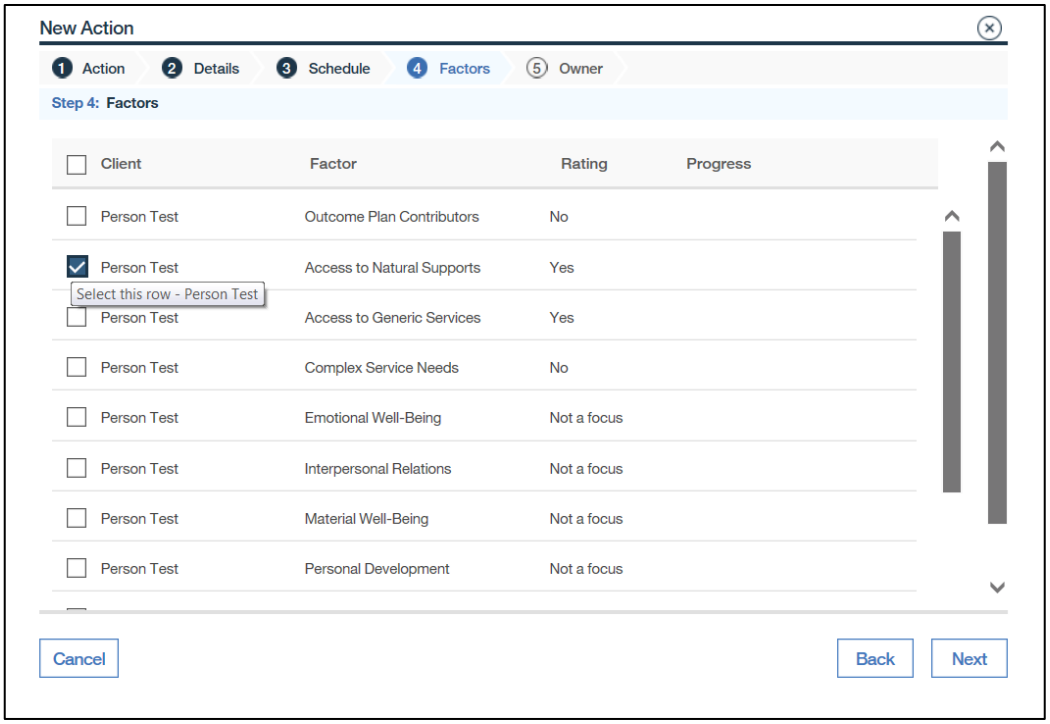
e) Select the **Next** button.
System presents the Schedule page in the New Action modal dialog.



f) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Start Date	M	Keep the default date. Do not update the date to reflect the actual past or future date. Default: today's date	No
End Date	O	PDD is not using this field - leave blank.	No
Frequency	O	Select the **Frequency** icon to enter the frequency of service. System displays the Select a Frequency Pattern modal dialog.  	Yes
Duration	O	Enter the duration of the action in hours and minutes.	Yes
Check Client Availability	O	PDD is not using this field.	No

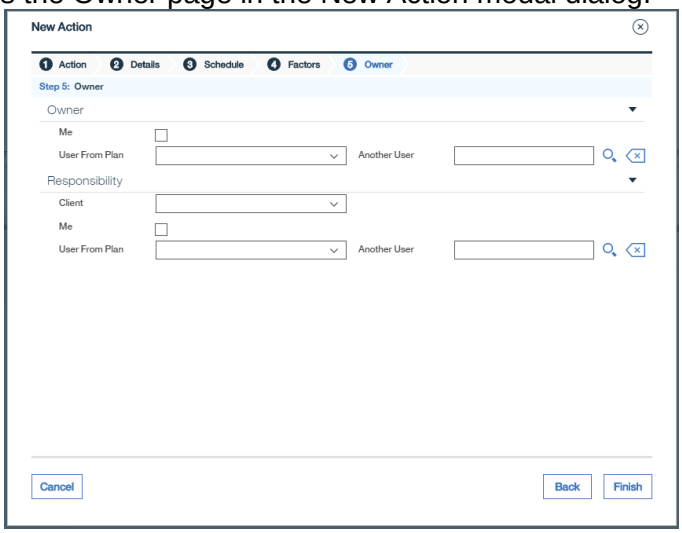
g) Select the **Next** button.
System displays the Factors page in the New Action modal dialog; all outcome plan factors and their ratings are displayed.



h) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Factor	O	Select one of the following factors: - Access to Generic Services - Access to Natural Supports If no factor is selected then the natural support or generic service will not be printed. If more than one factor is selected, both will be printed.	Yes

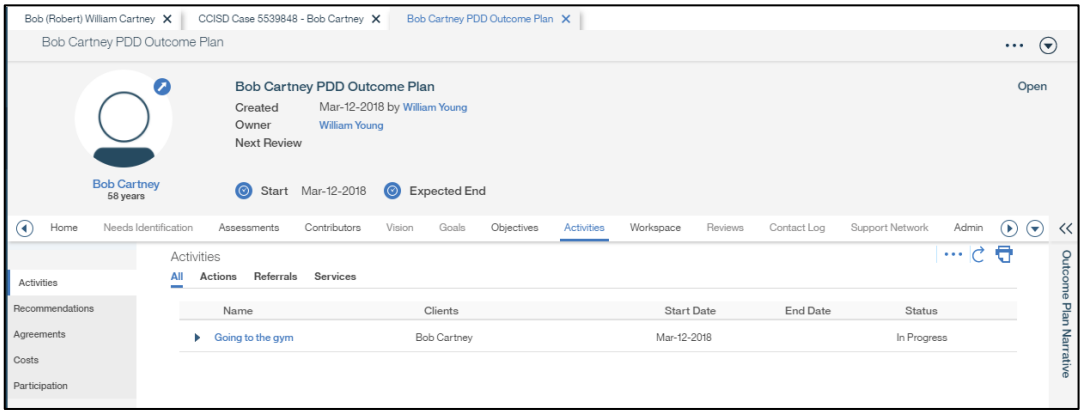
i) Select the **Next** button.
System displays the Owner page in the New Action modal dialog.



j) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Owner	M	PDD is not using this field. Since it is mandatory check the box next to the label Me.	No
Responsibility	M	PDD is not using this field. Since it is mandatory check the box next to the label Me.	No

k) Select the **Finish** button.
System displays the action in the *Activities* and Workspace tab area.



E1.2.8 Add "Complex Service Needs" Mandatory Services

(PDD Outcome Plan form section D. Does the Individual have Complex Service Needs?)

Capture the following services for clients identified as having complex needs:

- Risk Analysis / Risk Management
- Behavioral Supports
- Specialized Staff Training Requirements

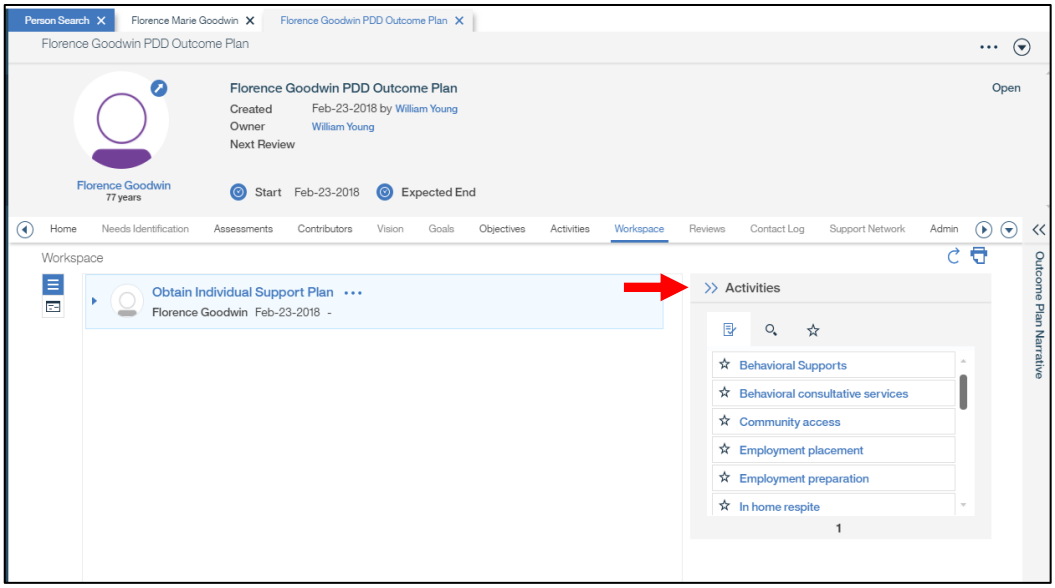
Start

- User is on the person's outcome plan home page

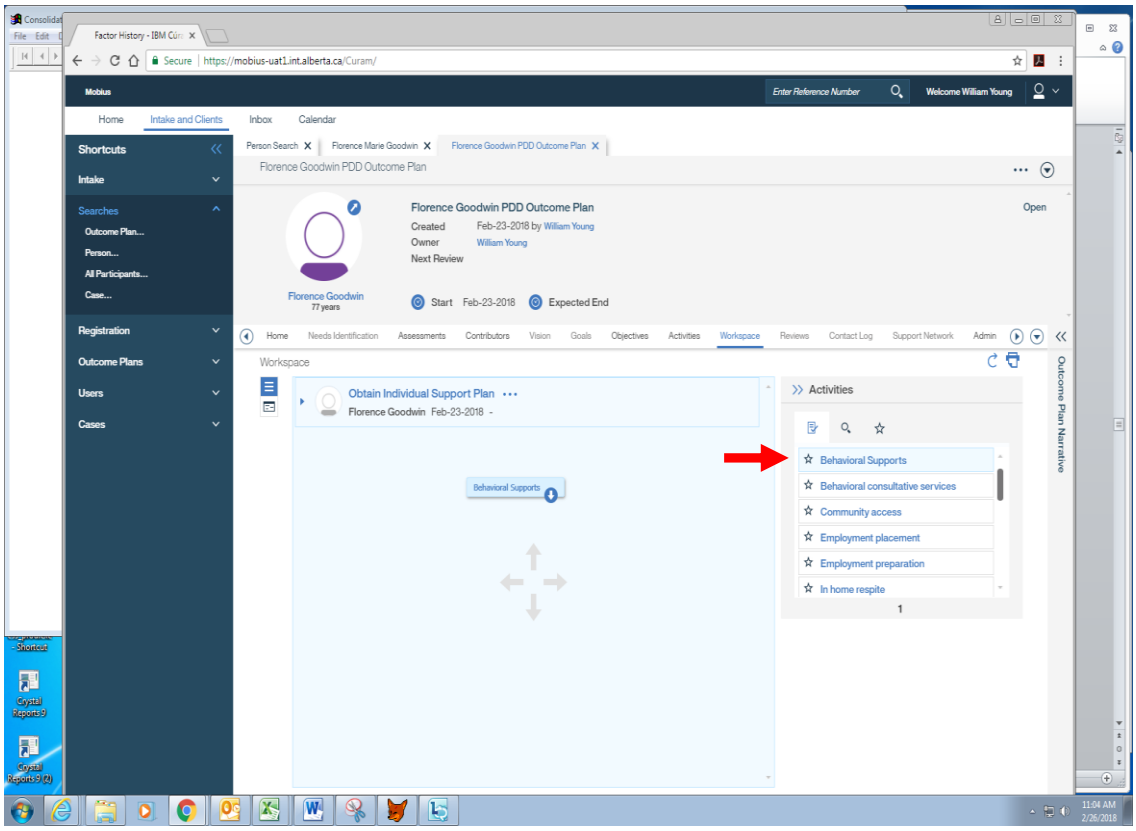
Action Steps

SOURCE: DP14.01.UC.02 Step 16: Internal User adds one or more Services the PDD Outcome Plan

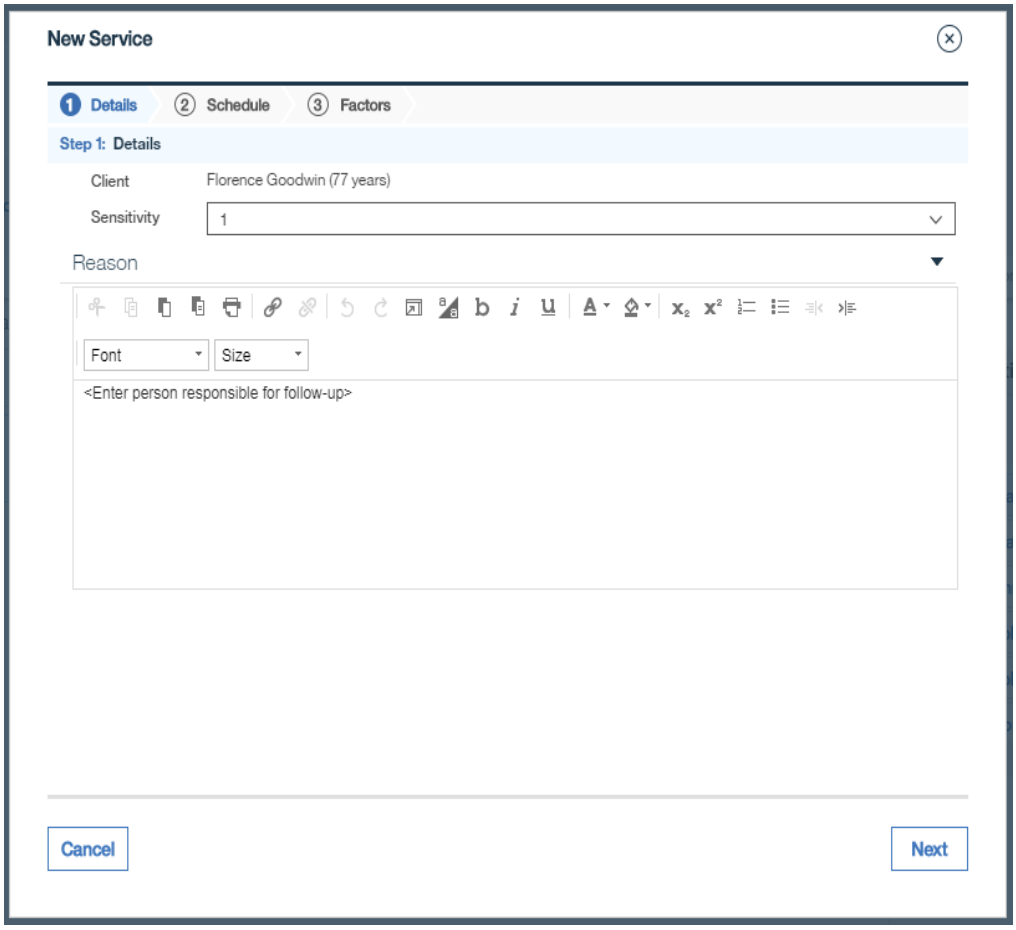
a) Select the **Workspace** tab.
System presents the activities panel with a list of Actions for selecting.



b) Drag a recommended **Action** for Complex Service Needs from the Activities panel and drop it onto the Workspace Area. **(All three recommended services are mandatory if you have selected YES to Complex Service Needs.)**
System presents the Details page in the New Service modal dialog.

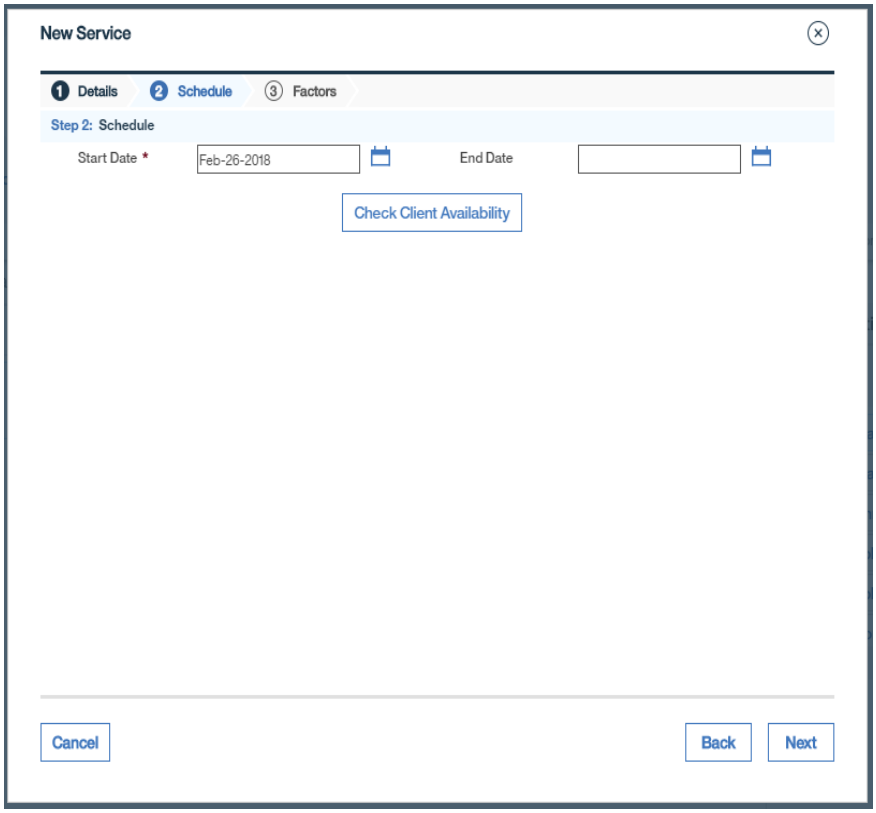


c) Open and populate the Details screen.



Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Client	M	Auto-populate with the client's name and age	Yes
Sensitivity	M	Restricts access to the data - do not change the value. Default: 1	No
Reason	O	Enter the person responsible for follow-up. The existing default text will be saved to the individual's record if it is not removed. (This displays in the Person Responsible for Follow-up box on the PDF.)	Yes

d) Select the **Next** button.
System presents the Schedule page in the New Service modal dialog; the Start Date is default to the current system date.

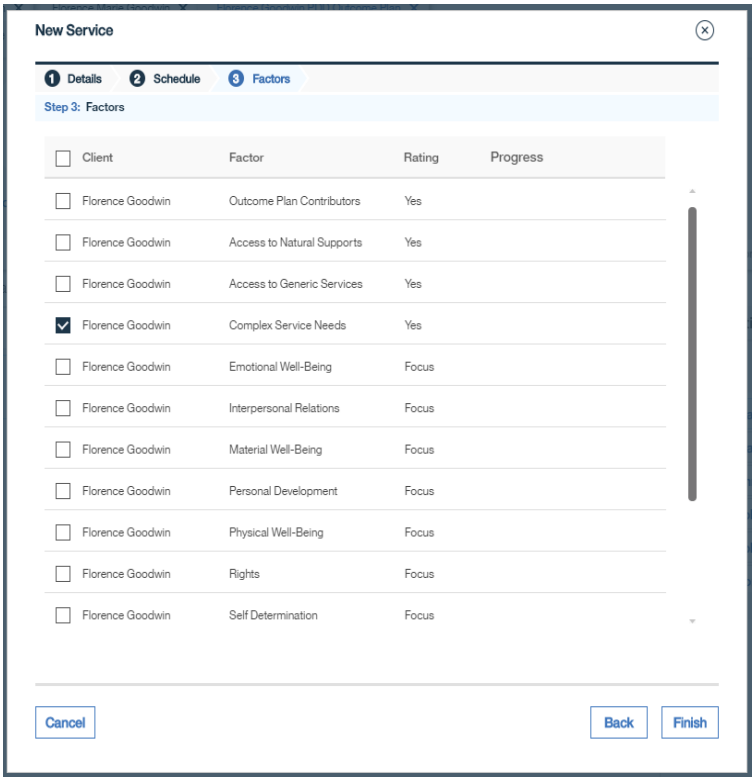


e) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Start Date	M	PDD is not using this field - do not change the value. Default: today's date	No
End Date	O	Enter the date the service is **completed** for: • Risk Analysis / Risk Management • Specialized Staff Training Requirements Enter the date the service is **implemented** for: • Behavioral Supports This field may be left blank and updated later if the information is not known at the time. (This will display in the Date Implementation /Completed by field of PDF.)	Yes
Check Client Availability	O	PDD is not using this field.	No

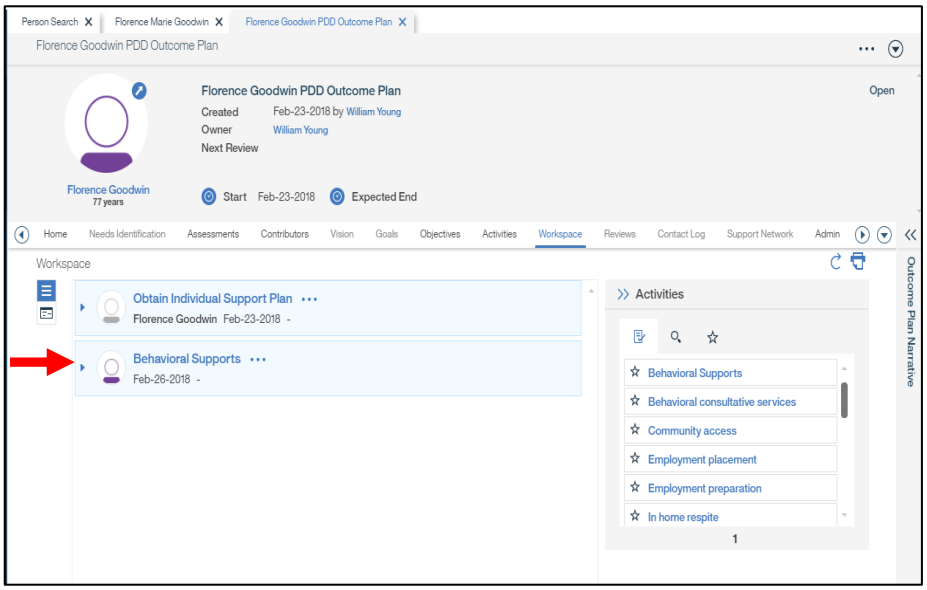
f) Select the **Next** button.

System displays the Factors page in the New Service modal dialog. **All outcome plan factors and their ratings are displayed; the factor for the recommended service "Complex Service Needs" is preselected.**



Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Factor	O	The factor “Complex Service Needs” is selected by default – do not change the value.	Yes

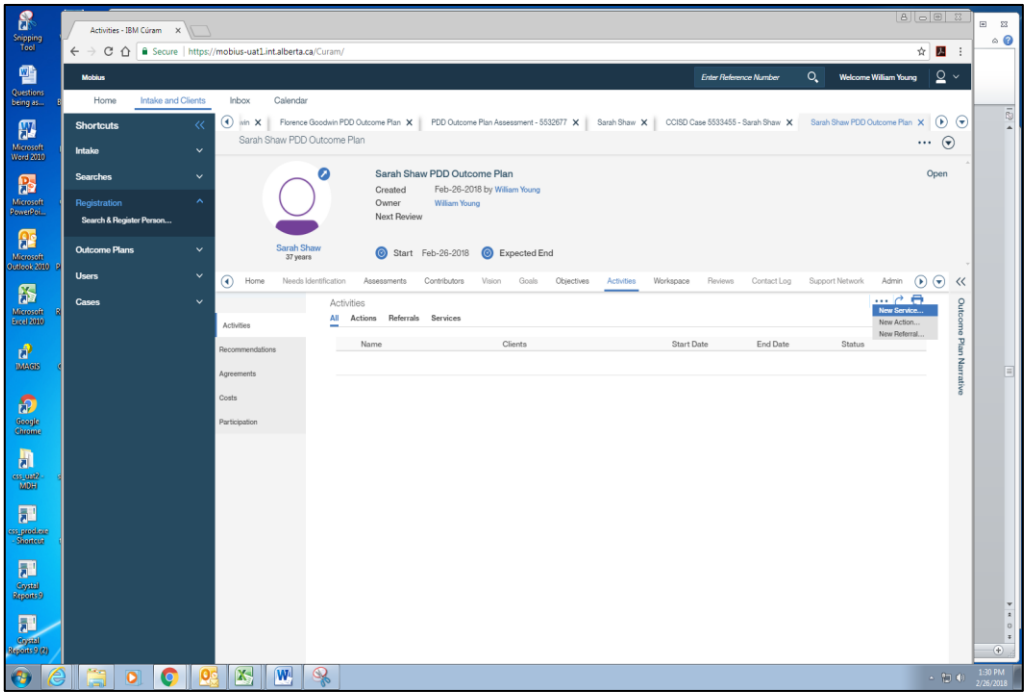
g) Select the **Finish** button.
System displays the service in the Workspace area and on the Activities tab.



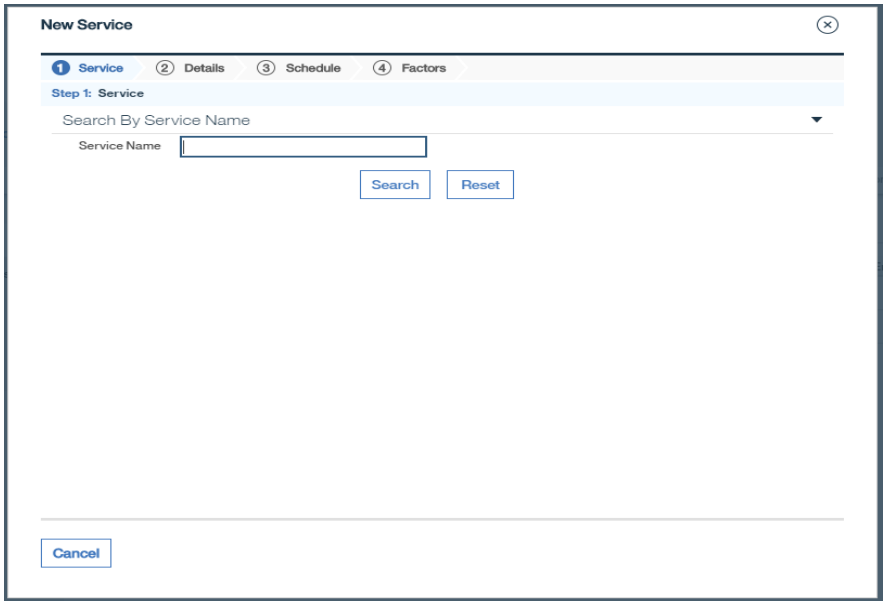
E1.2.9 Adding Services not in the Acitvities Panel under the Workspace tab

When the worker responds "**No**" to "Does the Individual have complex needs?" during the PDD Assessment, no Services for "Complex Service Needs" will be listed in the Workspace Activities panel. Services can be added following the steps below.

a) Select the Acitivities tab.
System presents the Activities page

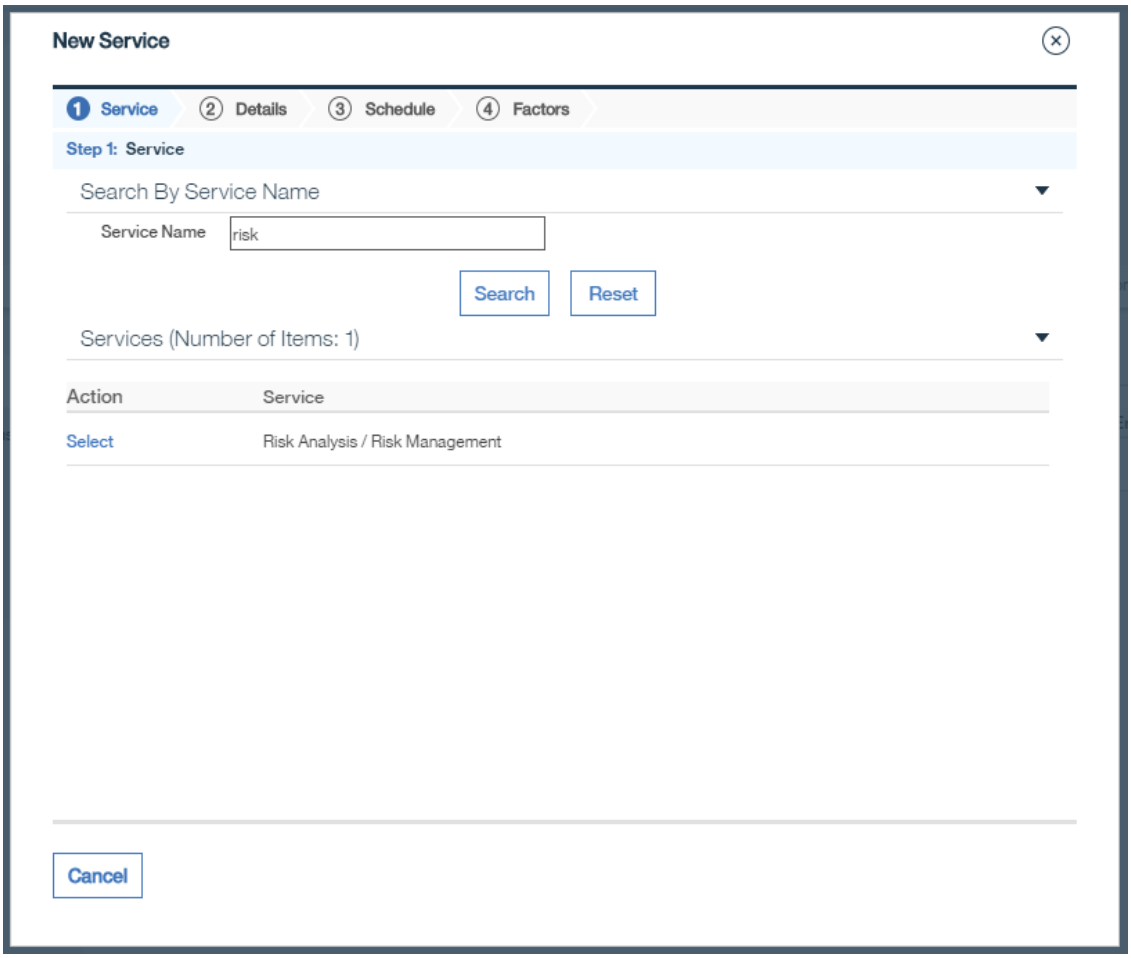


b) Select the New Service item from the dropdown Action menu.
System presents the New Service page in the New Service modal dialog.

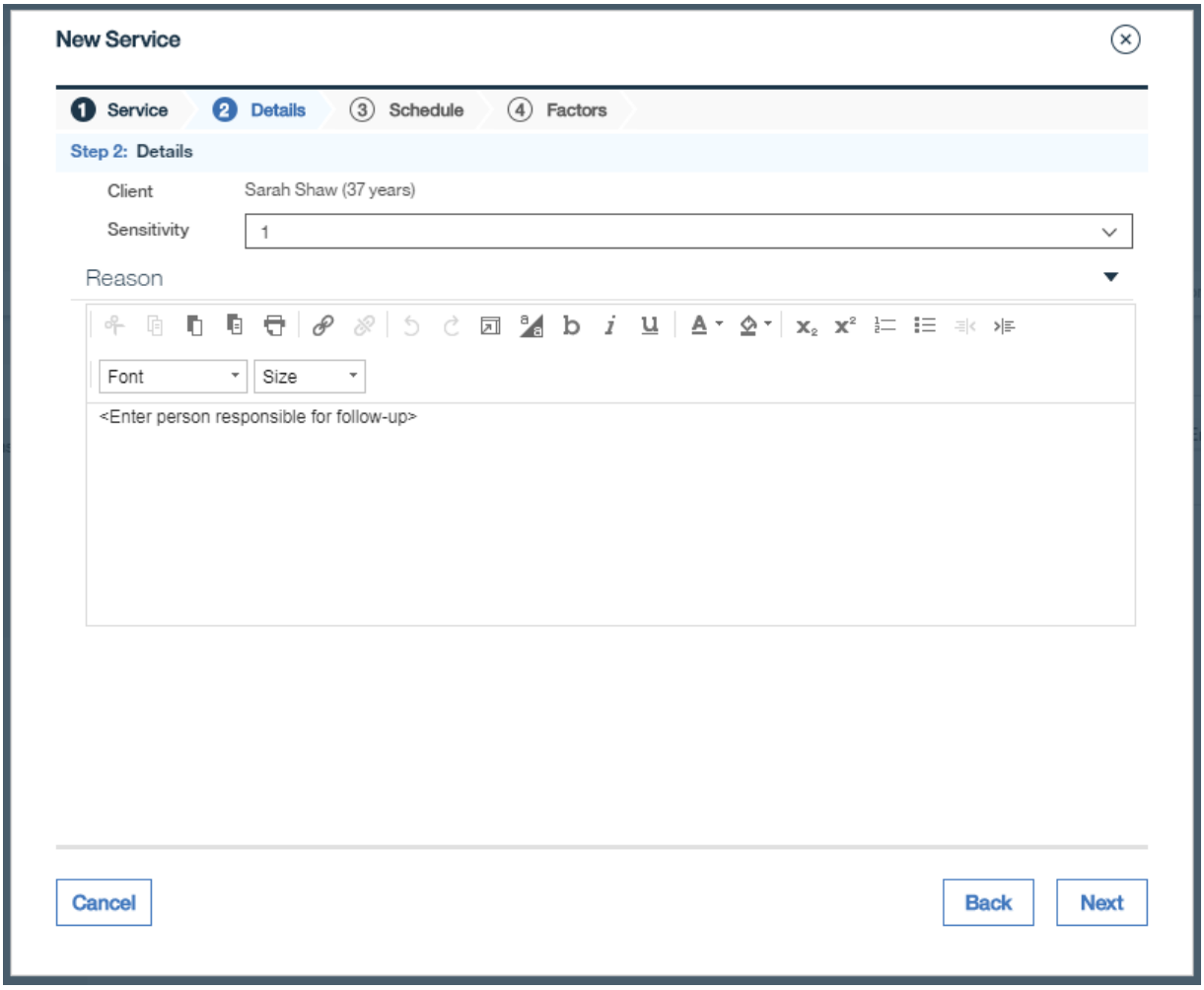


Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Service Name	M	Enter the Service required: • Risk Analysis / Risk Management • Specialized Staff Training Requirements • Behavioral Supports Enter any part of the Service Name. Example: Enter “Risk” to obtain “Risk Analysis / Risk Management” Note: Curam has trouble with special characters such as “/” so it is not recommended that you use this character in the search criteria	No

c) Select the **Search** button. System presents search results, if any.



d) Select a Service from the search results.
System presents the Details page in the New Service modal dialog.

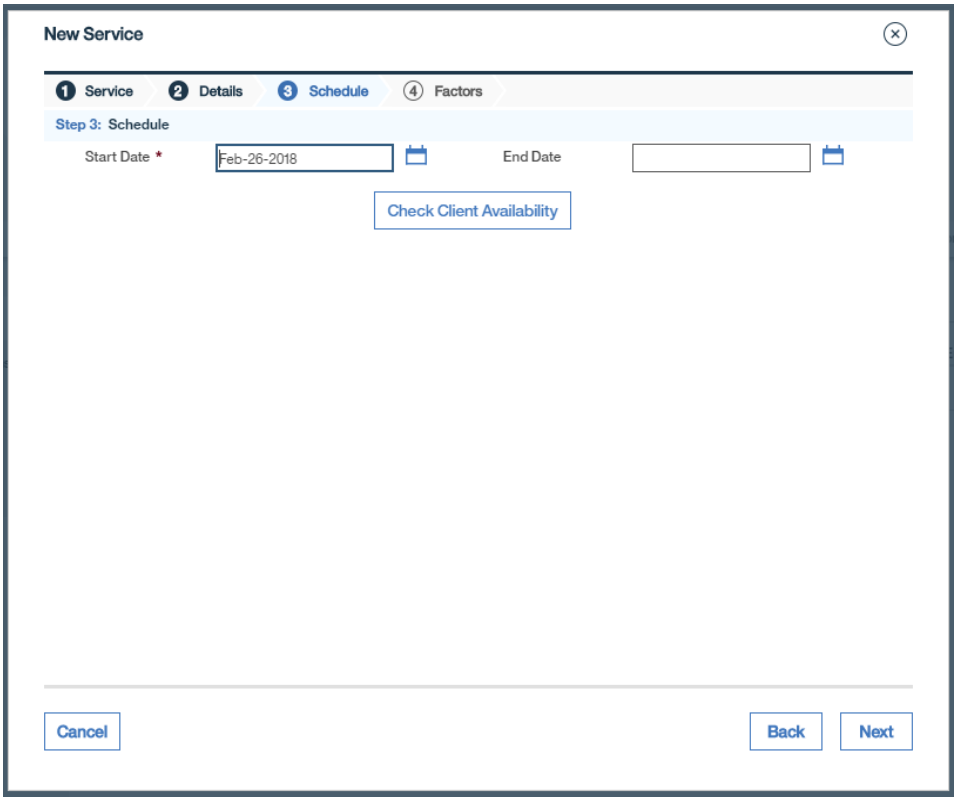


e) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Client	M	Auto-populate with the client's name and age	Yes
Sensitivity	M	Restricts access to the data - do not change the value. Default: 1	No
Reason	O	Enter the person responsible for follow-up. The existing default text will be saved to the individual's record if it is not removed. (This displays in the Person Responsible for follow up box in PDF.)	Yes

f) Select the **Next** button.

System presents the Schedule page in the New Service modal dialog; the Start Date is default to the current system date

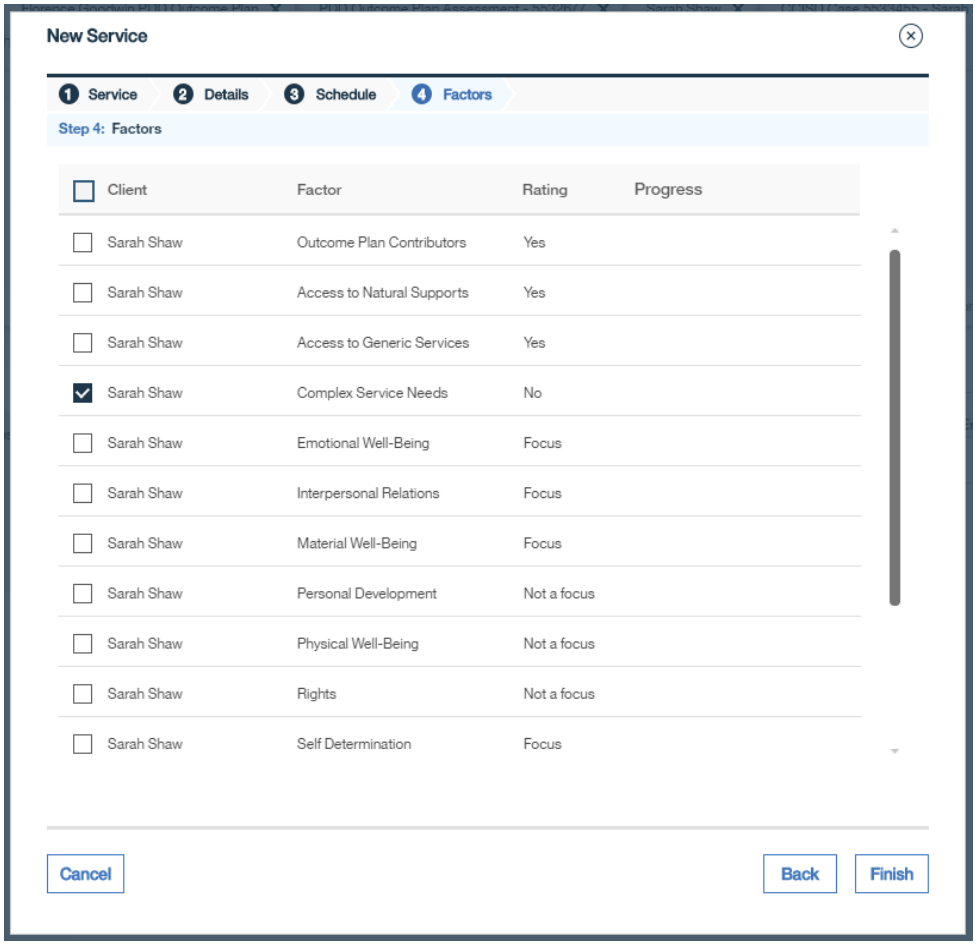


g) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Start Date	M	PDD is not using this field - do not change the value. Default: today's date	No
End Date	O	Enter the date the service is **completed** for: • Risk Analysis / Risk Management • Specialized Staff Training Requirements Enter the date the service is **implemented** for: • Behavioral Supports This field may be left blank and updated later if the information is not known at the time.	Yes
Check Client Availability	O	PDD is not using this field.	No

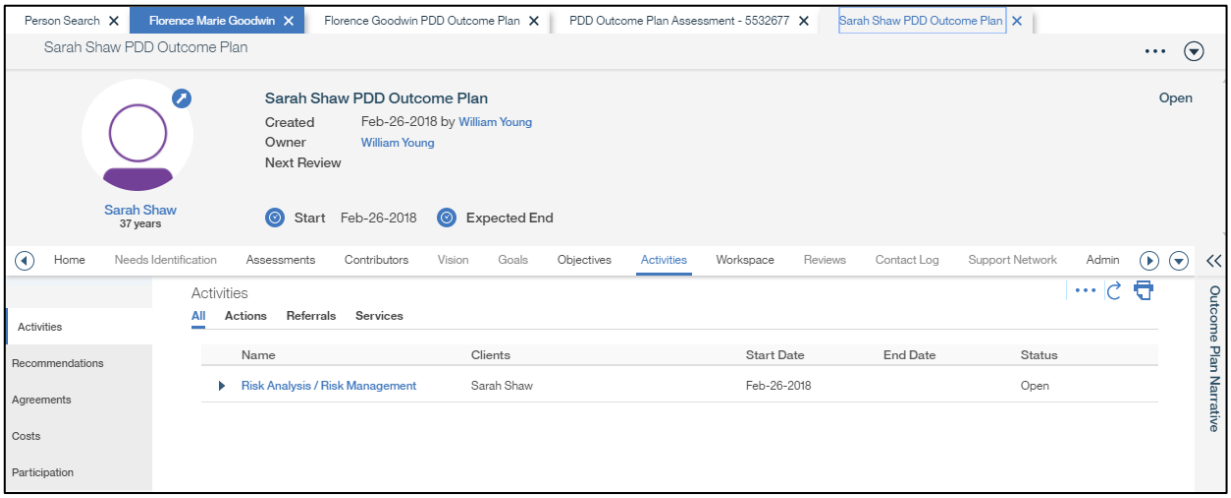
h) Select the **Next** button.

System displays the Factors page in the New Service modal dialog. **All outcome plan factors and their ratings are displayed; the factor for the recommended service "Complex Service Needs" is preselected**



i) Select the Finish button.

System displays the new service in the Activities page and in the Workspace area.



E1.2.10 Add Comments (Notes) to "Complex Service Needs" Services

Capture information about the service. This is the only place in the Outcome Plan where a comment/note is displayed in the PDF. (All of the other areas displayed in the PDF are via a Reason box, which contains <<Default text specific to each area>>. If you do not delete the <<Default text specific to each area>>, it will display on the PDF.)

Start

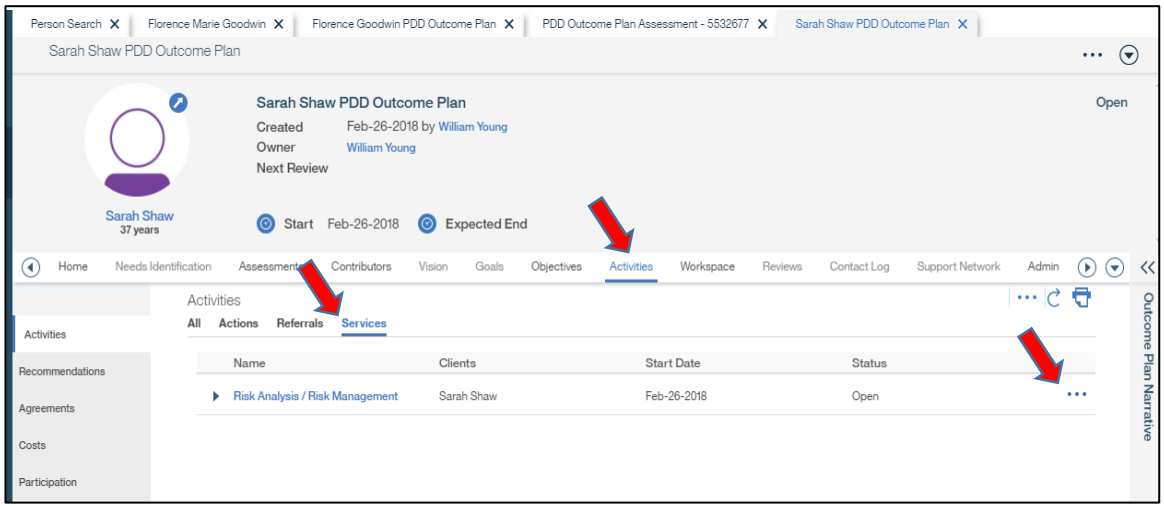
- User is on the person's outcome plan home page

Action Steps

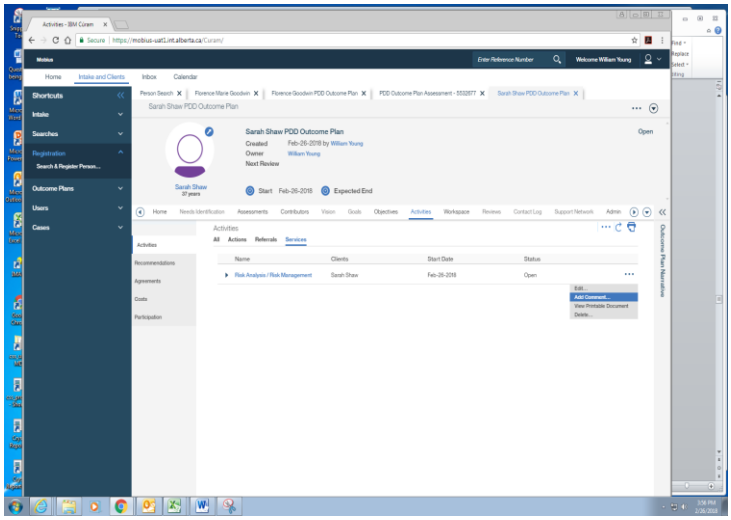
SOURCE: DP14.01.UC.02 Step 20: Internal User adds a note to a Service

a) Select the **Activities** tab.
System presents the Activities page.

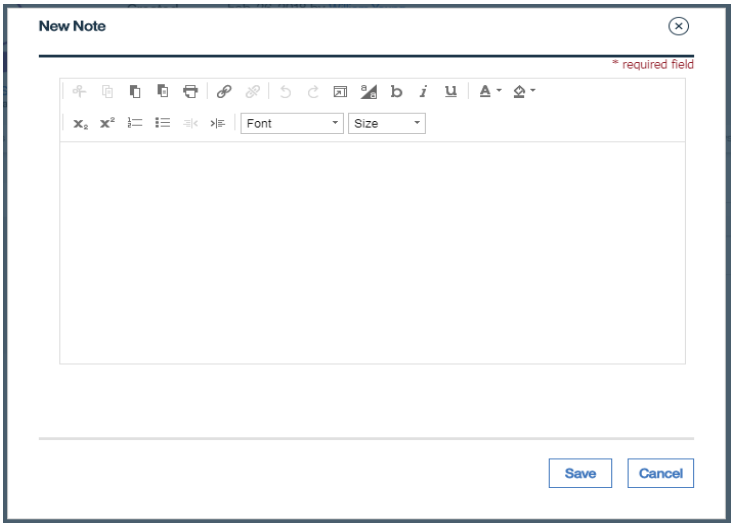
b) Select the **Services** tab from the Activities page.
System presents the Services list.



c) Select **Add Comment** from the list Action menu next to a service.



System presents the New Note modal dialog.



d) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
New Note	M	Enter information about the required service. Example: - For “Risk Analysis/Risk Management” identify if a risk management plan in place from a previous service provider. - For “Specialized Staff Training” list the specific staff training required such as suicide prevention or how to use an EpiPen.	Y

e) Select the **Save** button.
System displays the Services list.

E1.2.11 Add PDD Funded Services

(PDD Outcome Plan form section E. Description of PDD Funded Services)

Capture the services PDD will provide or support, and determine funding options. PDD funded services include:

Behavioral consultative services
Community access
Employment preparation
Employment placement
In home respite
Other specialized community supports
Out of home respite
Overnight staffed residence
Professional consultative services
Support home
Supported independent living
Transportation

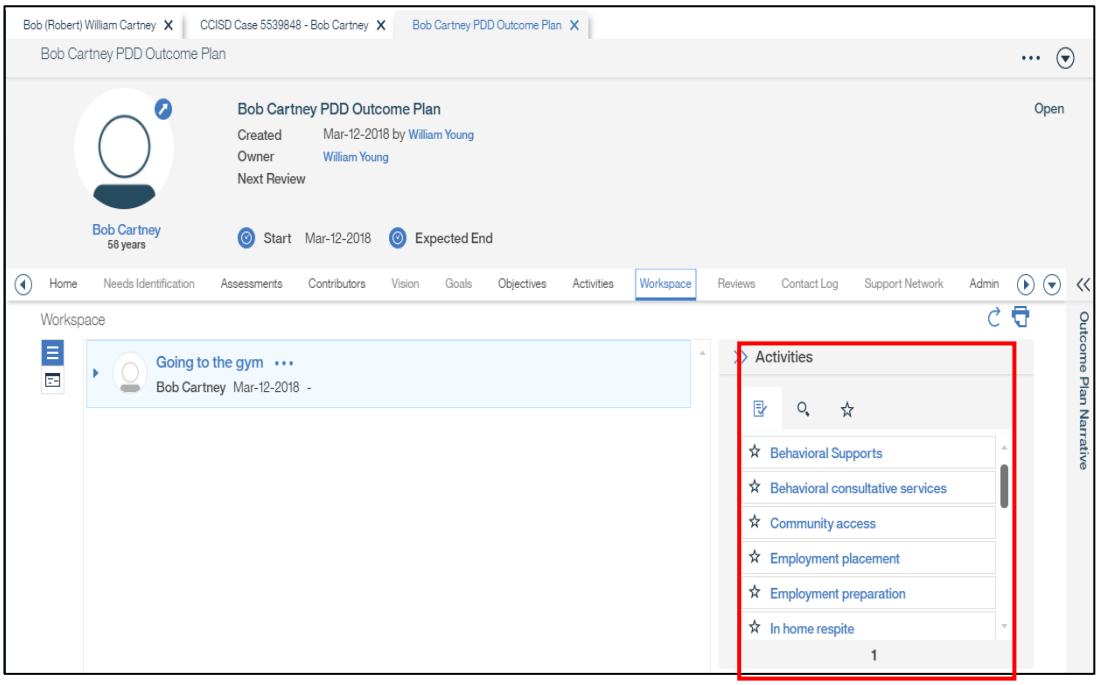
Start

- User is on the person's outcome plan home page

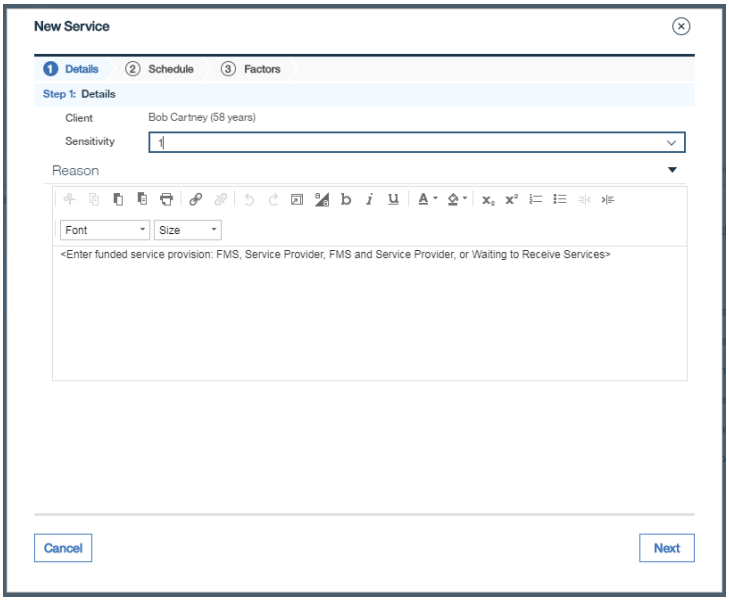
Action Steps

SOURCE: DP14.01.UC.02 Step 16: Internal User adds one or more Services the PDD Outcome Plan

a) Select the **Workspace** tab.
System presents the Workspace area; the Workspace area contains the Activities panel with a list of recommended Services.



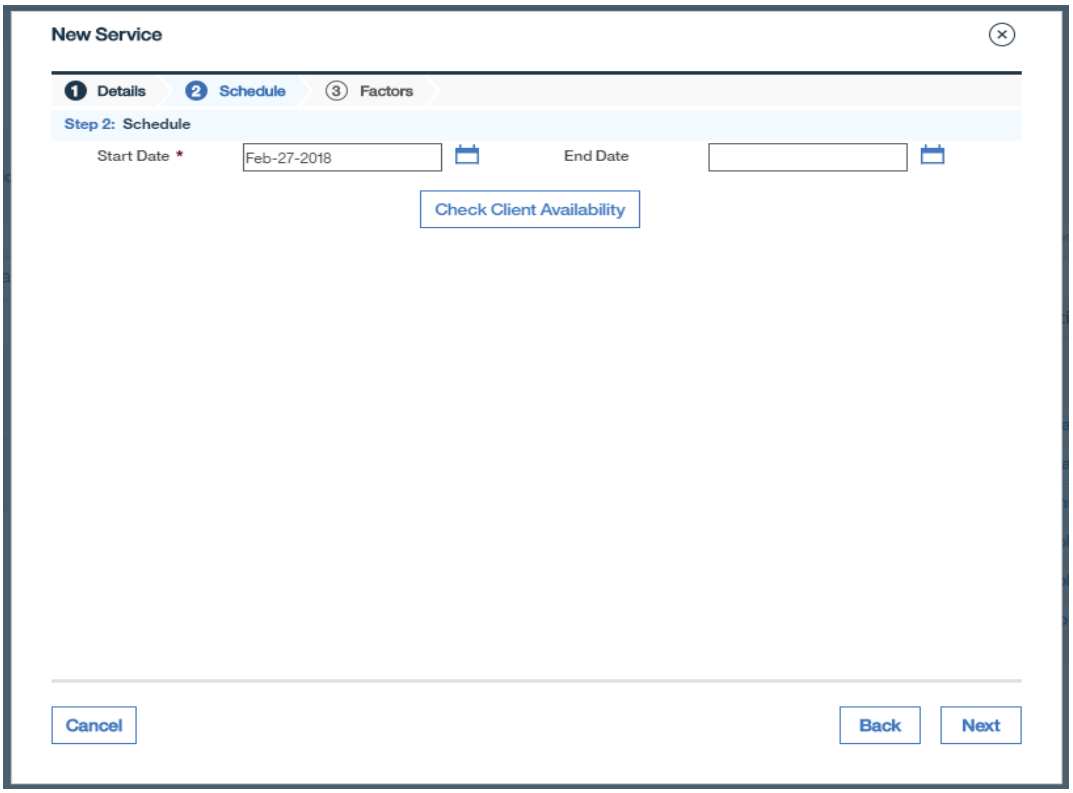
b) Drag a Service from the Activities panel and drop it onto the Workspace area. System presents the Details page in the New Service modal dialog.



c) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Client	M	Auto-populated field	Yes
Sensitivity	M	Restricts access to the data - do not change the value Default: 1	No
Reason	O	Enter the funded service provision: - FMS - Service Provider (name if applicable) - FMS and Service Provider (name if applicable) - Waiting to Receive Services *(this is when services are required but not currently being funded)* *Note: If Waiting to Receive Services is indicated then enter waiting into CSS activity tab.* The default text will be saved to the individual's record if it is not removed.	Yes

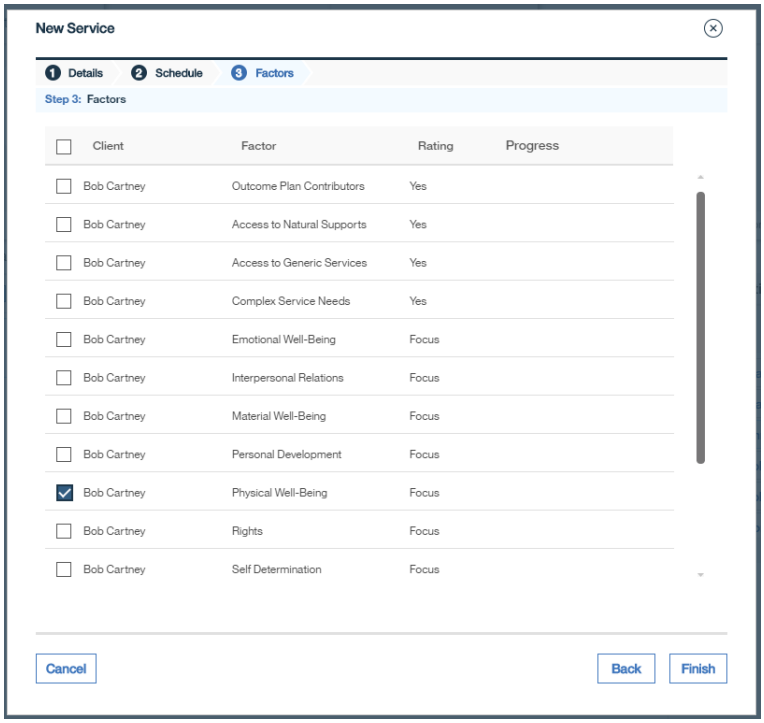
d) Select the **Next** button.
System presents the Schedule page in the New Service modal dialog; the Start Date is default to the current system date.



e) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Start Date	M	Enter the date the services will be required Default: today's date	Yes
End Date	O	PDD is not using this field - leave blank	No
Check Client Availability	O	PDD is not using this field – do not click the button	No

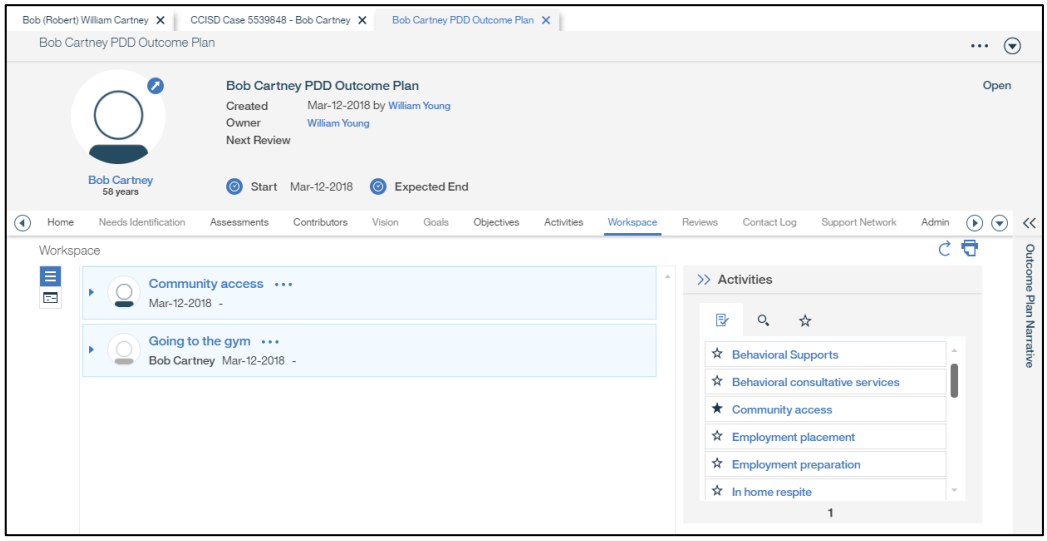
f) Selects the **Next** button.
System displays the Factors page in the New Service modal dialog.



g) Populate Screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Factor	O	Select all additional Quality of Life Domain that are associated with this service. Note: - Each (QoLD) factor associated with a PDD Funded service should have a rating of "Focus". - Outcomes/objectives are linked to the PDD Funded Service through the QofLD factors. If outcomes and funded services do not share the exact same factors the Outcome/objective, they will not be printed under the PDD Funded Service section of the PDD Outcome Plan form.	Yes

h) Select the **Finish** button.
System displays the service in the Workspace area.



E1.2.12 Add "Monitoring Plan" Action and Comments (Reason box)

(PDD Outcome Plan form section F. Monitoring Plan and section G. Summary of Individual's Information.)

The Monitoring Plan Action displayed in the Workspace tab, Activities panel matches the frequency identified in the Assessment. If the user wants to change the frequency identified in the Activities panel you must open a new Outcome Plan. (Please see 8. Reassessment for more information.)

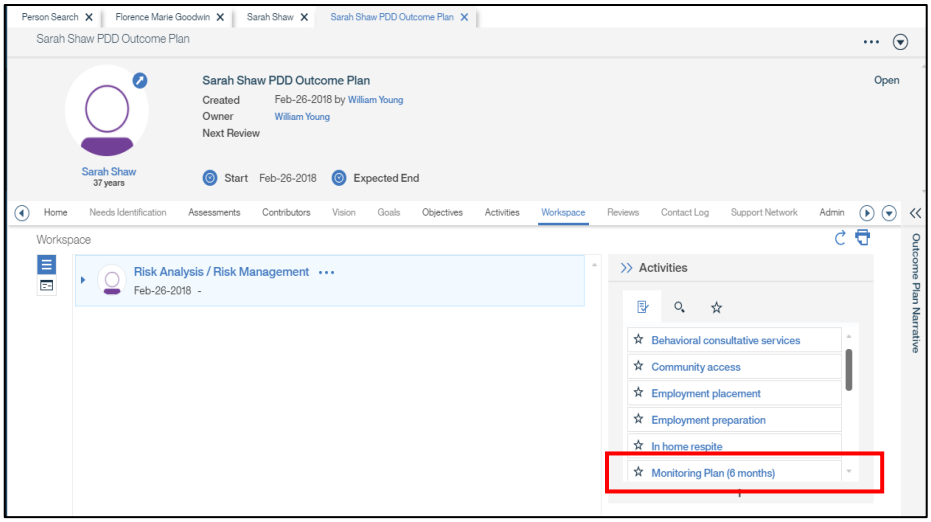
Start

- User is on the person's outcome plan home page

Action Steps

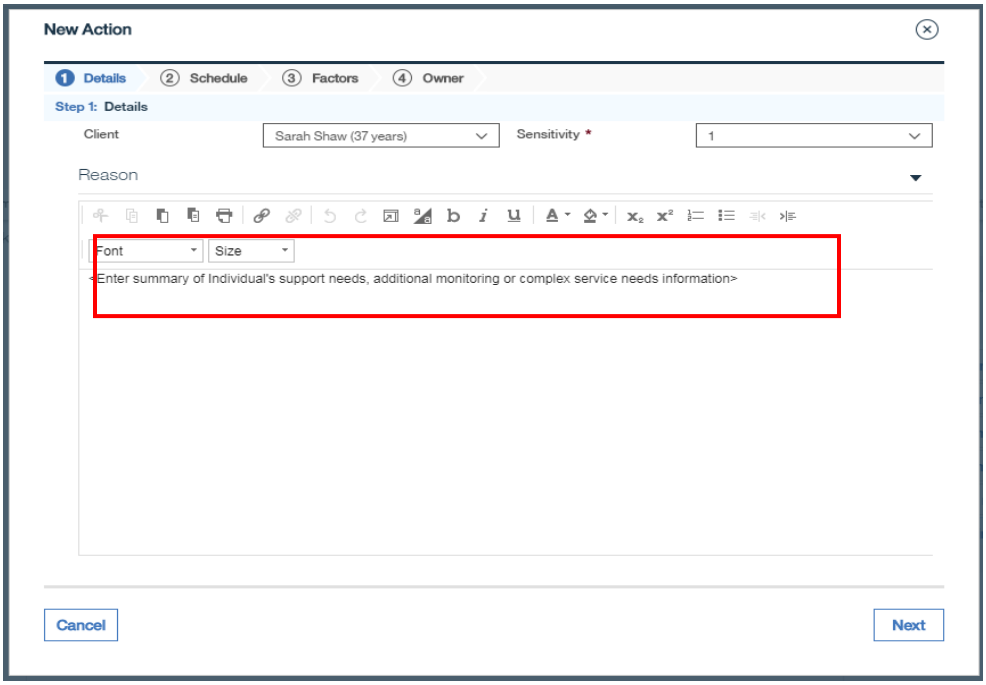
SOURCE: DP14.01.UC.02 Step 14: Internal User adds one or more pre-defined Actions to the PDD Outcome Plan

a) Select the **Workspace** tab.
System presents the workspace area; the workspace area contains the activities panel with a list of recommended actions.



b) Drag the **Monitoring Plan** recommended **action** from the activities panel and drop it onto the workspace area.

System presents the Details page in the New Action modal dialog. The Estimated Cost field is on the screen only when the user navigates to the screen from the New Action button.



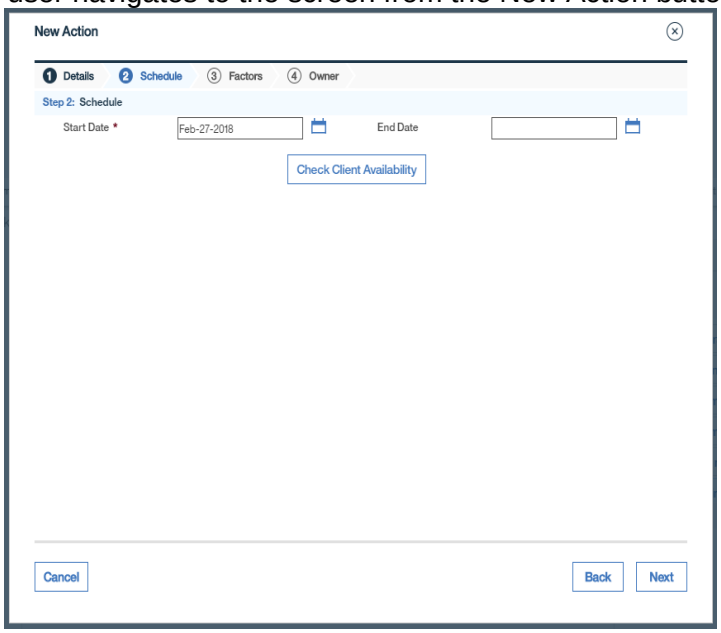
c) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Client	M	Select the client's name from the dropdown list. There will never be more than one client to choose from.	Yes

Sensitivity	M	Restricts access to the data - do not change the value Default: 1	No
Reason	O	This area has been created to capture a Summary of the Individual's information. This includes all additional information that is gathered, including the Monitoring Plan rationale.	Yes

d) Select the **Next** button

System presents the Schedule page in the New Action modal dialog; the Start Date is default to the current system date. The Frequency and Duration fields are displayed on the screen only when the user navigates to the screen from the New Action button.

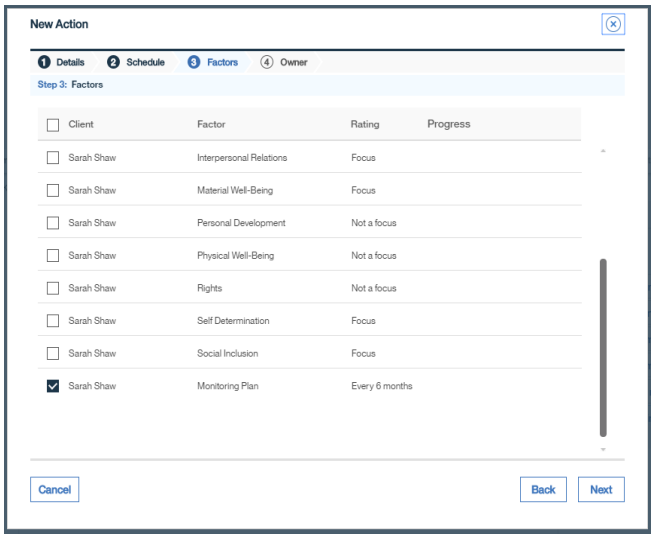


e) Populate the screen

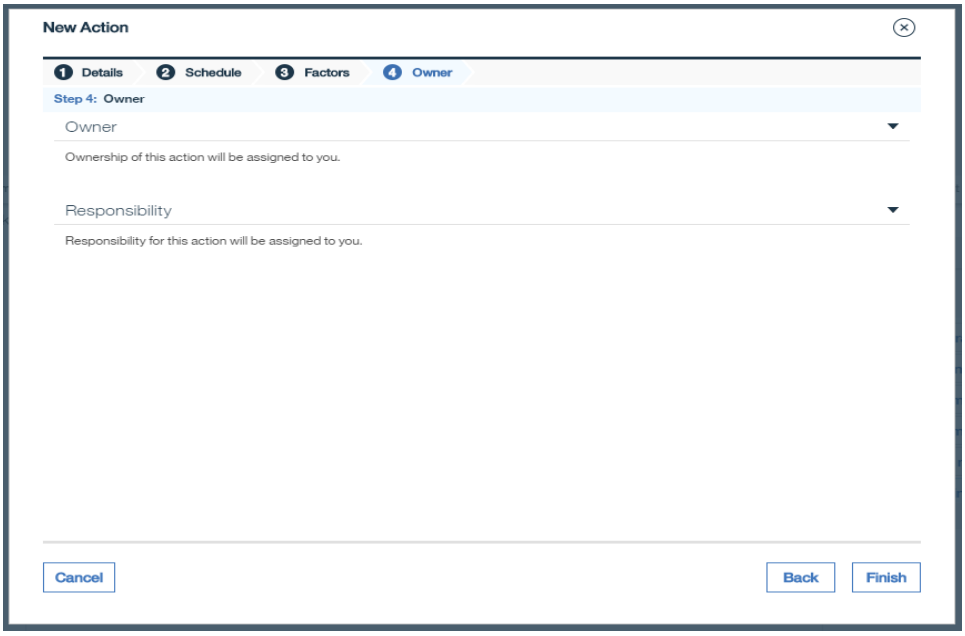
Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Start Date	M	PDD is not using this field, do not change the value. Default: today's date	No
End Date	O	PDD is not using this field - leave blank.	No
Check Client Availability	O	PDD is not using this field– do not click the button.	No

f) Select the **Next** button.

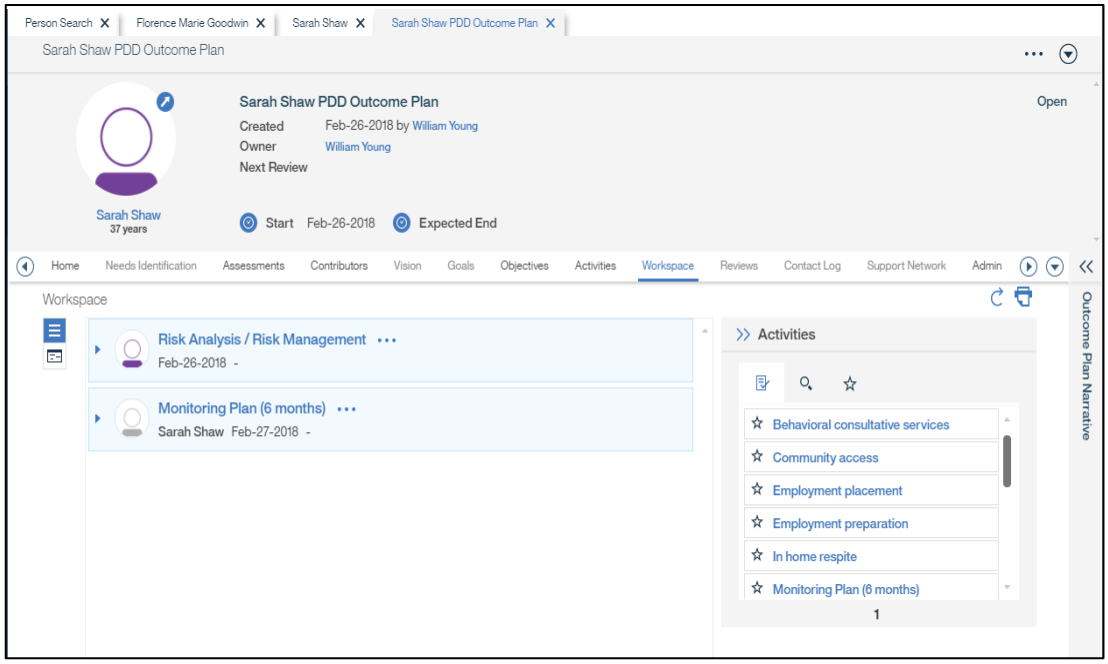
System displays the Factors page in the New Action modal dialog. All outcome plan factors and their ratings are displayed; the factor for the recommended Monitoring Plan action is preselected.



g) Select the **Next** button.
System displays the Owner page in the New Action modal dialog.



h) Select the **Finish** button.
System displays the action in the Workspace area.



E1.2.13 Add "Obtain an Individual Support Plan" Action

(PDD Outcome Plan form section H. Individual Support Plan (Required within 90 days))

The Obtain Individual Support Plan action has now been enhanced to allow users to update Receipt of an ISP annually, while leaving an Outcome Plan in place as long as required. This is only done if there are NO changes to Complex Service Needs, QofL Domains, Funded Service or Monitoring Plan.

Create an action to capture the date the Individual Support Plan is received.

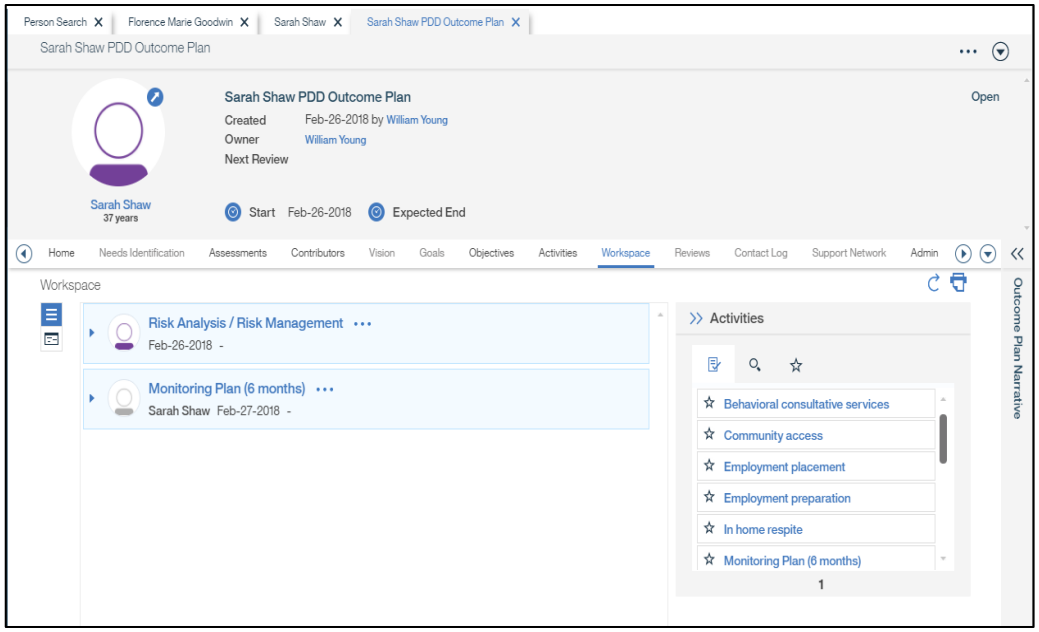
Start

- User is on the person's outcome plan home page

Action Steps

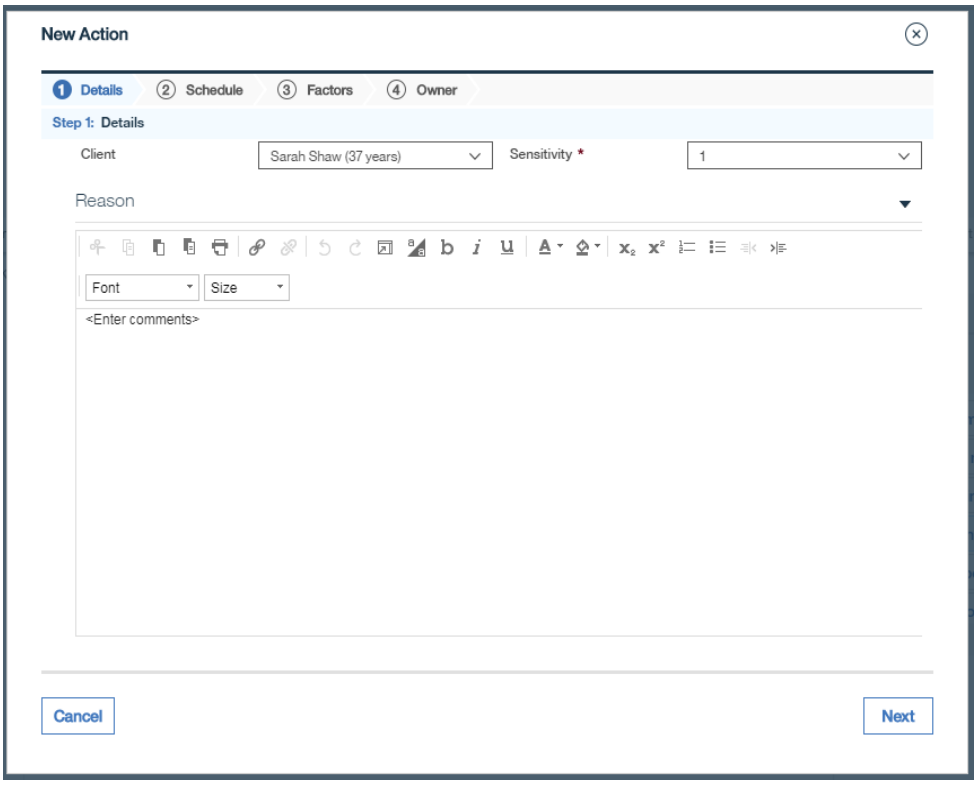
SOURCE: DP14.01.UC.02 Step 14: Internal User adds one or more pre-defined Actions to the PDD Outcome Plan

a) Select the **Workspace** tab.
System presents the workspace area; the workspace area contains the Activities panel with a list of recommended Actions.



b) Drag the **Obtain Individual Support Plan action** from the Activities panel **then** drop it onto the workspace area.

System presents the Details page in the New Action modal dialog. The Frequency and Duration fields are displayed on the screen only when the user navigates to the screen from the New Action button



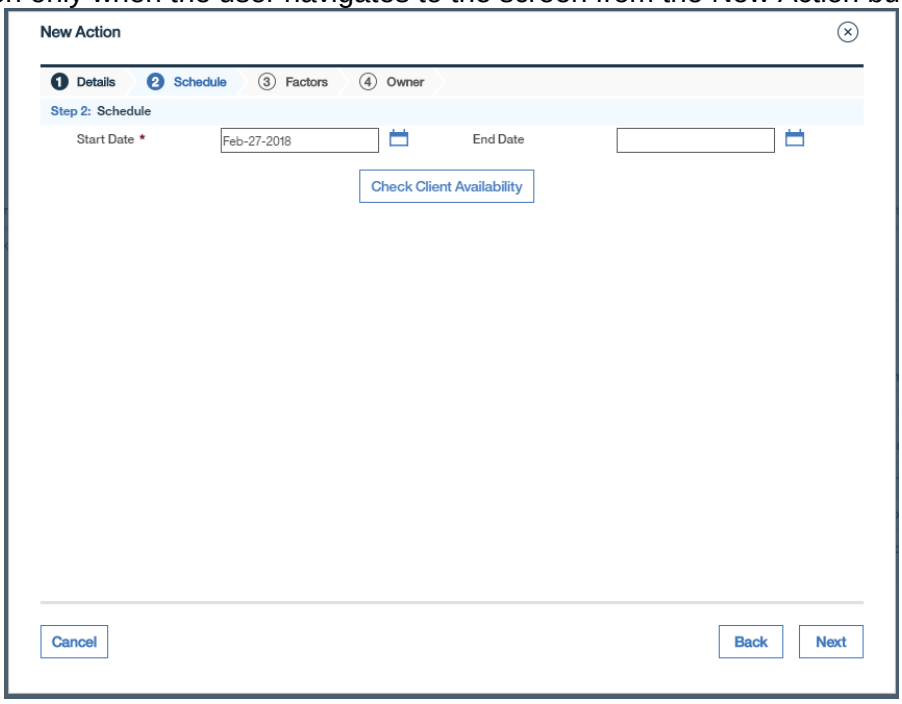
c) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP

Client	M	Client's name will be selected from the dropdown list. There will never be more than one client.	Yes
Sensitivity	M	Restricts access to the data - do not change the value Default: 1	No
Reason	O	Enter the name of the Service Provider developing the Individual Support Plan or other relevant information about the plan. The default text will be saved to the individual's record if it is not removed.	No

d) Select the **Next** button

System presents the Schedule page in the New Action modal dialog; the Start Date is defaulted to the current system date. The Frequency and Duration fields are displayed on the screen only when the user navigates to the screen from the New Action button.

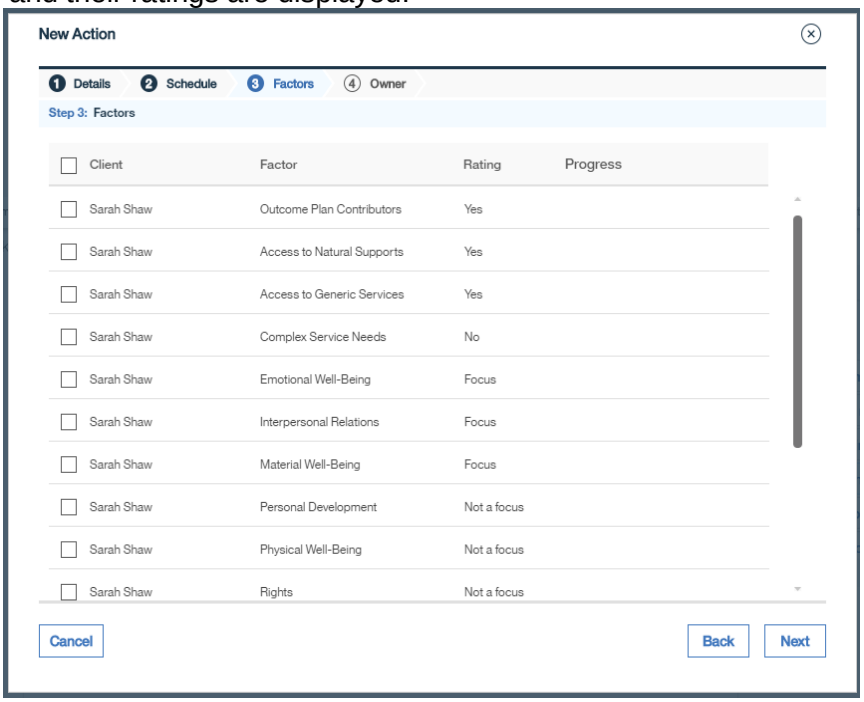


e) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Start Date	M	PDD is not using this field, do not change the value. Default: today's date	No
End Date	O	This is an optional field and will not be printed. You may want to enter a date 90 days from the start date. This could be used when notifications are implemented.	No
Check Client	O	PDD is not using this field – do not click the button.	No

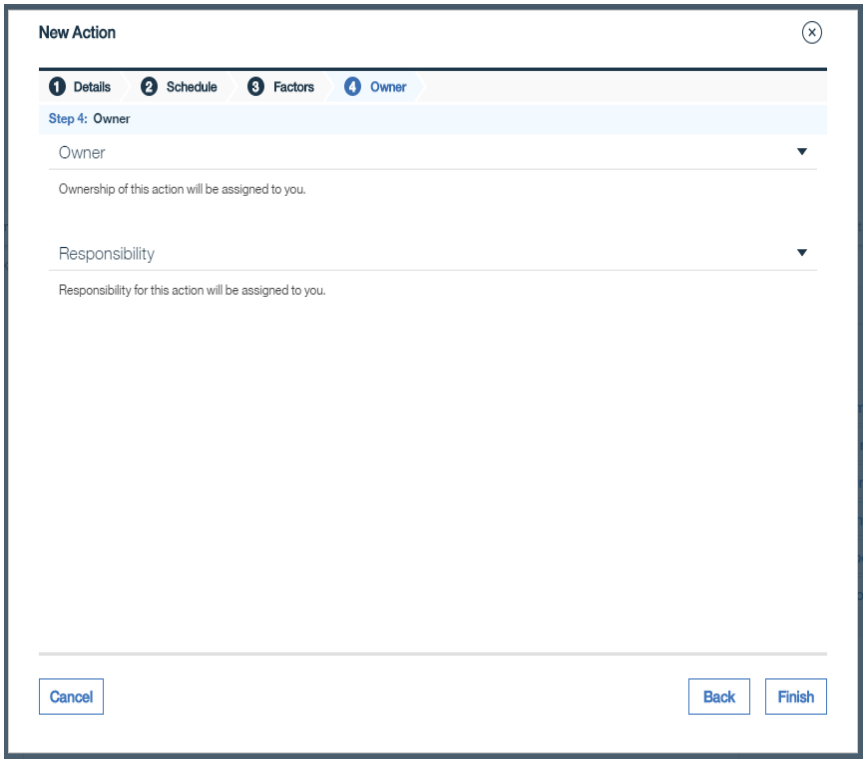
Availability			

f) Select the **Next** button.
System displays the Factors page in the New Action modal dialog. All outcome plan factors and their ratings are displayed.



Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Factor / Rating	O	No factors exist for this action – leave blank.	No

g) Select the **Next** button.
System displays the Owner page in the New Action modal dialog.



h) Select the **Finish** button.
System displays the action in the workspace area.

The Obtain Individual Support Plan action has now been enhanced to allow users to update Receipt of an ISP annually, while leaving an Outcome Plan in place as long as required. This is only done if there are NO changes to Complex Service Needs, QofL Domains, Funded Service or Monitoring Plan.

Action Steps

a) Repeat Action Steps above from E1.2.13 from a) until d). Populate the screen.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Start Date	M	The Start Date should now reflect this year's entry date. Default: today's date	No
End Date	O	This is an optional field and will not be printed. You may want to enter a date 90 days from the start date. This could be used when notifications are implemented.	No
Check Client Availability	O	PDD is not using this field – do not click the button.	No

b) Continue with instructions from above E1.2.13 f).

E1.2.14 Complete "Obtain an Individual Support Plan" Action

(PDD Outcome Plan form section H. Individual Support Plan (Required within 90 days))

Record the date PDD receives the Individual Support Plan (ISP) from the Service Provider. If the ISP has not been received provide a reason why.

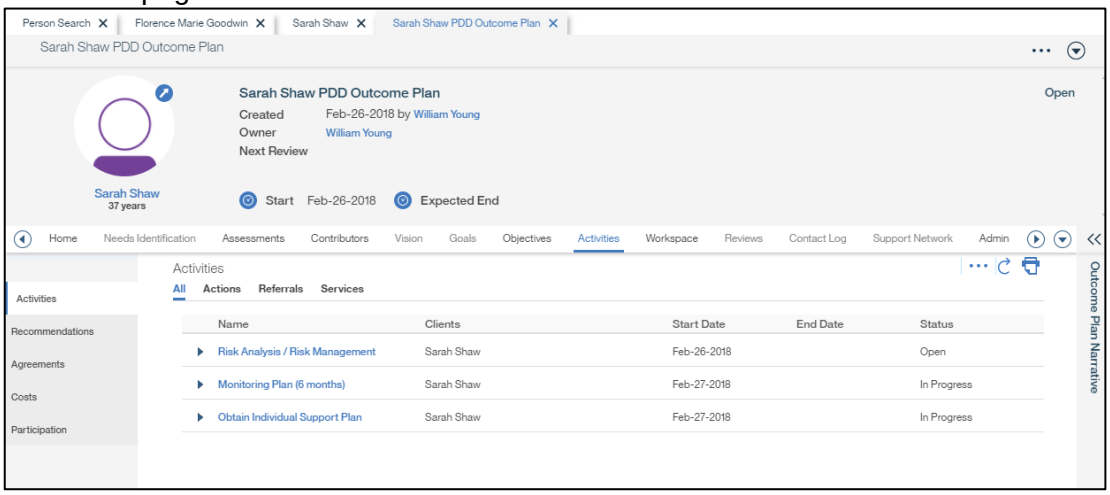
Start

- User is on the person's outcome plan home page

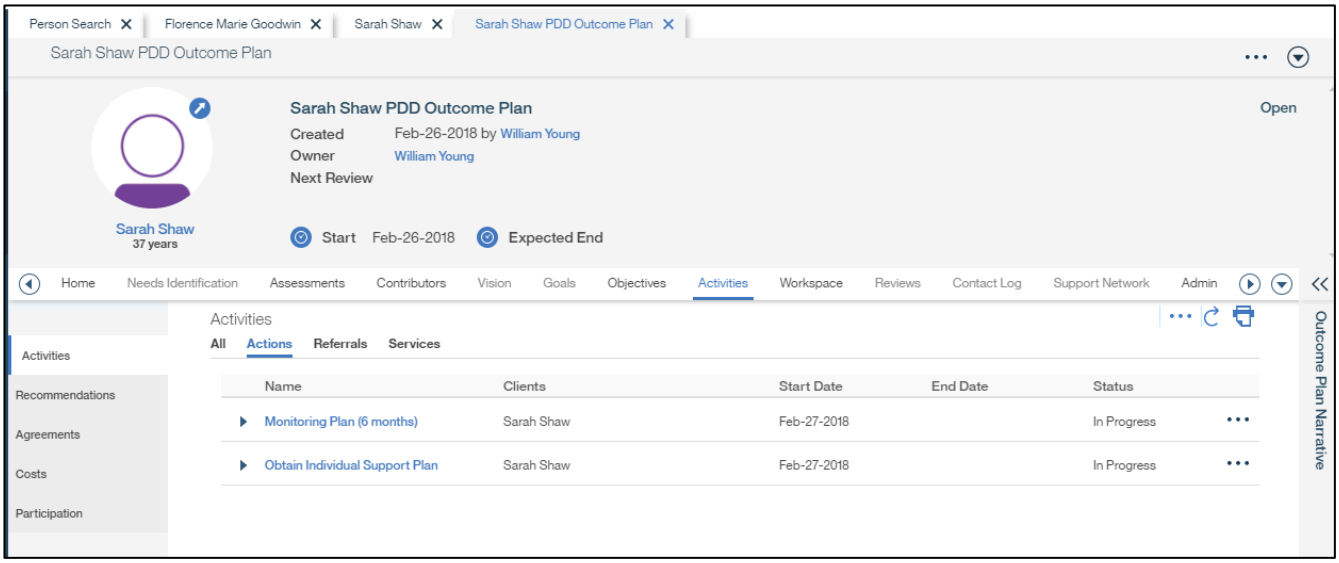
Action Steps

SOURCE: DP14.01.UC.02 Step 17: Internal User marks an Action as complete

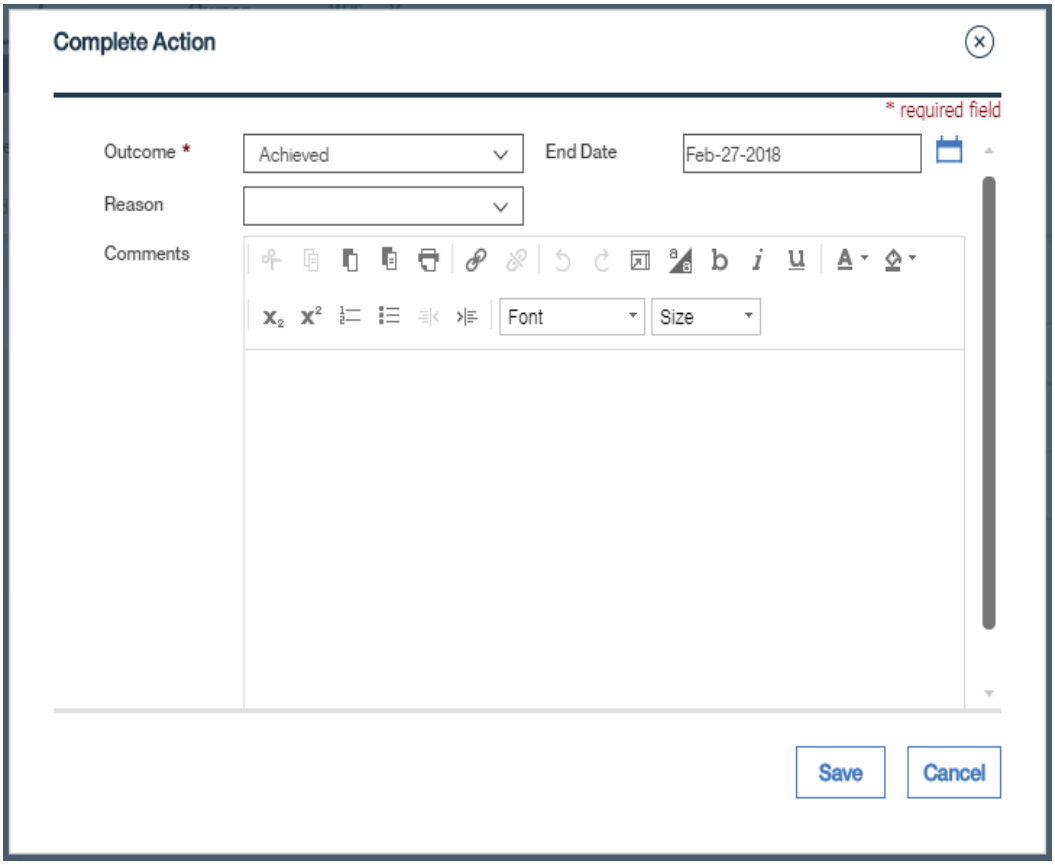
a) Select the **Activities** tab from the outcome plan home page.System presents the Activities page.



b) Select the **Actions** tab from the Activities page.
System presents the Actions list.



c) Select **Complete** from the list action menu next to an In Progress action.
System presents the Complete Action modal dialog.

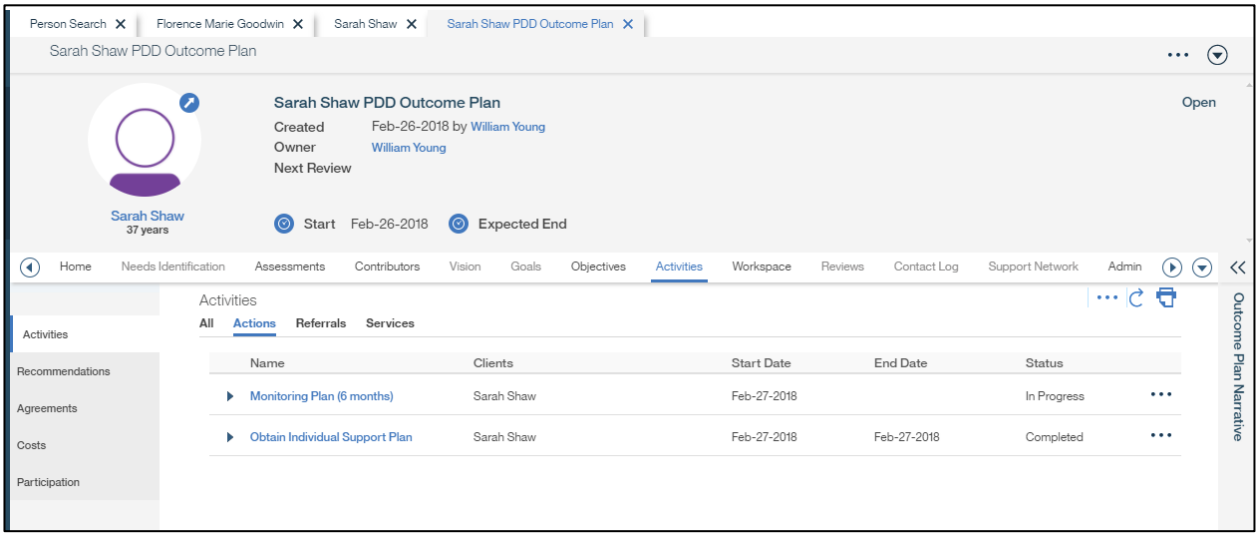


d) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Outcome	M	Select the appropriate value: - Achieved (select this when the ISP has been received) - Not Achieved (select this if the ISP has **not** been received but the PDD Outcome Plan needs to be closed).	Yes
End Date	O	Enter the date the Outcome was completed (Achieved or No Achieved). Default: today's date	Yes
Reason Not Achieved	O	If the ISP has not been received, select most descriptive reason: - No longer appropriate - Client Deceased - Client Incarcerated - Client Refused to Continue - Other - Resource Unavailable - Unable to Locate Client	Yes
Comments	O	Enter relevant comments such as Service Provider / FMS refuses to comply (new) for Not	No

		Achieved.	

e) Select the **Save** button.
System displays the action with the end date and outcome in the Actions list.



E1.2.15 Update Dates for "Complex Service Needs" Services

Capture the date the service was completed or implemented

Enter the date the service is **completed** for:

- Risk Analysis / Risk Management
- Specialized Staff Training Requirements

Enter the date the service is **implemented** for:

- Behavioral Supports

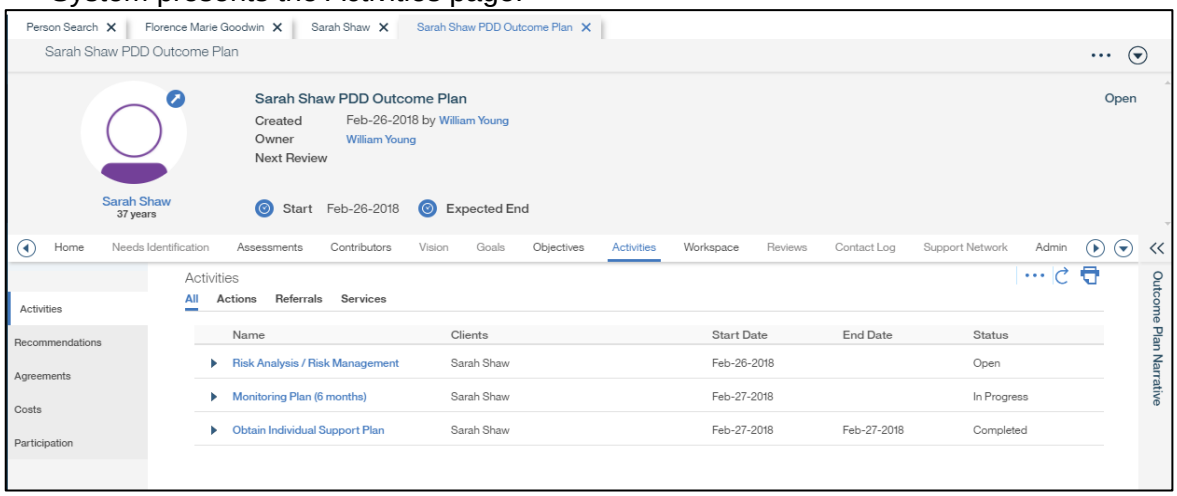
Start

- User is on the person's outcome plan home page

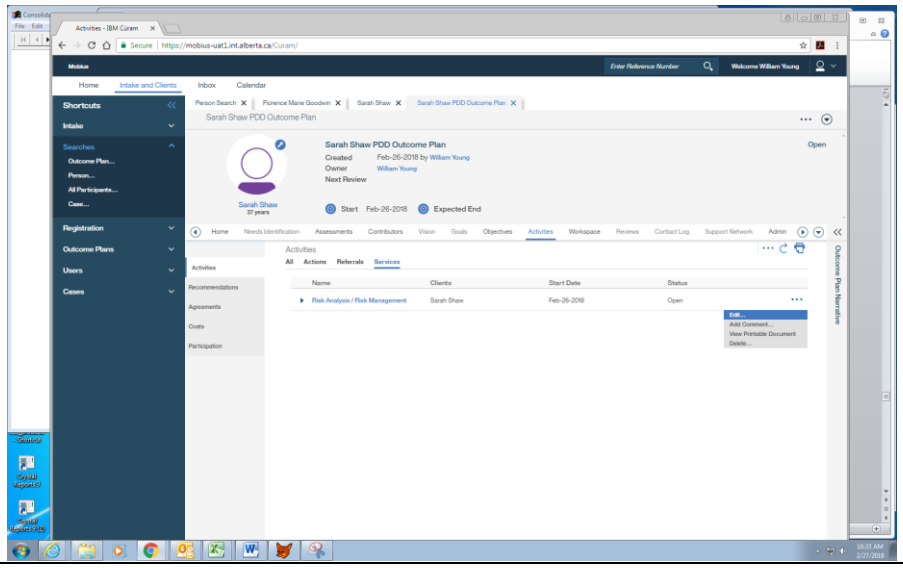
Action Steps

SOURCE: DP14.01.UC.02 Step 18: Internal User edits a Service

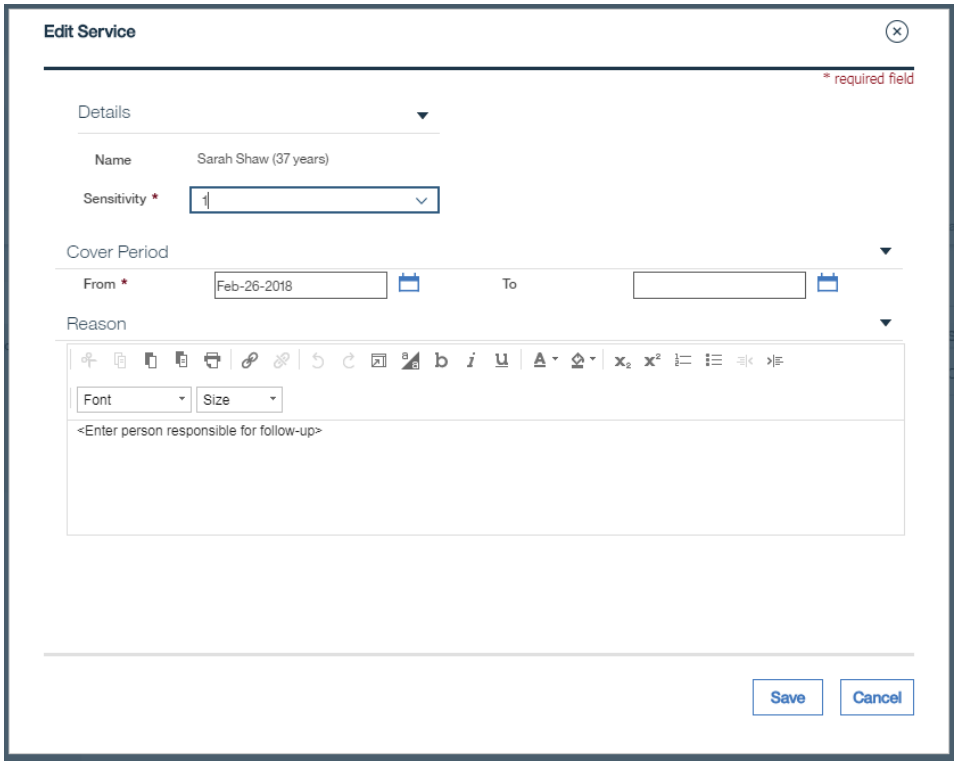
a) Select the **Activities** tab.
System presents the Activities page.



b) Select the **Services** tab from the Activities page.
System presents the Services list.



c) Select **Edit** from the list action menu next to a service.
System presents the Edit Service modal dialog.



d) Update the information presented as required.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Name	M	Auto Populated with the client's name	No
Sensitivity	M	Restricts access to the data - do not change the value Default: 1	No
From	M	PDD is not using this field - do not change the value.	No
To	O	Enter the date the service is provided.	Yes
Reason	O	Enter the Person Responsible for follow-up	Yes

e) Select the **Save** button.
System displays the Services list.

5 Print - a PDD Outcome Plan

The PDD Individual ID must be entered before a PDD Outcome Plan can be printed.

The Case Worker (Mobius Owner) who created the PDD Outcome Plan, along with their contact information (phone and email), is printed at the end of the PDD Outcome Plan document. To have this contact information changed contact Mobius Supports.

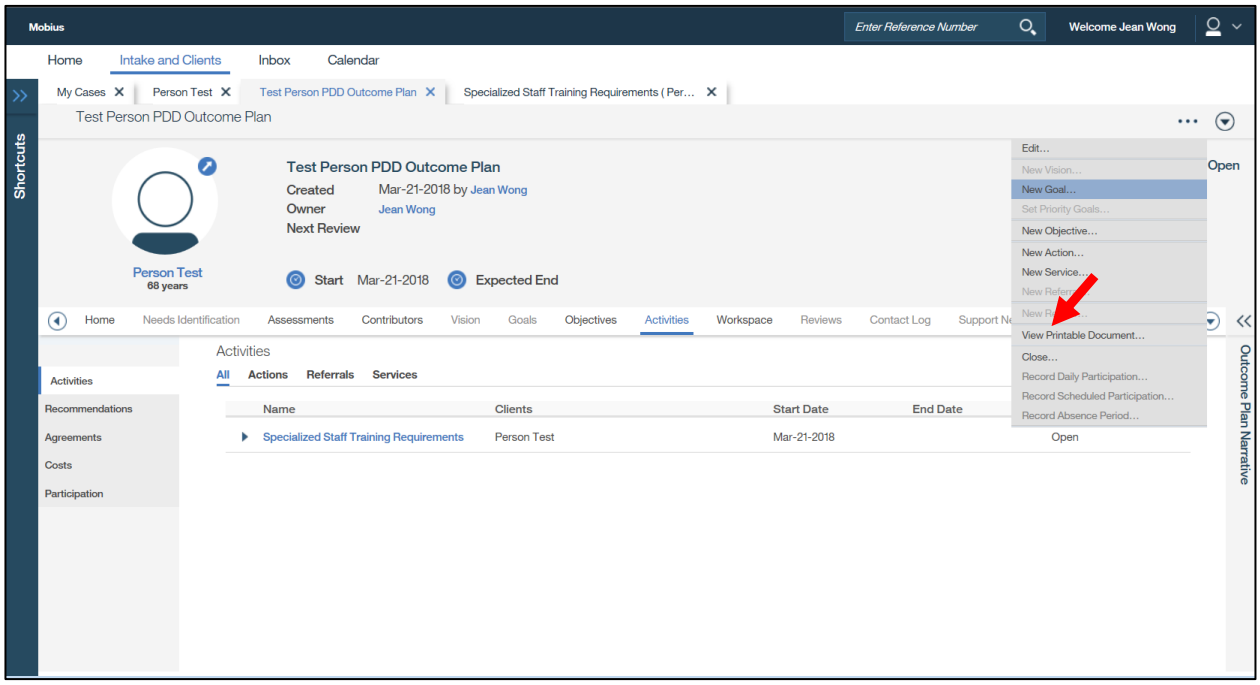
Tips:
Only Quality of Life Domains rated of Focus will print

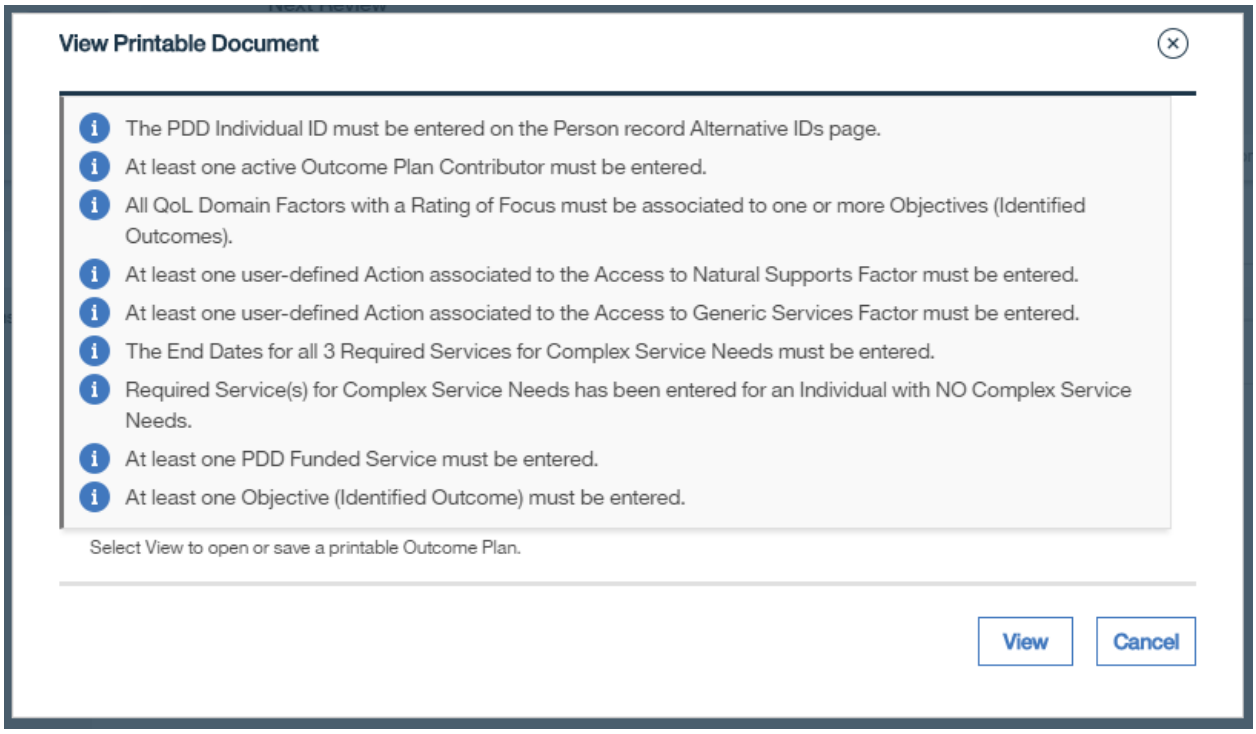
Start

- User is on the person's outcome plan home page

Action Steps
SOURCE: DP14.01.UC.04: Internal User Prints a PDD Outcome Plan

a) Select **View Printable Document** from the outcome plan home page tab actions menu. System presents the View Printable Document modal dialog, validates PDD Outcome Plan components, and displays applicable errors and warnings.





b) Select the **View** button
System saves or opens a PDF of the PDD Outcome Plan depending on the browser.

6 Close - a PDD Outcome Plan

The only time a PDD Outcome Plan is closed is when a new plan is required. A new plan is required when an individual's circumstances changes. Users should never make changes to closed PDD Outcome Plans even though Mobius allows this. The system restricts user from making changes to some parts of the Outcome Plan (e.g. users are not able to add or update Activities or create a New Goal to a closed Outcome Plan) but technically, users can still make changes such as change the end date.

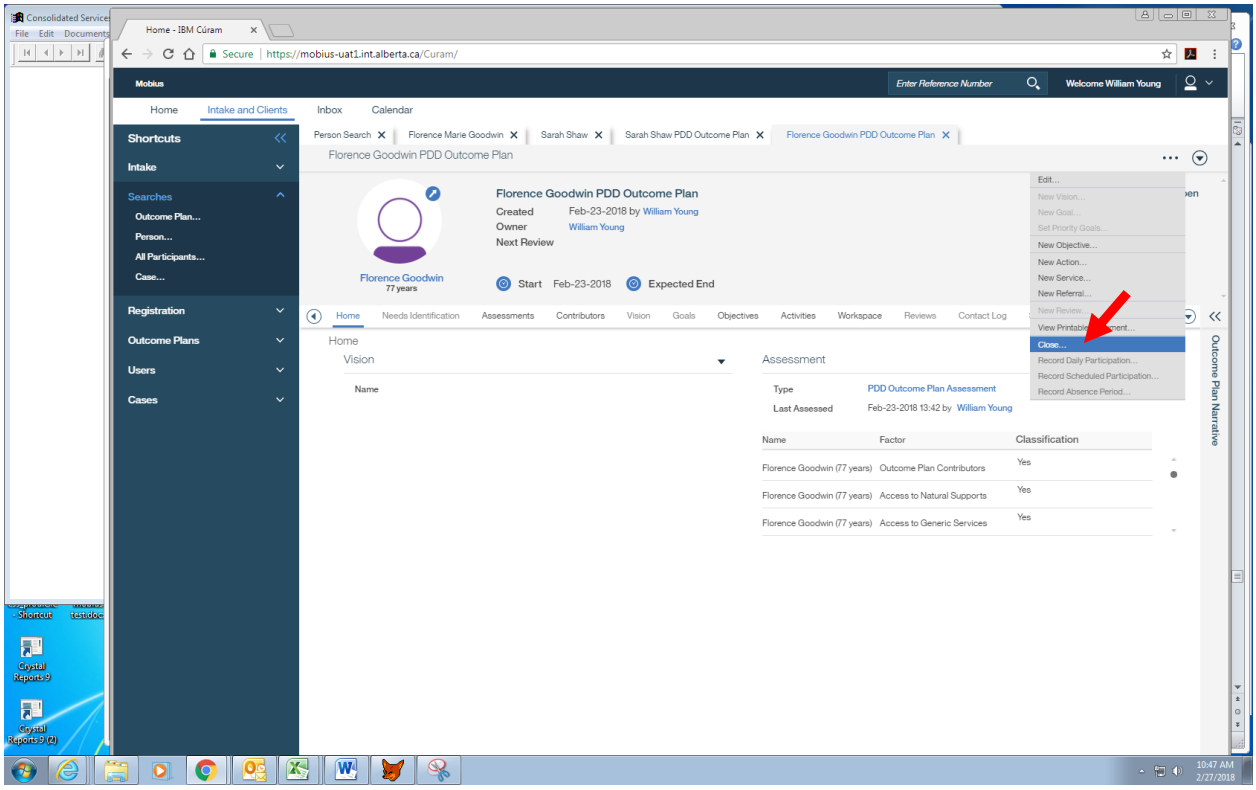
The PDD Individual ID must be entered before a PDD Outcome Plan can be closed.

Start

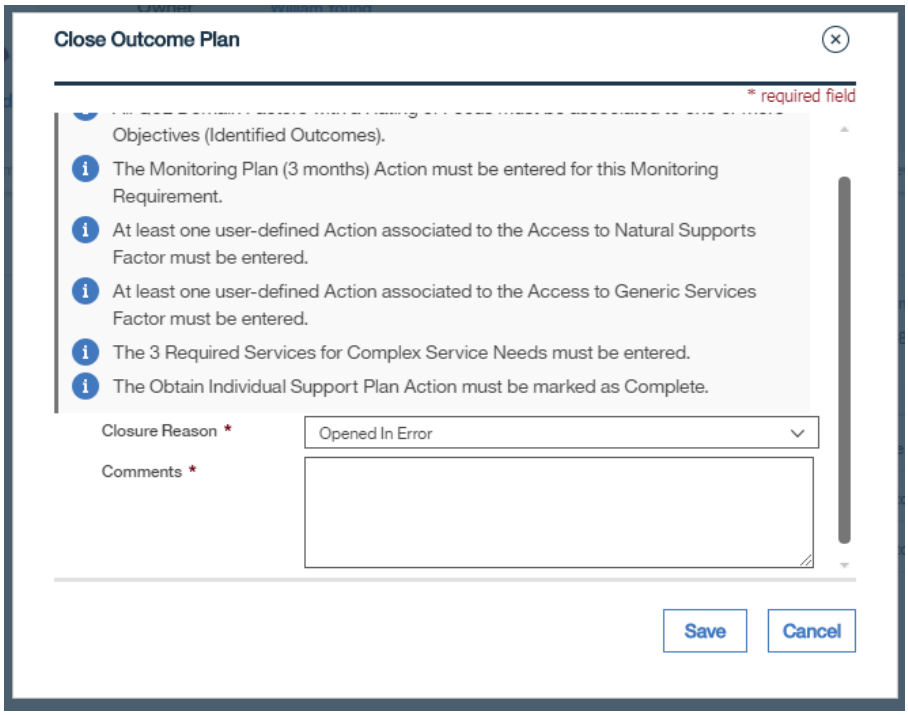
- User is on the outcome plan home page

Action Steps

SOURCE: DP14.01.UC.05: Internal User Closes a PDD Outcome Plan



a) Select **Close** from the outcome plan home page tab actions menu.
System presents the Close Outcome Plan modal dialog, validates PDD Outcome Plan components, and displays applicable errors and warnings.

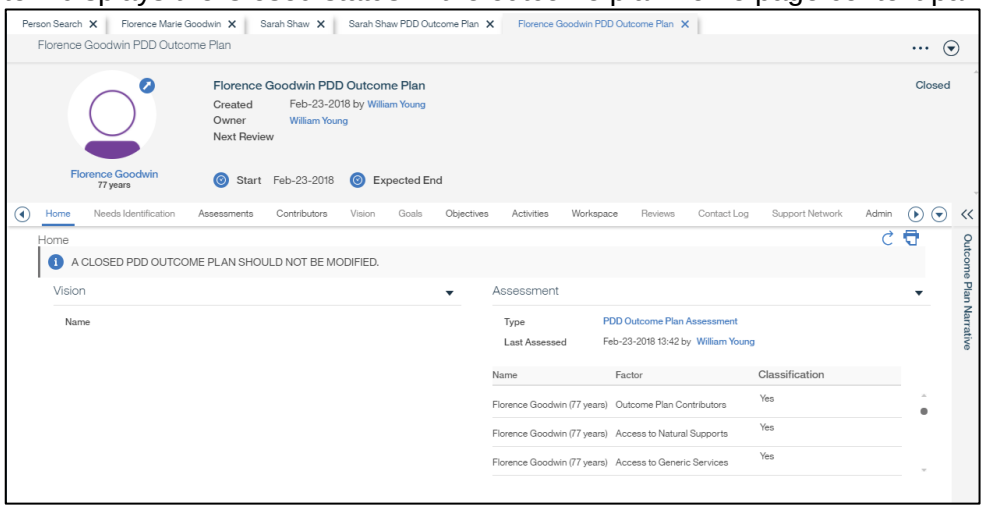


b) Populate the screen

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Closure Reason	M	Select the appropriate reason from the dropdown list: - Opened in Error - Other - Outcome Achieved	No
Comments	M	Enter reason for closing the Outcome Plan such as: client is no longer eligible for PDD funding, new Outcome Plan is required.	No

c) Select the **Save** button

System displays the Closed status in the outcome plan home page context panel.



7 View - a PDD Outcome Plan

A user can view both open and closed PDD Outcome Plans.

Start

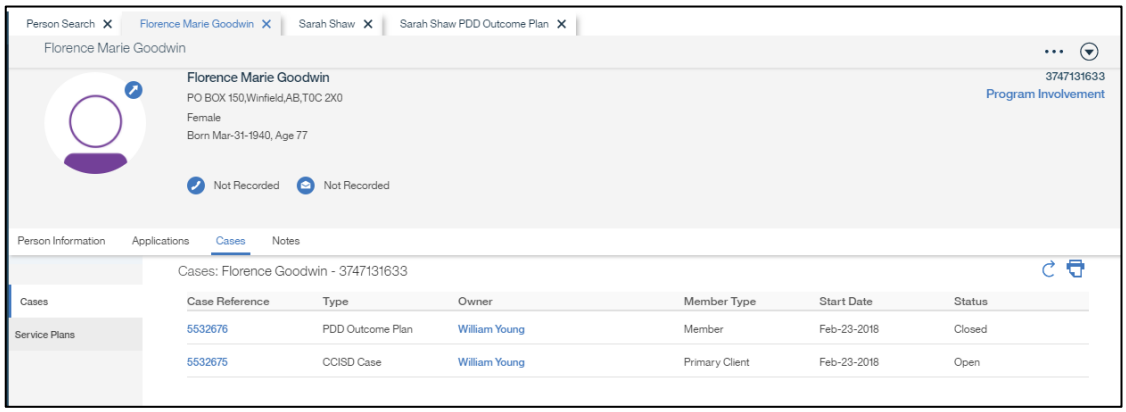
- User is on the person home page of a client who has a PDD Outcome Plan.

Action Steps

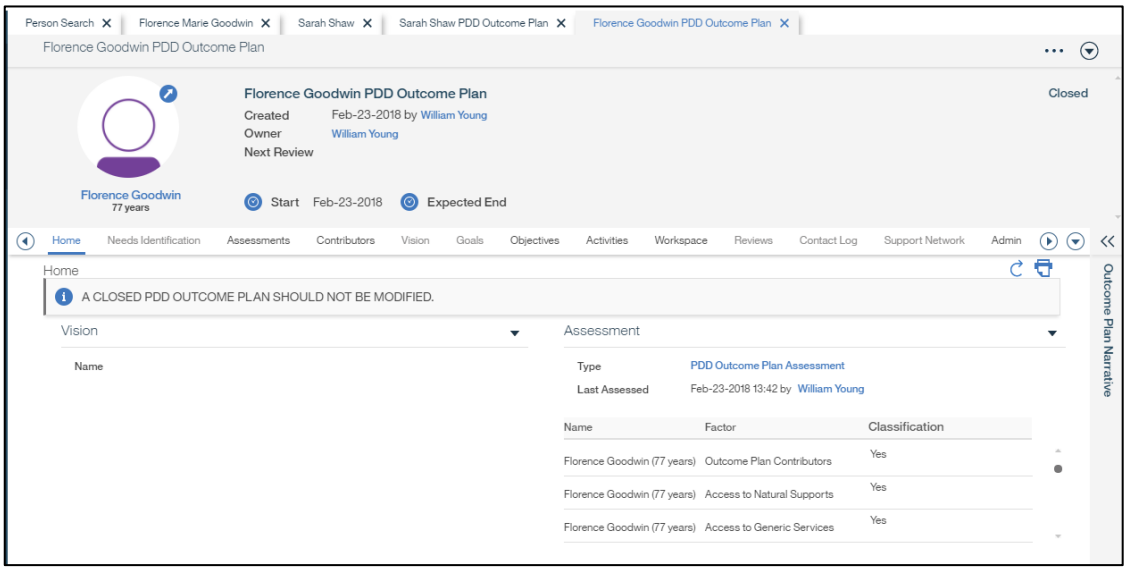
SOURCE: DP14.01.UC.06: Internal User Views a PDD Outcome Plan

a) Select the **Cases** tab in the person home page.
System presents the Cases page.

b) Select the **Case Reference** for the CCISD Case.
System presents the CCISD Case home page in a new tab.



c) Select the **Outcome Plans** tab in the CCISD Case.
System presents the Outcome Plans page.



d) Select the (**Case**) **Reference** for the PDD Outcome Plan.
System presents the outcome plan home page.

8 Reassessment

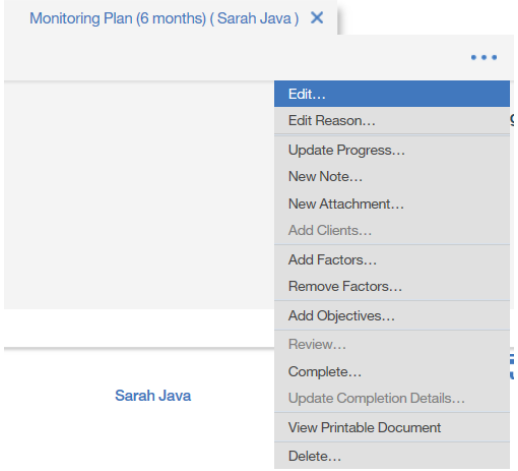
A reassessment is completed to:

- Fix errors upon data entry when the assessment was entered.
- Capture changes which do not affect supports and services.

Completing a reassessment will update the same data as completing a new assessment. The difference is that after a reassessment has been completed the Mobius Compare functionality is available to show the differences between the Assessment to the Reassessment.

If an error has been made while doing the Assessment, or you need to update the Contributors/ Natural Supports or Generic Services then you must do a re-assessment to change a checked yes to an unchecked no. If there are changes to an individual's Complex Service Needs, QofL Domain Factors, Funded Service or Monitoring Plan, you must do a new Outcome Plan. Please do not do a Reassessment, close the present Outcome Plan and create a new Outcome Plan.

If your PDD Outcome Plan PDF displays more than one Monitoring Plan you must go in and delete the unwanted Monitoring Plan from the Activities tab. This is done by clicking and opening the unwanted Monitoring Plan and then deleting it via the ellipses.



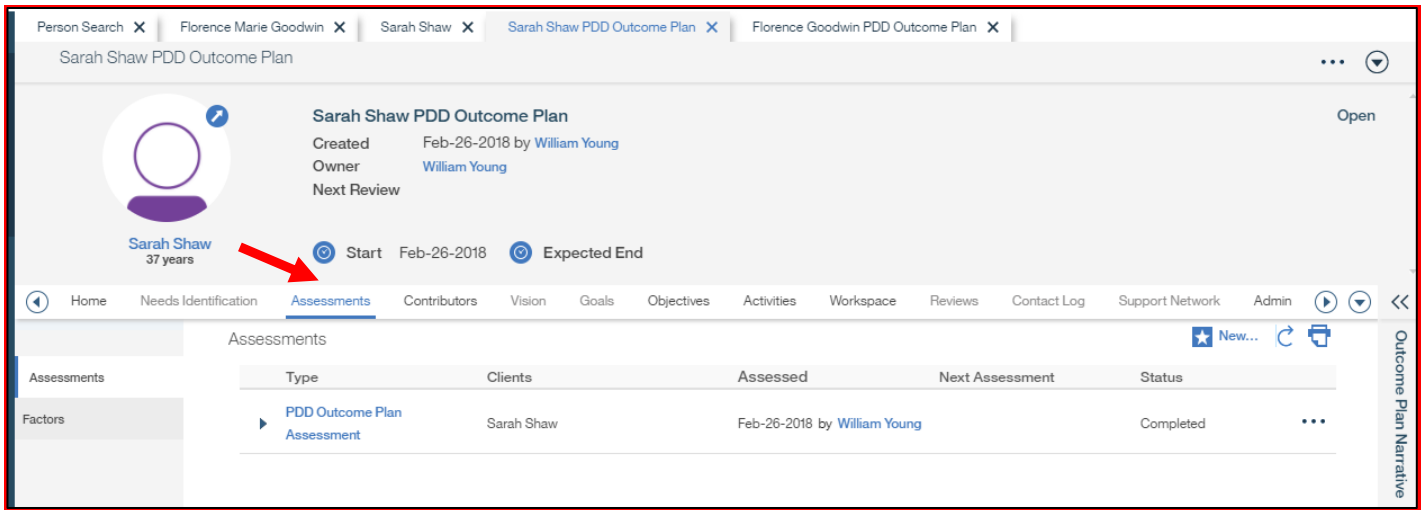
Start

- User is on the person's outcome plan home page

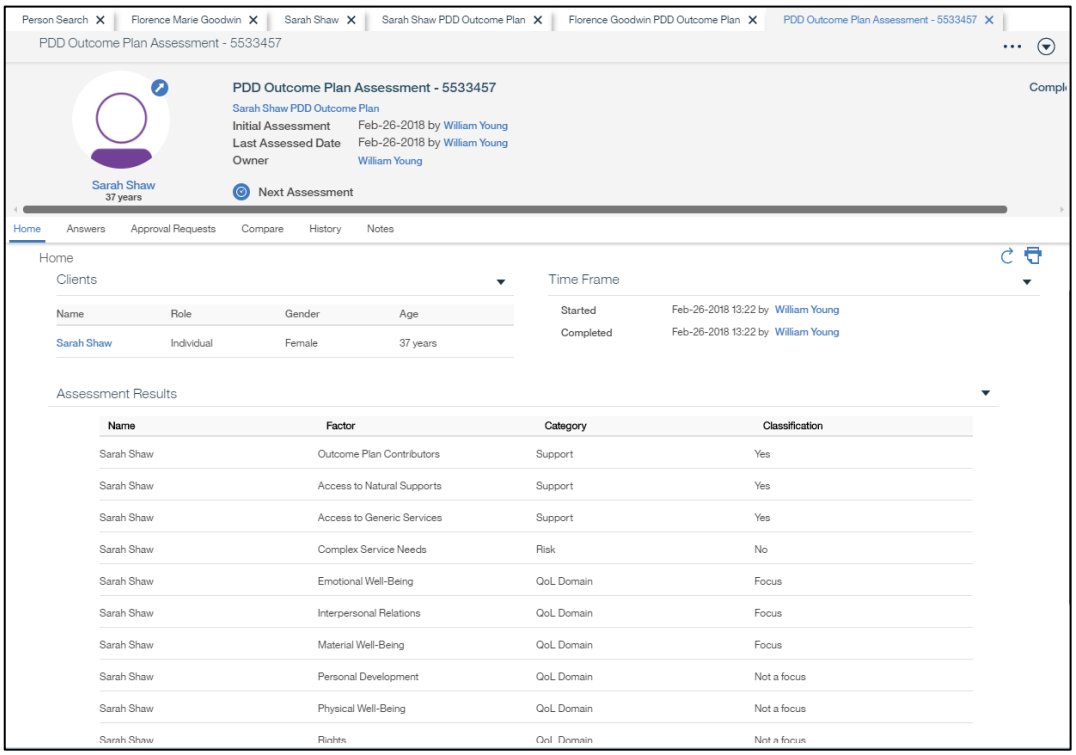
Action Steps

SOURCE: DP14.01.UC.03 Step 14: Internal User runs a PDD Outcome Plan Reassessment, if applicable

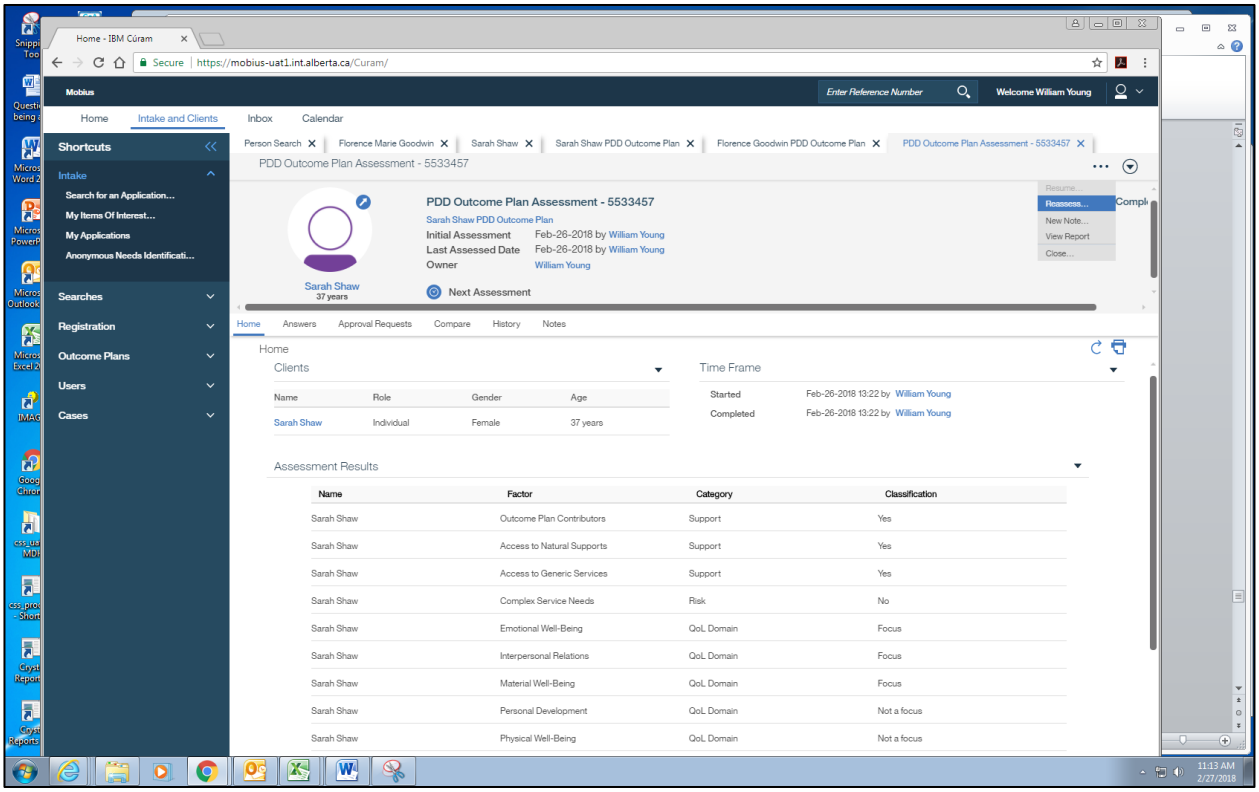
a) Select the **Assessments** tab.
System presents the Assessments page by default.



b) Select the Outcome Plan Assessment.
System presents the assessment webpage.



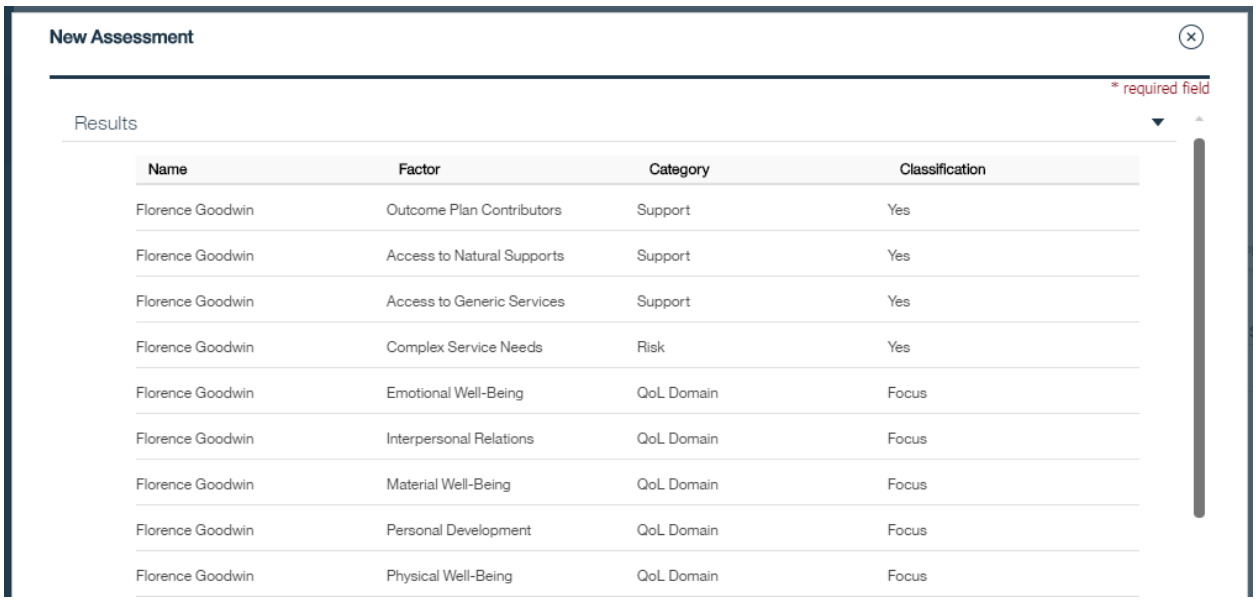
c) Select Reassess from the action list.
System presents the Assessment modal dialog.

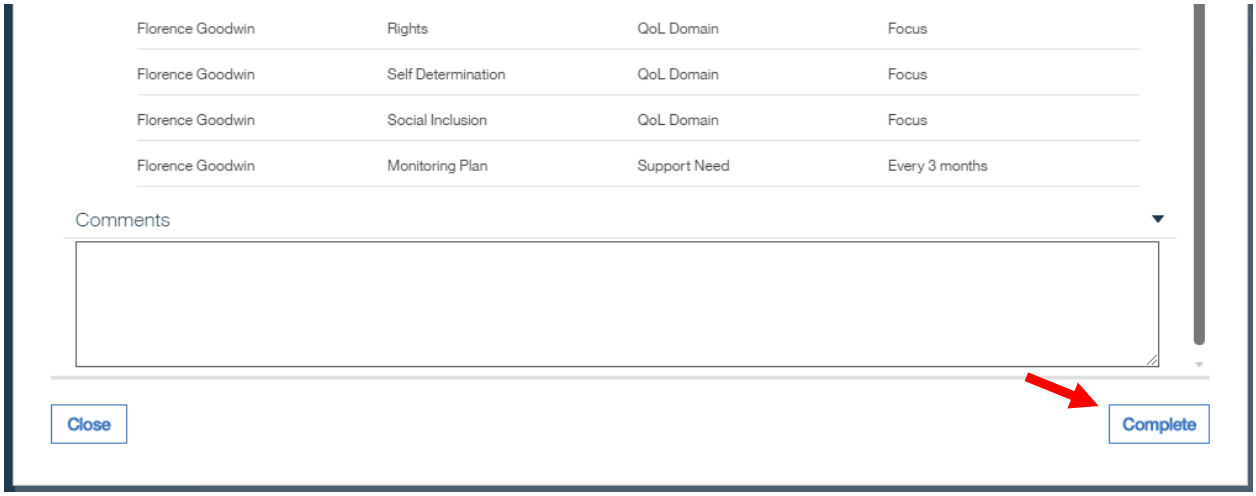


d) Complete the assessment questionnaire.

NOTE: Exactly the same screens as New Assessment Screen, fields are not prepopulated from the previous assessment

e) Select the **Next** button.
System presents the New Assessment modal dialog with assessment results.





Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Comments	O	PDD is not using this field – leave blank.	No

f) Select the **Complete** button to finish the reassessment.
System displays the completed reassessment in the Assessments list. System updates Ratings for Factors in the PDD Outcome Plan specified by reassessment responses.

9 Change Case Worker – for a PDD Outcome Plan

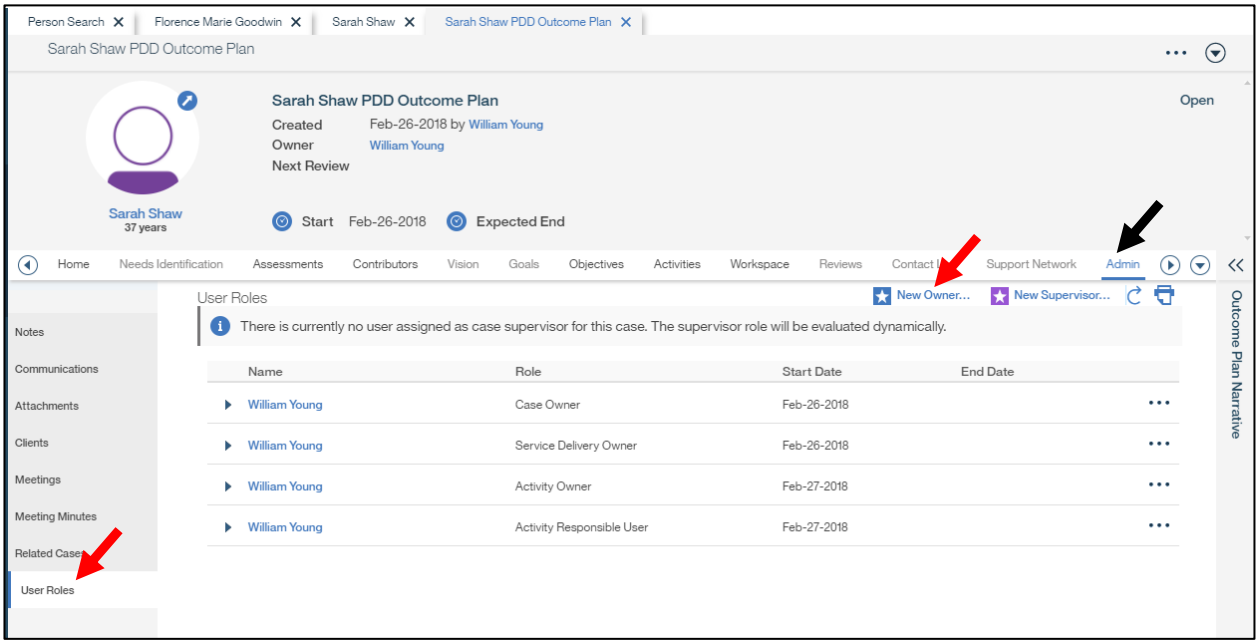
The Case Worker is captured as the Mobius **Owner** when the PDD Outcome Plan is created.

Note:
- Cases and Activities also have an Owner which is set by default to the user who created them.
- Changing the owner of a PDD Outcome Plan will not change the owner of the Case or Activity.
- Reporting will be based on the PDD Outcome Plan Owner. Owners for the Case and Activities will be ignored.

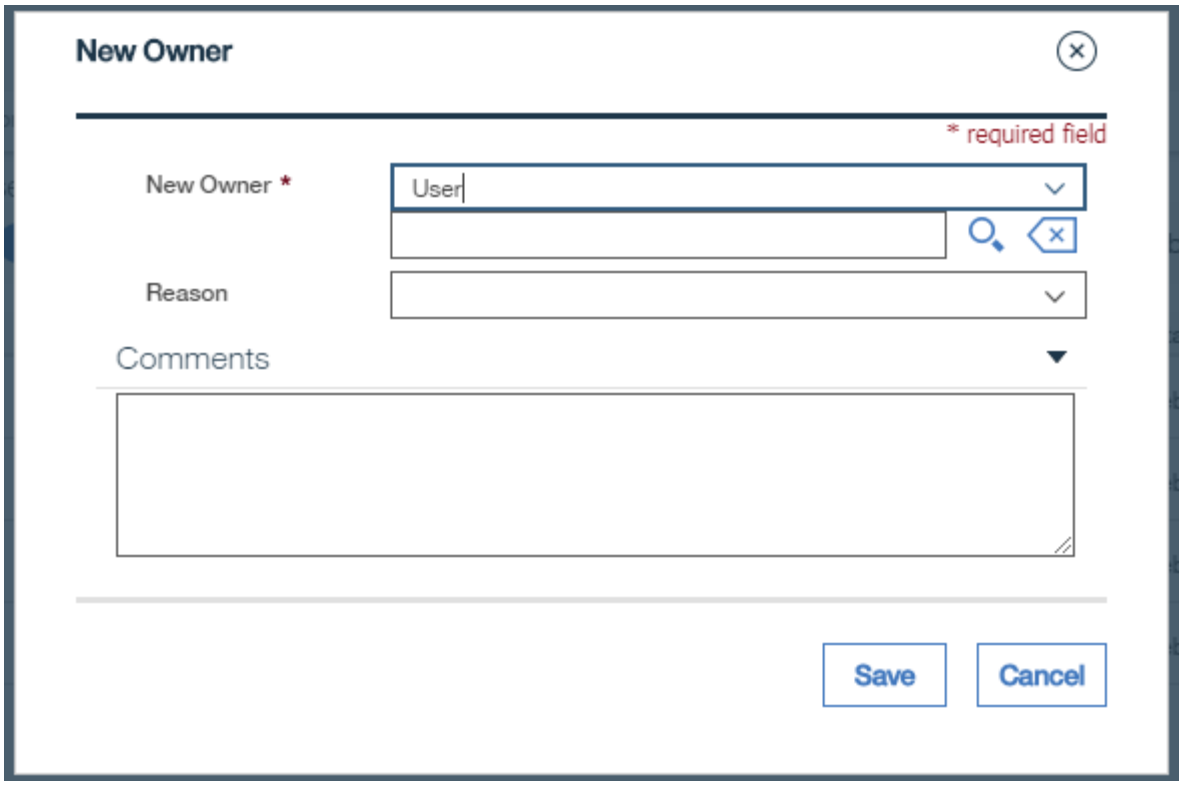
Start
- User is on the outcome plan home page

Action Steps
SOURCE: DP14.01.UC.07: Internal User Changes PDD Outcome Plan Owner

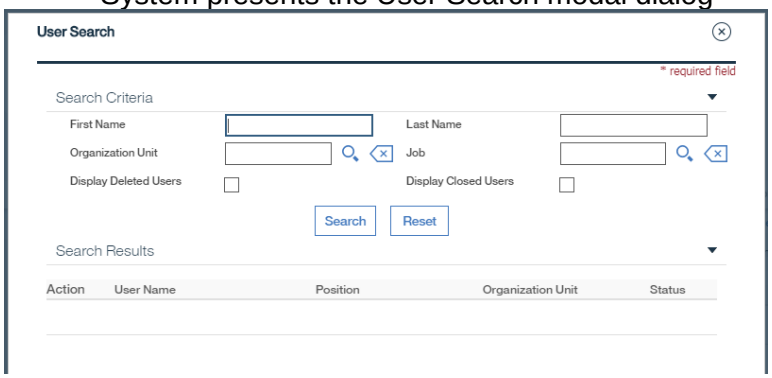
a) Select the **User Roles** page in the **Admin** tab.
System presents the User Roles page.



b) Select the **New Owner** button.
System presents the New Owner modal dialog.



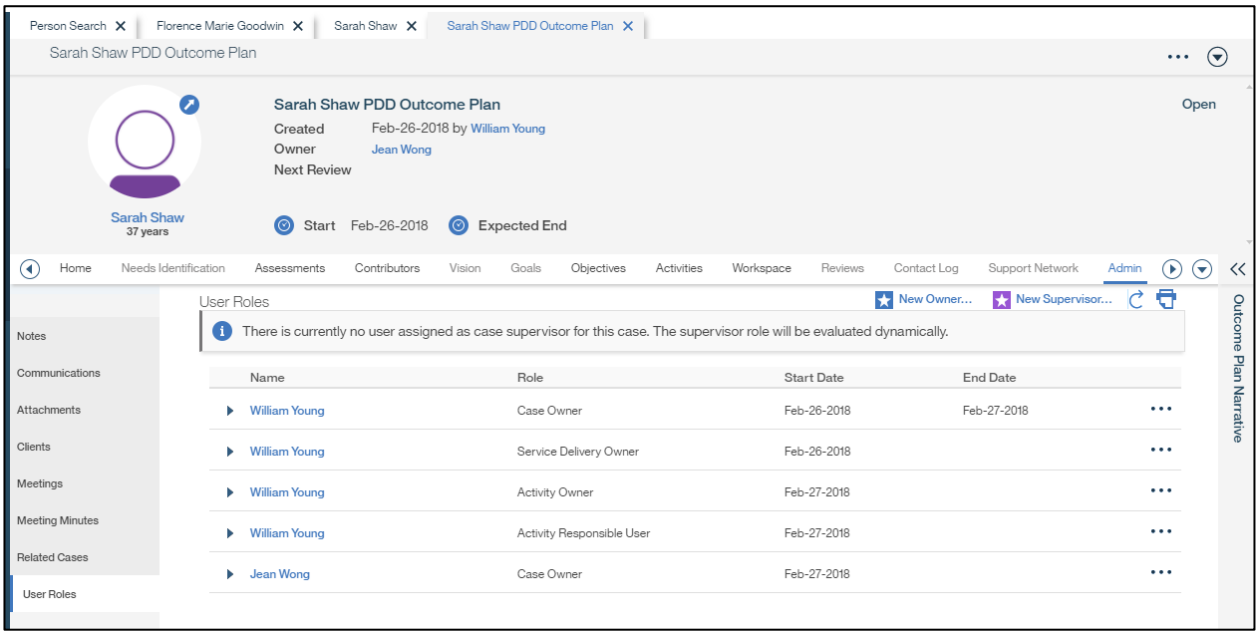
d) Populate the screen.

Field	Mandatory / Optional	How to Populate the screen
New Owner	M	Select **User** from the dropdown list. Dropdown values: Organization Unit, Position, User, Work Queue Default = User
Search	M	Select the **Search** icon. System presents the User Search modal dialog  i. Enter search criteria **First name and Last Name** and select **Search**. System presents Search Results. ii. Select a **User** from the Search Results. System presents the New Owner modal dialog.

Reason	O	Select a Reason: Career Break Leave of Absence Left Organization Maternity Other Paternity Retired
Comments	O	Enter comments if applicable, otherwise leave blank.

e) Select **Save**.

System presents the User Roles page. The new Case Owner is displayed in the list; the previous Case Owner is end dated.



10 List of Factors, Services and Actions

Factors

- Outcome Plan Contributors
- Access to Natural Supports
- Access to Generic Services
- Complex Service Needs
- Emotional Well-Being
- Interpersonal Relations
- Material Well-Being
- Personal Development
- Physical Well-Being
- Rights
- Self Determination
- Social Inclusion

Quality of Life Domains

Services – in alphabetical order

- Behavioral consultative services
- Community access
- Employment preparation
- Employment placement
- In home respite
- Other specialized community supports
- Out of home respite
- Overnight staffed residence
- Professional consultative services
- Support home
- Supported independent living
- Transportation
- Risk Analysis / Risk Management
- Behavioral Supports
- Specialized Staff Training Requirements

PDD Funded Services

Actions

- Monitoring Plan (12 months-Phone or email)
- Monitoring Plan (12 months- Face-to-face)
- Monitoring Plan (6 months)
- Monitoring Plan (3 months)
- Monitoring Plan (More often than every 3 months)
- Obtain an Individual Support Plan
- User defined actions (factors of Generic Services or Natural Supports)

Predefined

11 Validations

CCISD Case

The following validations are triggered when the View Printable Document action and the Close action is selected in a PDD Outcome Plan.

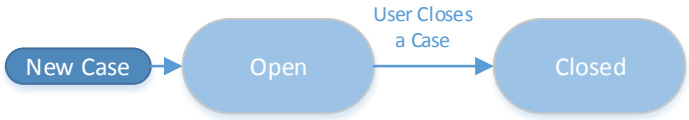
Name	Validation Description
PDD Individual ID	The PDD Individual ID must be entered on the Person record Alternative IDs page. An Active status (not canceled), with no end (to) date (or future end date) PDD Individual ID must be entered as an Alternative ID on the Person record.
Assessment	The PDD Outcome Plan Assessment must be completed. A PDD Outcome Plan Assessment with a Completed status must exist in the PDD Outcome Plan; all Factors must be added to the Outcome Plan.
No Contributors without Factor	If Outcome Plan Contributors Factor has not been assessed, no Active Contributors entered on the Outcome Plan.
Active Contributors	If Outcome Plan Contributors Factor has YES Rating, at least one Active Contributors must be entered on the Outcome Plan.
No Contributors	If Outcome Plan Contributors Factor has NO Rating, no Active Contributors should be entered on the Outcome Plan.
Focus QoLD Factor	At least one (of 8) QoL Domain Factors must have a Rating of Focus
Objective All QoLD Factors	All Quality of Life Domain Factors with a Rating of Focus) must be associated to one or more Active (not Canceled) Objectives and one or more Funded Service
Objective	At least one Active (not Canceled) Objective (Identified Outcome) must be entered on the Outcome Plan.
Objective QoLD Factor	Each Active (not Canceled) Objective (Identified Outcome) entered on the Outcome Plan must be associated to at least one QoL Domain Factor with a Rating of Focus.
Monitoring Plan Action	Only 1 Active (not Canceled) Monitoring Plan Action must be entered on the Outcome Plan.
Monitoring Plan (more than 3 months)	If Monitoring Plan Rating is More often than every 3 months, then the Monitoring Plan (more often than every 3 months) Action must be entered (Active (not Canceled)) on the Outcome Plan.
Monitoring Plan (3 months)	If Monitoring Plan Rating is Every 3 months, then the Monitoring Plan (3 months) Action must be entered (Active (not Canceled)) on the Outcome Plan.

Monitoring Plan (6 months)	If Monitoring Plan Rating is Every 6 months, then the Monitoring Plan (6 months) Action must be entered (Active (not Canceled)) on the Outcome Plan.
Monitoring Plan (12 months)	If Monitoring Plan Rating is Every 12 months, then the Monitoring Plan (12 months - Face-to-face) Action must be entered (Active (not Canceled)) on the Outcome Plan.
Monitoring Plan (12 months phone/email)	If Monitoring Plan Rating is Every 12 months (Phone or email), then the Monitoring Plan (12 months - Phone or email) Action must be entered (Active (not Canceled)) on the Outcome Plan.
Natural Supports Action	If Access to Natural Supports Factor Rating is YES, at least one Active (not Canceled) user-defined Action associated to the Access to Natural Supports Factor must be entered on the Outcome Plan.
No Natural Supports Action	If Access to Natural Supports Factor Rating is NO, no Active (not Canceled) user-defined Action associated to the Access to Natural Supports Factor should be entered on the Outcome Plan.
Generic Service Action	If Access to Generic Services Factor has YES Rating, at least one Active (not Canceled) user-defined Action associated to the Access to Generic Services Factor must be entered on the Outcome Plan.
No Generic Service Action	Actions associated to the Access to Generic Services Factor must not be entered if the Access to Generic Services Factor Rating is No. If Access to Generic Services Factor Rating is NO, no Active (not Canceled) user-defined Action associated to the Access to Generic Services Factor entered on the Outcome Plan.
No Required Services without Factor	Required Services for Complex Service Needs must not be entered if the Complex Service Needs Factor has not been assessed. If Complex Service Needs Factor Rating is not assessed, no Active (not Canceled) Required Services for Complex Service Needs entered on the Outcome Plan.
Required Services	If Complex Service Needs Factor Rating is YES, all 3 Required Services for Complex Service Needs must be entered on the Outcome Plan (and not have Canceled status).
Required Services End Date	The End Dates for all 3 Required Services for Complex Service Needs must be entered.
No Required Services	Required Service(s) for Complex Service Needs has been entered for an Individual with NO Complex Service Needs. If Complex Service Needs Factor Rating is NO, no (not Canceled) Required Services for Complex Service Needs entered on the Outcome Plan.
Funded Service	At least one (of 12) (not Canceled) PDD Funded Service must be entered on the Outcome Plan.

Funded Service QoLD Factor	Each PDD Funded Service (that does not have Canceled status) added to the Outcome Plan must be associated to at least one QoL Domain Factor with a Rating of Focus.
Funded Service for Not a Focus Factor	Any PDD Funded Service added to the Outcome Plan (that does not have Canceled status) must NOT be associated to QoL Domain Factors with a Rating of Not a Focus.
Obtain ISP Action	The Obtain Individual Support Plan Action must be entered (Active (not Canceled)) on the Outcome Plan.
ISP Action Complete	The Obtain Individual Support Plan Action must be marked as Complete.

12 Transition States

CCISD Case



New Case (Status = Open)

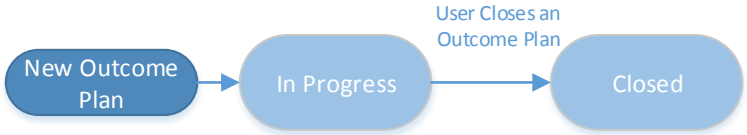
- Set when a user creates new Case.
- Only Prototype and PDD workers can create CCSID cases (i.e. those workers with the CommonIntake workspace). These workers cannot create Integrated Cases.
- An individual should only have one open CCISD Case.
- If a CCISD case already exists the worker should use the existing case and not create a new one. The user will have to create a new case is the existing Case is closed.

Close Case (Status = Closed)

- Set when a user closes an open Case.
- A CCISD Case is closed only when it is opened in error.

Delete – There is no delete functionality.

PDD Outcome Plan



New (Status = Open)

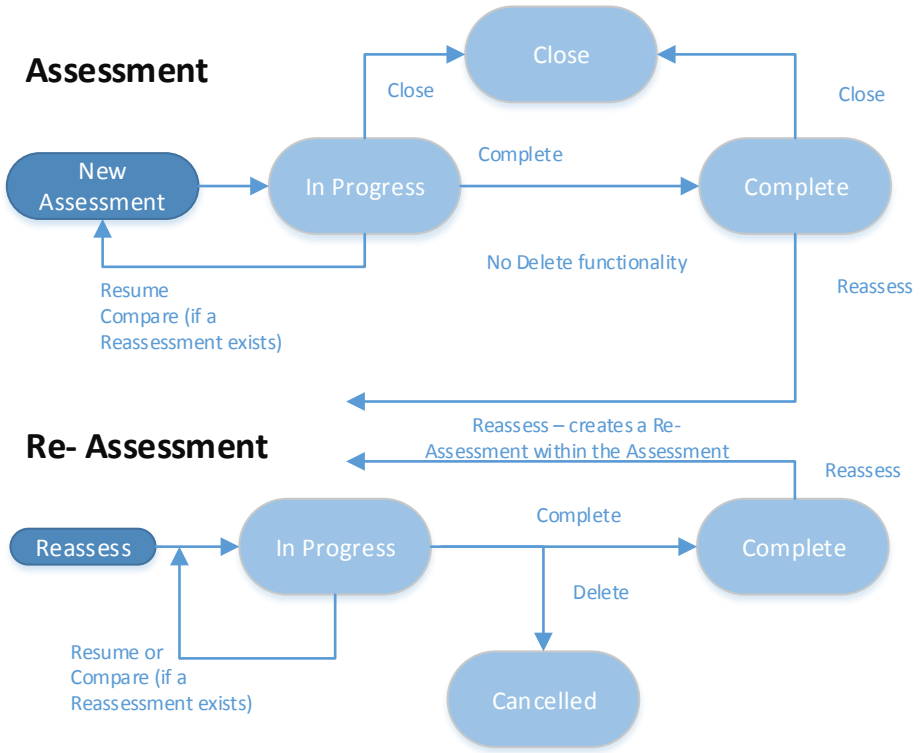
- Set when a user creates a new PDD Outcome Plan.
- An individual can only have one open PDD Outcome Plan within Mobius.

Close (Status = Closed)

- Set when a user closes an open PDD Outcome Plan.
- Users should only close a PDD Outcome Plan when it is opened in error or when new PDD Outcome Plan is required. The PDD Outcome Plan is not closed when someone is no longer receiving services through PDD or the Government of Alberta.

Delete – There is no delete functionality.

PDD Outcome Plan Assessment



New Assessment (Status = In Progress)

- Set when a user performs a new Assessment.
- An individual should only have one PDD Outcome Plan Assessment. It is possible that an individual may have both a PDD Outcome Plan Assessment and a Common Outcome Plan Assessment.

Complete (Status = Complete)

- Set when a worker finishes answering the questions on the PDD Outcome Plan Assessment and selects the “Complete” button from the Results page.

Close (Status = Closed)

- Set when a user closes an assessment.
- Assessments can be closed when they are “In Progress” or “Complete”
- A PDD Outcome Plan Assessment is closed only when it is opened in error.
- A PDD Outcome Plan Assessment can be used if it is “In Progress” or “Complete”.

Resume (Status = In Progress)

- Set when a user resumes an assessment.
- Workers may resume an Assessment when the status of the Assessment is “In Progress”

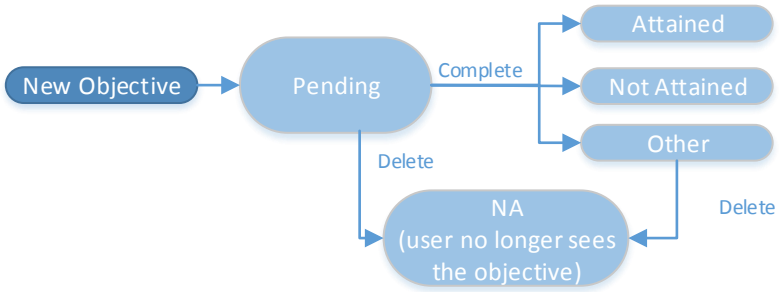
Reassess (Status = In Progress)

- Set when a user reassess’ an assessment.
- Users may perform a Reassessment when the status of the existing assessment is “Complete”. A reassessment cannot be performed on an assessment “In Progress”.
- A reassessment is performed when there is a change to the individual’s circumstances. Completing a reassessment will update the same data as completing a new assessment. The difference is that after a reassessment has been completed the Mobius Compare functionality is available to show the differences between the Assessment to the Reassessment.

- If an error has been made while doing the Assessment, or you need to update the Contributors/Natural Supports or Generic Services then you must do a re-assessment to change a checked yes to an unchecked no.
- If there are changes to an individual's Complex Service Needs, QofL Domain Factors, Funded Service, or Monitoring Plan you must do a new Outcome Plan. Please do not do a Reassessment, close the present Outcome Plan and create a new Outcome Plan.
- If your PDD Outcome Plan PDF displays more than one Monitoring Plan you must go in and delete the unwanted Monitoring Plan from the Activities tab. This is done by clicking and opening the unwanted Monitoring Plan and then deleting it via the ellipses.

Delete - There is no delete functionality.

Objective



New Objective (Status = Pending)

- Set when a user creates a new Objective.

Complete (Status = Attained)

- Set when a user Completes an Objective with the Outcome type of "Attained".

Complete (Status = Not Attained)

- Set when a user Completes an Objective with the Outcome type of "Not Attained".

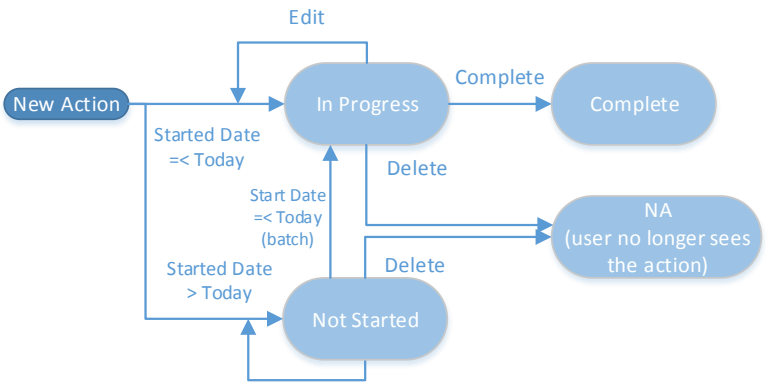
Complete (Status = Other)

- Set when a user Completes an Objective with the Outcome type of "Other".

Delete (Status =Not Applicable)

- Set after the user selects "Delete" from the Action menu next to an Objective with an Outcome of "Pending " or "Other". No other Objectives can be deleted.

Actions



New (Status = In Progress)

- Set when a user creates a new Action with a Start Date <= Today.

New (Status = Not Started)

- Set when a user creates a new Action with a Start Date >Today.

NOTE: A status is changed from “Not Started” to “In Progress” by an overnight batch job when the date has passed.

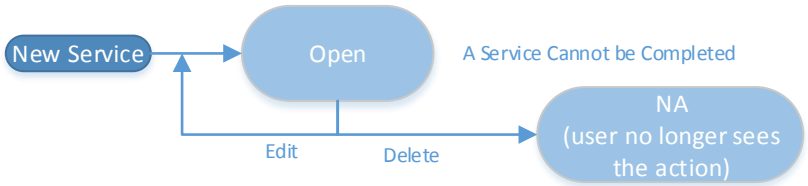
Complete (Status = Complete)

- Set when selects “Complete” from the Action menu from the Action home page.
- All Actions must be completed before the Outcome Plan is closed in order to be used again for the same individual.

Delete (Status =Not Applicable)

- Set after the user selects “Delete” from the Action menu next to an “In Progress” Action. The system removes the Action form the Action list. The state is “Not Applicable” because the user cannot see the Action any more. Actions that are “Completed” cannot be deleted.
- An Action is deleted only when it is created in error.

Services



New (Status = Open)

- Set when a user creates a new Service.

Delete (Status =Not Applicable)

- Set after the user selects “Delete” from the Action menu next to an “Open” Service. The system removes the Service form the Services list. The state is “Not Applicable” because the user cannot see the Service any more.
- A Service is deleted only when it is created in error.

Close - There is no close functionality for a service. There is no business need to close a Service.

13 Setting up a Relationship

Precondition:

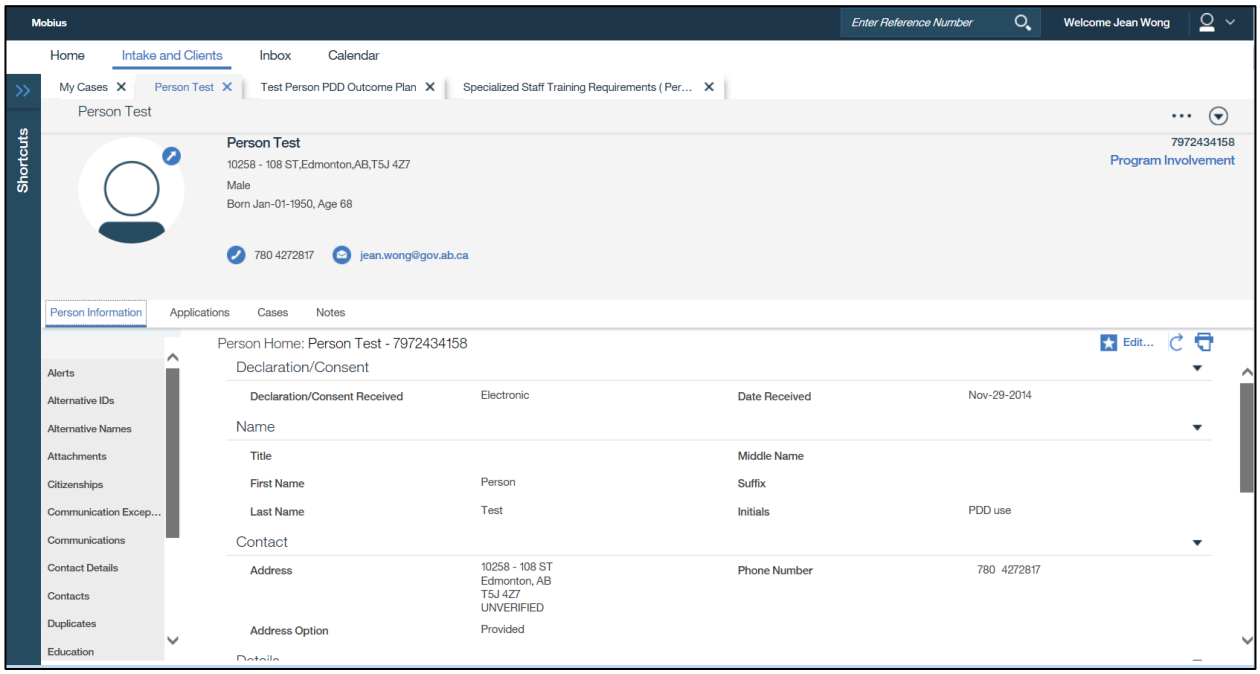
- The two individuals are registered

Start

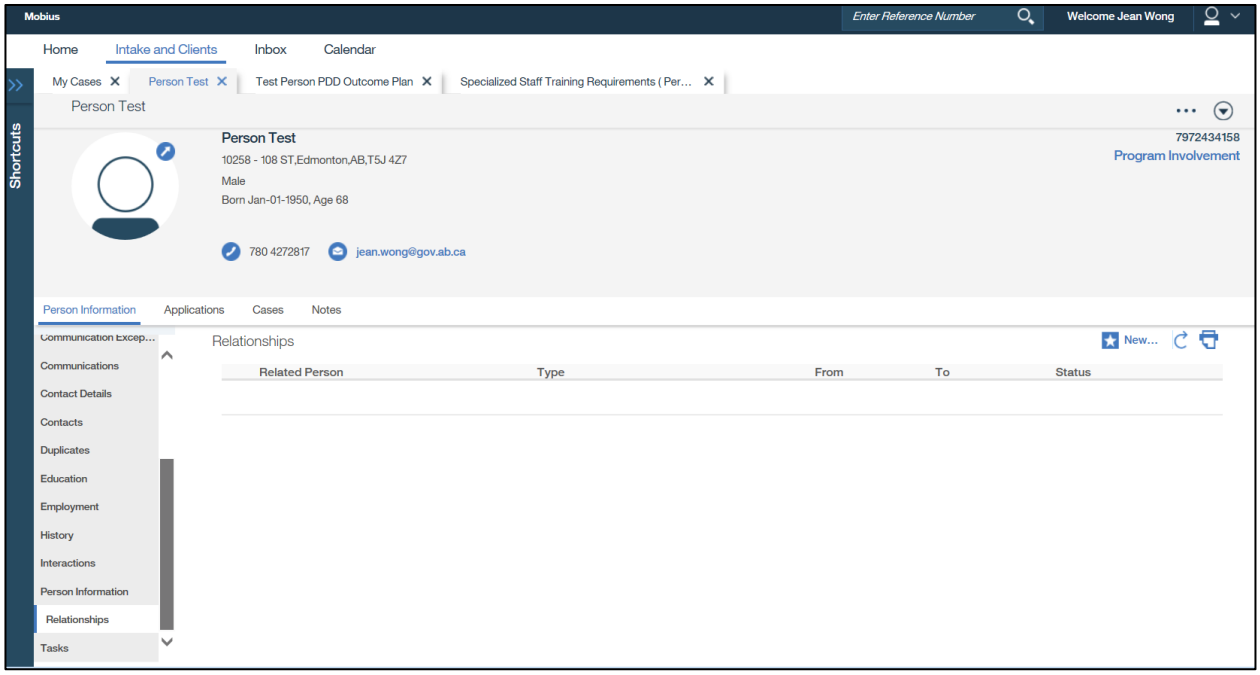
- User is logged into Mobius

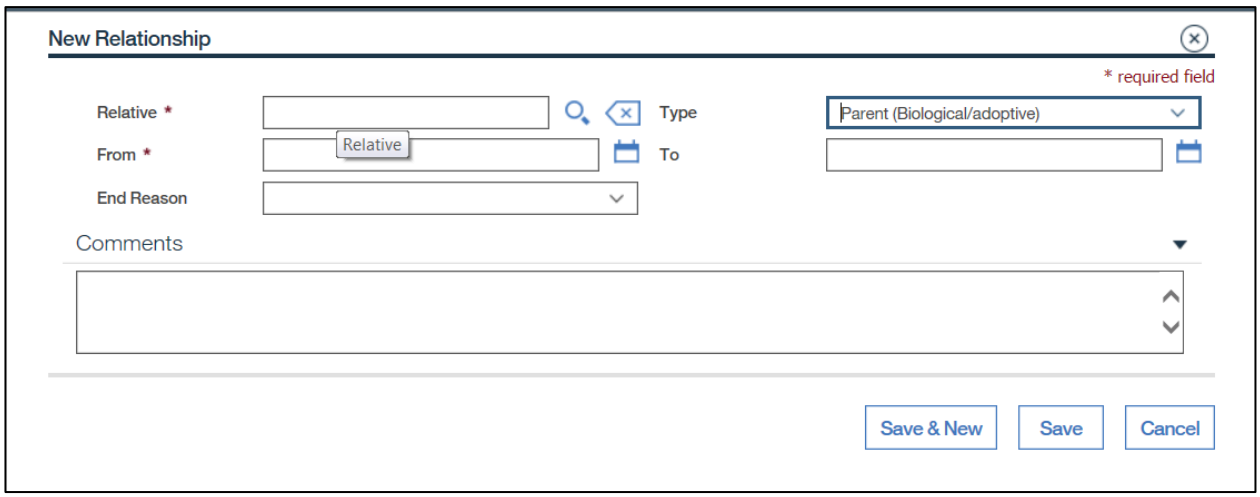
Action Steps

1. Select **Search for a Person** from the **Quick Links** panel.
   The system displays the **Search Criteria** screen.
2. Enter the **search criteria** to find the first individual in the relationship and select **Search**.
   Recommended minimum data: first name / last name / date of birth
   The system displays the Search Results.
3. Select a **Person** from the search results.
   The system displays the Person Information page of the individual.



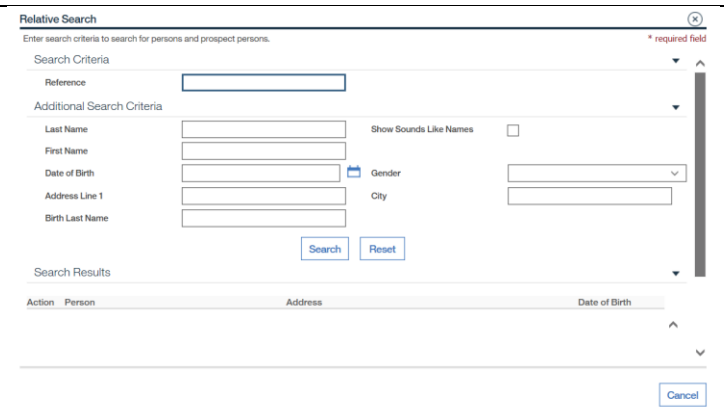
4. Select the **Relationships** Tab.
   The system displays the existing relationships.
5. Select **New.**
   The system display the New Relationship Modal





6. Populate the mandatory fields.

Field	Mandatory / Optional	How to Populate the screen	Printed on OP
Relative	O	Select the **Search** icon to find the second individual for the relationship. The system displays the New Relationship Modal.	No

		 Enter the **search criteria** and select **Search**. Recommended minimum data: first name / last name / date of birth The system displays the Search Results. Click the **Select** button for the individual The system displays the New Relationship Modal.	
From	M	Enter today's date	No
Type	M	Select the relationship of the Relative Example: While on the home page of Princess Diana Spencer Relative = Prince William Mountbatten Type = Child While on the home page of Prince William Mountbatten Princess Diana Spencer Relative = Princess Diana Spencer Type = Parent of Dependent Child	
End Reason	O	Leave Blank when creating a new relationship.	No
To	O	Leave Blank when creating a new relationship.	No

7. Select **Save**

   System displays the Relationships page