**Hab Checklist Policy and Procedure**

1. Left click the “Individual” tab on the left side of the Therap dashboard.
2. Scroll down to the “Habilitation Plan” module and left-click “Hab checklist” to create a Hab checklist.
3. Having followed step(s) 1 and 2 above, the screen will refresh and “Select Program for ISP Program” will appear in the upper region of the screen. Left-click the program with which the individual is affiliated. The screen will refresh and show “Individual List for ISP Program” and show the name of the program you selected underneath.
4. Left-click the individual’s name. The screen will refresh to show “Report Criteria” in the top region of the screen.
5. Select “Hab Type” from the drop down menu.
6. If you do not wish to see ISP Data, check appropriate box.
7. If you want to show initials only, check appropriate box.
8. Check the month and year of the data you wish to view from the drop down boxes.
9. For the box “include attendance data”will already be set to “No. You MUST select “Yes”.
10. From within the Habilitation Plan section, check the Hab Plan you wish to appear in the Hab Checklist.
11. Click “Next” and the screen will refresh to show the title of the Hab Type you selected in Step 5 in the top region of the screen.
12. Complete the field for “Report Description”, identifying the program name, month, and year of the monthly summary. For example, “Finley, May, 2016, Monthly/Semi”.
13. Scroll down to the text box beneath the summary note and follow the instructions provided.
	1. For Day Services, the monthly narrative note summarizes the implementation of the person’s Habilitation plan, addresses the persons response to the services provided and states any issues or concerns about the plan or the services. This note is to composed and formatted using the following:

OBJECTIVE : Type in Long Term Objective here: “Staff will assist…”

Summarize the implementation of the plan: Explain how the goal was run, written in the past tense.

Consumer response to objective: Individuals response to the goal, what prompt level was the individual successful at, challenges the individual may have had while working on the goal, what did the person enjoy about the goal, what did the person not like (if anything)?, etc. Also written in past tense.

Issues or concerns: Recommendations for next month (continue the goal, D/C), any behavioral concerns, absences, etc.

**Copy and Paste the info below in to the Group Day Hab Monthly Summary Note box on Therap. Complete each section for each goal:**

OBJECTIVE 1:

Summarize the implementation of the plan:

Consumer response to objective:

Issues or concerns:

OBJECTIVE 2:

Summarize the implementation of the plan:

Consumer response to objective:

Issues or concerns:

OBJECTIVE 3:

Summarize the implementation of the plan:

Consumer response to objective:

Issues or concerns:

OBJECTIVE 4:

Summarize the implementation of the plan:

Consumer response to objective:

Issues or concerns:

* 1. Residential and FSS will follow the instructions provided which state: “Provide a narrative that summarizes the implementation of the individual's Residential Habilitation/Supportive Employment Hab Plan/Community Hab plan, and addresses the individual's response to the services provided and any issues or concerns.”
	2. SEMP will complete this section in accordance with those guidelines provided by the State:
		1. The implementation of the individual’s SEMP Habilitation Plan for the month;
		2. A description of the individual’s vocational progress;
		3. A description of some of the actions of staff to address vocational challenges;
		4. A description of the individual’s response;
		5. Any issues or concerns.
1. Click “Save”.
2. Left-click the “Display PDF” to display a copy conveniently formatted for printing and on-the-go data collection. NOTE: Success on this step requires that a printer be installed with the system you are using. For example, do not try to use kiosk PCs to print. You will likely need to place a tech support request call as a consequence of neglecting this advice.
	1. If an information box opens on the bottom of the screen after clicking the text to display the PDF, click “Open” if you plan to print the document immediately. If you would like to store a copy for printing later, click “Save” to use the default file name and save the document in the last place you saved files, or click the drop-down, select “Save As”, navigate to your location of choice, and change the file name to one that suits your purposes.

Error correction protocol:

1. From the Individual tab, scroll down to the ISP and Habilitation Plan section and locate the Habilitation Plan module and click “Search Hab Checklist”
2. Type the name of the individual for whom you wish to search.
3. Click the entry corresponding to the item you wish to edit.
4. Scroll down to the section with text that says “Provide a narrative that summarizes…” and copy the summary note. [One may copy text by first hovering one’s mouse at the beginning of the first line of text, holding down the left mouse button, and dragging over the text you wish to copy…. this will highlight the text. Once you have highlighted the text, reposition the cursor over the highlighted text and right-click. A context menu will pop open. Select “Copy” from the list shown.]
5. Scroll down to the “Delete Reason” text box and insert the following
“Correction Needed”. Click the “Delete” button on the bottom right-hand corner of the screen.
6. Immediately upon completing Step 5 (Deleting the Hab Checklist), follow steps 1 through 11 above (those used for creating the Hab Checklist), proceed to Step 12 and paste what you copied in Step 4 of these instructions for correcting the checklist. Make any additional corrections.
7. Scroll to the bottom and click “Save”.

(v.4-11-16)