Plan Facilitator Reference Guide Version 4.2

What is iplanit?

Welcome to the iplanit facilitator guide. iplanit is a secure online service which helps people and their supporters keep track of their plans. It also helps team members and provider management monitor progress on plans and allows you to easily build a picture of how we are doing across the provider organisation.
With iplanit, the provider team member can see the details of plans for those people you have a direct connection with. You can update how individual acitons and outcomes are progressing, communicate with team members and individuals about plans, share best practices and manage video, pictures and music that relate to those plans.
iplanit saves time and effort in terms of plan administration and team working with colleages. It helps to put the person into the centre of the planning process and supports all best practice Person Centered Planning approaches.

iplanit is easy and fun to use. This guide will explain how to use iplanit.

You will need to have an account set up on iplanit before you can start using it – ask your iplanit administrator for help on this if you don't have one.

Once you know your account details, you can log on .....

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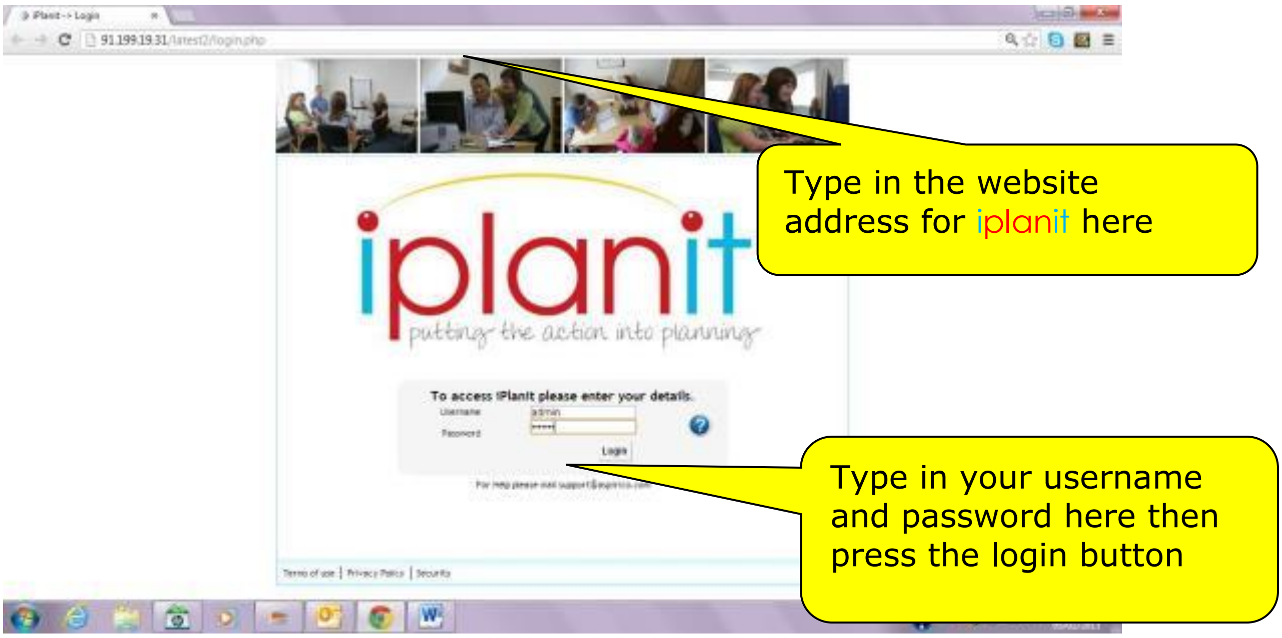
1.0 Logging on to iplanit

To use iplanit you will need internet access and computer with a web browser. The type of web browser is also important iplanit works best with Internet explorer version 8 and greater and latest versions of Firefox, Chrome and Safari. (Ask your iplanit administrator if you need help with this)

Your iplanit administrator will give you a website address for iplanit which you type into the address bar of your web browser. When you enter the web address of iplanit you will see a screen similar to the one below. It would be a good idea to create a shortcut to the website by using the favourites or bookmarks tools in your web browser.

Use this space to write the WEB ADDRESS for your iplanit system.



Now enter your username in the username box and your password in the password box and then press the "Login" button with your mouse.

Remember your password is case sensitive. The letter capital "A" is not the same lowercase "a". If you enter the incorrect values a message will be displayed and after a number of incorrect attempts your account will be locked. Should this happen, contact your administrator

The opening page is displayed when you log in – by default you should arrive in the people tab as shown in the screen below. It will list the people which you have a direct link with or support.

Remember: If you are not currently linked to any people you support, then this sreen displayed below will be blank.

iplanit is organised so that you can easily see alerts about overdue actions, overdue plans and new messages on the right hand side of the screen. You navigate around iplanit just like any other web page, using your mouse to click the tabs, text links and buttons. If you hold your mouse over a tab, link or button, a help message will appear telling you what this it does.

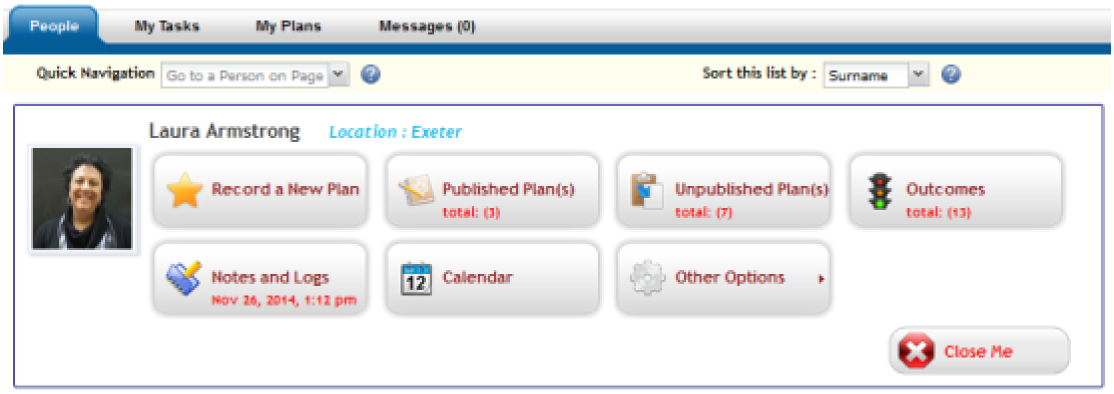
2.0 The People Tab

This is the first screen you will see when you access iPlanit. This screen shows your case load and is a list of all the people you are currently directly linked to. It is possible that several pages are available if you are linked to many people. Linking is the term user to identify a person (service user) that you have a valid working relationship with. If you are not linked to any People on iplanit then this screen will be empty.

The iplanit system protects the privacy of individuals whom your organisation supports. You will not be able to link to every person on the system (unless you are a senior manager) only to the people you have a direct relationship with. If you do not have the option to link to people you can ask your manager to do it for you.

Some of the screenshots in this manual have numbered “bubbles” indicating a recommended order for you to review the screen functions.

The People Tab (the first page you see when opening iplanit) is where you can access all the information about the people you support. You may use the people tab whenever you are working with people and updating their information. The image below shows what you will see when you click the **_Work With Me_** button.



The number of the button and labels displayed in the example screen shot below is dependent on the iplanit modules available on your system.

2.1 Person Profile Page

The person profile page is where you can view and update personal details (where permissions are set up) for people you support. You can arrive at this page when you click on the person’s picture in the “People” screen, as shown on the previous page.

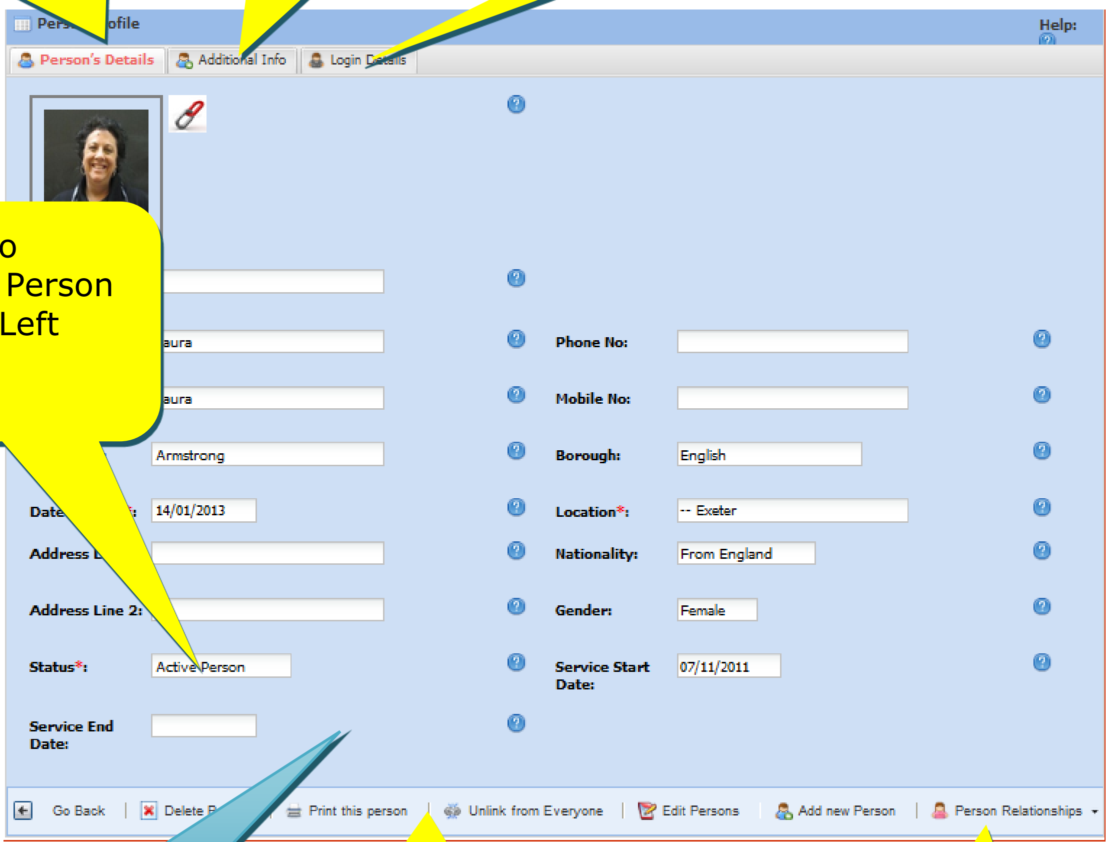
Your organisation may choose to store different information than that shown below in the example below, so it might look slightly different, but the format will be the same. You can click on the menu tabs to see/add more information about this person.

Remember the ability to add, edit profiles and delete people on the system will only be available to certain users such as managers or administrators

Click here to view/edit profile data such as name and address. You can also edit the

Click here to see additional profile data for this person

Click here to edit a person's login details e.g. to change or reset a password



Click here to change the Person status e.g. Left Provider

Here is the profile data on our example person "Jane". Your screen might have slightly different information

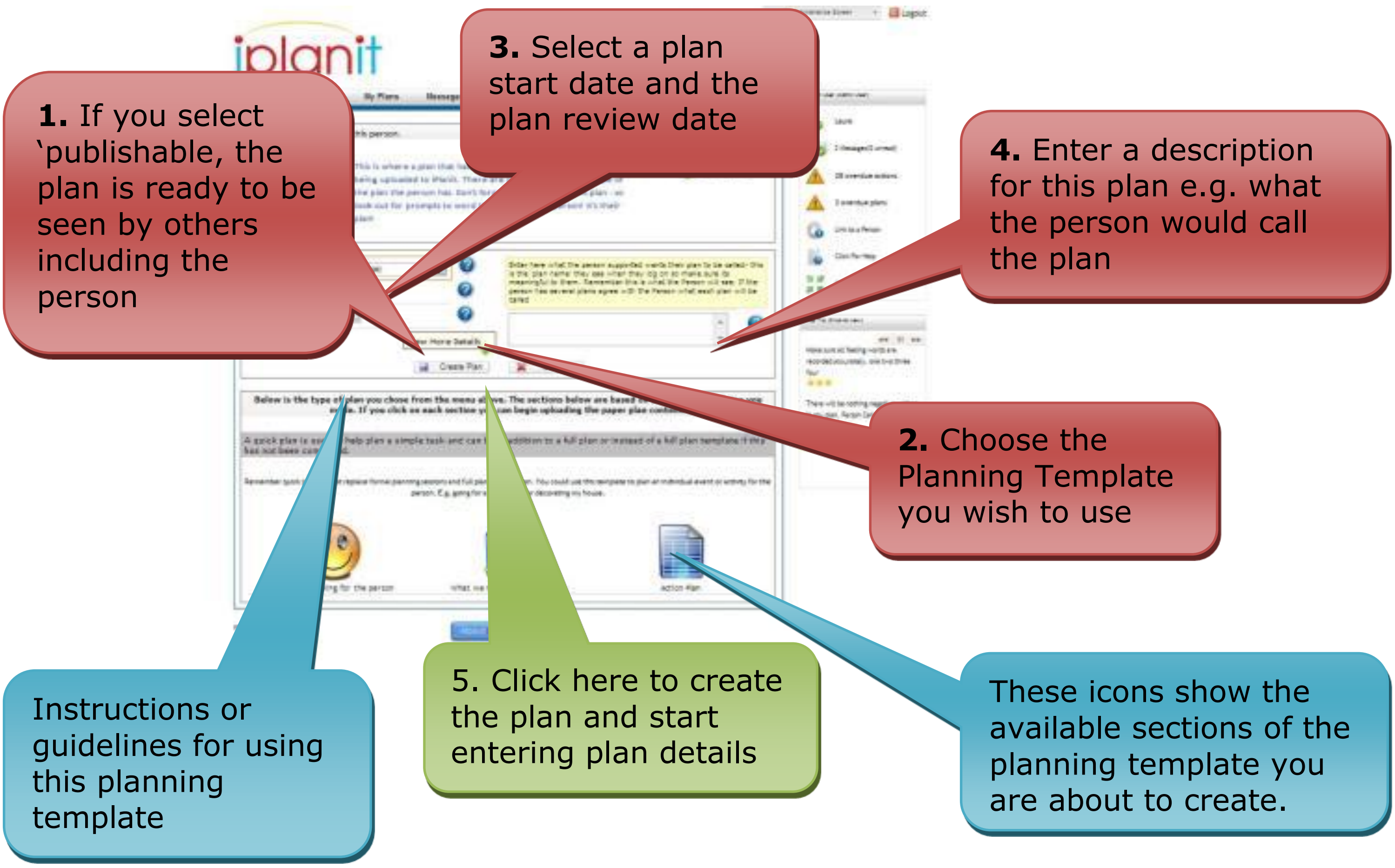
Use these tabs to add, edit, or print a person from iplanit. If these are not shown, it means you are not allowed to do this (speak to administrator to change)

Click here to see people's relationship info on iplanit, e.g. parents, friends they have invited

3.0 Recording a New Plan on iplanit

Recording the details of people's plans is one of the most important aspects of using iplanit. iplanit supports lots of different types of planning templates including custom made templates that your organisation may have created.
You arrive at the iplanit page below by clicking 'Record a New Plan' for the relevant person on the 'People' page. The following pages show you the basic steps in recording plans on iplanit for the people you support. Once you have done this, the people you support will be able to view their plans online, see how well they are moving towards achieving their outcomes, and see what actions are being taken to support them in doing this.

> Remember iplanit is not a planning tool and does not replace good planning practice. iplanit records the details after the planning session has occured. Instead of recording the results of a planning session in a word document you record or copy the results into the iplanit system



3.1 Entering or viewing sections of the plan

The screen below shows the sections of the plan you are creating. You enter the plan by clicking into each section and adding the information asked for from the persons plan.

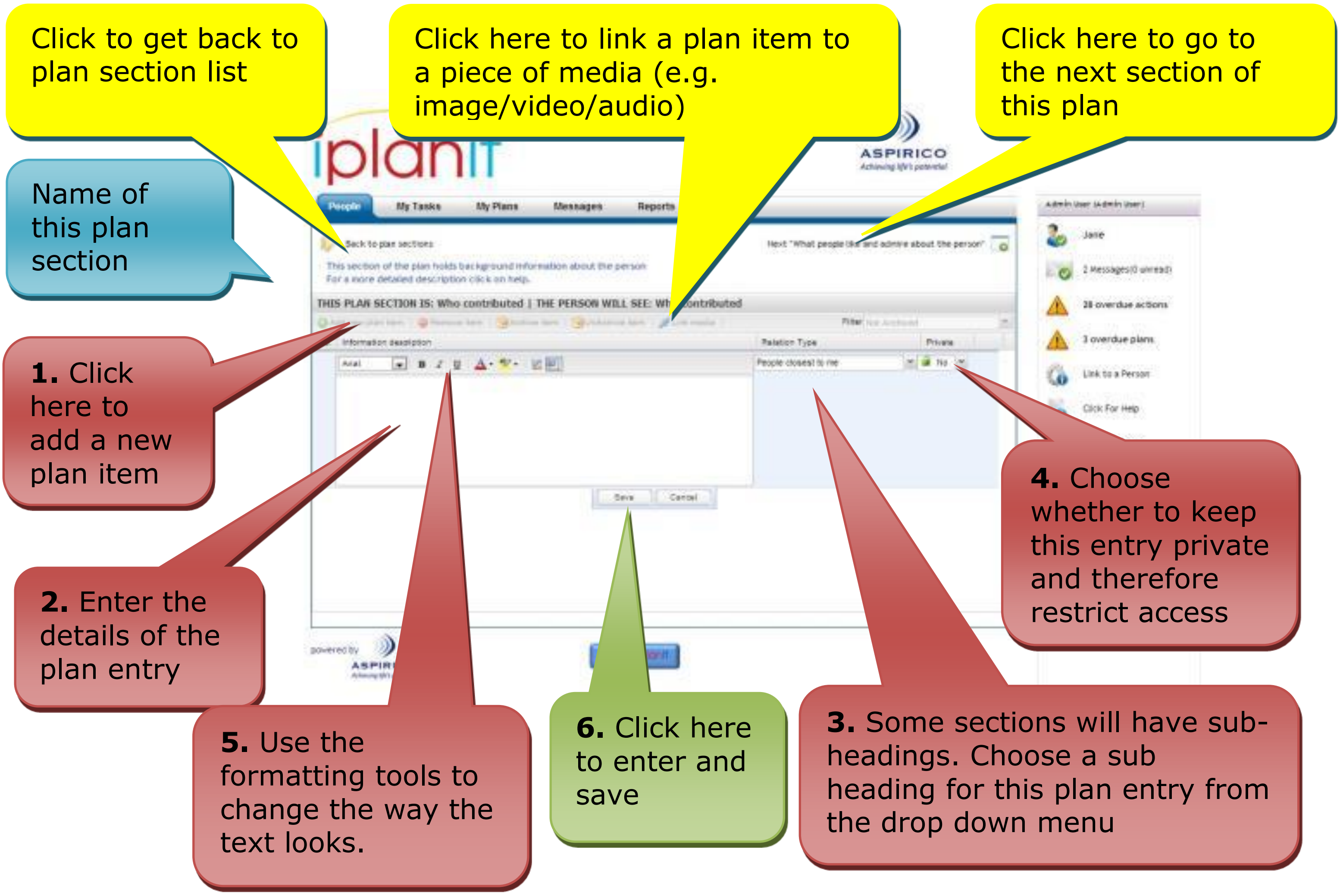
Each organisation using iPlanit have customised planning templates. These reflect the people each organisation supports. Needs assessment and risk management section are options within some planning template these are show in section 3.7

If you wish to enter information into a section of the plan, click on the picture (icon) of the plan section. Each of the pictures represents the main headings in the planning template e.g. a Support Plan would generally have 6 to 8 different sections. The example above is a One Page Profile Planning template.

3.2 Adding background information into a plan

Each section of a plan will capture different types of information. Some information is classified as static or background information e.g. good things people say about me , other information is more important and needs to be monitored e.g. what must happen, support me by doing this

Every plan contains different types of information about the person and the planning process. What this means is that there are some sections within a person's plan that are more important which you want to monitor e.g. goals/outcomes that someone wants to achieve, and some that you don't e.g. "What people like and admire about me". Some sections of plans are naturally more "track-able" (in terms of monitoring progress) so iplanit adapts each plan section to take account of this. The screen below shows you how to add a non track-able item. This is generally background information about the person or may be a list of people that are in the person's circle of support. Read the blue text at the top of the page for tips on what type of information to enter.



When we record information into sections of a plan you should avoid writing long paragraphs if possible. For each separate item you wish to record remember to click save and then add item again to start inputting new information. e.g. if we want to say, the person is brave, has a good sense of humour and is fun to be with this should be three separate items not one item with multiple lines.

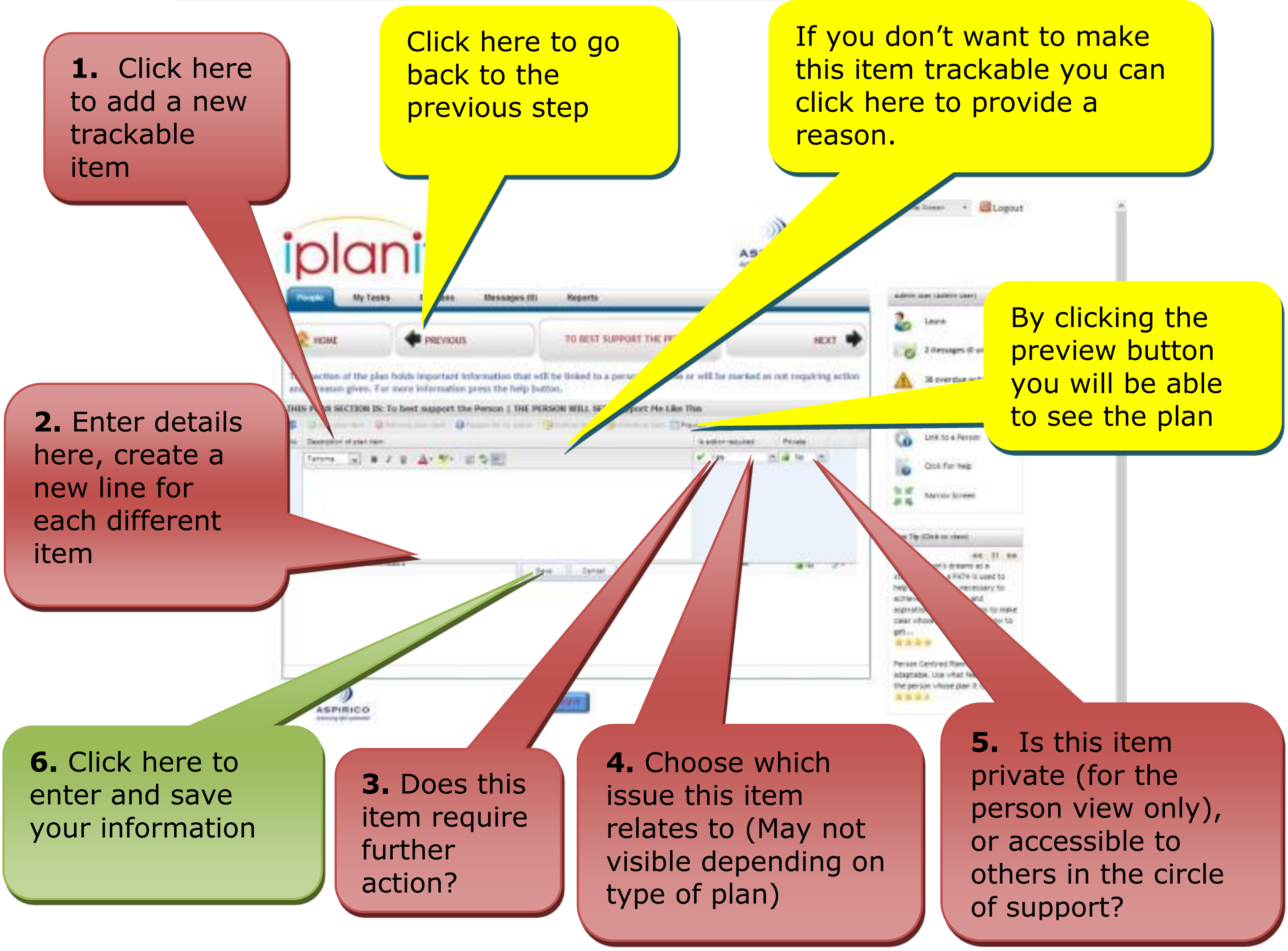
You can use this space to make some notes:

3.3 Adding an item that you want to monitor or track

"Trackable Items" are important items in the plan which you may want to create a person centred outcome form. When entering the item, iplanit asks you for information on whether further action is required, what issue this relates to, and, if you don't want this item tracked, what the reason is. The screen below shows how to add a trackable item to a section of a plan. In our example we are still in Jane's one page profile Plan and are in the 'What is important to the person' section.

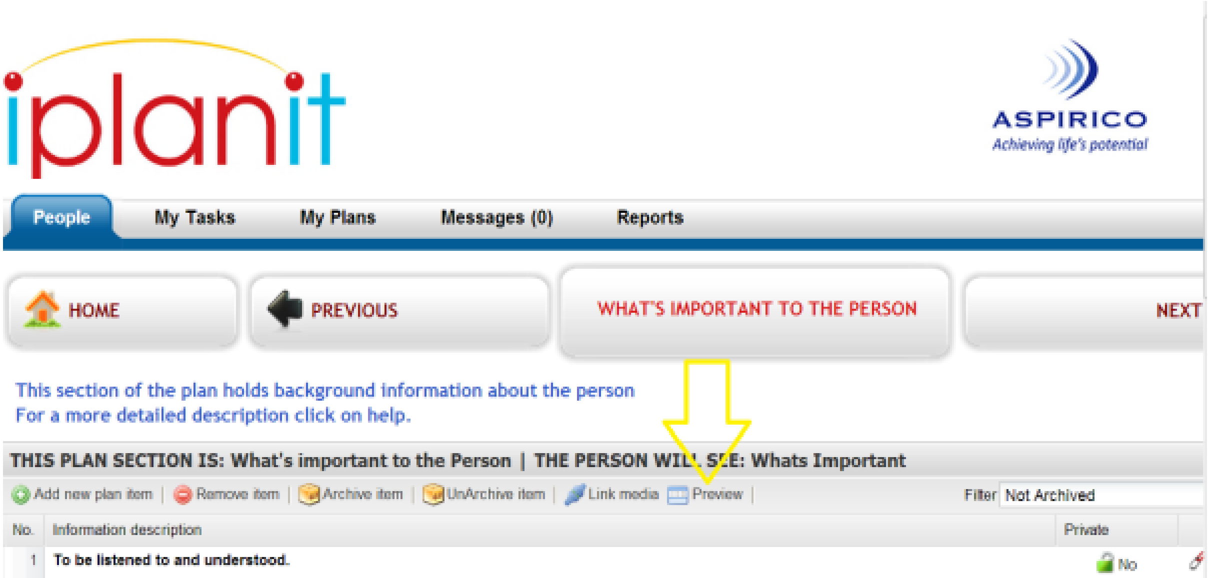
For Assessment Based/Workflow plans, the trackable items can be indicated in any area where you select if action is required. You will see this option in all areas of the support plan where you enter support, risk, crisis management or disengagement plan data.

Track-able items are important items in the plan that would usually have a person centred outcome associated with them. e.g. I want to get a job

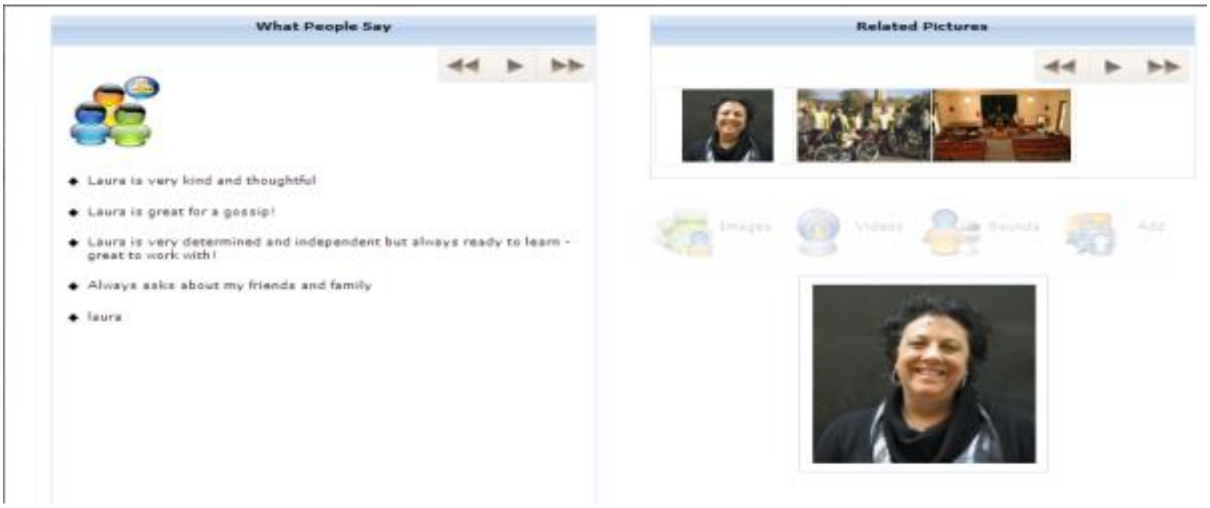


3.4 Plan Preview Button

The plan preview button allows you to preview what the plan section will look like on the person side while you are creating the plan on the staff side. This function will save time and you can easily and quickly view what the person will see at a click of a button.



When Preview button is pressed the person side will appear such as below:

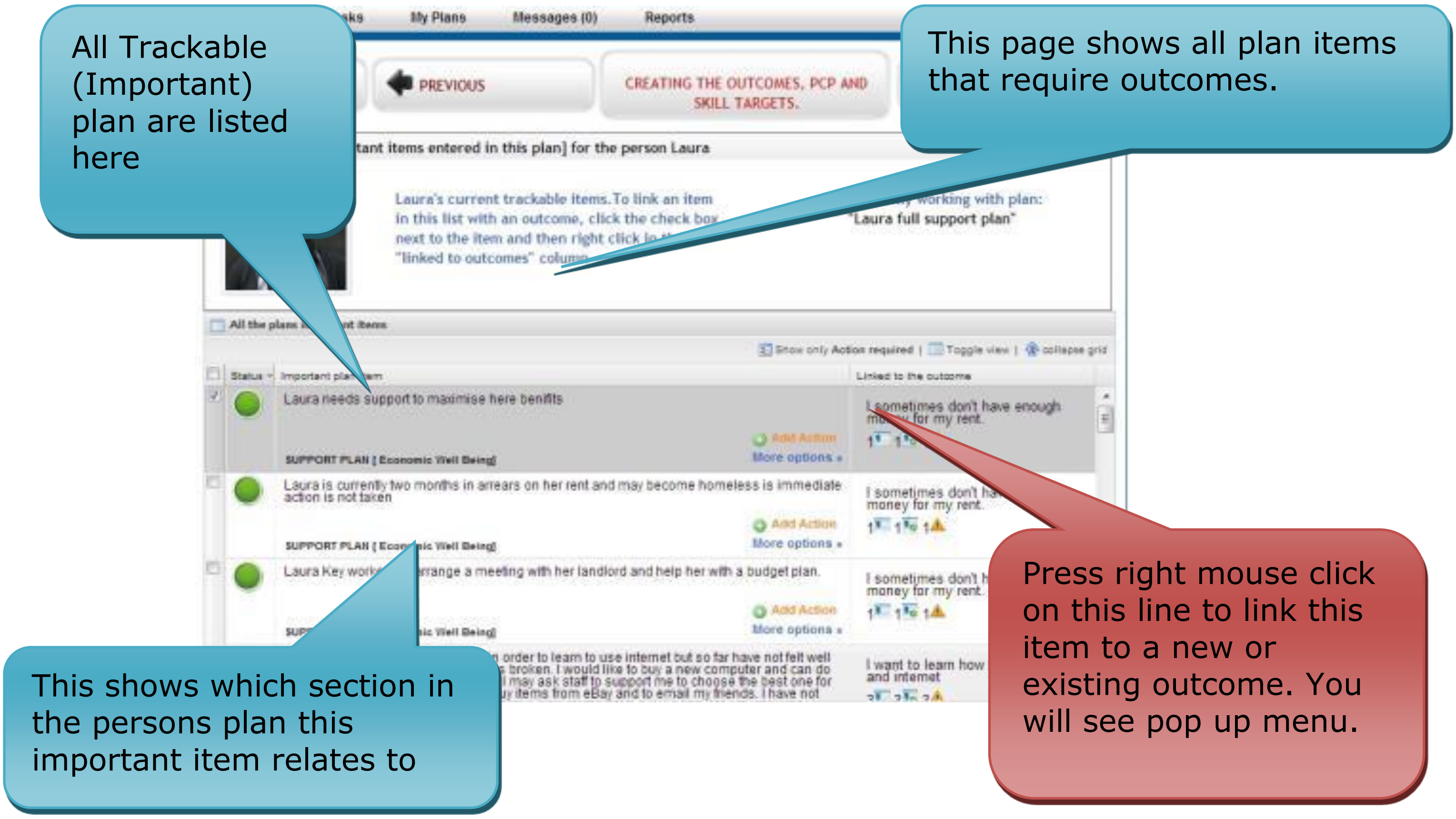


3.5 Action Plan – Viewing all actions for the plan

When you have finished loading up the basic plan data and have progressed through each section of the plan, you will arrive at the Action Plan page. This screen shows you all the plan items that have actions listed against them.

You can then choose to link these actions to the relevant plan outcomes that you are going to measure and monitor yourself or your team against. The screen below shows you how to do this.

This screen is simply listing all the items from the plan that are important and should probably have outcomes associated with them.

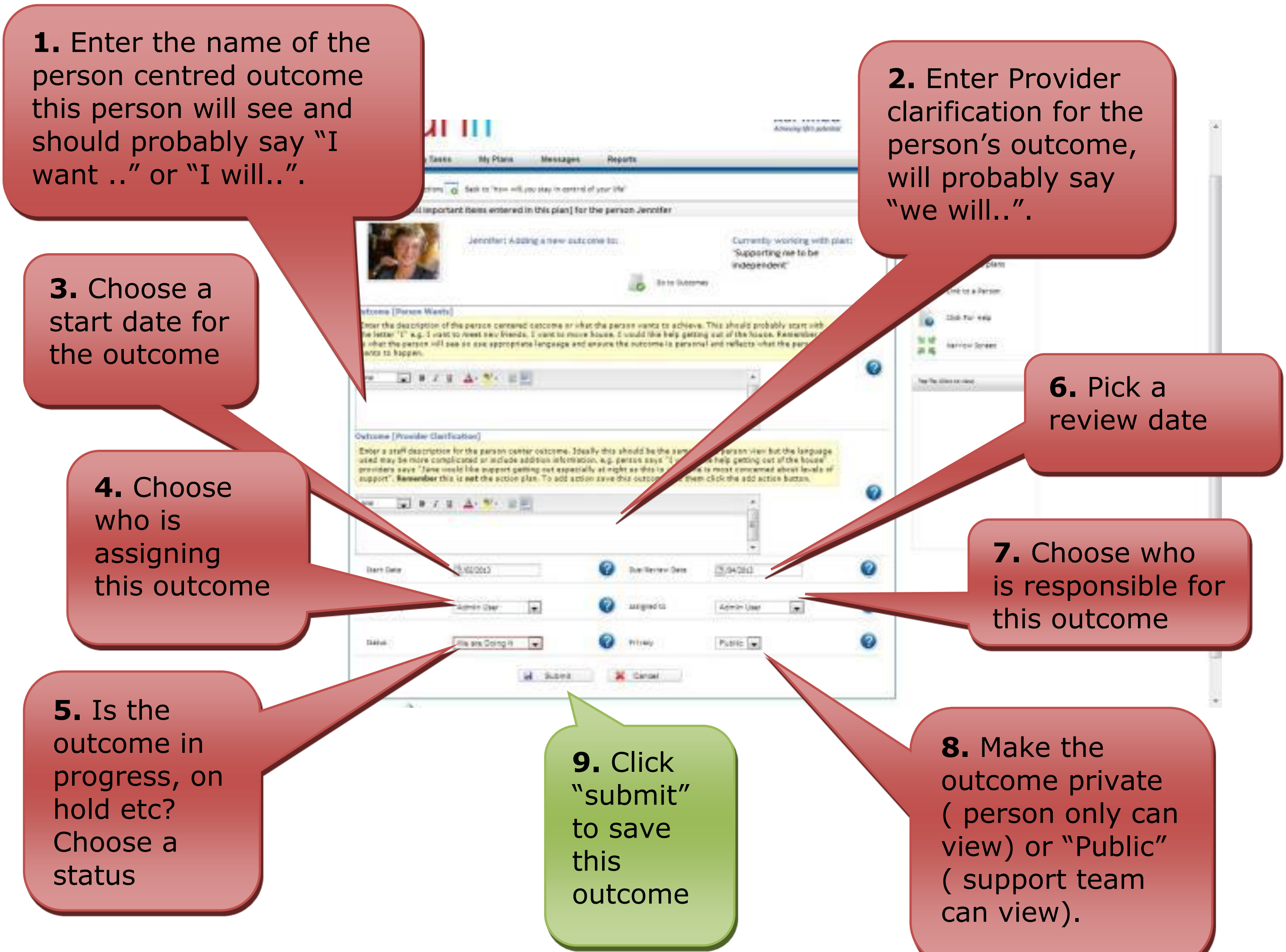


There is also a "collapse grid" that gives the staff member more space to view all outcomes if required. There is a new "More Options" button which allows you to link a new outcomes to the important support item, This has the same function as the right click menu previously available on this screen but will help some users who sometimes forget. The feature also shown the most logical option as a quick pick e.g. if a support items is linked to an outcome for the person the most logical next step is to add an action to that outcome.

3.6 Creating a new Person Centred outcome

If you want to link an important item in your plan to a new outcome that doesn't exist yet on iplanit you need to create a new person centred outcome. This screen shows you how to do this.

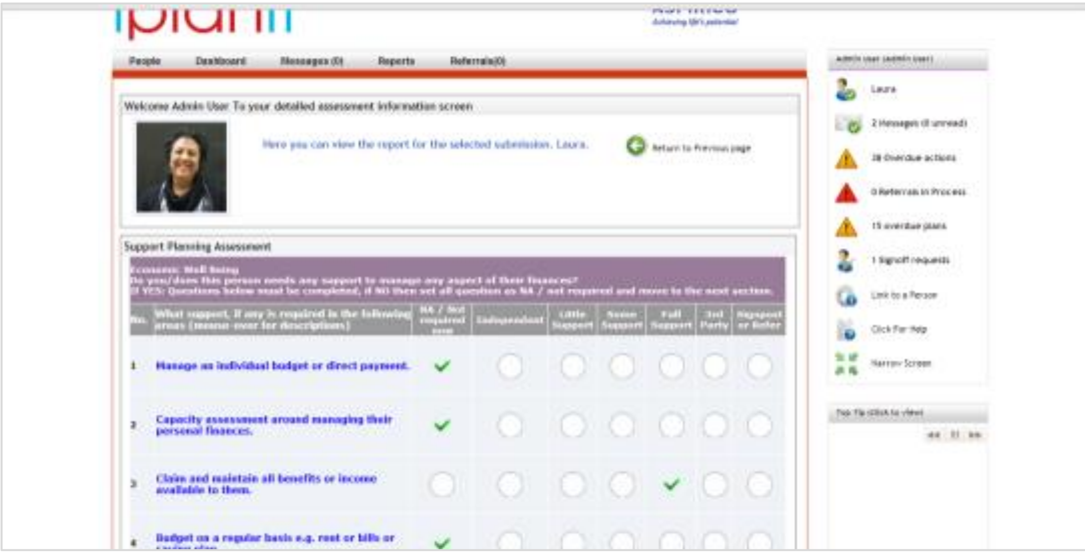
You can access this screen in two ways **A)** Chose "link to new outcome" in the bottom right (pop up menu) of the previous screen or **B)** by clicking on the "Outcomes" option for this person in the original "People Tab" and then select "create new outcome" option.



Person centred outcomes should probably start with the phrase "I want to" or "I need to". Try and record the outcome as the person would have said it.

3.7 Optional (Needs assessment support plans)

Some organisations use a highly customized Assessment Workflow to support plan with individuals. This means that you would start the support plan by capturing the persons support needs by answering questions. The completed assessment begins to populate the support plan with the identified support issues or needs for the individuals. You can then add support details or risk management details to each item/need. The assessment is straightforward to complete, there is an example below. For most questions you simply identify that that need exists for the person and then identify if or what level or support is needed.

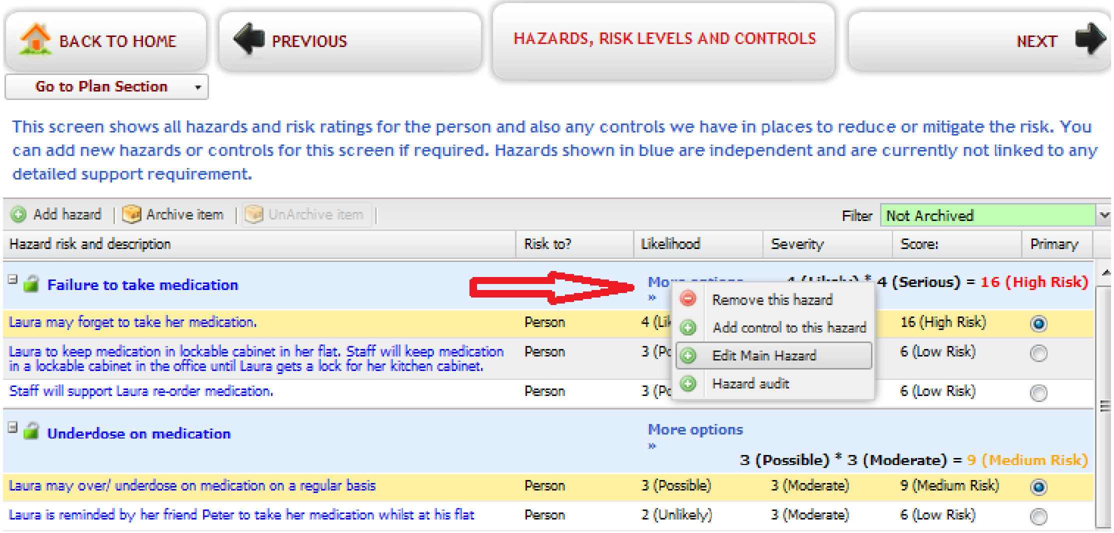


Some organisations use this functionality to capture, identify and mitigate risks within the support of an individual. In these cases you will be asked to complete a risk assessment score similar to the one below.

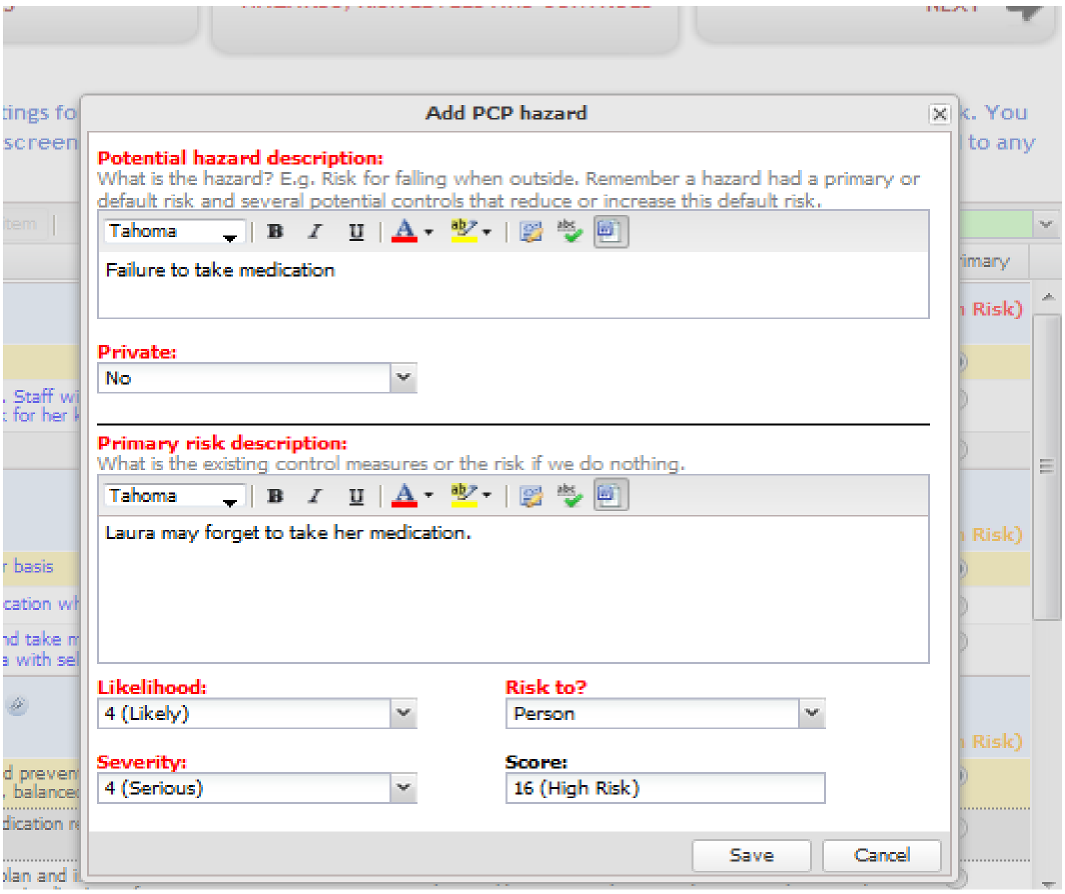
Likelihood and severity of risks are recorded. Usually on a score of 1 – 5
If the risk is not present select N/A

3.8 Optional Update a Risk Item

To update any risk items you might have associated with a plan go into the relevant Plan section where you will be able to see all the risk items for the person. In the below example the section is Hazards, Risk levels and Controls.



By clicking on the Edit Main hazard a pop up box will appear where you can edit the risk item.



4.0 Managing outcomes and related actions

After you have added a new outcome as shown on the previous section, you will be taken into this outcomes screen, which lists all the outcomes added for this person from their plans.

You have options to choose only outcomes from specific plans and you can see old outcomes which have been archived for this person and are completed. From this page you can update progress on the outcome, create more outcomes, add and view actions that support this outcome, and link this outcome to media files.

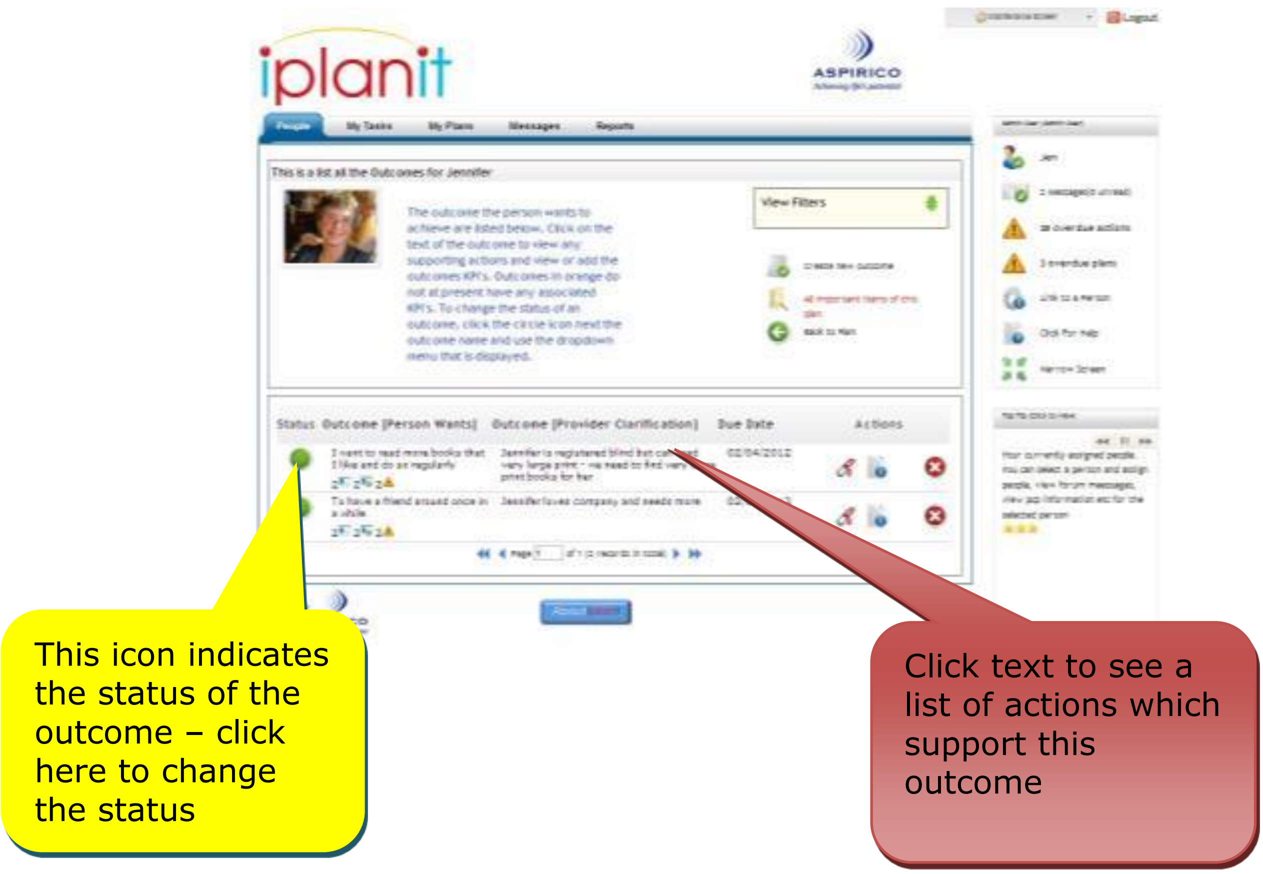
In the ideal world outcomes are always part of a plan. This is not necessarily always the case and outcomes (with supporting actions) can also be standalone and not linked to a plan. You may find the iplanit *Guide To Outcomes* useful.

4.1 Viewing, creating and editing actions

If you have created a new outcome for a person you will probably want to add new actions to support achievement of this outcome for the person. The following screens show you how to do this.

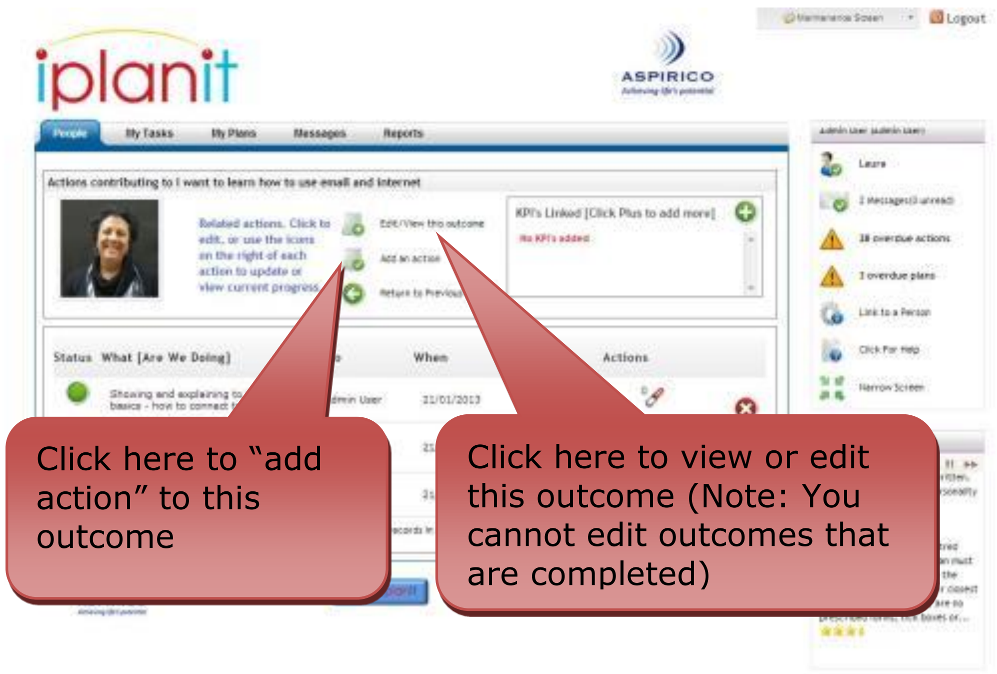
Most person centred outcomes will have a set of actions that support the outcome for the person. If you have a support plan already then the action plan from this will closely match the actions created on iplanit. The outcome will tell you why you are doing the actions e.g. "Person said I want to get a job"

To view actions for the outcome, click on the name of the outcome as shown below.



4.2 - Adding an action to an existing outcome

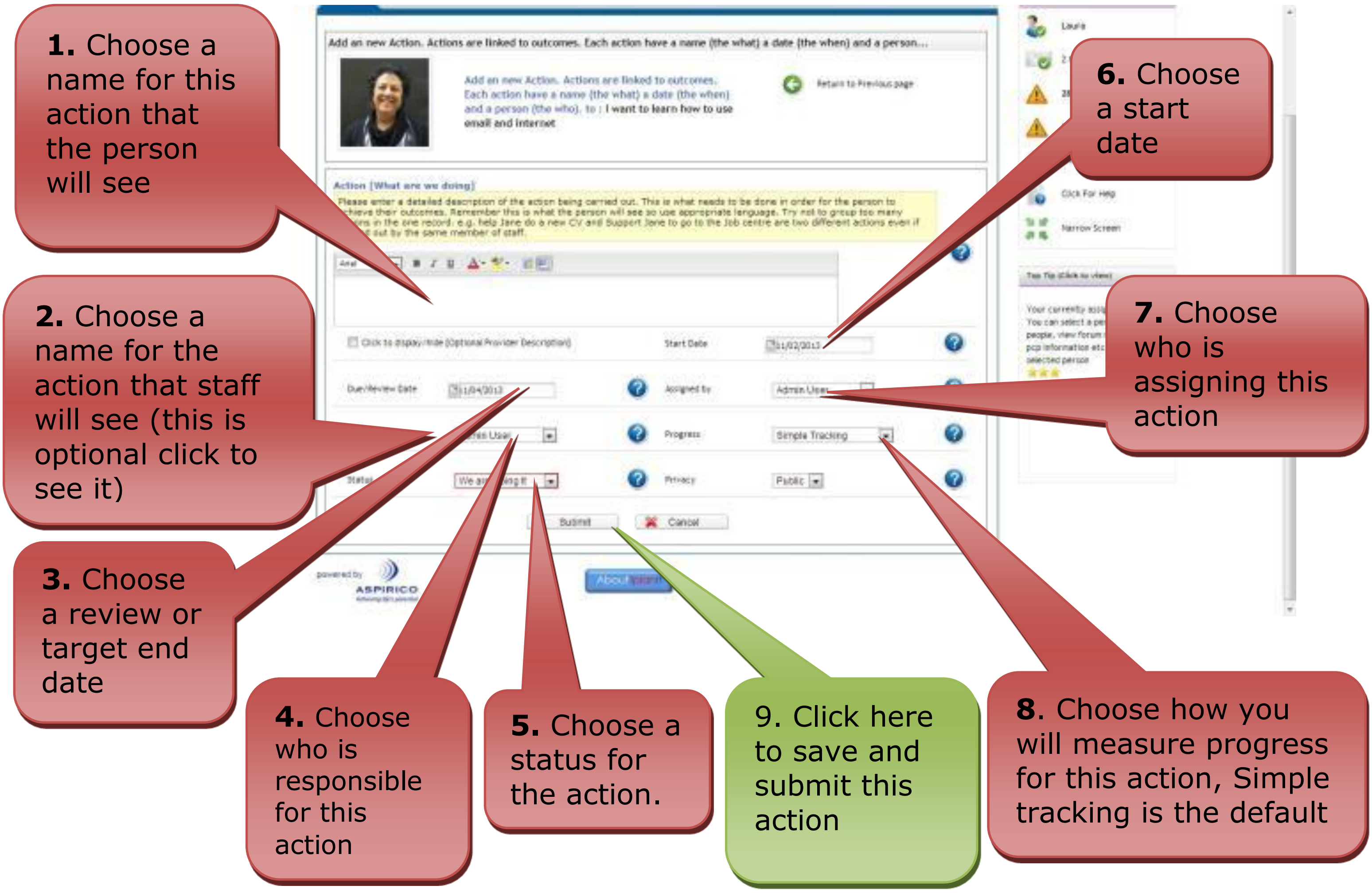
If the outcome currently has actions associated with it they will be displayed on this screen. Outcomes that do not have any actions at the moment will have a message displayed "No actions recorded". From this screen you can also edit or view the outcome itself. Use this option if you wish to change the text of the outcome, change its dates, change it percentage complete (if enabled), or to make the outcome private.



Remember if an outcome is completed or not achieved then you will not be able to add new actions to it nor will you be able to change the outcome. Your system administrator may perform this task for you if required.

4.3 – Creating a new action

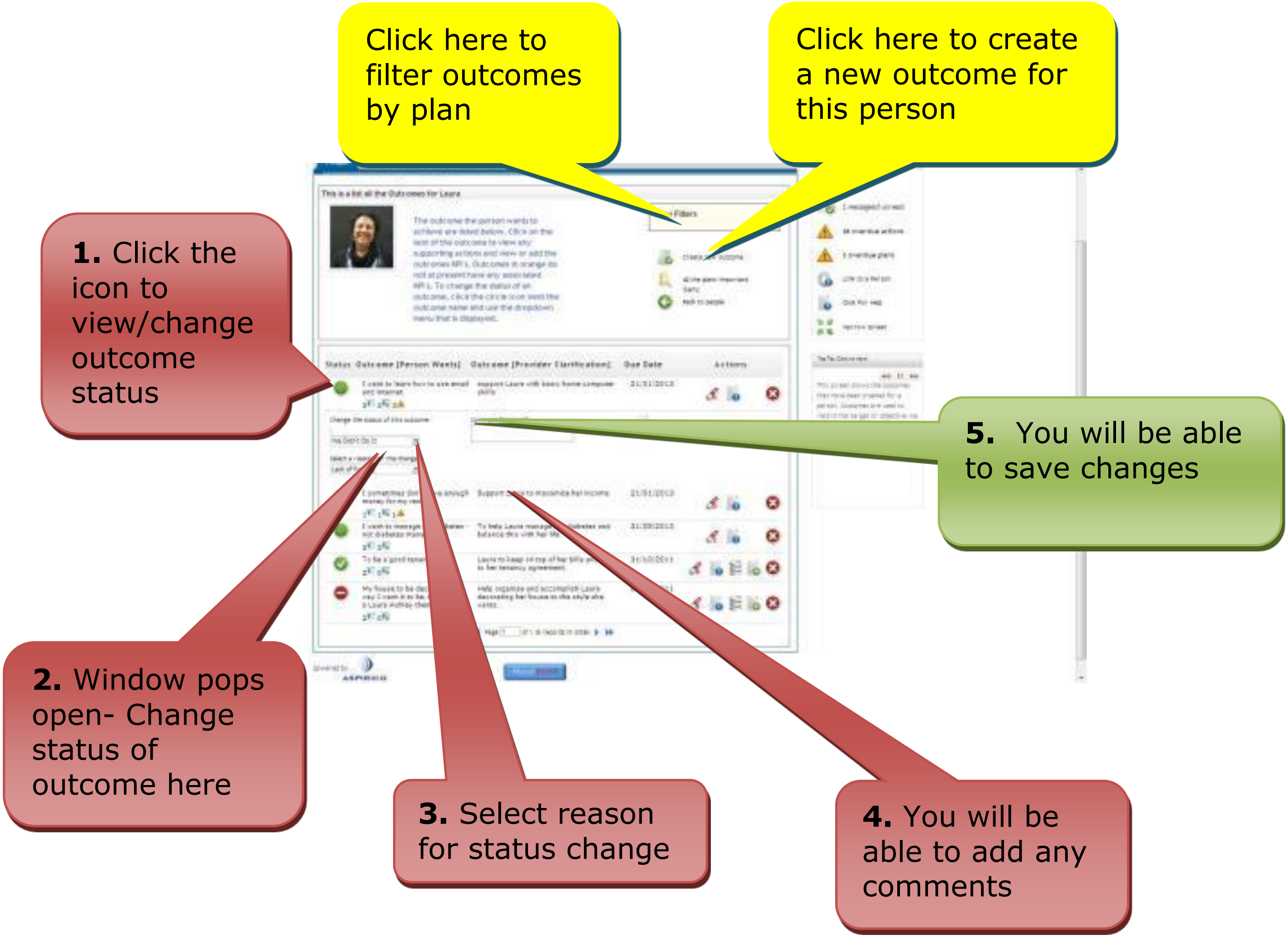
To create a new action for a person centred outcome, click on the "add action" button in the previous screen. Then the following screen below will be displayed. Fill out the actions details and press the submit button to save this new action. Editing an existing action can be carried out with the same steps.



When you create an action on iplanit you are describing the steps or project plan that is required to achieve the person centred outcome or target. Each action must be assigned to one individual that supports the person even if several people will be supporting or working on the actions. Each separate task you wish to measure should be created as a separate action rather than each individual action containing several different tasks

4.4 Outcomes Page – Viewing & Updating Outcomes

The outcomes page is an easy place to see and update all the outcomes for a person you are working with. You can filter outcomes from a particular plan, and also quickly add new outcomes. The screen below shows you how to update outcomes.



4.5 Review and update actions supporting an outcome

Actions that support an outcome often need to be regularly updated to monitor progress. If you click on the text of an outcome in previous screen above you will arrive in the screen below.

This screen lists all the "who, what, when" details for actions recorded against this outcome. It also allows you to edit actions, update progress, view progress charts, and link media to an action.

Remember most actions created on the system will use the simple tracking option. This means the action is being monitored simply as done or not done. Actions monitored like this will not use the graph options

4.6 Updating the progress on an Action

To update progress on an action you need to "Run an Assessment". When you click on the "update progress" ICON in the previous screen it will take you into the page below, which shows you how to record progress.

4.7 Progress Chart for Actions

When you have made a number of progress updates on your actions it is useful to be able to see a chart of progress to date. By clicking on the "progress charts" button highlighted in the "Review and Update Actions" screen previously, you will get a graph like the one below (assuming the updates have been entered).

4.8 Linking media to an Action

It can be useful to link media to an action, for example if you wanted to show the stages in someone's new house being built.

Again, from the Action Review screen described previously select the media link highlighted on the bottom right. It will bring up a pop up box with the persons media items. The screen below shows you how to do this.

5.0 Linking Key Performance Indicators to Outcomes

Your organisation may use Key Performance Indicators (KPI's) or Lead Performance Indicators (LPI's) such as the Care Quality Commission (CQC) standards to monitor how well as an organisation it is doing in terms of improving people's lives. Your organisation may also have its own KPI's to monitor performance and outcomes. iplanit makes monitoring (and celebrating) these achievements easier by linking the achievement of outcomes in peoples plans with these KPI's. The screens below show you how to link an outcome to KPI's.

When you view the list of outcomes, those that are presented in orange text are those that are not currently linked to any KPI/LPI. You can begin the linking process by double clicking the text of the outcome or by clicking on the graph icon that appears to the right.

5.1 – Where to Find KPI's

Go into outcomes list for the person as before or by selecting My Tasks top level tab. If you click on the text for any outcome a screen like the one below will be displayed listing the actions for that outcome.

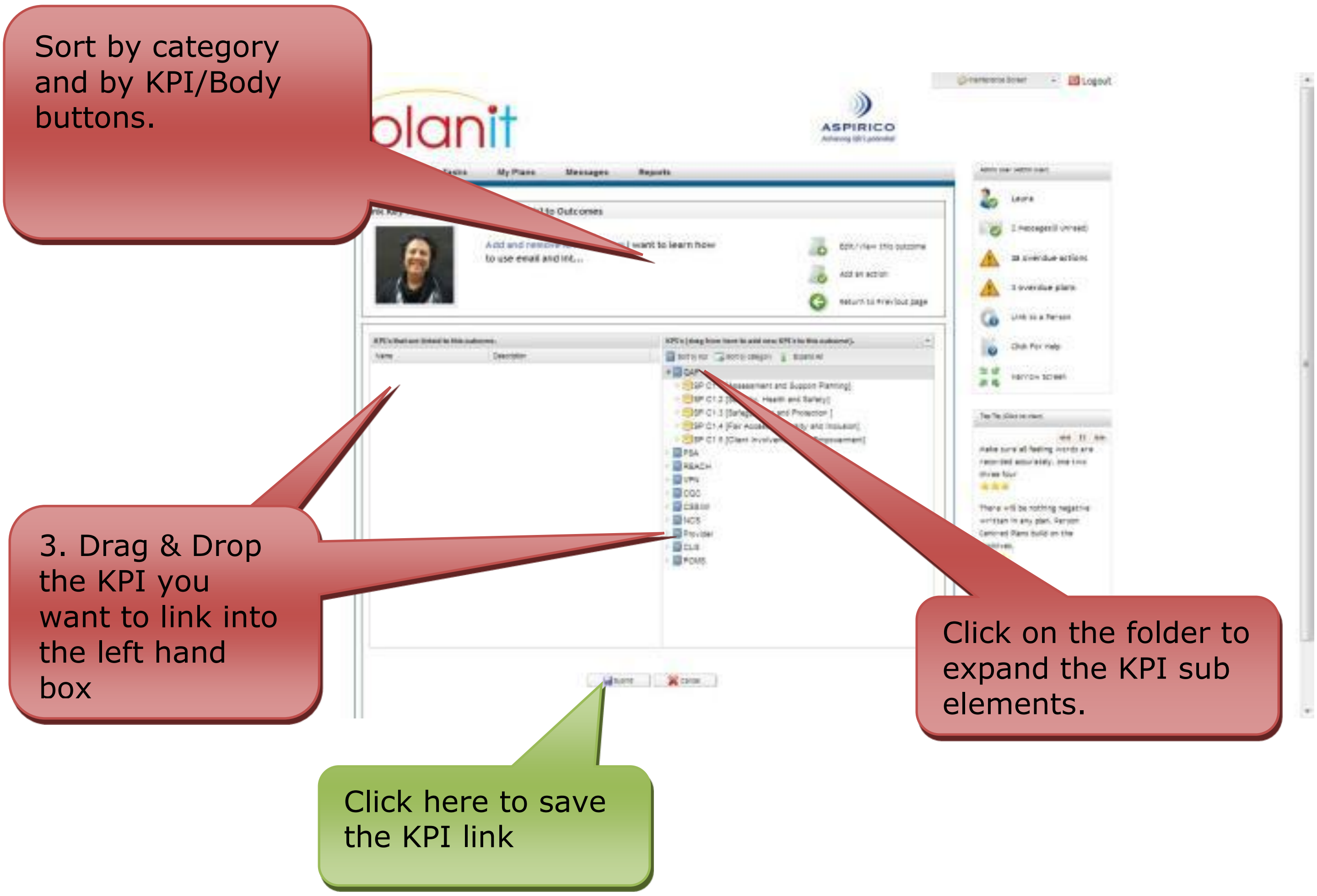
Note the box in the top right hand side of this screen which lists any KPI which you have previously linked to that outcome.

Remember Every outcome on the system should be linked to at least one Key Performance Indicator (KPI)

5.2 - Linking a KPI to an Outcome

KPI can easily be linked to outcomes. All of the KPI which your provider want to track are listed by category (what is relevant to the person e.g. independence, relationships etc…) or by organisation e.g. CQC, etc…

Click on the "Sort by KPI" button or "Sort by Category" button to get that list. From the list provided, select the KPI's that are appropriate for the person outcome on the right hand side. Click on the KPI with your mouse and **hold** the mouse button down (left button) while you "drag and drop" the KPI over to the left hand side. The KPI you are dragging over will show a green tick when it is ok to let go and a red tick when it is dropped in.

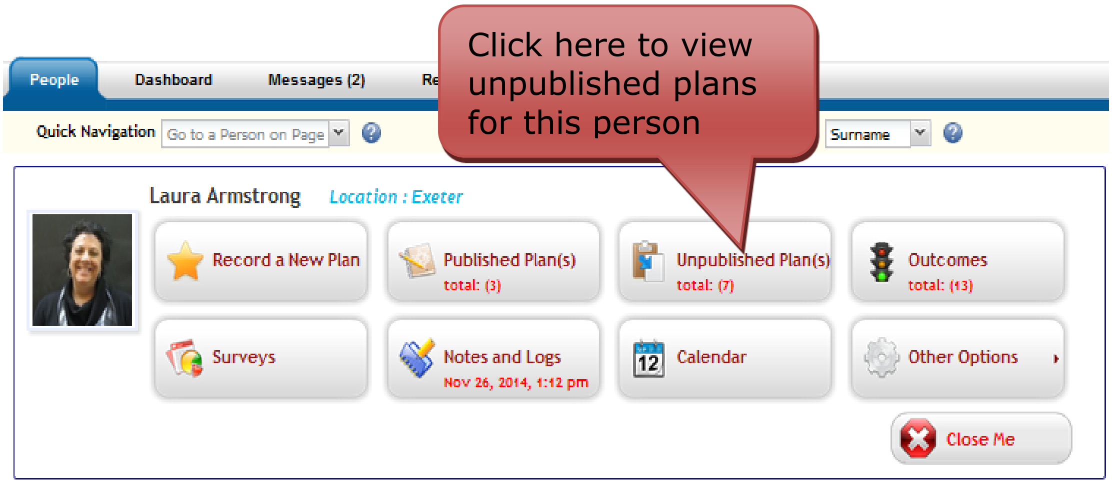


6.0 “People Tab” - Viewing/Editing Unpublished Plans

Unpublished plans are simply plans that are not yet visible to the person.

When you initially load a new plan onto the iplanit system the plan will be unpublished. Unpublished plans are plans that are still in the process of being put onto iplanit and therefore have a status of “Editable” or “Draft”. Plans that are in draft format are not visible to the person view of iplanit.

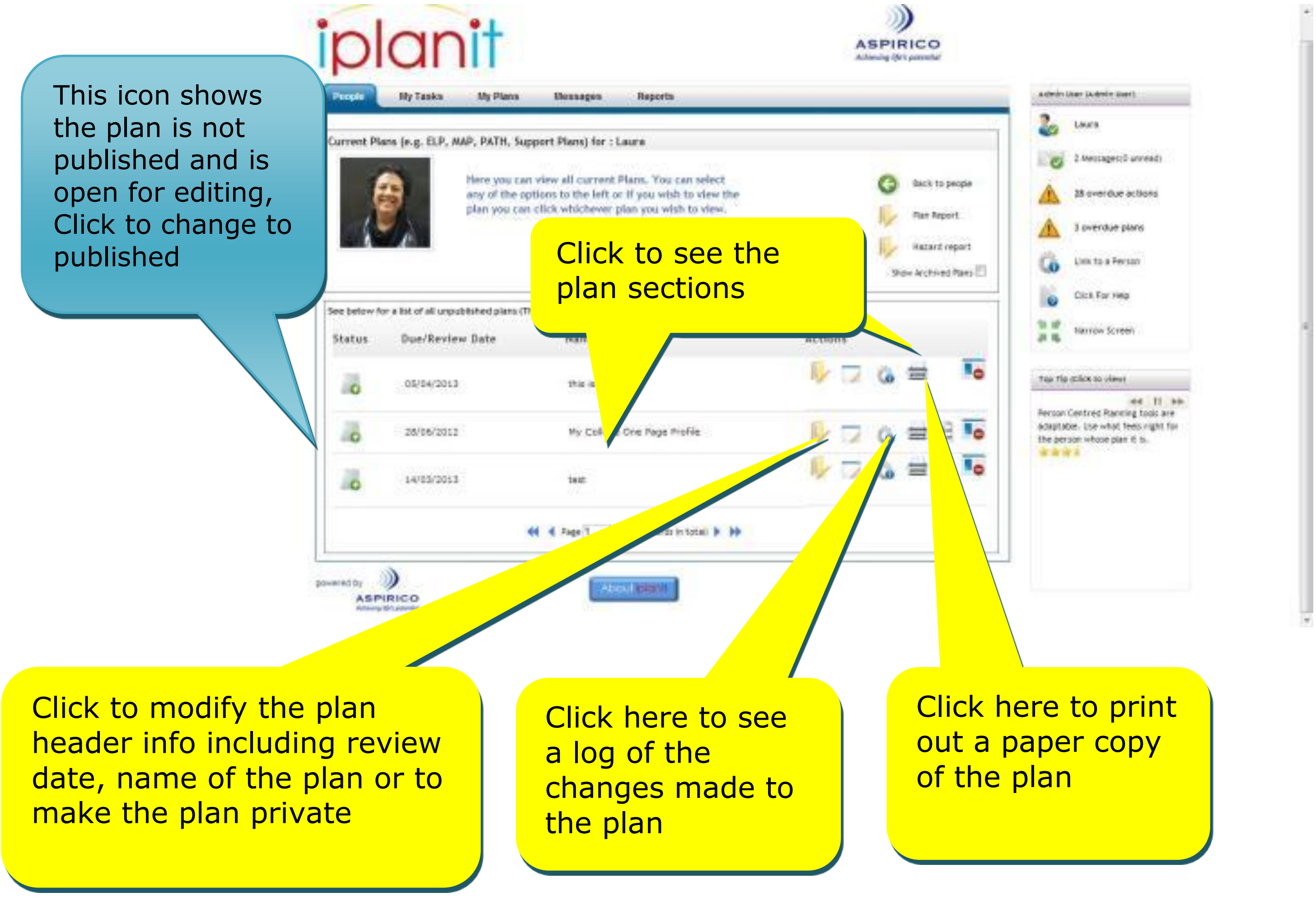
This is to allow you or the team that supports the person time to load the plan prior to the plan being visible to the person. The screens below show you how to access and edit your unpublished plans.



Some iplanit systems are configured to automatically publish the new plans. If your system is configured like this the unpublished plan option will not be displayed

6.1 "People Tab" - The Unpublished Plans management screen

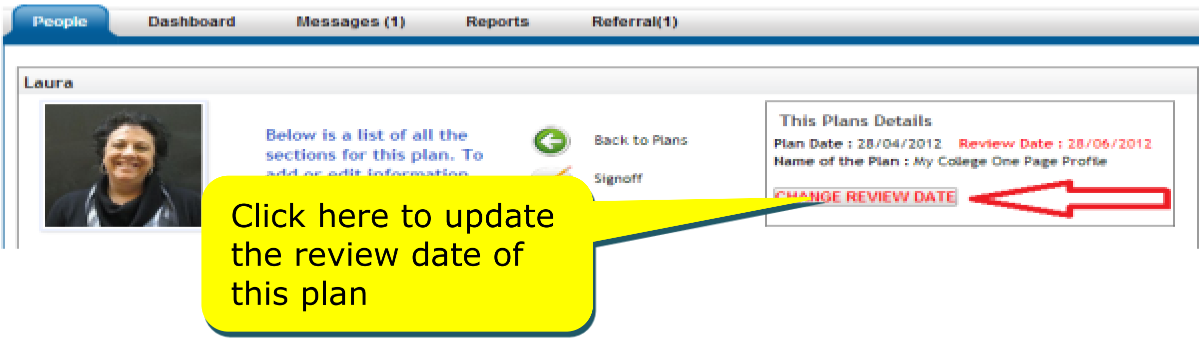
The screen below is showing the current list of unpublished plans on the system for this person. If the person has no unpublished plans this screen will be empty. Each plan has a list of options that you may perform represented by the icons beside the name of the plan.



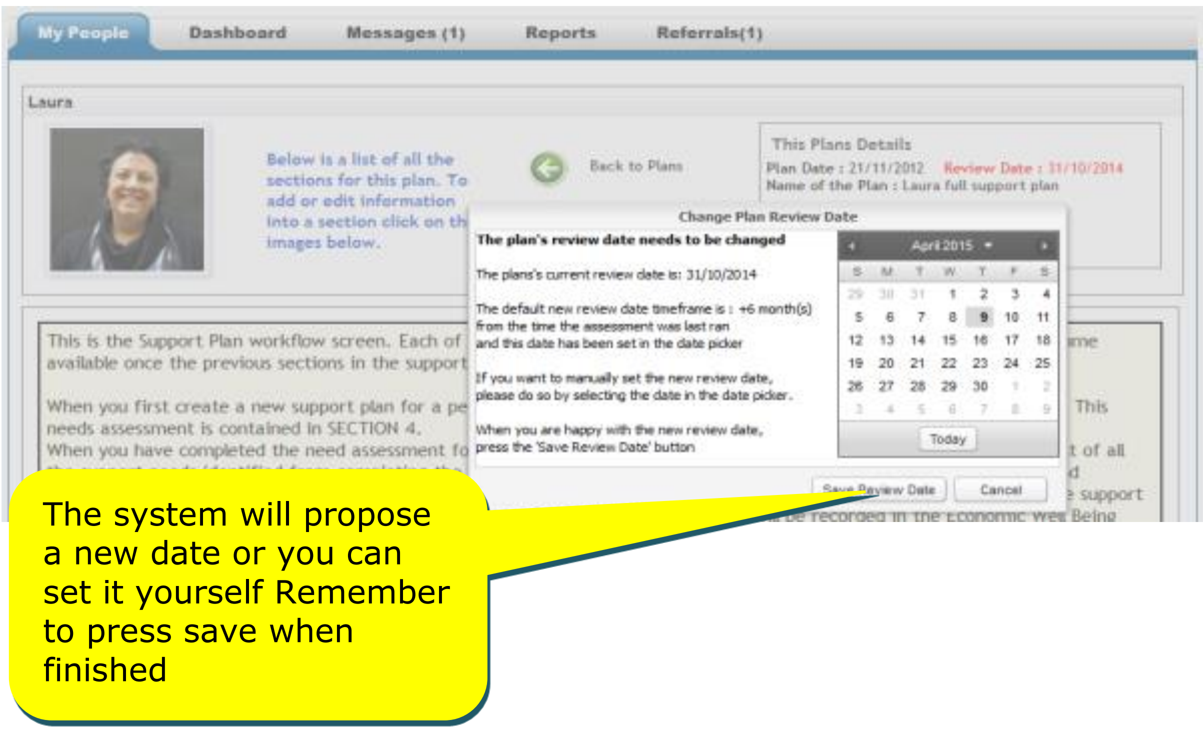
A plan can be moved between published and unpublished as many times as you wish. e.g. When you want to review the plan you may change it to "unpublished" then make some changes and then publish it again

6.2 Change Plan Review Date

When you view a plan that is overdue (its review date is in the past) the change review date button will be displayed in red. This is a visual remained. If you click this button the next review date can be quickly set.



Remember when changing the review date of your plan the system keep track of every change made to the plan. Please make sure have reviewed all section of the plan and made any required or agreed updates before setting the new review date.



7.0 “People Tab” - Viewing/Editing Published Plans

Published plans are those that have been entered fully on iplanit and are visible to the person and can be shared online with the person and (if authorised) their circle of support. To edit a published plan you need to change the status of the plan to editable. The screens below show you how to view your published plans. The edit and review process is followed as above.

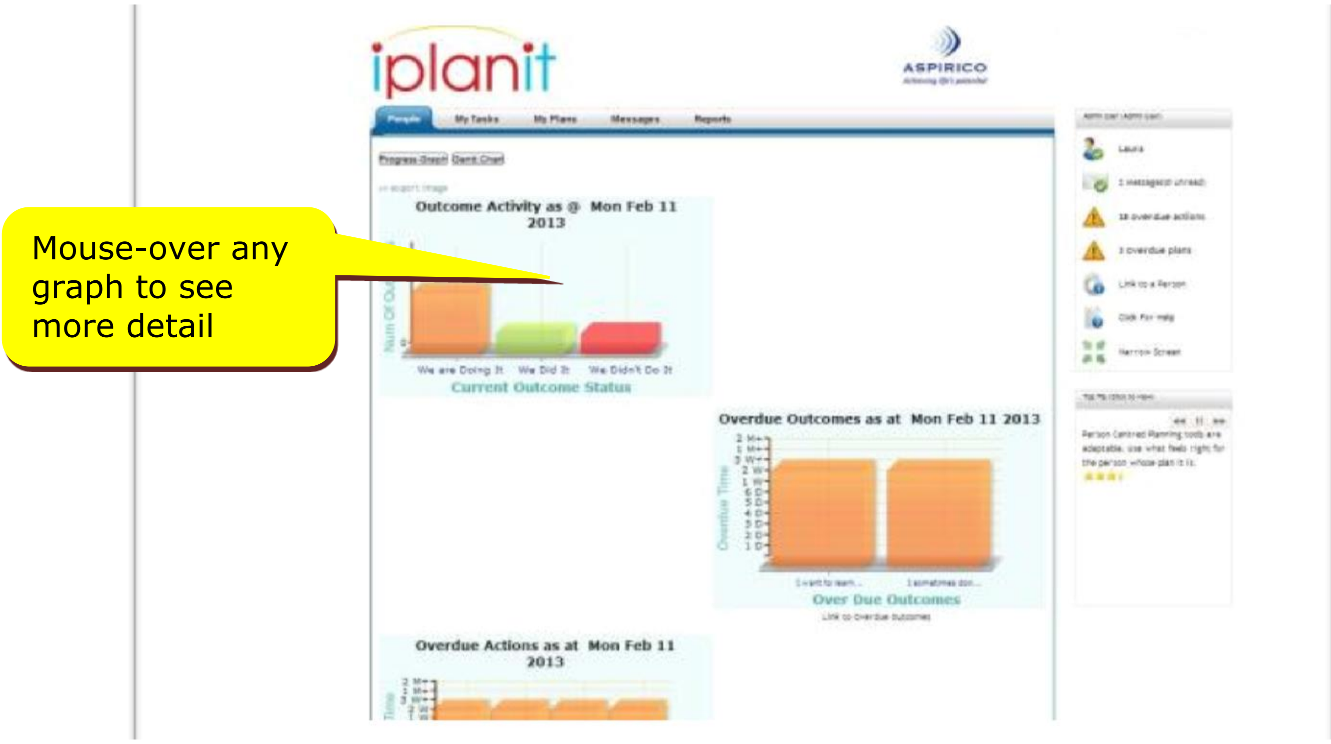
7.1 ”People Tab” - The Published Plans Screen

The screen below is showing the current list of published plans on the system for this person. If the person has no published plans this screen will be empty. Each plan has a list of options that you may perform represented by the icons beside the name of the plan.

8.0 “People Tab” - Progress Graphs

iplanit lets you see graphically the progress that is being made in supporting someone to achieve their goals. Click the Person’s Progress Graph icon from the “People” tab.

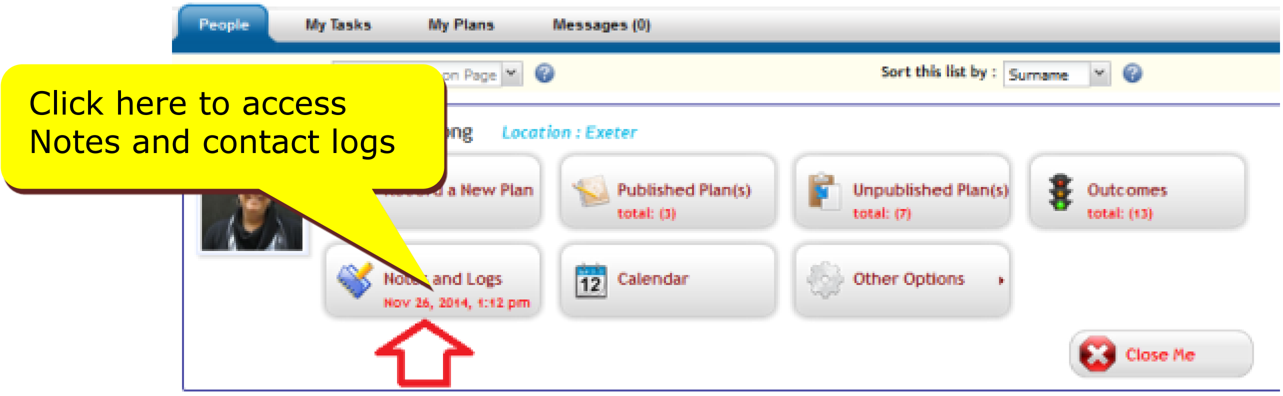
The progress chart screen gives four different ways of showing progress, 3 of which are as shown below.



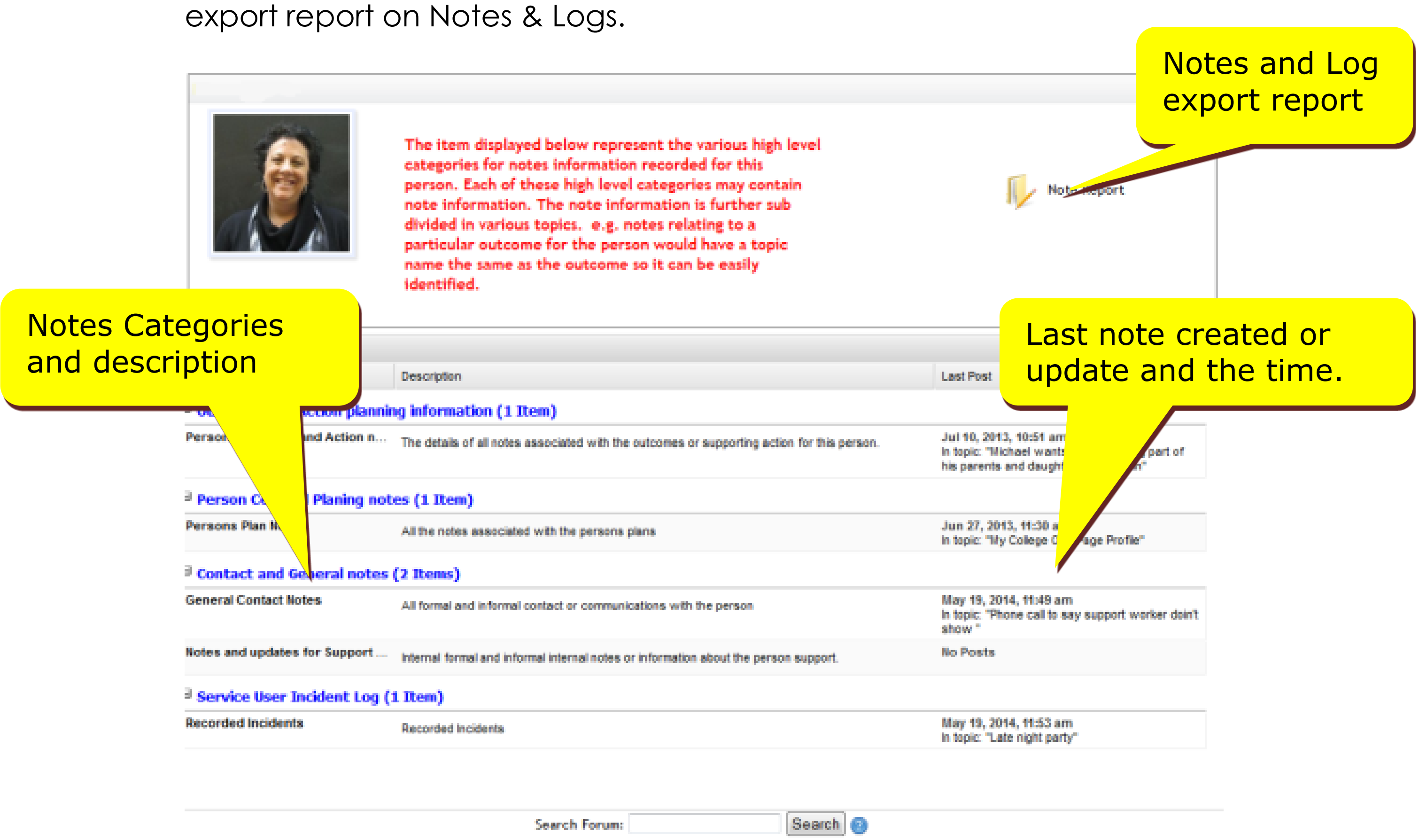
These graphs are simply a graphical view of the current status of the outcome being worked on for the person. The Overdue graphs show how many of the outcomes or action currently being worked on for this person are overdue and gives an indication of how overdue they are e.g. 1 day or 3 months overdue. The final graph compares the progress made towards each of the outcomes for the person

9.0 “People Tab”- Notes and Logs

Access to the Notes and Logs button is an option feature on iplanit. Pressing the notes and Logs will show a full view of the notes associated with outcomes and actions for this person and any create stand-alone progress notes or contact logs.

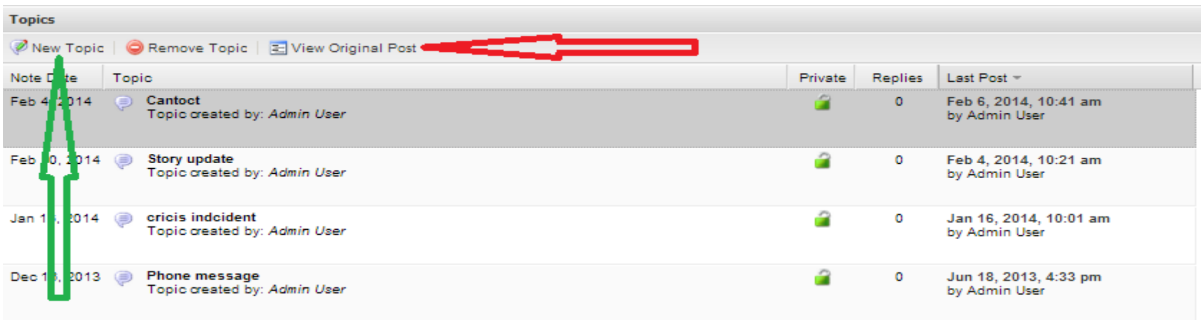


When you press the Notes & Logs button the notes listing screen will be displayed. This screen shows the main high level categories or folders of notes (shown in blue below). There is an option to run a detailed export report on Notes & Logs.



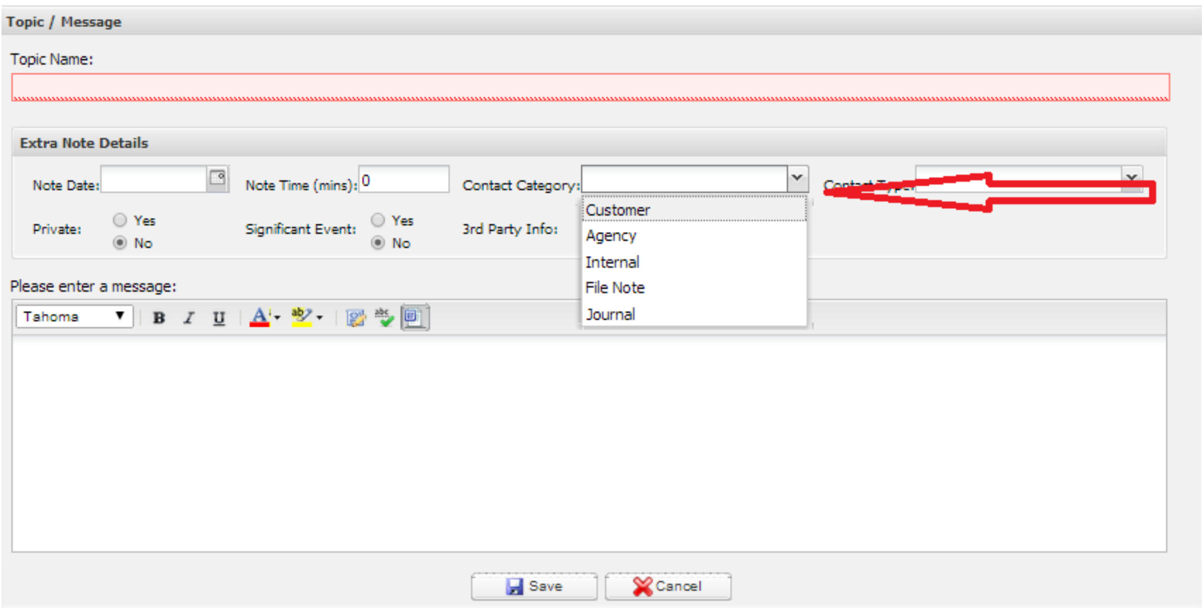
A quick-view of the available categories is available by opening each topic up by clicking on the "+" button in front of the category Name. This quick-view will show the different topics under each category with their relevant description and last note.

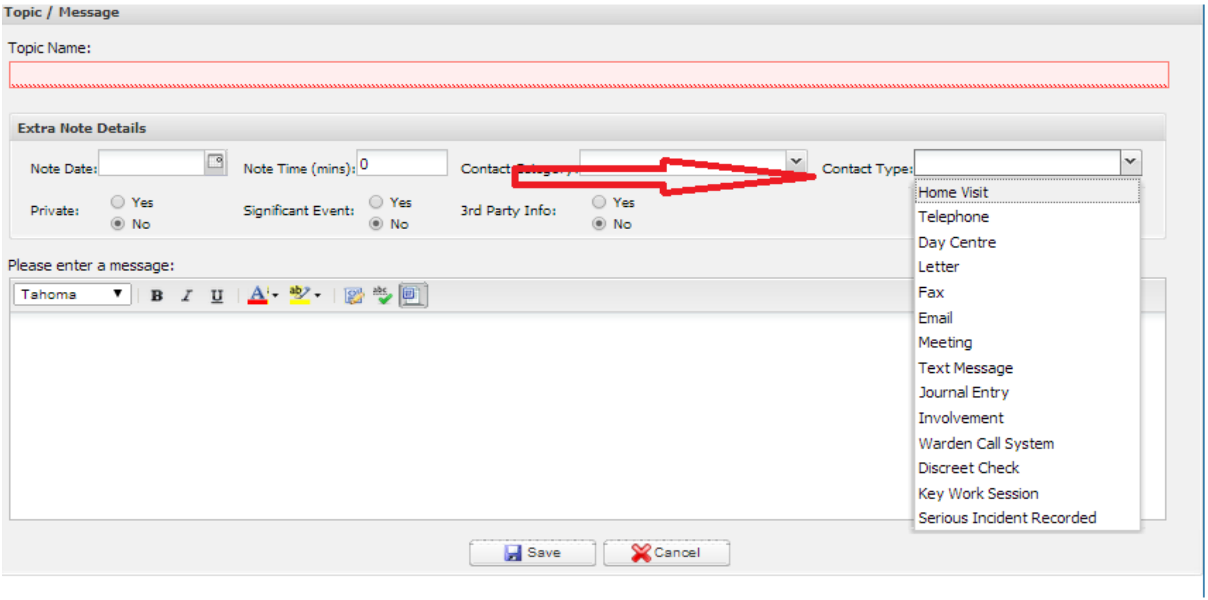
By double clicking on the name of the topics displayed under each category you will be able to see all the notes and contacts relating to the category. For example, by double clicking on General Contact Notes (topic) under Contact and General notes (category) you will see all general Contact notes and options to create a new topic (Green arrow) and a quick-view to the messages relating to topics (Red arrow).



Depending on the configuration of you iplanit system the drop down and check box options shown may or may not be available for every category of notes and logs.

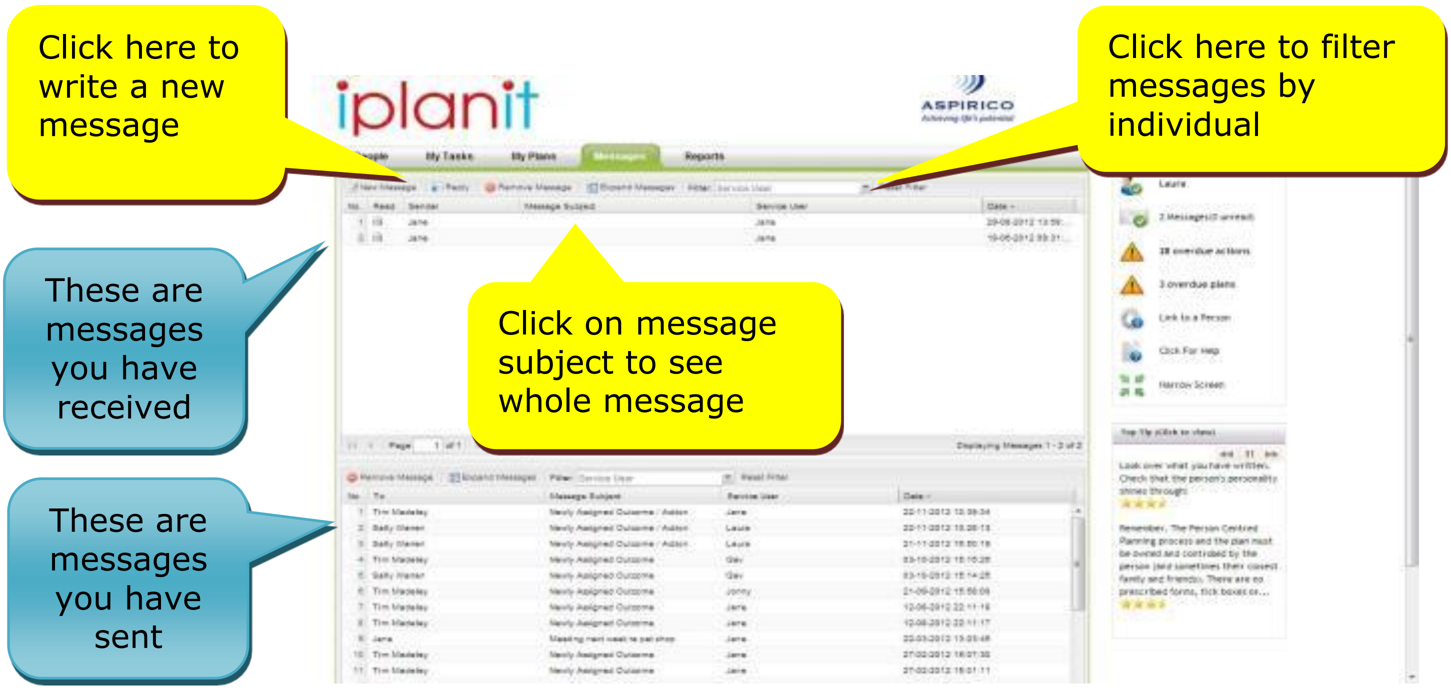
There are a number of options for creating a New Topic under General Contact Notes.





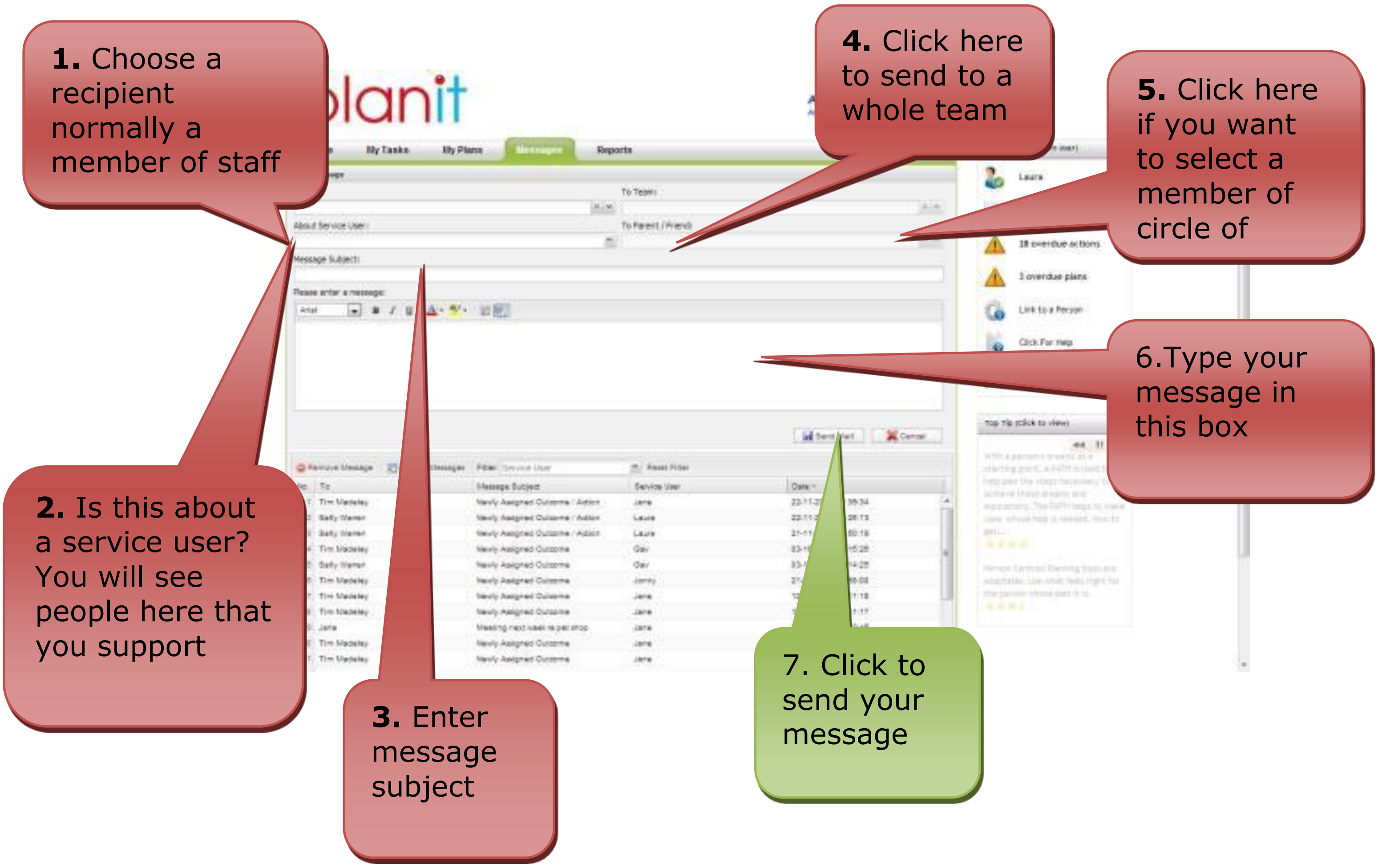
10.0 Messaging Tab – Inbox

iplanit has a messaging system which allows secure and safe communication within the circle of support and the facilitator and management team. It is not intended to replace email and you can't generally send message outside the iplanit system, but it allows you to keep track of all the communications directly related to progressing the plans of the individuals you support. The screens below show you how to use this system.



10.1 Messaging Tab – Sending a Message

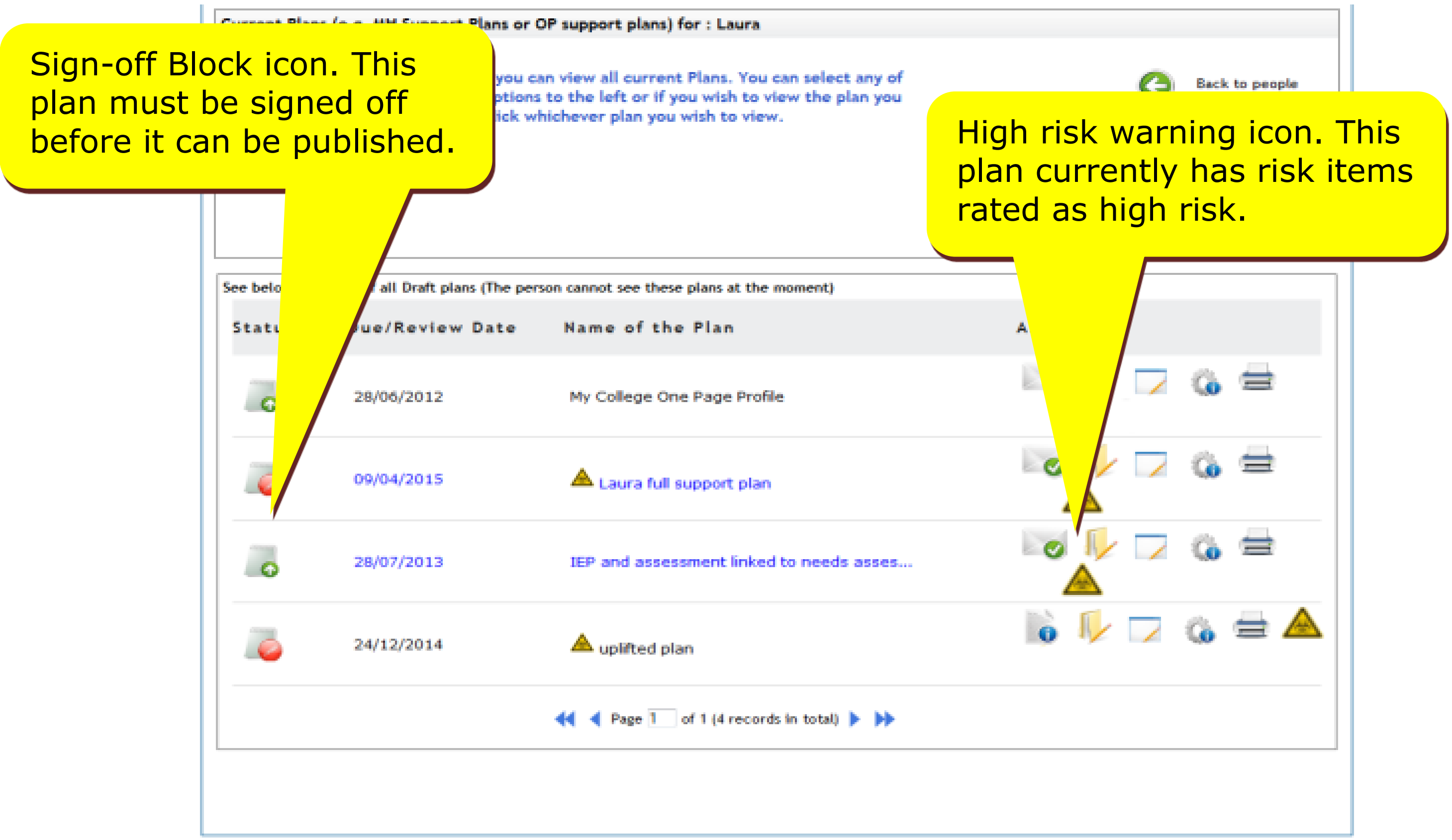
When you click on new message in the previous screen you get the following new message screen.



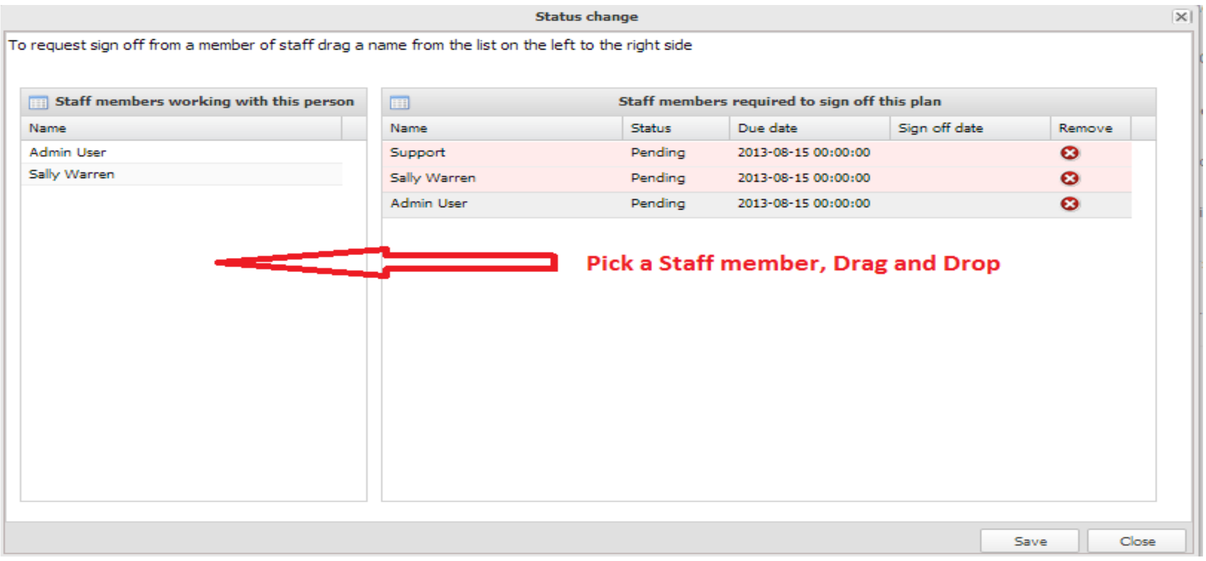
On iplanit the people you can send messages to is restricted to the people you support. You may also only send message to a circle member for people if you have a relationship with the person.

11.0 Signoff (Optional feature)

Some plans may have risk items that are rated as high risk. This type of risk may require a signoff before the plan can be published.

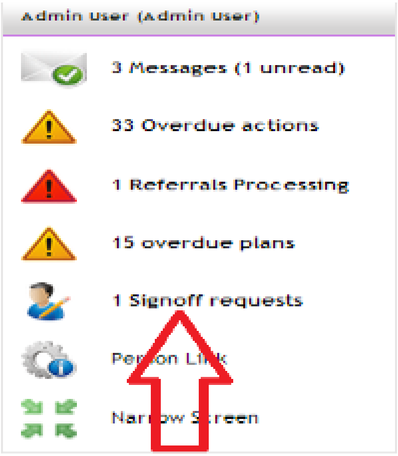


When clicking on the Signoff-block icon requests a separate window will pop up where you are able to select the people who need to sign off on the plan from the left list over to the right side.

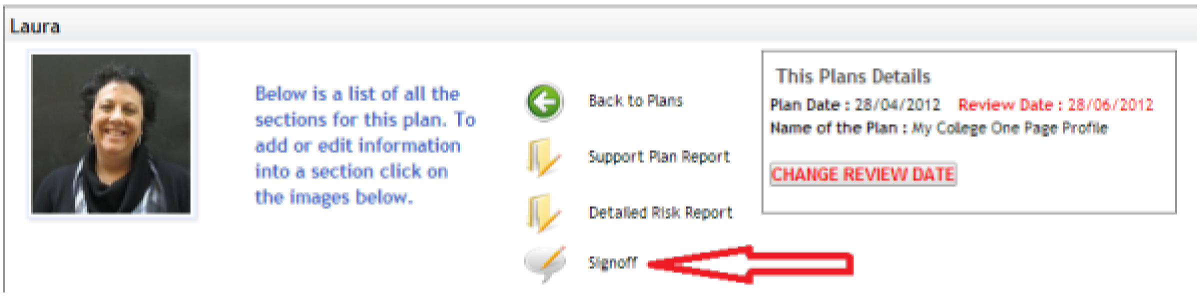


On some iplanit systems the plan template may be configured so your manager(s) are automatically selected to signoff the plan. In these situations you may not be able to sign of the plan yourself but must wait until the manager completes their signoff task.

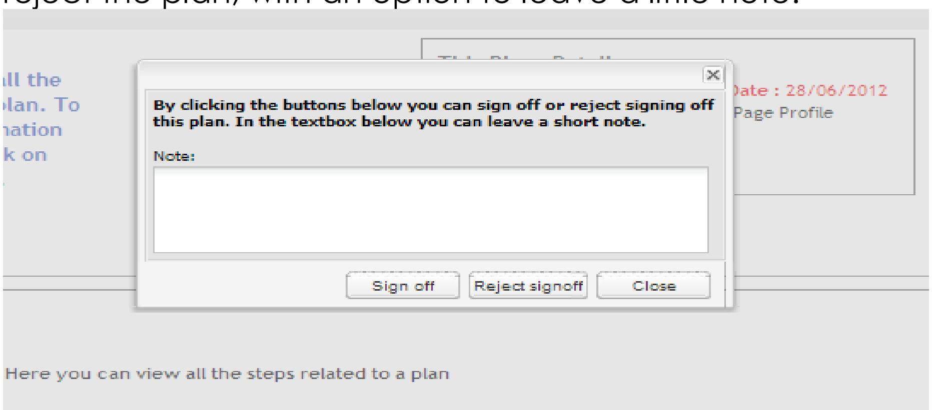
Some staff member and/or managers who will receive a request to Sign off the plan will see a Signoff request reminder in the sidebar on the left



By clicking on this you will be taken to the Draft Plan that requires signoff. Double-click on the plan name (or right click and choose Plan sections) to enter the plan and choose Signoff



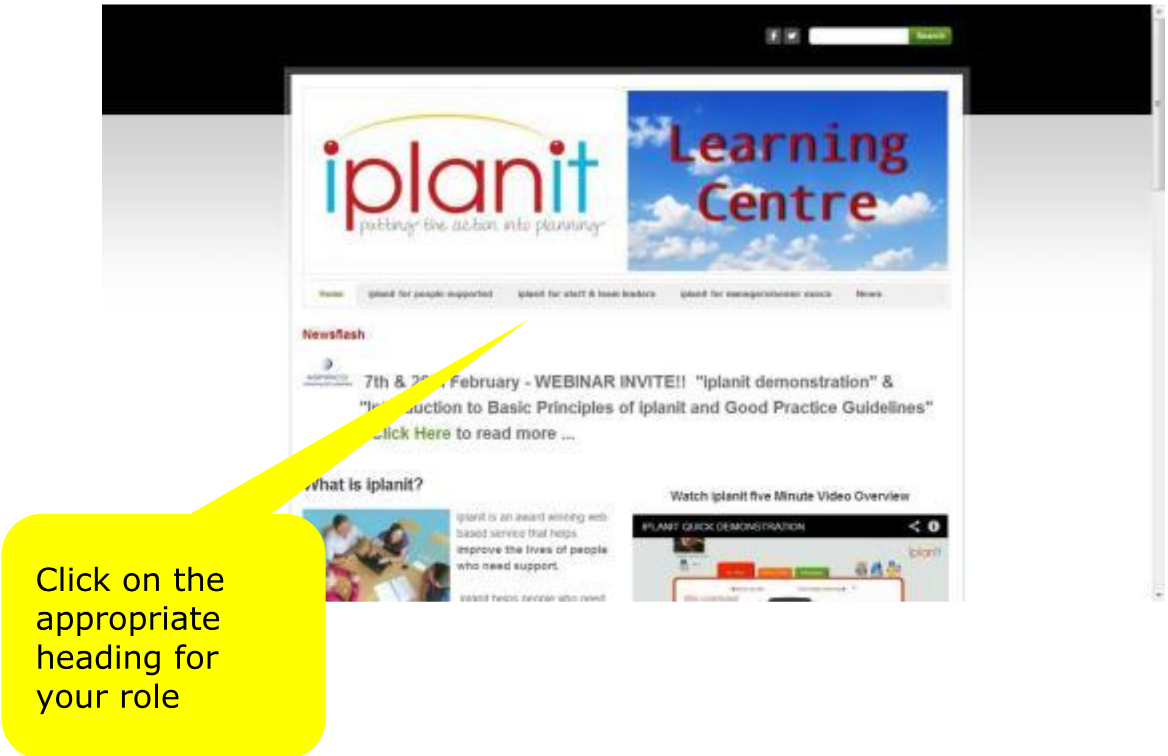
A small pop-up window will appear where you will be able to sign off or reject the plan, with an option to leave a little note.



12.0 Getting Help With iplanit

There is an innovative and dynamic way to access help and support for iplanit users of all levels of experience. The iplanit Learning Centre is an online resource for all provider organisations with an iplanit subscription. This rich resource has distinct sections that enable you to access support materials relevant to your role. The iplanit Learning Centre is available as part of the annual Aspirico iplanit support service. To access:

www.aspirico.com/ilc



Notes...