

Individual Program Plan (IPP)

Some regional centers may still use the legacy version of the IPP. The IPP draws the client's information from their CDER, POS and within the client's Primary Record.

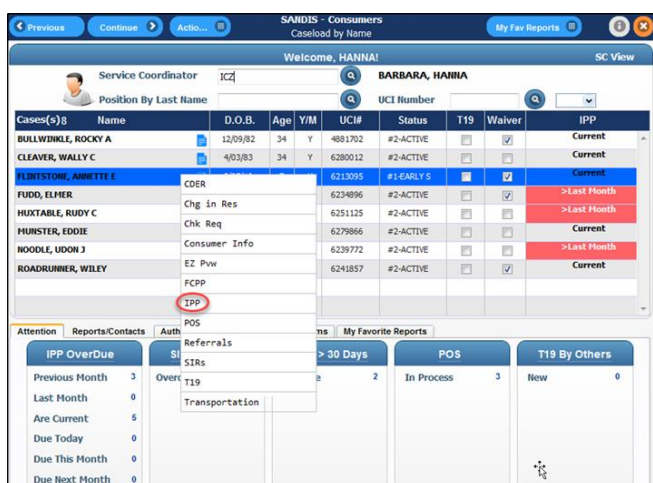
There is a new version of the IPP called the Person-Centered Thinking IPP (PCT IPP). Click on the link below to be taken to the documentation for that version of PCT IPP.

Person Centered Thinking IPP

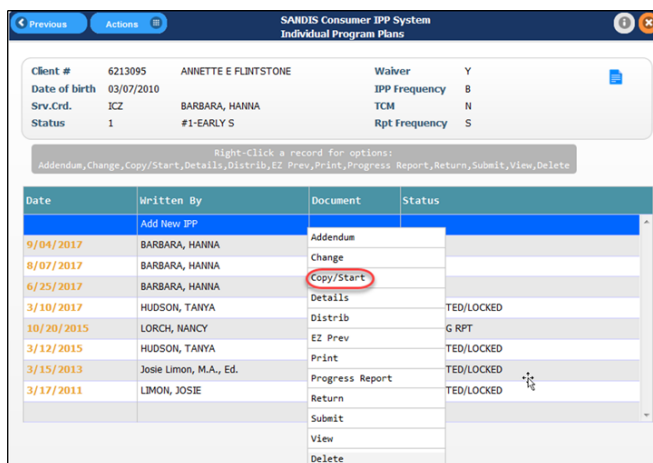
ADDING A NEW IPP -HEADER2

Prior to starting a new IPP, it is very important to update the CDER, Client File and Client Address information because the IPP auto-populates information from those screens.

From the **Welcome Screen**, right click on a client and select **IPP** from the dropdown menu.



From the **IPP History** screen, right click on **Add New IPP** from the dropdown menu and select **Copy/Start** to create a new IPP.



To copy an IPP from a previous locked IPP, right click on the locked IPP and select **Copy/Start** from the dropdown menu. Doing so will copy the narrative texts areas to the new IPP.

Date	Written By	Document	Status
5/02/2018	SUPPORT, SANDIS-NLA	IPP	DISTRIBUTED/LOCKED
10/11/2017	SUPPORT, SANDIS-NLA	ADDENDUM	Addendum
8/25/2017	SUPPORT, SANDIS-NLA	PRG-ANN	Change
8/24/2017	SUPPORT, SANDIS-NLA	PRG-ANN	Copy/Start
8/22/2017	SUPPORT, SANDIS-NLA	PRG-QRT	Details
1/06/2017	SUPPORT, SANDIS-NLA	PRG-QRT	Distrib
11/01/2016	SUPPORT, SANDIS-NLA	ADDENDUM	EZ Prev
8/01/2016	SUPPORT, SANDIS-NLA	IPP	Print
7/22/2016	SUPPORT, SANDIS-NLA	PRG-QRT	Progress Report

A popup window opens and asks if the **CDER** will need to be updated. Click **Go to CDER** to go to the client's **CDER** or click on the **Continue** button to proceed with the IPP.

After pressing the **Continue** button, a popup window will prompt if the **Consumer Information** will need to be updated. Click **Go To CMF** to update the Client's **Consumer Information** if needed, otherwise press the **Continue** button.

A popup window will prompt for the **IPP Date** and the **Next IPP Due Date**. A date can be selected by clicking on the 📅 icons. Click the **Continue** button to proceed when ready.

Narrative Text Area – HEADER3

For each of the **Narrative Text Areas**, a user can **View** or **Change** the text by right clicking on the corresponding area. Clicking on the **Go** button will also allow the information to be edited.

Edit the information in the textbox and select **Save** at the top of the screen. There are buttons at the bottom of the screen for **Spell Check** and **Changing the Font Size**.

The remaining **Narrative areas** can be accessed by using the scroll bar that is located on the right of the screen.

SANDIS Consumer IPP System
IPP Narrative Text Areas

Go To Services/Support View Services/Support Waiver Print Preview

Client # TEST1 JANE SMTIH-DOE IPP Date 12/17/2021

Date of Birth 12/11/2000

Narrative Progress Current Outcomes

Narrative Text Areas

- Go Persons Involved in Meeting No text here...
- Go Strengths No text here...
- Go Long Range Goals No text here...
- Go Family/Significant Others/Indiv No text here...
- Go Home Current Status:-If receiving Supported Living Services, SLS Assessme
- Go Taking Care of Yourself No text here...
- Go Communication No text here...
- Go School/Work/Day Activity No text here...

PROGRESS- HEADER3

The Progress section of the IPP pulls in the outcomes from previous IPP and IPAs. To access this section, click on the **Progress** button.

SANDIS Consumer IPP System
IPP Narrative Text Areas

Go To Services/Support View Services/Support Waiver Print Preview

Client # TEST1 JANE SMTIH-DOE IPP Date 12/15/2021

Date of Birth 12/11/2000

Narrative Progress Current Outcomes

Narrative Text Areas

- Go Persons Involved in Meeting No text here...
- Go Strengths No text here...
- Go Long Range Goals No text here...
- Go Family/Significant Others/Indiv No text here...
- Go Home Current Status:-If receiving Supported Living Services, SLS Assessme
- Go Taking Care of Yourself No text here...
- Go Communication No text here...
- Go School/Work/Day Activity No text here...

On the **Progress on Outcomes** screen, right click on an **Outcome** and select the **Status** that reflects the progress made.

SANDIS Consumer IPP System
Progress on Outcomes


Go To Services/Support View Services/Support Waiver Print Preview

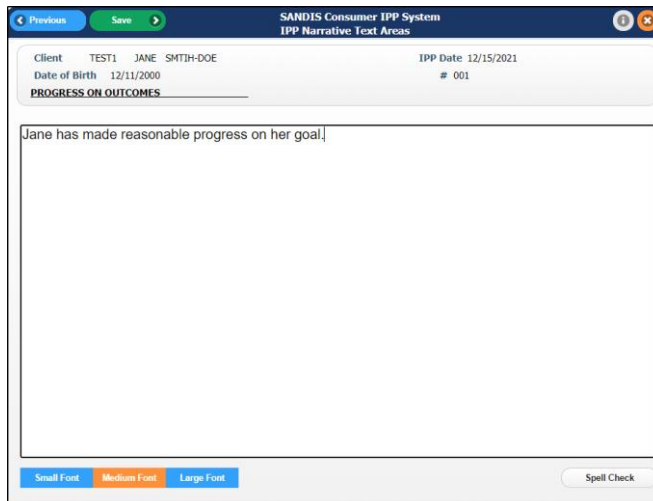
Client # TEST1 JANE SMTIH-DOE IPP Date 12/15/2021

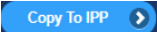
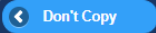
Date of Birth 12/11/2000 Status of Outcomes for IPP Dated 12/18/2020


Narrative Progress Current Outcomes

Out#	Outcome	Status
001	Jane will improve her productivity for focus	Clean
002	Jane will like to cook a meal for herself	Met
		No Progress
		Reasonable Progress
		View

Next, edit the **Progress** entries as needed. The **Spell Check** and **Change the Font Size** features are available as needed. Select  when finished.



A popup window opens and will prompt if the outcomes from the previous IPP will be copied to the new IPP. Select  or  as desired.



The updated progress status will be displayed upon returning to the **Progress on Outcomes** screen.



Out#	Outcome	Status
001	Jane will improve her productivity for focus	REASONABLE PROGRES
002	Jane will like to cook a meal for herself	


Current Outcomes- HEADER3

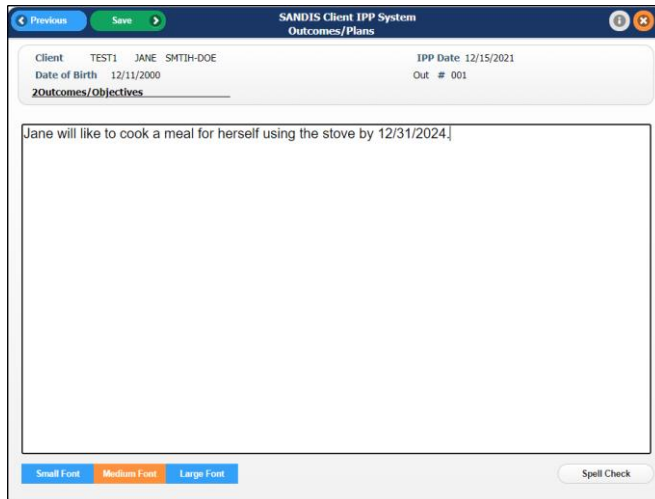
Under **Current Outcomes**, there are options to **Change**, **Copy/Start**, **View** or **Delete** any of the Outcomes by right clicking on the Outcome. If clicking on an existing Outcome and selecting **Change**, the screen will redirect to the **Outcomes/Plans** screen.

Out#	Outcome	Status
000	New Outcome	
Plans:		
001	Jane will like to cook a meal for herself	
Plan for Jane /family::~Jane's part will be....~Plan for RC supports::~		

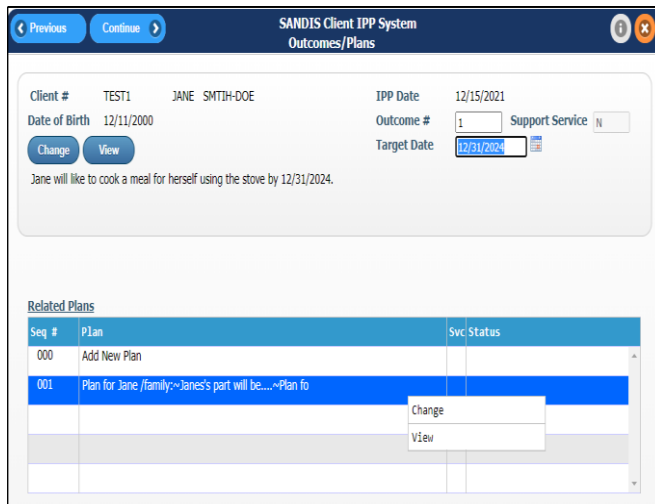
A screen appears with options to **Change** or **View** the Outcomes/Plans. If **Change** is selected, the screen will redirect to the Outcome text box.

Seq #	Plan	Svc: Status
000	Add New Plan	
001	Plan for Jane /family::~Jane's part will be....~Plan fo	


In the Outcomes/Plans text box, edit the **Outcome** as needed and click  to save any changes made.

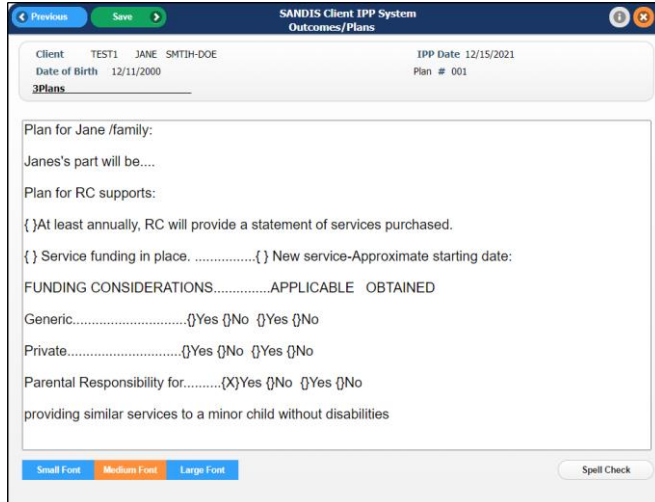


To update a Related Plan, right click on an existing plan and select **Change**.

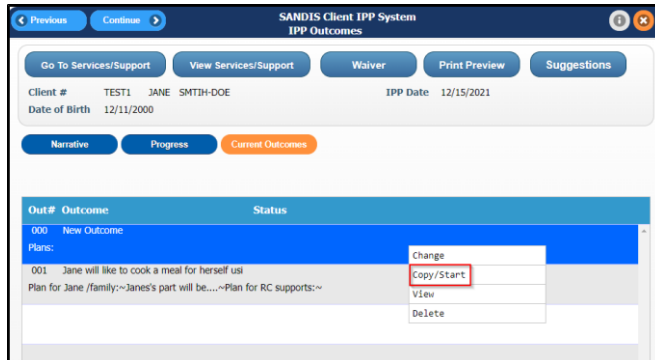


Seq #	Plan	Svc Status
000	Add New Plan	
001	Plan for Jane /family::~Jane's part will be....~Plan fo	

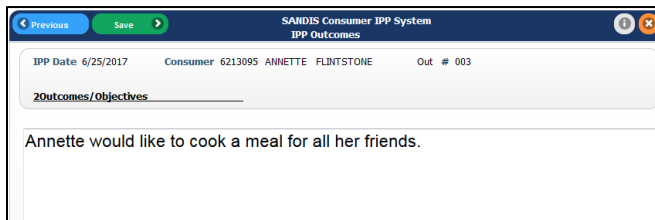
Edit the plans as needed and click the  button when ready to save any changes.




To add a new **Outcome**, right click on the **New Outcome** line and select **Copy/Start** from the **Current Outcomes** screen.



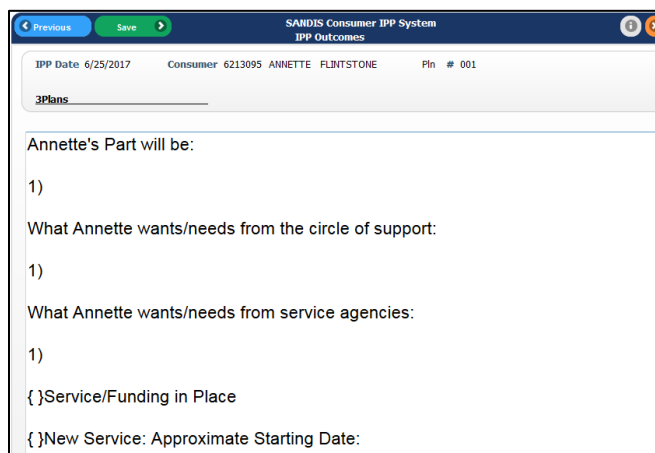
Create a new **Outcome** by typing within the text box and click

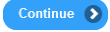




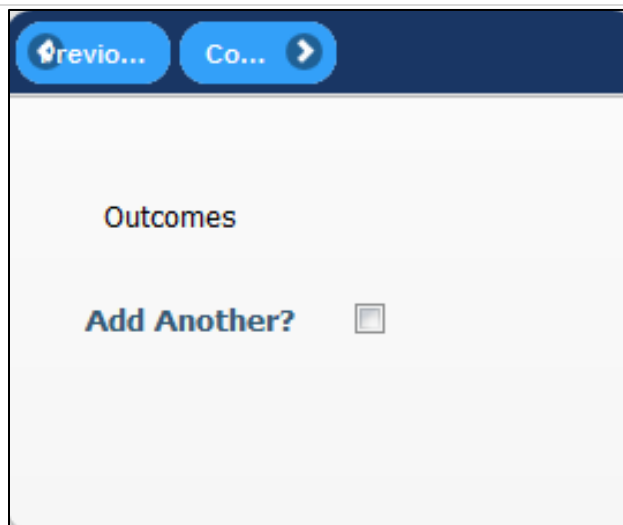
The IPP Plans text box will open and a template will already be auto-generated.¹

After completing the questions, click the  button to continue.


1: This feature may not be available at all Regional Centers.



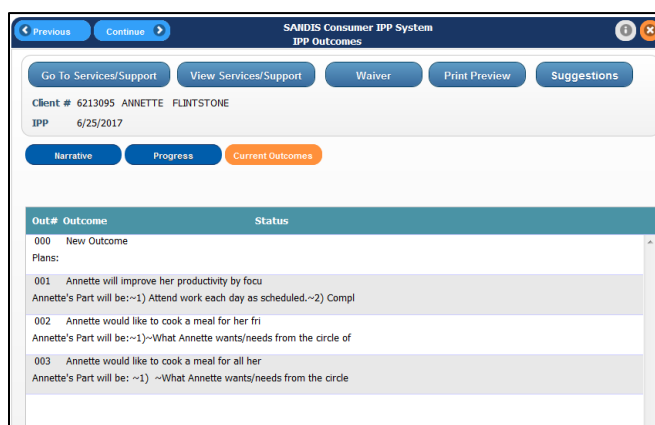
A popup window will prompt if another **Outcome** will need to be added. If adding another outcome, check the box and click the  button. If another outcome is not needed, click the  without making any changes.



The new outcome is added to the client's list of **IPP Outcomes**.

The  button at the top right of the screen is available and contains suggested outcomes.¹

1: This feature may not be available at all Regional Centers.



Clicking on the **Suggestions** button provides a list of **Pre-formatted Outcomes and Plans**.

SANDIS Consumer IPP System
Suggested Outcomes & Plans

Client # 6213095 ANNETTE FLINTSTONE IPP 6/25/2017

Double Click to Select a Record

Suggested/Standard Outcomes

- Independent Living**
@@@Consumer will ask for assistance from her ILS provider, in accessing needed community resources, through @@@date.
- Finances**
@@@Consumer will save \$5.00 a month through @date.
- Health/Mental Health**
@@@Consumer will have annual medical and dental check-ups and take his medications as prescribed through [date].
- Community Employment**
@@@Consumer will volunteer weekly in the community through [date].
- Home**
@@@Consumer will be free of rashes and other ailments related to hygiene on a daily basis through

Select an item from the Suggested Outcomes list by double-clicking on the desired **Outcome**.

SANDIS Consumer IPP System
Suggested Outcomes & Plans

Client # 6213095 ANNETTE FLINTSTONE IPP 6/25/2017

Double Click to Select a Record

Suggested/Standard Outcomes

- Independent Living**
@@@Consumer will ask for assistance from her ILS provider, in accessing needed community resources, through @@@date.
- Finances**
@@@Consumer will save \$5.00 a month through @date.
- Health/Mental Health**
@@@Consumer will have annual medical and dental check-ups and take his medications as prescribed through [date].
- Community Employment**
@@@Consumer will volunteer weekly in the community through [date].
- Home**
@@@Consumer will be free of rashes and other ailments related to hygiene on a daily basis through

SERVICES AND SUPPORT

On the **IPP Services and Supports Screen**, all services associated with the current IPP are displayed. Before linking, the user will need to identify which **Outcomes** must be linked to each service.

SANDIS - Consumers
IPP Services and Supports

Client # 6213095 FLINTSTONE, ANNETTE E

Document IPP Date 08/01/2017

Right-Click a record for options:
Add, Change, Link, View/Search, Delete

Services and Supports

Type of service	Service support details	Linked in IPP
Add New Service		
BENEFITS/RESOURCES	Benefit Information	
ACTIVITY CENTER	RC Purchase (505/01UN)	Not Linked
TRANS ADDITIONAL COM	RC Purchase (880/OW1)	Not Linked
RES FAC ADULTS-SO	RC Purchase (915/L41)	Not Linked
TRANS COMPANIES	Transp Service	

The **Services and Supports** screen can be accessed through two different sections of the IPP:

From the IPP history screen, right-click on IPP record and select **Details**. The IPP Details window will be displayed. Click on the [Go to Services Summary](#) button to continue.

IPP Details

Client # 6285891 SUNNY DAYS
 Date of Birth 10/15/1976
 IPP Frequency T
 IPP Date 01/05/2022 Status L DISTRIBUTED/LOC
 Next IPP 10/31/2024 [Go to Services Summary](#) All Linked
 Written By MENDEZ, MAURA
 On 2/10/2022 SC Approved Date 3/08/2022
 Waiver Areas Documented 01 of 02 [Go to Waiver Areas](#)
 Reviewed by MENDEZ, MAURA
 On 3/08/2022

An alternate way to access the **Services and Supports** screen is to enter the IPP record, click on **Outcomes** and then click the [Go To Services/Support](#) button.

**SANDIS Consumer IPP System
IPP Outcomes**

[Go To Services/Support](#) [View Services/Support](#) [Waiver](#) [Print Preview](#) [Suggestions](#)

Client # 6213095 ANNETTE FLINTSTONE
 IPP 6/25/2017

[Narrative](#) [Progress](#) [Current Outcomes](#)

Out#	Outcome	Status
000	New Outcome	
Plans:		
001	Annette will improve her productivity by focu	
Annette's Part will be:~1) Attend work each day as scheduled.~2) Compl		
002	Annette would like to cook a meal for her fri	
Annette's Part will be:~1)~What Annette wants/needs from the circle of		
003	Annette would like to cook a meal for all her	
Annette's Part will be: ~1) ~What Annette wants/needs from the circle		

The IPP Services and Supports screen will be displayed. To link a service with an **Outcome**, right click on the **Service** and select **Link** from the dropdown menu.

If there are services that are not reflected in this screen, select **Refresh** under the **Actions** menu. In doing so, SANDIS7 will refresh the Services and Supports screen with all of the current Services and Supports available.

Right-Click a record for options:
Add, Change, Link, View/Search, Delete

Type of service	Service support details	Linked in IPP
Add New Service		
BENEFITS/RESOURCES	Benefit Information	
ACTIVITY CENTER	RC Purchase (505/01UN)	Add
TRANS ADDITIONAL COM	RC Purchase (880/OW1)	Change
RES FAC ADULTS-SO	RC Purchase (915/L4I)	Link
TRANS COMPANIES	Transp Service	View/Search
		Delete

Choose an **Outcome**, right click and click **Select** to link to the **Service**.

Individual Program Plan Sections

Client # 6213095 FLINTSTONE, ANNETTE E
IPP 08/01/2017

Outcome
OUT001 Annette wants to have a dinner party.

After linking all the **Service** entries that require linking, they will be displayed alongside their associated (and linked) **Outcome**.

Services and Supports

Type of service	Service support details	Linked in IPP
Add New Service		
BENEFITS/RESOURCES	Benefit Information	
TRANS COMPANIES	Transp Service	
ACTIVITY CENTER	RC Purchase (505/01UN)	Outcome 001
TRANS ADDITIONAL COM	RC Purchase (880/OW1)	Outcome 001
RES FAC ADULTS-SO	RC Purchase (915/L4I)	Outcome 001

A non-Regional Center funded service can be added by right clicking on **Add New Service** and selecting **Add** from the dropdown menu.

Type of service	Service support details	Linked in IPP
Add New Service		
BENEFITS/RESOURCES	Benefit Info	
TRANS COMPANIES	Transp Se	
ACTIVITY CENTER	RC Purchase	Outcome 001
TRANS ADDITIONAL COM	RC Purchase	Outcome 001
RES FAC ADULTS-SO	RC Purchase (915/L4)	Outcome 001

A popup window will prompt the user to add a service and displaying the options for either

Service/Resource

Other/Text Entry

To add a non-Regional Center funded service, select **Other/Text Entry**.

Here is where non-Regional Center funded services that are important to the client can be identified. The **Funding Source** can also be entered within this page. Click **Continue** when finished.

Use the drop-down menu to identify the **Funding Source**. Add the type of service under Comments.

Press **Continue** when complete, the screen will redirect back to the Services and Supports page and the new Service will be displayed and can be linked.

To view a copy of the report created for Services/Supports, click the **View Services/Support** button. The report will then be displayed on the page.

A rendering of the **Spooled File** is displayed on the screen and a summary of all **Services** and **Supports** for the client will be displayed.

Use the **Page Arrows** located on the lower right side of the screen to navigate through the file. When finished with reviewing the file, click the **Continue** button.

On the next screen a prompt will display with the option to print the report.

Specify **Yes** or **No** to print the report to the default printer assigned to the active SANDIS account and click the [Continue](#) button.

WAIVER

The Waiver Documentation screen displays the client's **Waivers for Qualifying Conditions** they may have. The Waiver Qualifying Conditions can be linked to the Narrative Text Areas and/or Outcomes where the Waiver Qualifying Conditions are addressed. To access the client's **Waiver Qualifying Conditions**, click the [Waiver](#) button.

Each condition needs to be addressed by linking it to an IPP Section. Select a condition by right clicking and select **Link** from the dropdown menu.

Waiver Qualifying Conditions	In IPP Sections
EPILEPSY	Clear Link View/Search
89-HAS HIST. OF HABITUAL THEFT	
Requires assistance to take medication	
Toilets without prompting, but needs assistance	

Identify the appropriate section in the IPP for the selected **Qualifying Condition**. Once identified, right click and choose **Select** from the dropdown menu.

The **Waiver Qualifying Condition** now displays as being addressed in the **Health Section** of the IPP by displaying the linked IPP section.

Waiver Qualifying Conditions	In IPP Sections
EPILEPSY	Health
89-HAS HIST. OF HABITUAL THEFT	
Requires assistance to take medication	
Toilets without prompting, but needs assistance	

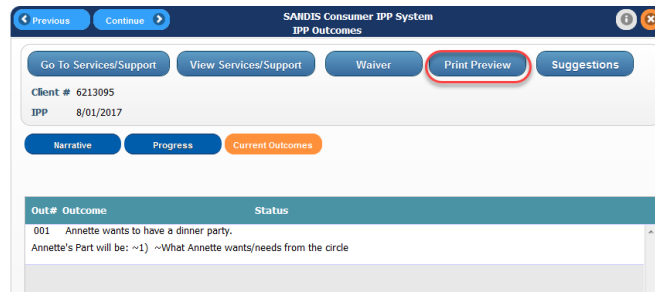
Link all the required **Waiver Qualifying Conditions** to an IPP section. A scroll bar is located on the right-side of the screen to view all available conditions. Click **Continue** when finished.

Waiver Qualifying Conditions	In IPP Sections
EPILEPSY	Health
89-HAS HIST. OF HABITUAL THEFT	Safety
Requires assistance to take medication	Self Care
Toilets without prompting, but needs assistance	Self Care

PRINTING & DISTRIBUTION HEADER2

Print Preview

Clicking the  button generates a PDF of the IPP.



SANDIS Consumer IPP System
IPP Outcomes

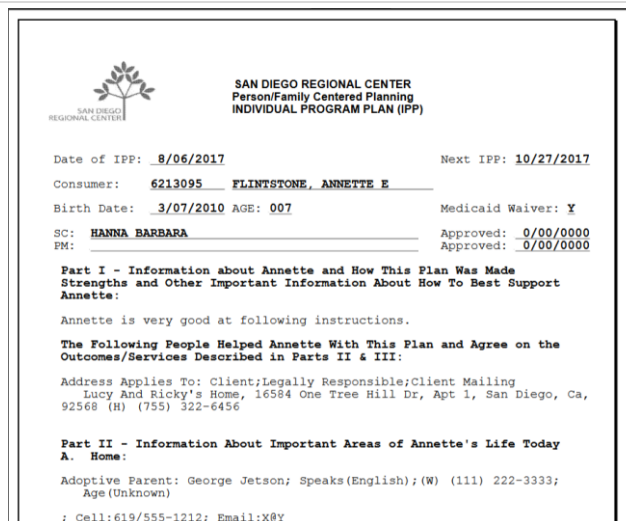
Go To Services/Support View Services/Support Waiver **Print Preview** Suggestions

Client # 6213095
IPP 8/01/2017

Narrative Progress **Current Outcomes**

Out#	Outcome	Status
001	Annette wants to have a dinner party. Annette's Part will be: ~1) ~What Annette wants/needs from the circle	

This builds a **.PDF** file that will display what the IPP looks like.



SAN DIEGO REGIONAL CENTER
Person/Family Centered Planning
INDIVIDUAL PROGRAM PLAN (IPP)

Date of IPP: 8/06/2017 Next IPP: 10/27/2017

Consumer: 6213095 FLINTSTONE, ANNETTE E

Birth Date: 3/07/2010 AGE: 007 Medicaid Waiver: Y

SC: HANNA BARBARA Approved: 0/00/0000
PM: Approved: 0/00/0000

Part I - Information about Annette and How This Plan Was Made Strengths and Other Important Information About How To Best Support Annette:

Annette is very good at following instructions.

The Following People Helped Annette With This Plan and Agree on the Outcomes/Services Described in Parts II & III:

Address Applies To: Client; Legally Responsible; Client Mailing
Lucy And Ricky's Home, 16584 One Tree Hill Dr, Apt 1, San Diego, Ca, 92568 (H) (755) 322-6456


Part II - Information About Important Areas of Annette's Life Today

A. Home:

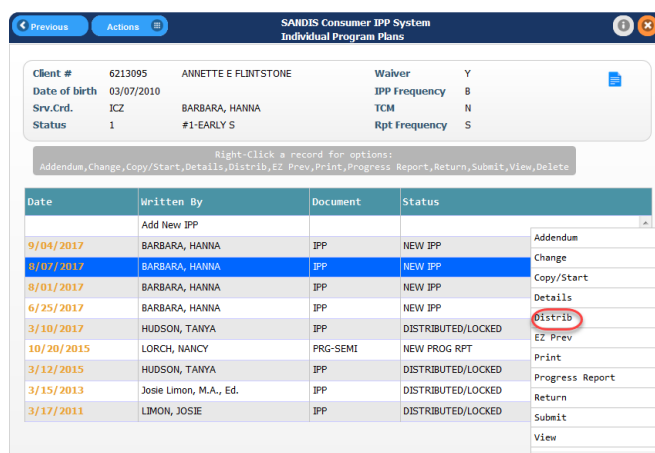
Adoptive Parent: George Jetson; Speaks (English); (W) (111) 222-3333;
Age (Unknown)

; Cell: 619/555-1212; Email: X@Y

Distribution

To identify where the IPP will be sent to, close out the IPP by clicking on the  in the upper right corner.

On the **IPP History** screen, right click on the IPP and select **Distrib** from the dropdown menu.



SANDIS Consumer IPP System
Individual Program Plans

Client # 6213095 ANNETTE E FLINTSTONE Waiver Y
Date of birth 03/07/2010 IPP frequency B
Srv.Crd. ICZ BARBARA, HANNA TCM N
Status 1 #1-EARLY S Rpt frequency S

Right-Click a record for options:
Addendum, Change, Copy/Start, Details, Distrib, EZ Prev, Print, Progress Report, Return, Submit, View, Delete

Date	Written By	Document	Status
9/04/2017	BARBARA, HANNA	IPP	NEW IPP
8/07/2017	BARBARA, HANNA	IPP	NEW IPP
8/01/2017	BARBARA, HANNA	IPP	NEW IPP
6/25/2017	BARBARA, HANNA	IPP	NEW IPP
3/10/2017	HUDSON, TANYA	IPP	DISTRIBUTED/LOCKED
10/20/2015	LORCH, NANCY	PRG-SEMI	NEW PROG RPT
3/12/2015	HUDSON, TANYA	IPP	DISTRIBUTED/LOCKED
3/15/2013	Josie Limon, M.A., Ed.	IPP	DISTRIBUTED/LOCKED
3/17/2011	LIMON, JOSIE	IPP	DISTRIBUTED/LOCKED

Addendum
Change
Copy/Start
Details
Distrib
EZ Prev
Print
Progress Report
Return
Submit
View
Delete

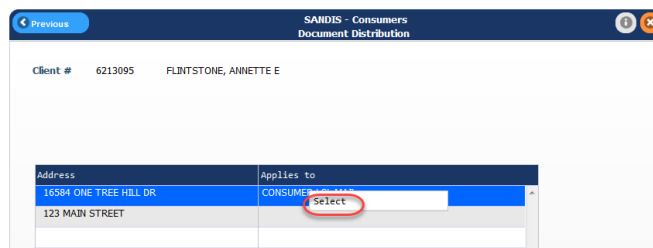
From the **Document Distribution** screen, select **Add New Contact** by right clicking on the record line. Select **Add Contact** from the dropdown menu that appears.



A popup window will prompt to select the type of contact being added. Click on the ☐ and indicate whether the contact is a **Family Member** or someone else in the SANDIS database by selecting **Resource/Other**. A **Resource** contact contains address information that is already recorded within the SANDIS database. Select **Continue** after choosing either option.



If selecting **Family Member**, a screen will display all of the family members within the client's record. Choose the appropriate contact by right-clicking an entry and choosing **Select**.



The selected contact is then added to the **Document Distribution** list.

Client # **6213095** FLINTSTONE, ANNETTE E

Type of Document **IPP** Distributed By

Date **08/07/2017**

Distribution List

Name	Relation to Client
Add New Contact	
LUCY AND RICKY'S HOME	CONSUMER LGL MAIL

If selecting Resource/Other, the option to select a **Resource#** with its associated **Name** and **Address** is available.

An address can also be manually entered. Under **Relation**, specify to whom the IPP should be sent to. Click **Continue** when ready.

Client # **6213095** FLINTSTONE, ANNETTE E

Resource# **p47473** (Optional)

Name **LUCY AND RICKY'S HOME** [Copy Address](#)

Address **123 FREEPORT**

City **SAN DIEGO** State **CA**

Zip Code **92075** Phone:

Relation **ATTENTION: LUCY FLINTSTONE**

(Changes to Address Information here do not update the consumer or resource record.)

The new contact is added to the **Document Distribution List**.


Client # **6213095** MERTZ, ETHEL

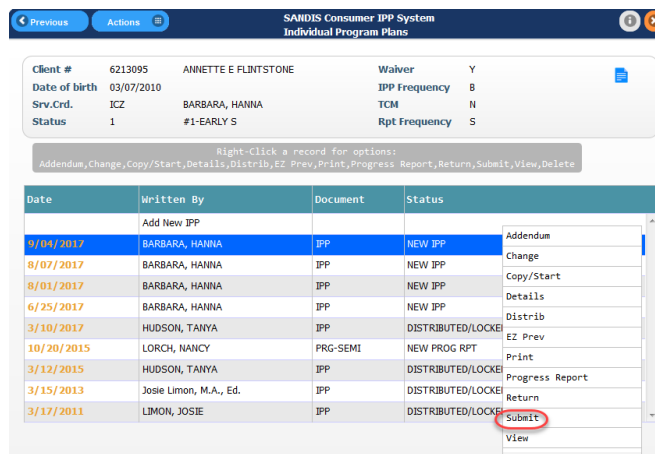
Type of Document **IPP** Distributed By

Date **06/25/2017**

Distribution List

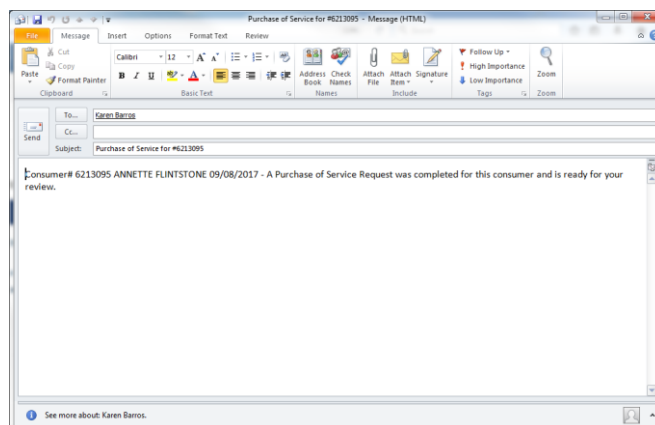
Name	Relation to Client
Add New Contact	
LUCY AND RICKY'S HOME	ATTENTION: LUCY MERTZ

Click the  on the top right of the screen to return to the **IPP History** screen. The IPP can be submitted for approval by right clicking the IPP record and selecting **Submit** from the dropdown menu.

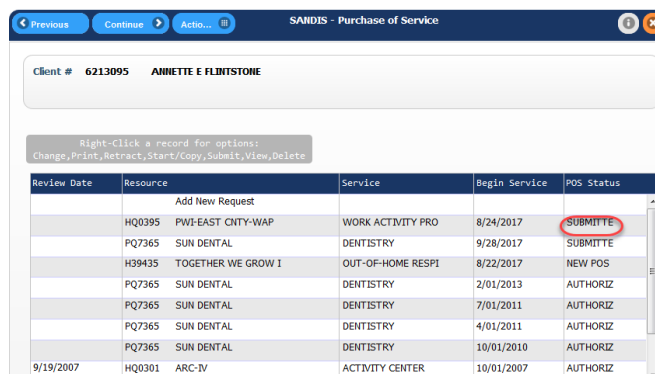


Date	Written By	Document	Status
		Add New IPP	
9/04/2017	BARBARA, HANNA	IPP	NEW IPP
8/07/2017	BARBARA, HANNA	IPP	NEW IPP
8/01/2017	BARBARA, HANNA	IPP	NEW IPP
6/25/2017	BARBARA, HANNA	IPP	NEW IPP
3/10/2017	HUDSON, TANYA	IPP	DISTRIBUTED/LOCKE
10/20/2015	LORCH, NANCY	PRG-SEMI	NEW PROG RPT
3/12/2015	HUDSON, TANYA	IPP	DISTRIBUTED/LOCKE
3/15/2013	Josie Limon, M.A., Ed.	IPP	DISTRIBUTED/LOCKE
3/17/2011	LIMON, JOSIE	IPP	DISTRIBUTED/LOCKE

An automatic email to the **Program Manager** is generated, containing the **IPP** information that is ready to be approved. This email may now be sent to the **Program Manager** by pressing **Send**.



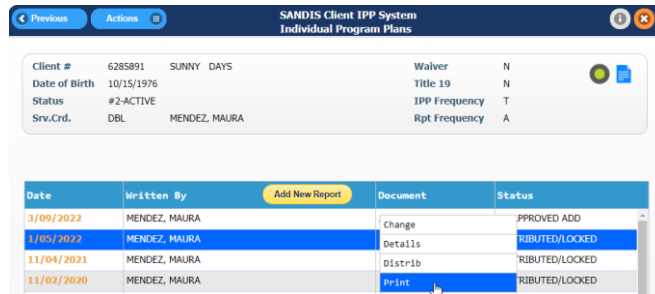
The status in the **IPP History** screen will now display that the IPP has been **Submitted** by the Service Coordinator.



Review Date	Resource	Service	Begin Service	POS Status
		Add New Request		
	HQ0395 PWS-EAST CNTY-WAP	WORK ACTIVITY PRO	8/24/2017	SUBMITTED
	PQ7365 SUN DENTAL	DENTISTRY	9/28/2017	SUBMITTED
	H39435 TOGETHER WE GROW I	OUT-OF-HOME RESPI	8/22/2017	NEW POS
	PQ7365 SUN DENTAL	DENTISTRY	2/01/2013	AUTHORIZ
	PQ7365 SUN DENTAL	DENTISTRY	7/01/2011	AUTHORIZ
	PQ7365 SUN DENTAL	DENTISTRY	4/01/2011	AUTHORIZ
	PQ7365 SUN DENTAL	DENTISTRY	10/01/2010	AUTHORIZ
9/19/2007	HQ0301 ARC-IV	ACTIVITY CENTER	10/01/2007	AUTHORIZ

Printing

To Print an IPP, right click on the report and select **Print**.



A popup window will display the available options.

- Print IPP Only
- Print Services Page Only
- Print IPP/Services Page
- Email PDF of IPP
- Email PDF of Services Page
- Email PDF of IPP/Services Page

Select one of the options or click **Continue** or **X** to proceed without printing or emailing.

