

Individual Plan and Quarterly Report Training | Questions, Comments and Answers

Hawaii State Department of Health, Developmental Disabilities Division

Tuesday, 6/23/26, 10:00 a.m. to 12:00 p.m. via Zoom

#	Question/Comment	Answer/Response
1	Are providers expected to use the Provider Portal starting July 1st?	Yes. For ISP meetings held on July 1st and after, the IP and QR will be uploaded into the Provider Portal
2	How do providers know which IP and QR are completed in the Provider Portal?	<p>**This response covers all similar questions asked during the training.**</p> <ul style="list-style-type: none"> • This is an example to illustrate the IP and QR status in the Provider Portal. • Participant's ISP meeting is held on July 1, 2026. • The CM has seven working days from the ISP meeting date to enter goals, outcomes, action steps, and risks (GOARs) (ETA: July 1, 2026 to July 10, 2026). • Upon CM completion of the GOARs, INSPIRE will trigger the shell of the IP to populate in the Provider Portal. • The provider will know that the IP shell has been populated by looking at the grid in the Provider Portal main homepage. • The provider then has 30 days from the shell being populated to complete the IP, send to the participant or guardian/legal representative for their signature, upload the signed IP to the Provider Portal, and attach any documentation with the IP submission. (ETA: July 30, 2026 to August 10, 2026). • After the provider submits the IP, the CM has 7 working days to review the IP and either approve or send back to the provider for revisions. • If revisions are needed, this grid will list the IPs that have been returned from the CM to the provider for revision with CM comments to explain what needs to be revised.
3	Does the Provider Portal email notifications to the provider staff who submits the IP or QR?	The CM receives a notification and also sees on their portal dashboard when the IP and QR is submitted. Providers do not receive email notifications after the IP or QR are submitted to the CM.

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4	Will the CM indicate when the QR is due?	<p>**This response covers all similar questions asked during the training.**</p> <p>In the Provider Portal, providers will see a grid on the main homepage showing which participants have an IP or QR that is coming up due soon and those whose IP and QR are overdue. This grid will also list the IP and QR that have been returned from the CM to the provider for revision.</p>
5	When the CM completes the ISP goals, outcomes, action steps, and risks (GOARs) INSPIRE, this triggers the shell of the IP to populate in the Provider Portal. Does INSPIRE and the Provider Portal "date stamp" the IP so there is a record of when the shell was ready for the provider to work on?	<p>Yes, when the CM completes the GOARs, the system will note the date of completion. The CM completing the GOARs will trigger the IP shell to be generated in the Provider Portal. The provider then has 30 days from the IP shell being populated in the Provider Portal to complete the IP, send to the participant or guardian/legal representative for their signature, upload the signed IP to the Provider Portal, and attach any documentation with the IP submission.</p>
6	Why does DDD require the participant or guardian/legal representative to sign the IP before the CM reviews and approves it? Please explain why the process is this way. It seems to be more efficient if the CM reviews and approves first, followed by the provider asking for the participant or guardian/legal representative to sign the approved IP.	<p>**This response covers all similar questions asked during the training.**</p> <p>The ISP and the corresponding IP belong to the participant. The information about them should not be submitted or approved without their or their guardian/legal representative's agreement/signature. DDD encourages provider staff to attend the participant's ISP meetings and schedule meetings with the CM as needed to coordinate services proactively. For example, if the provider is unsure what to include in the method and measurements sections, the provider should contact the CM ahead of sending the IP to the participant or guardian/legal representative. Routine communication with the participants CM and circle of support can help to avoid revisions to the IP.</p>
7	Please clarify for IP, providers request the participant or guardian/legal representative to sign during the drafting process and before submitting the draft IP to the CM for review/approval. If the CM does not approve the IP, the provider must revise the IP. This revision means that the provider will need to inform the participant or guardian/legal representative of the revised version and request the participant and guardian/legal representative to sign again before resubmitting to the CM for review/approval. Is this correct?	<p>**This response covers all similar questions asked during the training.**</p> <p>Correct. The IP needs to be signed by the participant or guardian/legal representative before the provider submits the IP to the CM. If there are revisions, the IP need to be signed by the participant or guardian/legal representative again.</p>

8	Will providers be able to print the IP to obtain the participant's or guardian/legal representative's signature?	Yes, providers will have the option to print IPs from the Provider Portal to distribute for participant or guardian/legal representative review and signature.
9	Providers need to distribute the report to the participant and guardian. Is there a print option for the IP and QR after they are approved by the CM?	**This response covers all similar questions asked during the training.** Similar to the AER printout report, there will be a option in the Provider Portal for the IP and QR for providers to download and print.
10	Please clarify for the QR - is it per ISP year or calendar year quarter?	Quarterly reports should be completed based on the participant's plan year, not calendar year.
11	For the QR, are the due dates aligned with the ISP year for ISPs held on or after July 1, 2026?	**This response covers all similar questions asked during the training.** For QR, the due date is 30 days after the end of the quarter. There is a grid on the main homepage of the Provider Portal showing providers which participants have a QR that is coming up due soon and the QR which are overdue.
12	Should providers only train employees on the finalized IP instead of training them on the version of the IP that may be changed?	Providers should train DSPs on the IP that is submitted to the CM. Providers should leave ISP meetings feeling confident in completing the IP and should contact the CM if they have any questions when developing the IP.
13	What happens when there are multiple DSPs assigned to a single participant? How do providers document which DSPs were trained on the IP? What if there are multiple DSPs and they were trained on different days. Can we add that info into the Provider Portal?	**This response covers all similar questions asked during the training.** For each DSP assigned to a participant, providers will enter dates that each DSP was trained.
14	Will providers need to upload a signature sheet into the Provider Portal that documents the DSPs who were trained?	No, in the Provider Portal, providers would indicate the date that each DSP was trained. If a DSP started work mid-ISP year, the provider can upload that information into the Provider Portal in the same format that providers are using now (e.g., on a separate signature sheet) to indicate the DSP was trained, what the training was, and the date/signature.
15	Does DDD provide a signature sheet template for the participant or guardian/legal representative to sign or does the provider create their own?	Providers may generate their own signature sheet. DDD does not have a template for this sheet.

16	If the participant has T&C services in their ISP, does the Service Supervisor response in the Provider Portal or does the T&C provider respond in the Provider Portal?	Unsure of what this question is asking. Please clarify and re-submit your question to DOH.dddtraining@doh.hawaii.gov
17	For clarification, are the methods and strategies the same as plans and approaches?	Term previously used >> Term now used Objectives >> Outcomes Outcomes >> Action steps (each action step has a method and measurement) Plans and approaches >> Methods and strategies
18	Is there an area within the Provider Portal to assign "customers" (participants) to their assigned Service Supervisor?	This function is handled from INSPIRE. Providers do not have access to INSPIRE. The provider should communicate with the CM on which Service Supervisor is assigned to each "customer" (participant).
19	Is the risk mitigation section the same as risk and safety?	For IP and QR risk mitigation, the provider will describe the risks that are being addressed specifically for the outcome.
20	What warrants a non-approval of an IP or QR? How can providers avoid non-approvals from CMs?	Non-approval of the IP and QR occur on a case-by-case basis and specific situations based on the ISP and the IP and QR content. You can use the tool tips and manual for guidance. CMs are going to be reviewing each IP and QR for missing information, completeness, relevance to the ISP, updated information, etc.
21	Where do we find the "look up records" option in the Provider Portal?	To find the "look up" option, provider staff would go to the customer tab, then search for the participant you're looking for to view the status of the IP and QR.
22	What kind of data does DDD want providers to upload? For example, three months of "daily" data for each goal? Three months of data "average" for each goal? Average per plans and approaches "step"? Average for "entirety"?	Data would not change from what providers are typically submitting to the CM now. The timeframe includes three months of data to cover the QR period.
23	What is an example of data that needs to be collected? Is this everyday data?	Yes, this is the same data currently being collected. Please upload the data as an attachment when submitting into the Provider Portal.
24	Can providers upload the QR which includes data information?	Yes, supporting documentation may be uploaded via the Provider Portal under the QR. Please use the correct file naming convention for each file that is uploaded.
25	Is there a folder in the Provider Portal to upload the provider nursing assessment?	Yes, there is a IP folder and a QR folder where the provider will upload the nursing assessment.

26	Do RNs need to complete the nurse QR in the Provider Portal?	<p>**This response covers all similar questions asked during the training.**</p> <p>Yes, for ISP meetings held on or after July 1, 2026, the IP and QR, including the nurse QR, are completed in the Provider Portal.</p>
27	For nurse delegated tasks, are there separate sections in the Provider Portal to upload the skills checklist and care plans?	Yes, there are folders in the Provider Portal for uploading supporting documentation when submitting the IP and QR. Please use the correct file naming convention for each file that is uploaded.
28	Will providers submit the nursing QR in the Provider Portal or does this narrative specific to nursing need to be combined with the Service Supervisor's QR?	At this time nurses will not be entering their own quarterly report in the Provider Portal. Nurses should provide the service supervisor with the required information to add into the quarterly report for the service that nursing is provided during.
29	Are Service Supervisors required to submit monthly reports also?	No, there are no monthly reports.
30	Currently, Service Supervisors have Provider Portal access to all participants assigned to the provider. Will this continue to be the case after July 1st? This full-access helps with staff coverage.	Yes.
31	Our agency employes QR writers. Will they no longer write QRs? Will PCs be doing it now? Will the Service Supervisor be required to do the QR? Currently, our PC or Service Supervisor reads and approves the QR after the writer completes it.	<p>**This response covers all similar questions asked during the training.**</p> <p>We are unsure what the role of the QR writer is. It is not a standard practice for agencies to employ "QR writers" separate from agency staff who are interacting, observing and gaining first-hand experience with the participant. That said, this question is not applicable to today's training. Your agency needs to determine the operational process for its staff.</p>
32	We need full copies of the ISP for fiscal, state and internal surveys. Will CMs continue to send providers a copy of the approved ISP or will providers only be accessing the finalized/approved ISP through the Provider Portal?	Yes, the ISP is "read only" for providers. The CM is responsible for distributing copies of the ISP to the participant, guardian/legal representative and the providers.
33	Does the provider receive notification of the approved IP via email or does the provider need to revisit the portal to check the approval status?	The provider will receive notification in their email when the participant's IP is approved.
34	If the IP is not approved in time for the start of the annual plan year, what happens to the service? Does it mean that the participant's services are paused?	Case managers need to approve the IP within 7 days. If for some reason the IP is not approved timely, and services are supposed to begin, please contact the case manager to inquire about the status of

		the IP. If your concerns are not resolved, please contact the appropriate unit supervisor.
35	Should the CM not meet their deadlines, and the agency is unable to get a response from the CM, the agency is "dinged" for their delay. What is the consequence is the CM does not meet their deadlines? There have been CMs that we chase for documents. Who do we contact regarding this issue.	If you are having trouble obtaining the ISP from the CM, please contact the CM first. If no response in a reasonable period of time, please contact the CMs Unit to speak with the Unit Supervisor. If you're unable to reach anyone (CM or Unit Supervisor), please contact the Training Unit via email at doh.dddtraining@doh.hawaii.gov or phone at (808) 453-6035 and we will help to get you in touch and receive the documents needed. Please note: The provider's timeline starts when the CM populates the GOARs which triggers the Provider Portal to notify the provider.
36	Has DDD considered pushing back the rollout of all these updates to August when providers still have pending trainings scheduled in July?	<p>DDD is moving forward with the July 1st implementation of the IP and QR submitted in the Provider Portal for ISP meetings held on or after July 1st.</p> <ul style="list-style-type: none"> • We know this is a big change for providers and CMs and we are wanting to help make sure that the transition is as smooth as possible. The instruction manual, FAQs, recordings and handouts will be available for providers to use as guidance and to train staff. • DDD will host office hours in July for providers to talk more specifically about parts of the process that they are wanting to clarify or need assistance with understanding. • At this time, the one training scheduled on July 28, 2026 is not for IP and QR. It is a training that covers the provider monitoring process.
37	Will Provider Portal office hours be done via Zoom as a "town hall" meeting like in the past?	Yes, Provider Portal office hours will be scheduled virtually, similar to previous office hours. Providers are welcome to join to ask questions, describe scenarios, or ask about specific content, or join to listen in on the discussion. We will announce the date/time for office hours via email to providers.
38	For each section of the IP and QR that the provider types into, how many characters (including spaces) are going to be allowed?	Currently the max limit is 2,000 characters. We are looking to expand the max limit.

39	Where can we find the Request User Account or Change Form?	The form is available on the DDD website: https://health.hawaii.gov/ddd/files/2021/12/CRB-FY2021-DDD-Provider-Portal-User-Account-Form.pdf
40	Comment: FYI the ISP format in the Provider Portal is hard to read and follow given the multiple boxes the information is provided in and doesn't show the complete ISP information that we usually get when we receive the hard copy from the CM.	We will review the ISP format in the Provider Portal. Providers receive ISP information when the CM populates the goals, outcomes, action steps, and risks (GOARs) in the ISP.
41	Will there be a hotline number to call in case there are issues with the IP and QR in the Provider Portal?	To report issues with the IP and QR in the Provider Portal please email us at doh.dddproviderhelpdesk@doh.hawaii.gov or call (808) 733-9309 with specific details describing the issue you're experiencing (e.g., day, time, page you're on, what you are doing when the issue occurs, etc.).
42	If providers happen to experience technical issues with the Provider Portal, who do they contact?	For technical assistance with the Provider Portal, please contact the DDD Provider Help Desk via email: doh.dddtraining@doh.hawaii.gov
43	Are there plans to update the Provider Portal? It has been very slow to load pages. For example, when navigating back and forth between pages, there is a lag/significant wait time for the page to load. Additionally, there have been latency issues as recent as yesterday, all day including the late afternoon around 5 p.m.	We have heard about latency issues. You may email us at doh.dddproviderhelpdesk@doh.hawaii.gov or call (808) 733-9309 to report Provider Portal technical issues.
44	What happens when the participant is not linked to the assigned agency staff for the QR?	Please reach out to the CM. The CM will need to link the participant to the provider and the assigned provider staff.
45	For the annual program audit, is the audit paperless via INSPIRE review or do providers need to fax requested documentation?	Please join the July 2026 training for provider monitoring which will cover the program monitoring process.
46	What happens to records prior to July 1st? Will providers still need to provide the information to the monitors?	Please join the July 2026 training for provider monitoring which will cover the program monitoring process.

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