

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

Hawaii State Department of Health, Developmental Disabilities Division  
 Tuesday, 6/16/26, 10:00 a.m. to 12:00 p.m. via Zoom

#	Question/Comment	Answer/Response
1	Who is expected to use the portal?	The Provider Portal will mostly be used by provider agency staff. It is the Service Supervisor who completes the IP and QR.
2	When do you expect providers to implement this new learning process with the Provider Portal updates?	Providers will implement this new IP and QR learning process for ISP meetings that occur on July 1, 2026 and forward.
3	When can we expect access to the Provider Portal?	Service Supervisors should already have access to the Provider Portal. If you are a Service Supervisor, and do not have access to the Provider Portal, please contact your agency administrator to request access from DDD.
4	Are providers to use the current format for QRs until the participant has their ISP on or after July 1st?	Yes, providers will continue to use the current IP and QR format for ISPs that occurred prior to July 1, 2026. For ISP meetings held on or after July 1, 2026, providers will upload the IP and QR into the Provider Portal.
5	Are the ISP/IPs prior to July 1, 2026 being inputted into the Provider Portal or are providers using hard copies of the documentation prior to July 1, 2026?	The IP will not be done in the Provider Portal prior to July 1, 2026. Providers can continue using what they currently do for IPs until July 1, 2026.
6	Is this correct - QR will no longer be faxed or emailed to CMs. Instead, the CM will automatically receive the QR via the Provider Portal.	Yes, this is correct.
7	Would submitting the IP, staff training, and QR via the Provider Portal replace the provider IP, staff training, and QR documents that are submitted for audits?	Yes, submitting the IP, staff training, and QR via the Provider Portal, is correct for ISP meetings held on or after July 1st.
8	Will the Provider Portal give providers a reminder when the IP is due?	At this time, notification of an IP being ready for the provider to draft will only notify the provider once the CM has entered the goals, outcomes, action steps and risks (GOARs). CMs are required to do this step within seven working days of the ISP meeting so providers can anticipate when the IP will be ready for drafting.

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9	Will there be an automatic notification in the Provider Portal or from the DDD office to the provider that a document is available or completed in the Provider Portal? Or, does the provider have to check the Provider Portal daily so that the deadline can be followed?	Regarding when a provider will be notified that the CM has entered the goals, outcomes, action steps and risks (GOARs), the CM is required to do this step within seven days of the ISP meeting so providers can anticipate when the IP will be ready for drafting. Right now, the provider would need to log into the Provider Portal to view the IPs that are ready for drafting.
10	Do participants have an opportunity to approve/sign off on the IP? Is the IP included with the ISP when the CM sends it out, or does the provider need to distribute it to the participant?	Yes, participants or guardians/legal representatives should sign the IP after the provider has completed it and prior to sending it to the CM for review. The provider would distribute the IP to the participant.
11	If the participant or guardian/legal representative signs off on the original IP and then submits it to the CM for review, who then makes changes/corrections? Does the revised IP need to be signed again by the participant or guardian/legal representative?	Yes, the provider will need to obtain an updated signature from the participant or guardian/legal representative when changes/corrections are made to the IP.
12	Regarding the quality check before submission, we have an internal process where our QRs are reviewed and approved by a supervisor prior to being sent to the CM. Will this be something we can continue? Maybe in a draft mode, at least?	Providers can view IPs and QRs in draft form.
13	Will the provider be able to print the IP and QR from the Provider Portal?	Printing is available for the IP and QR, but providers will not be required to print or scan for provider monitoring. Monitors will be able to view the completed IP and QR in the Provider Portal.
14	When trying to access the ISP on the Provider Portal, I could not download it. When I tried to print it, it would not print multiple pages. Will this issue be resolved?	Providers are able to download the IP and QR, but not the ISP. The CM will give a copy of the ISP to the provider, and any updates to the ISP will also be given by the CM to the provider. This is because if there are any changes or updates to the ISP, the CM may need to combine the ISP report with an updated page. We always keep the original ISP along with any pages that are edited. We want the CM to be the point of contact for providers to receive the ISP, ensure it is correct, and provide the most recent copy with any and all updates.

15	Are providers expected to train DSPs about IPs that the CM has not approved yet? If the CM requests revisions, then would the provider have to retrain the DSP? This seems counter-productive for providers.	The goal is to work through any issues in the IP quickly. We believe with good ISP meetings and with the new templates, many IPs will be accepted and it will not be as common that an IP would be rejected. If the IP is rejected, the goal will be to resolve the issue right away so that the IP can be finalized and all staff trained without a negative impact on the provider's time or resources.
16	Is there a field where providers indicate training of staff if the staff changes during the service plan year? For example, a DSP resigns and another DSP is hired halfway through the service plan year.	There is not a separate field to indicate training of a DSP has been completed on the IP. If a new DSP is trained on an IP mid-plan year, the provider can upload evidence of training to the Provider Portal.
17	Is the IP updated each time a method is updated?	Yes, if a method is updated, the IP should also be updated.
18	Will providers have to use the DDD methods template in the Provider Portal? Will the provider be able to print and use the method cards for office use and audit?	Providers will be required to complete the IP and QR in the Provider Portal including completing the templates and required fields. The IPs will be available for printing.
19	What would be the measurement for IPs for participants who are only for "assistance" (e.g., participants who are non-verbal, non-ambulatory, etc.)?	I would first say that many participants who are non-verbal or non-ambulatory can have full engagement and habilitative goals. I think you are probably referring to participants who have very little habilitative abilities. You start to shift the focus from "task completion" to "quality of life," which can still have measurable goals with habilitative aspects. You might focus on making choices in whatever way they can, even if it's eye gaze, gestures, facial expressions. Help them engage in their community because the participant has limited independent functioning, measurable criteria many focus on the exact amount of support, prompting or environmental adaptations.
20	Please describe under "Engagement" what do you mean by, "ability to complete reflection with support"?	This means the person is able to share their experience, what they liked or didn't like, or how comfortable they felt, when staff give them support.
21	Will providers be able to submit nursing QR in the Provider Portal as well or do narrative specific to nursing be combined with the Service Supervisor's QR?	Quarterly, or more frequent, visits must be documented, including the date, start and end time, who was present and specific nurse delegated tasks observed. This information must be included in the provider's QR for each service or as a separate nursing report.
22	Are Service Supervisory visits going away? It seems most of the information that would have been documented in the visits now needs to be incorporated into the QR.	Service Supervisor visits are still required.

23	Although we've always been progress focused, moving forward, will continued progress impact the hours of services participants qualify for?	Hours of services participants qualify for is based on the participant's budget.
24	With the insane caseloads some CMs have, when they are delayed with the timeline for a participant's action plan to be in the Provider Portal or get to approving the IP when the provider submits it, what will happen if the provider is waiting for the CM to give an answer when documents are delayed? Who does the provider contact?	For any issues that cannot be resolved directly with the CM, contact the appropriate CM Unit Supervisor.
25	How will waiting for CM approval on the IP and QR affect the providers' timeline to submit the IP and QR to the participants and guardian/legal representative?	The signature will be obtained on the IP prior to submission to the CM. CMs are required to approve the IP or request feedback from the provider on the IP within seven working days.
26	What is the consequence of the ISP not being available from the CM or the approval of the ISP not being sent?	The provider has 30 days from the receipt of the goals, outcomes, action steps and risks (GOARs) details, to submit the IP. The provider timeline does not start until the CM has entered those details.
27	Is the QR review period for the outcome of the quarter or for the plan year?	The QR align with the participant's plan year and each cover three month intervals.
28	In the QR, is there a field for quantitative data?	Quantitative data will be uploaded as an attachment.
29	Will the QRs be distributed to the participants? If so, by the provider or by the CM?	The QR should be distributed by the provider, as requested by the participant or guardian/legal representative.
30	Will these tasks be billable services?	Completing the IP and QR are not billable services.
31	Will the provider no longer need to secure signatures on the IP if the CM is securing signatures from the participant and guardian/legal representative for all services? Will the CM be able to secure such signatures within seven days and in the Provider Portal?	The provider is still required to obtain signatures from the participant or guardian/legal representative for each IP.
32	If the IP is completed on a template in the Provider Portal by the Service Supervisor, how do we get a signature from the participant or guardian/legal representative and print it to use as a training tool? Will we need to complete our own IP and then transfer it into the Provider Portal so the participant or guardian/legal representative can sign a hard copy?	The signature will be obtained the same way they are now. The provider will obtain the participant's signature on a provider created signature sheet and now upload to the Provider Portal.

33	Examples in the presentation slides say "Keoni will..." which are not person-centered.	Thank you for pointing this out. ISPs should be written from the participant's perspective. The examples in the presentation will be revised before posting to the DDD website so that the ISP information aligns with this ISP requirement for first person language.
34	Will sample IPs that are acceptable and meet these requirements be available for us to see? It is still not clear exactly what you're looking for in the IPs and what format you'd like to see the information in.	We do not have sample IPs, but we have an instruction manual that will be available for providers to refer to. The manual will be available to providers soon. The Provider Portal will also have tool tips for each section of the IP and QR to help prompt and guide providers as they are completing them via the Provider Portal.
35	Will all of these changes keep the language in the ISP, IP and QR written in the same manner that participants understand? Or, is this requirement changing?	Documents should be written in plain language and if participants need additional supports to understand what is written, they can request additional supports.
36	Will there be an updated copy of the IP format?	The IP template will be completed in the Provider Portal by the provider staff entering information into each field.
37	Can you provide an "upload attachment" in the portal so that we do not have to "reinvent the wheel"?	The IP and QR will be completed in the Provider Portal by completed each field in the portal before submitting.
38	Can you please post examples from the Activity slides so we can see the input from others?	Yes, a separate handout with examples shared by other attendees will be available on the DDD website along with the recording and slides handout.
39	Are more training sessions available to providers to prepare for the IP and QR in the Provider Portal?	Training on how to enter IPs and QRs into the Provider Portal occurred on 6/23/26. There will be office hours available for providers to ask questions on the IP and QR in July and August.
40	Can providers get a copy of the IP and QR manual?	Yes, the IP and QR manual will be posted online soon.
41	Would providers use the same report template for T&C QR? Does it need to be built in as one report or can it continue to be submitted separately?	Not sure I understand the question. Please clarify and email your question to <a href="mailto:doh.dddtraining@doh.hawaii.gov">doh.dddtraining@doh.hawaii.gov</a>
42	For the IP, the provider's 30-day deadline starts when the CM finishes their entry, but because there is a seven day window, it affects the actual provider deadline. It would be nice to have an automatic notification so provider can track the time accurately.	This comment will be referred back to the DDD Community Resource Branch.
43	Comment: In my opinion, methods are a component of the plan. When a component is changed, that is the same as saying the IP has been updated.	This comment will be referred back to the DDD Community Resource Branch.

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44	Wouldn't it be more timely if the IP is approved by the CM before the participant or guardian/legal representative sign it?	This comment will be referred back to the DDD Community Resource Branch.
47	Comment: Regarding the "assistance" question, expect 100% as assistance should always be provided.	This comment will be referred back to the DDD Community Resource Branch.
46	Comment: If it were me, I would measure the duration of time the assistance is needed to complete the task, as well as count for how many times throughout the service or each shift this specific tasks of assistance is required.	This comment will be referred back to the DDD Community Resource Branch.
45	Comment: Streamlining the process by having the CM approve the IP first allows for any necessary revisions to be made before it is presented to the participant and guardian/legal representative, reducing the need for repeated sign-offs. Fewer delays if the participant and guardian/legal representative signs off before CM approval and the CM then requires changes, the participant would need to review and sign again, adding extra steps and potential delays. Clear accountability for the process because only finalized, CM-approved documents are presented to participants, minimizing confusion or back-and-forth. In summary, having the CM review and approve the IP before the participant and guardian/legal guardian signs off helps ensure that the version the participant sees is already finalized, which saves time and reduces administrative effort.	This comment will be referred back to the DDD Community Resource Branch.
48	How will providers report on additional required information in the QR not covered in these fields? For example, information regarding profiles and benefits counseling for DCP, job placement info for IES, RN training and reviews for nursing supports, documentation of onsite supervision visits: Will providers have to make sure it's included in the body of the progress summary? Current QR templates are useful in ensuring we're reporting on all required info per the standards.	This comment will be referred back to the DDD Community Resource Branch.
49	Comment: Implementing the IP and QR in the Provider Portal on July 1, 2026 is an unrealistic start time. DDD only started training for this now and the 2nd training is on June 23rd. DDD is only giving provider agencies less than five business days to train staff on how to use the Provider Portal and new format before July 1, 2026.	This comment will be referred back to the DDD Community Resource Branch.

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50 | The Provider Portal needs updating. It takes a while to start sending the IP and QRs. The system pauses/freezes/crashes.

This comment will be referred back to the DDD IT.