

# Informational Memo

## Search functionality of the *Manage Plan-Individual Search* screen in HCSIS

**BAS Communication Number: BAW17-34**

**AUDIENCE:** Adult Autism Waiver (AAW) Supports Coordinators (SCs) and SC Supervisors

**PURPOSE:** To announce updates made to the search functionality of the *Manage Plan-Individual Search* screen in HCSIS

### **BACKGROUND & DISCUSSION:**

Effective September 9, 2017, changes have been made to the search functionality of the *Manage Plan-Individual Search* screen in HCSIS. These changes now allow SCs and SC Supervisors to search for plans (within their scope or caseload) that are in a given status (Draft, Pending Review, Pending Approval, Approved).

This new functionality allows SCs to more easily manage their caseloads by pulling up all plans on their caseload within a given status, rather than having to search by each individual participant's plan. SC Supervisors can also utilize this new functionality to conduct a more collective review of the status of all plans within their agency.

SCs and SC Supervisors should review and utilize the attached Learning Management System (LMS) document which outlines the steps involved in searching for plans based upon plan status. The attached '[Tip Sheet: Search for Plans Based upon Plan Status](#)' can be found in the LMS under the 'BAS: Reference Materials' section.

*Attachment:*

*Tip Sheet: Search for Plans Based upon Plan Status*