

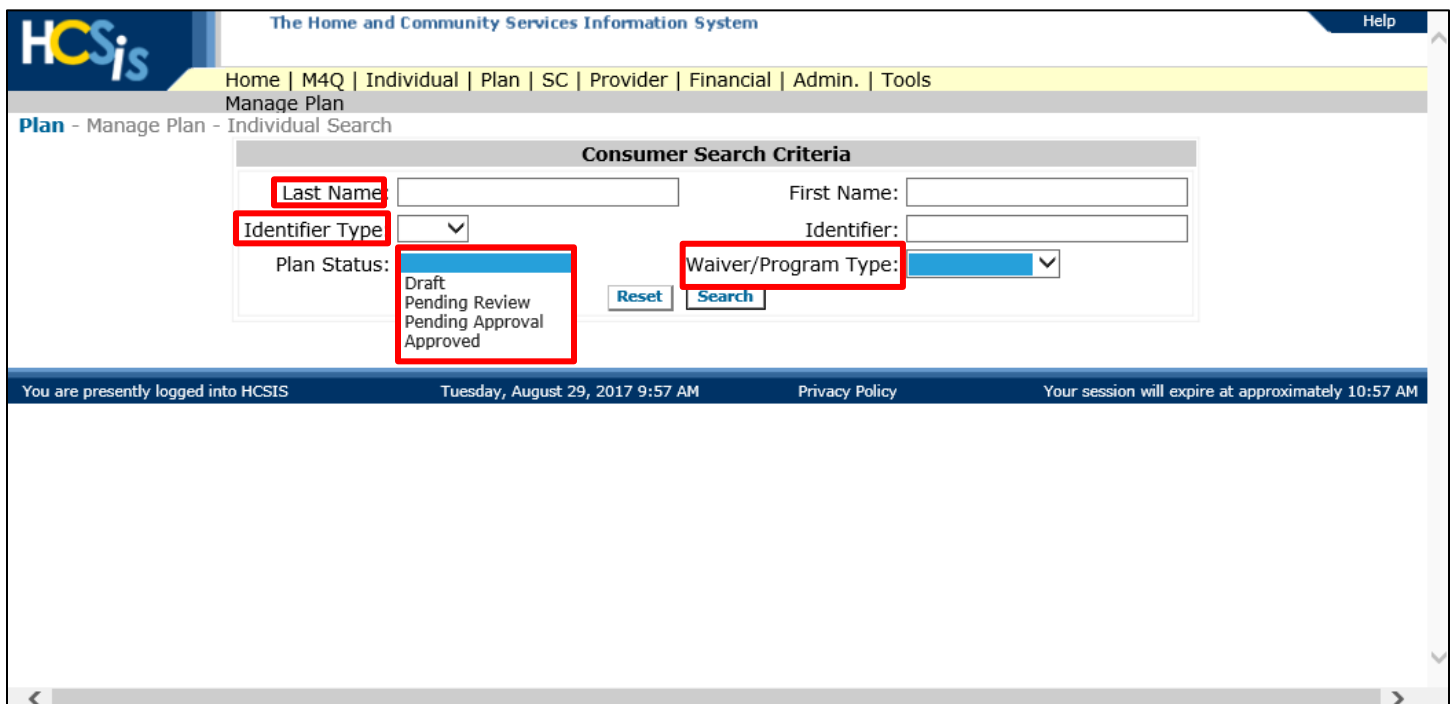
The Manage Plan - Individual Search screen allows BAS State Users (Regional Office and Clinical Representatives and Supervisors), BAS Supports Coordinators (SCs), and BAS SC Supervisors the ability to easily identify all plans that are in a given status (Draft, Pending Review, Pending Approval, Approved). Search results are displayed for only those plans that are within the user's scope or caseload.

The Manage Plan - Individual Search screen

The Manage Plan - Individual Search screen allows Program Representatives, SCs, SC Supervisors to search for plans (within their scope or caseload) that are in a given status. Users can move from one ISP to another based upon the search results containing all plans under a given status.

This new functionality allows SCs to more easily manage their caseloads by pulling up all plans on their caseload within a given status. This also allows SC Supervisors to perform a more collective review of the statuses of their SC's plans.

Navigate to: Plan > Manage Plan > Individual Search



Plan Status Drop-down Filter:

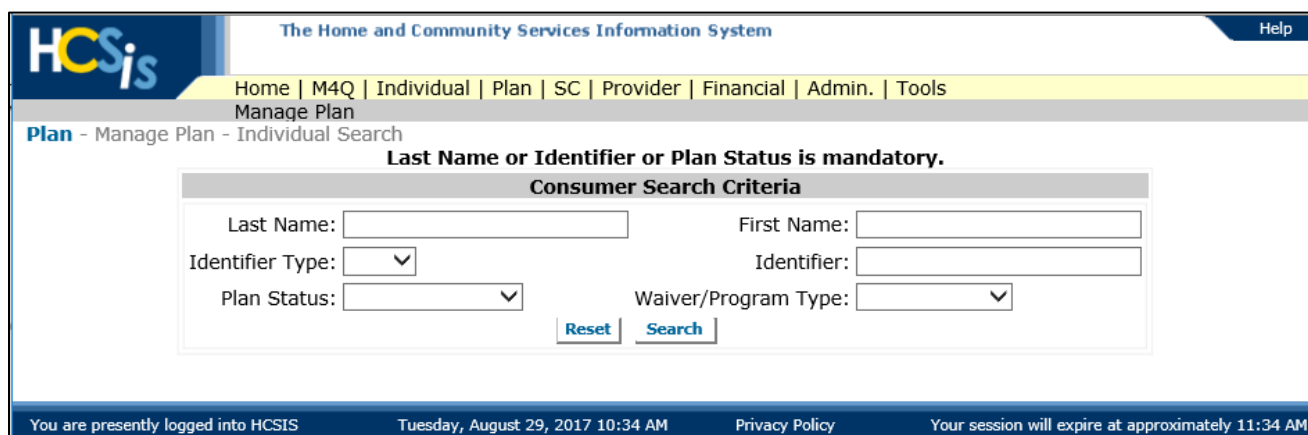
Users must provide either a Last Name or Identifier Type (Social Security Number (SSN), Base Service Unit (BSU), Master Client Index (MCI), or Medical Assistance (MA)) if they want to search for the status of a particular Participant's plan, or they can now select a Plan Status (Draft, Pending Review, Pending Approval, Approved) to search for all plans on their caseload in a given status. Only one Plan Status can be selected at a time.

Waiver/Program Type:

Once a Plan Status has been selected, users can choose to specify a Waiver/Program type (Adult Community Autism Program (ACAP) or Adult Autism Waiver (AAW)), although this is **not** a mandatory field.

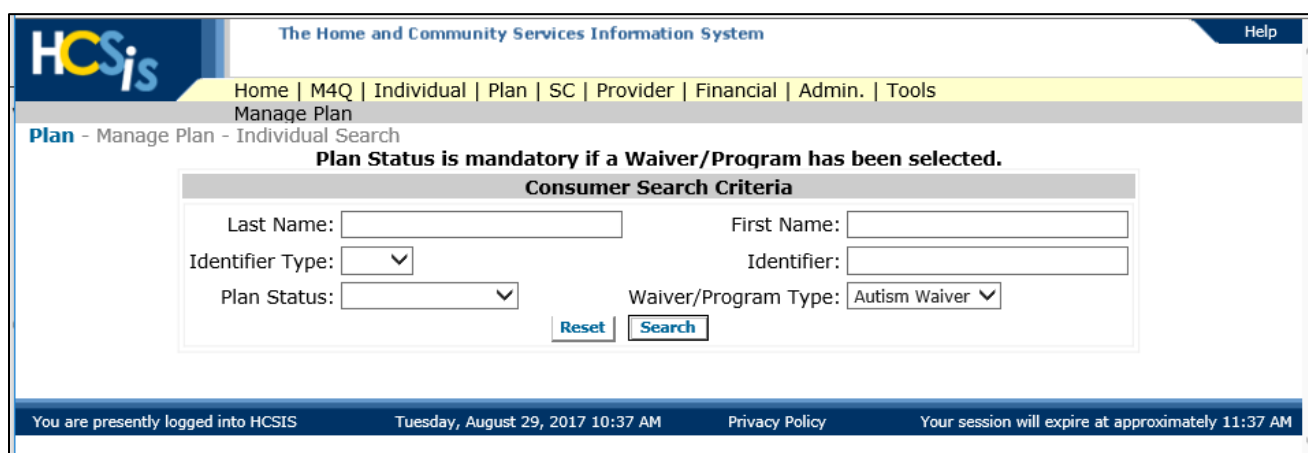
Validation Messages

If none of the minimum required search parameters are provided, HCSIS will issue the following message: ***Last Name or Identifier or Plan Status is mandatory.***



The screenshot shows the HCSIS web application interface. At the top, there is a navigation bar with the HCSIS logo and the text "The Home and Community Services Information System". Below this is a breadcrumb trail: "Home | M4Q | Individual | Plan | SC | Provider | Financial | Admin. | Tools". The main content area is titled "Manage Plan" and "Plan - Manage Plan - Individual Search". A validation message is displayed: "Last Name or Identifier or Plan Status is mandatory." Below this message is a "Consumer Search Criteria" form. The form contains four input fields: "Last Name:" (text box), "First Name:" (text box), "Identifier Type:" (dropdown menu), and "Identifier:" (text box). There are also two more fields: "Plan Status:" (dropdown menu) and "Waiver/Program Type:" (dropdown menu). At the bottom of the form are two buttons: "Reset" and "Search". The footer of the page contains the text: "You are presently logged into HCSIS", "Tuesday, August 29, 2017 10:34 AM", "Privacy Policy", and "Your session will expire at approximately 11:34 AM".

If a Waiver/Program Type is selected, but no Plan Status is selected, HCSIS will issue the following message: ***Plan Status is mandatory if a Waiver/Program has been selected.***



The screenshot shows the HCSIS web application interface. At the top, there is a navigation bar with the HCSIS logo and the text "The Home and Community Services Information System". Below this is a breadcrumb trail: "Home | M4Q | Individual | Plan | SC | Provider | Financial | Admin. | Tools". The main content area is titled "Manage Plan" and "Plan - Manage Plan - Individual Search". A validation message is displayed: "Plan Status is mandatory if a Waiver/Program has been selected." Below this message is a "Consumer Search Criteria" form. The form contains four input fields: "Last Name:" (text box), "First Name:" (text box), "Identifier Type:" (dropdown menu), and "Identifier:" (text box). There are also two more fields: "Plan Status:" (dropdown menu) and "Waiver/Program Type:" (dropdown menu). The "Waiver/Program Type:" dropdown menu is currently set to "Autism Waiver". At the bottom of the form are two buttons: "Reset" and "Search". The footer of the page contains the text: "You are presently logged into HCSIS", "Tuesday, August 29, 2017 10:37 AM", "Privacy Policy", and "Your session will expire at approximately 11:37 AM".

Search Results

If you have any questions or difficulty performing a step, please refer to the HCSIS [LMS](#) for additional training content.