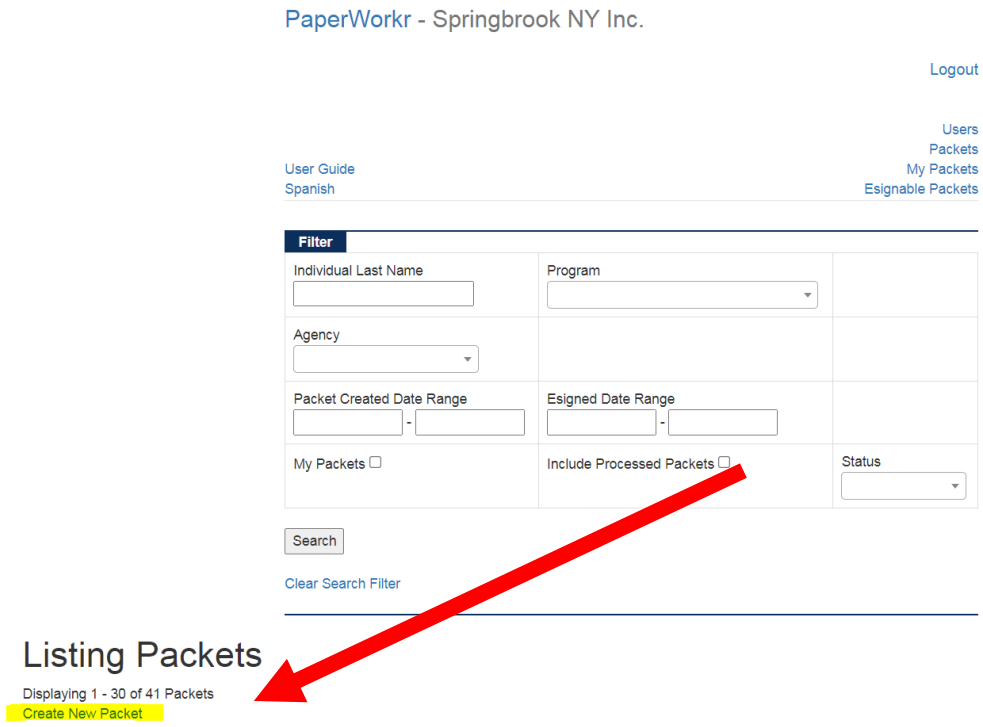
SELF-DIRECTED SERVICES | PAPERWORKR

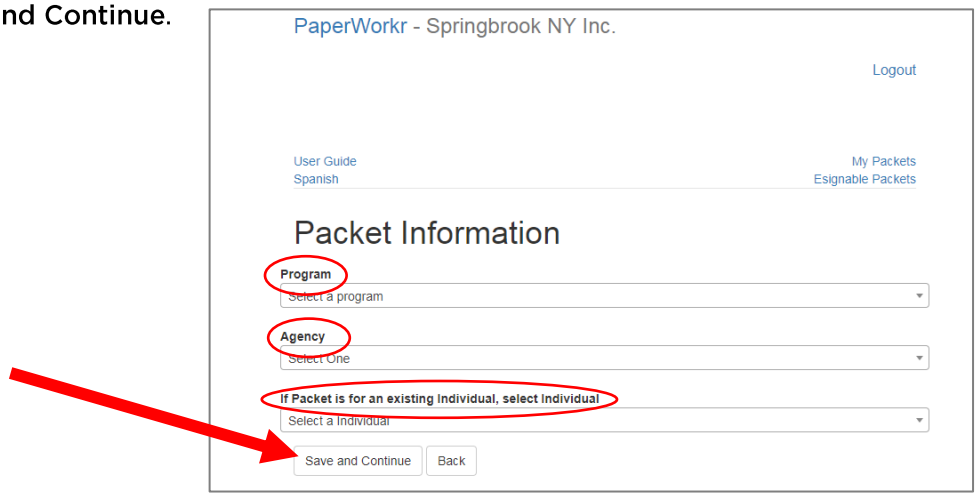
Paperworkr is web-based application designed to help Self-Directed Services electronically complete and sign Staff Action Plans and Annual Forms with the click of a button.

Sign In And Click Add Packet

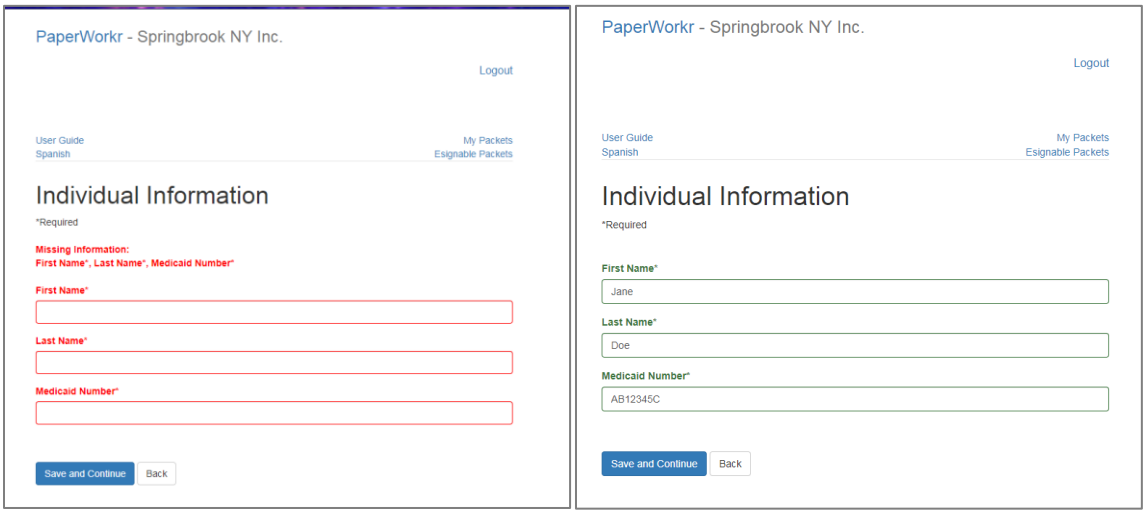
1. Select or copy and paste this URL into a browser address bar: https://springbrook-paperworkr.annkissamprojects.com/en
2. Log In
3. Select **Add Packet or Create New Packet**. This will allow you to start work on the Staff Action Plan.



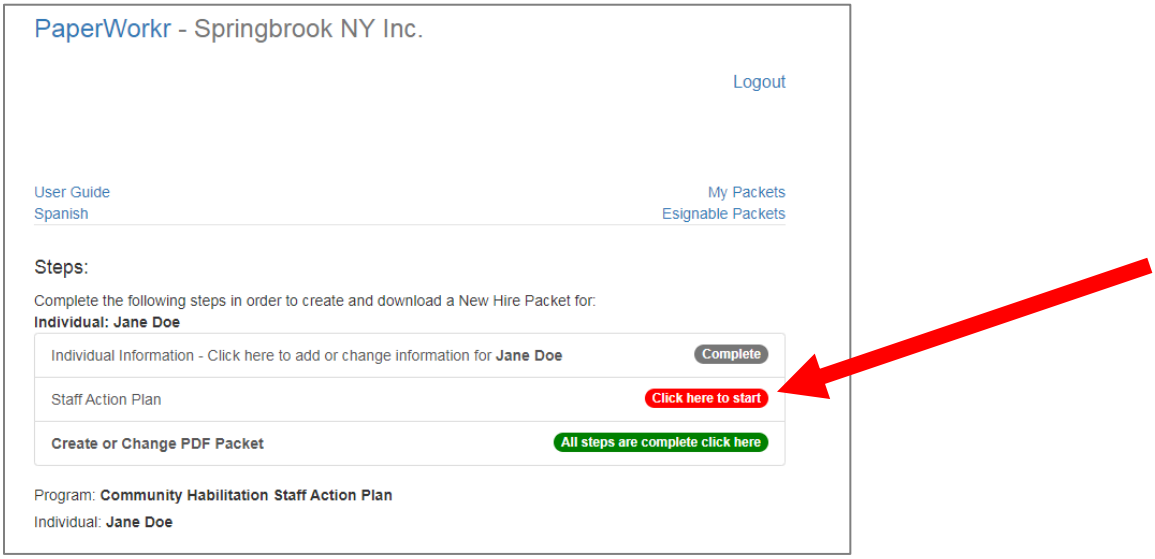
4. Using the drop-down menus, select:
   - **Program**: Community Habilitation or SEMP
   - Care Management **Agency**;
   - Select an **Individual**. If individual is new to the system, simply move to the next bullet.
   - Click **Save and Continue**.



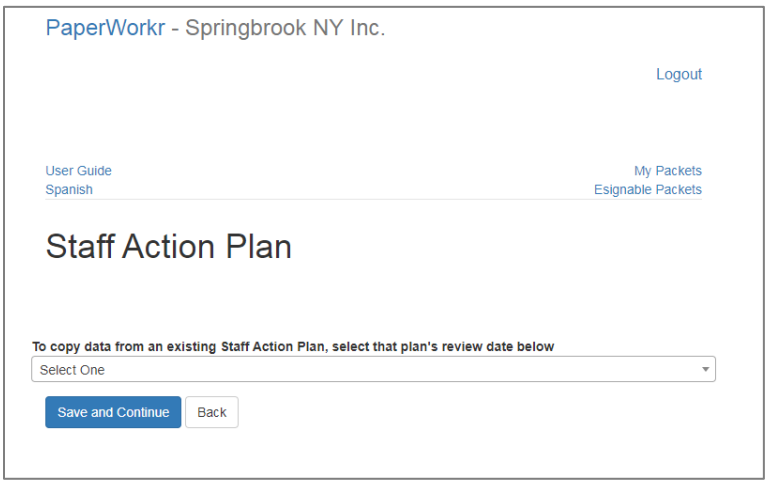
5. Click on missing information, to create the individual. Once entered click **Save and Continue**.



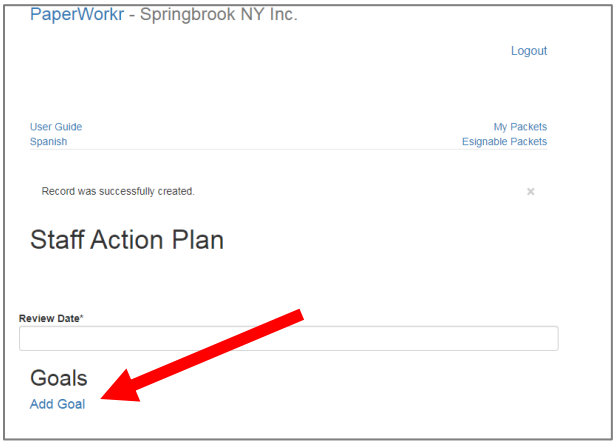
6. Select, **"Click here to start"** to begin the staff action plan.



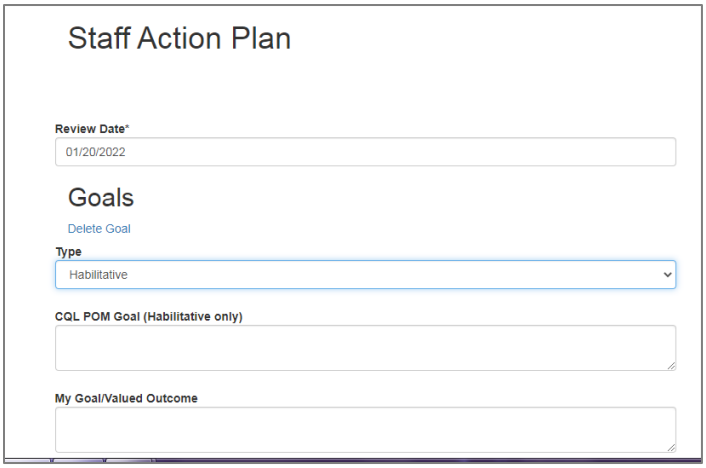
7. You will have the option to copy data from an existing staff action plan. If there is no data to copy, click save and continue.



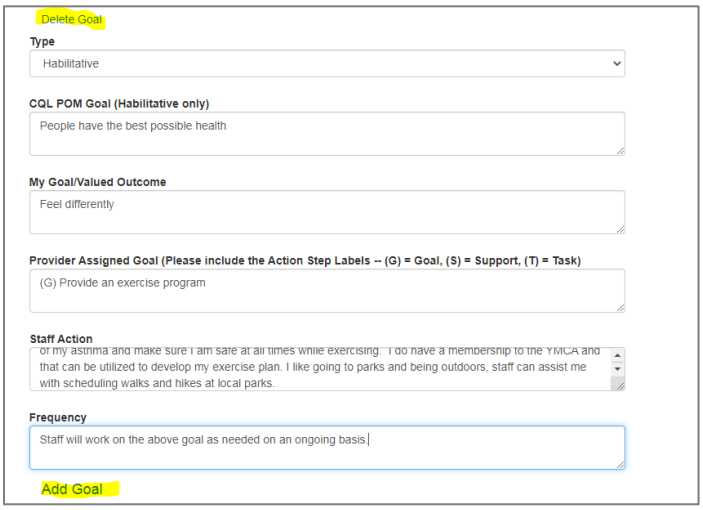
8. Add the review date and click add goal, selecting habilitative or safeguard.



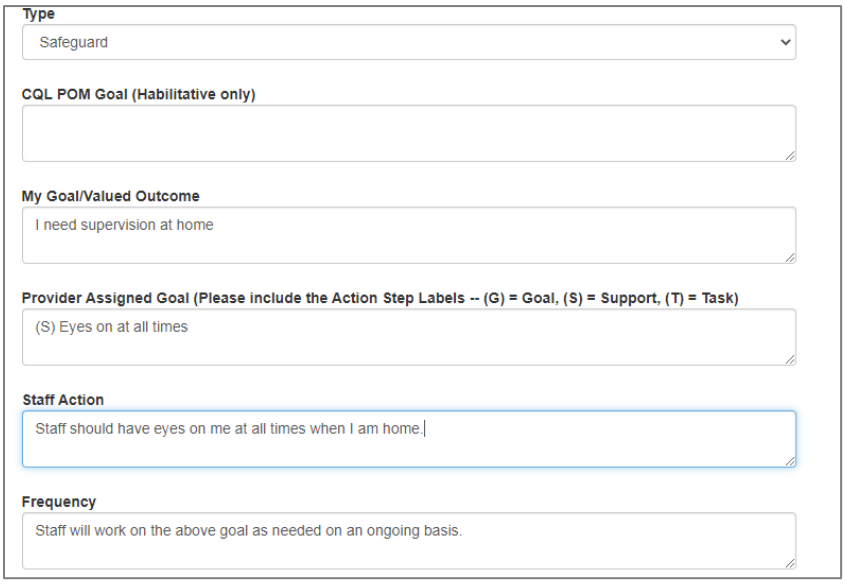
9. Add POMs information, using the exact wording from the Life Plan provided by the individual's Care Manager.



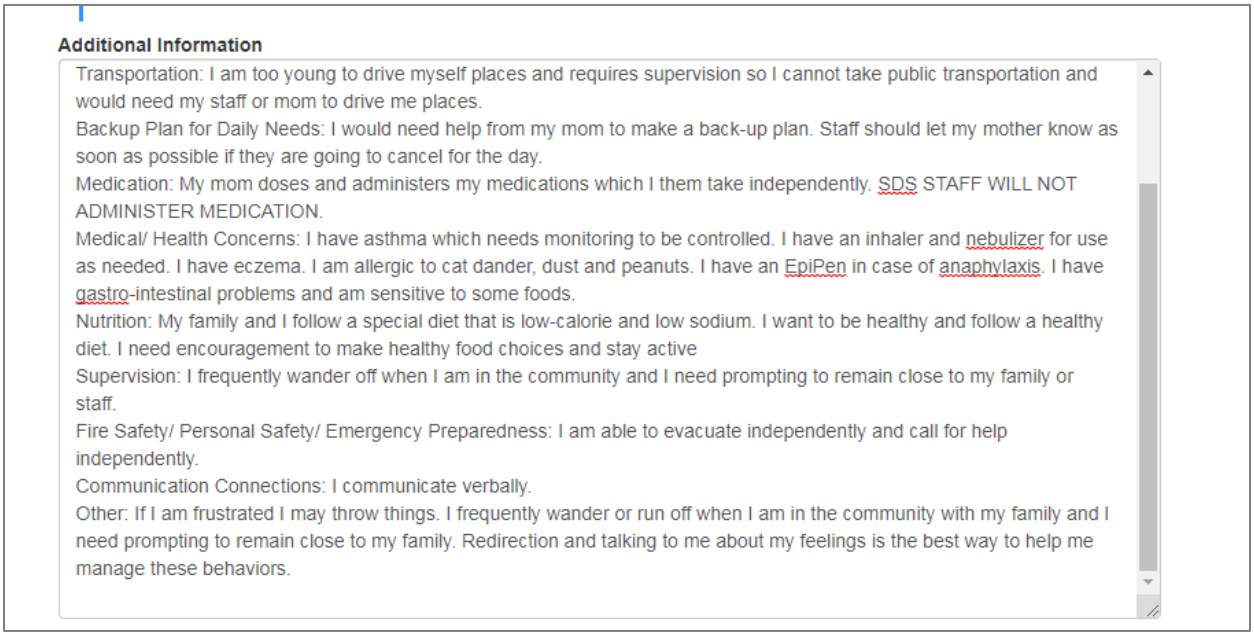
10. You will have the option to delete or add goals:



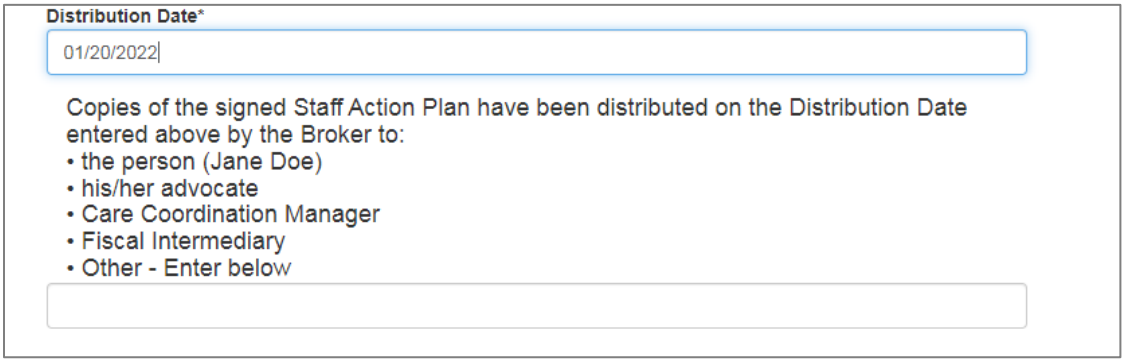
11. Enter **Safeguards,** leaving the CQL POM goal box blank (CQL POM information is habilitative only).



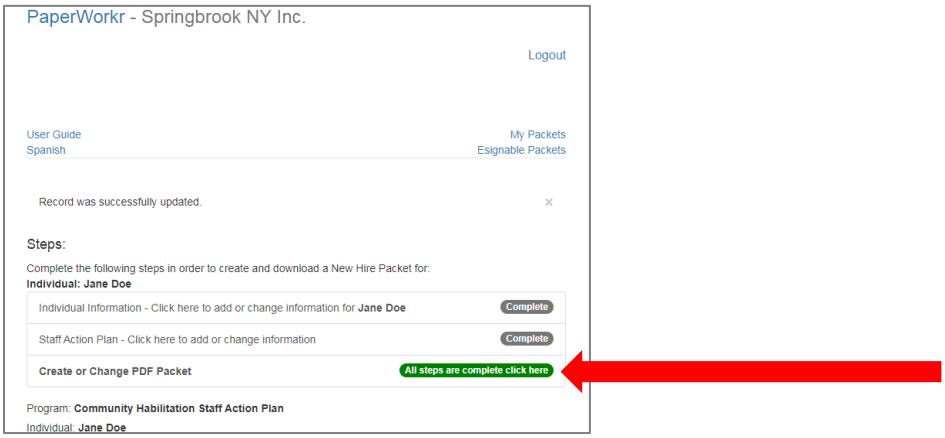
12. Add **Additional Information**: other safeguards and pertinent information



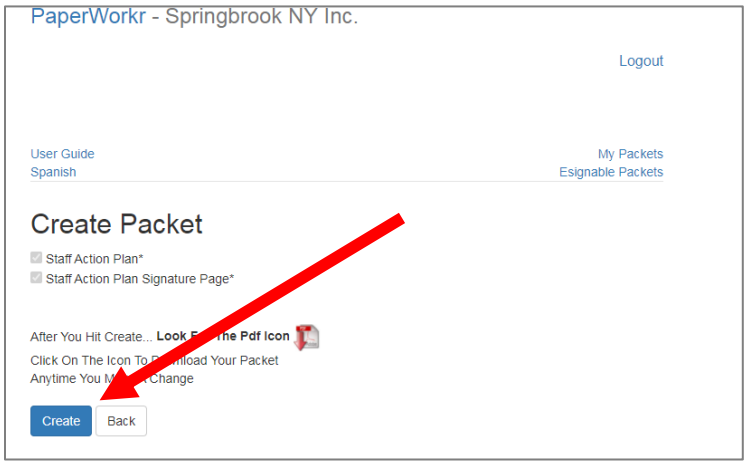
13. Add **distribution date.** The distribution date is required to save the staff action plan.

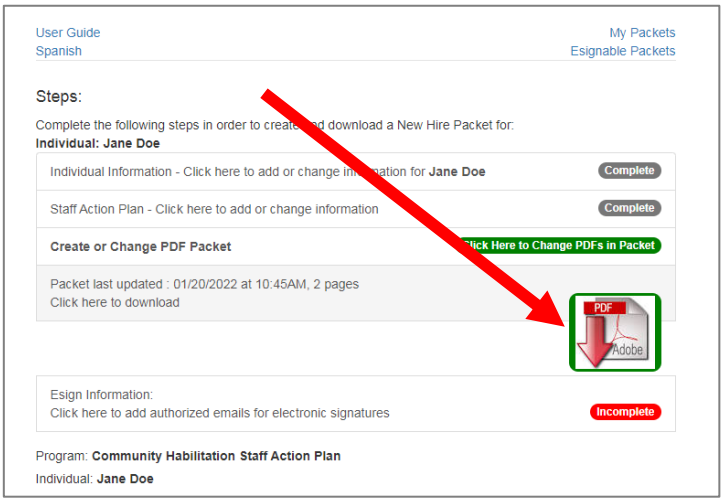


14. Click **Save and Continue**. Users can return to this section to make changes at any time.



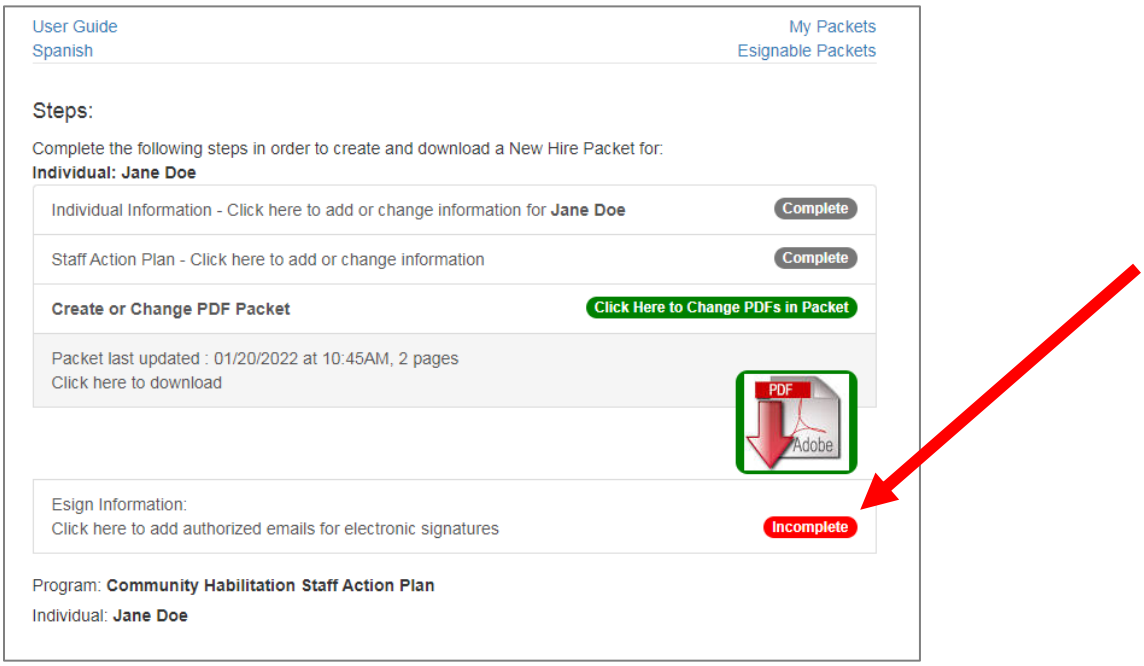
15. Click **Create** and look for the PDF icon – click on the icon to download and review the SAP.







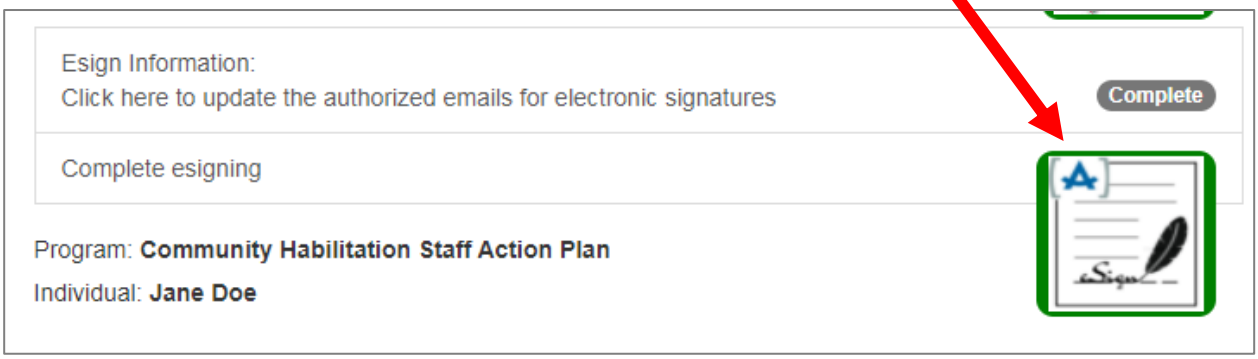
16. **Electronic signature**. Return to the packet page in Paperworkr, click **Incomplete** in the Esign Information section.



17. Click **Prepare Packet for E-signatures**. This sends an email to the address entered with a notification that there is a packet waiting for an electronic signature. The email will contain a link to the Electronic Signatures Site.



18. Click **Complete** in the Esign Information section.

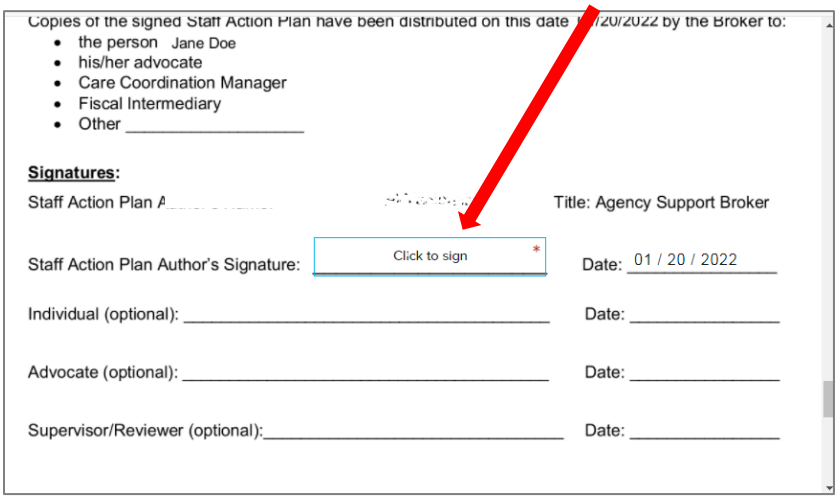


19. Click **I agree** and **Accept**.



20. The Staff Action Plan displays with the e-signatures available to sign.





21. Click the signature box, select one of three options to sign (drawn in, typed in, or upload a photo).



22. Click **Insert**.



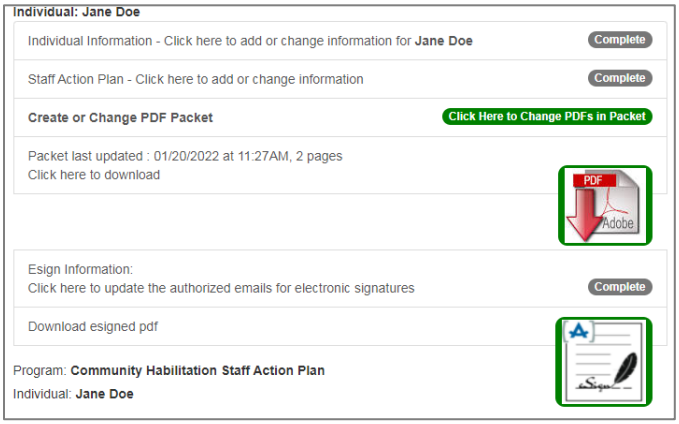
23. Click **Continue**.



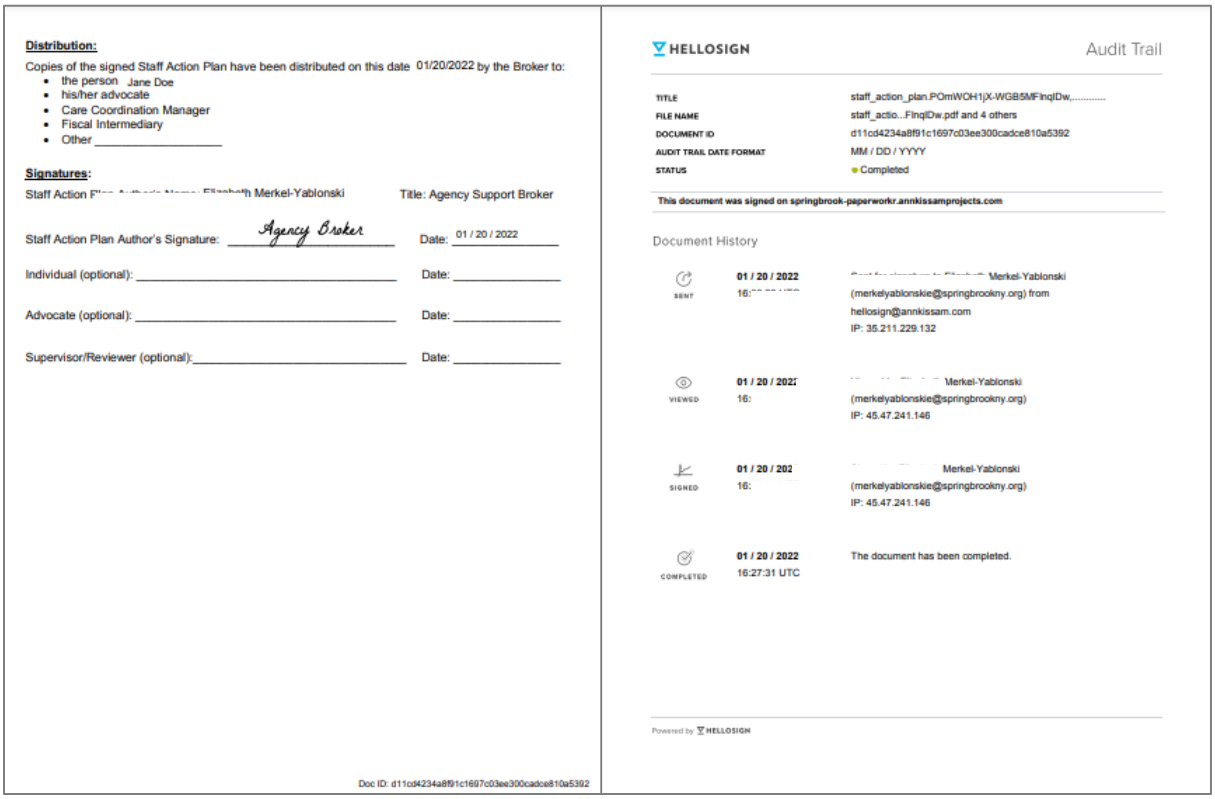
24. Click **I agree**.



25. The Staff Action Plan is ready to download and distribute.



26. Select the PDF download icon. The downloaded version will display your signature and an audit trail.



If you notice a goal missing it maybe because you did not select an option from the drop down.

Please direct any questions to selfdirection@springbrookny.org.