

WSC ADVISORY #2023-002
FISCAL YEAR PLAN CONTINUATION PROJECT
MANDATORY ACTION

EFFECTIVE DATE: MARCH 16, 2023

This advisory informs Waiver Support Coordinators (WSCs) and Consumer-Directed Care Plus (CDC+) Consultants about Plans and Planned Services for Fiscal Year 2023-24. The Agency for Persons with Disabilities (APD) is automating the continuation of Plans to Fiscal Year 2023-24 as much as possible to reduce the workload of WSCs, CDC+ Consultants, and APD staff.

APD iConnect will be offline for approximately 3 hours after 6:00pm on March 23, 2023. When APD iConnect comes back online, the consumer's Plan will be hidden from view and will remain hidden until approximately midday on **March 31, 2023**. When the Plans tab is displayed again, WSCs will be able to access authorizations that have been generated for the next fiscal year.

While the Plans tab is unavailable, WSCs and CDC+ Consultants **must** notify the Regional office of any client needs that require immediate attention.

The procedures below must be followed statewide. WSCs and CDC+ Consultants who need assistance should contact their APD Regional office.

I. APD Responsibilities

- A. APD will copy all Plans that are in **Approved, Pending, Draft, or No Review Required** status with an end date of June 30, 2023. These copied Plans will have a start date of July 1, 2023, and an end date of June 30, 2024. APD will not copy Plans in **Complete** status with an end date of June 30, 2023.
- B. If a Plan has a start date after July 1, 2022, the Plan will be copied in **Draft** status to allow the WSC to annualize the Plan. For example, if a consumer turned 21 or enrolled on the waiver after July 1, 2022, the copy will be in **Draft** status.
- C. APD will only copy Planned Services with an end date of June 30, 2023, in **Region/State Approved or Proposed** status. These copied Planned Services will have a start date of July 1, 2023, and an end date of June 30, 2024.
 - a. Planned Services that are in **Region/State Approved** status at the time of copy will remain in that status and authorizations will be generated.
 - b. Planned Services that are in **Proposed** status and services are not annualized at the time of copy will remain in **Proposed** status and will not have an authorization generated.
- D. APD will **not** copy the following Planned Services:
 - a. When the county of the Planned Service does not match the county of the consumer's Demographics tab
 - b. One-time services:
 - i. Durable Medical Equipment
 - ii. Environmental Accessibility Adaptations
 - iii. Dental
 - iv. Personal Emergency Response System Installations

- v. Assessments: Physical, Speech, Occupational, Respiratory Therapy, Nursing, Specialized Mental Health, Environmental Accessibility Adaptation, and Behavior
 - c. Behavior Assistant services
 - d. Service Plans that ended before June 30, 2023
- E. APD will copy the statements in the Authorization Notes/Comments section on the Planned Service screens.

II. Required WSC and CDC+ Consultant Responsibilities

- A. Ensure that every client has a Plan that is in **Approved, Pending, or No Review Required** status by March 17, 2023.
- B. Ensure that the Authorization Notes/Comments section on the Planned Service screen specifies accurate service provisions. The Authorization Notes/Comments should give direction to the provider describing how services are to be administered. This section should not duplicate information already identified on the Service Authorization screen.
- C. Ensure that all Planned Services have been reviewed for provider changes, ratio changes, and demographic accuracy, and confirm that the Plan is linked to the Budget.
- D. WSCs and CDC+ Consultants will regain access to their consumer's Plans midday on **Friday, March 31, 2023**. At that time, they can access and edit consumer Plans review Fiscal Year 2023-24 authorizations for accuracy.
 - a. Ensure the Fiscal Year 2023-2024 Plan meets the client's needs and goals identified in their support plan.
 - b. Ensure the Fiscal Year 2023-2024 Plan meets medical necessity criteria and iBudget Handbook coverage and limitations.
 - c. Add any one-time services in accordance with the iBudget Handbook.
 - d. If a Planned Service was copied without an authorization generated, the WSC will need to manually create the authorization.
 - e. If a Planned Service is edited after the Plan was copied and the authorization was generated, the WSC will need to manually edit the authorization.
 - f. **Only** update authorizations if the Planned Services were edited.

III. Special Information for CDC+ Consultants Only

- A. In addition to the instructions under Section II above, the CDC+ Consultant must also complete the following actions:
 - a. Review and confirm the service code and rate (Full or Limited) is correct for the CDC+ Consultant. If a change needs to be made before the Plan is copied, the Fiscal Year 2022-23 Plan will need to be in **Pending, Region/State Approved, or No Review Required** status by **March 23, 2023**. Once the Fiscal Year 2022-23 Plan is in Region/State Approved status, the service code or rate can only be corrected by terminating the copied Planned Service and creating a new Planned Service with the correct information.
 - b. Ensure the Fiscal Year 2023-24 Plan meets the client's needs and goals identified in their support plan. Add any Short-Term Expenditures (STEs) or One-Time Expenditures (OTEs).
- B. Once complete, the CDC+ State Office will review and confirm budgets created by the automated system. The CDC+ State Office will then send the validated Fiscal Year 2023-24 CDC+ Budget Calculation Worksheet to all CDC+ Consultants and APD Regional offices.

- C. CDC+ State Office will only review July 1, 2023, purchasing plans if the consumer's budget is reduced or there is an OTE or STE that needs to be entered on a July 1, 2023, Purchasing Plan. An August 1, 2023, Purchasing Plan should be submitted for all other budget changes. If the consumer's budget did not reduce and a necessary change needs to go into effect July 1, 2023, a Quick Update can be submitted for July, followed by a full Purchasing Plan effective August 1, 2023.
- D. CDC+ State Office will not process New Start enrollments for July 1, 2023.
- E. CDC+ State Office will return to the standard review of all Purchasing Plans effective August 1, 2023. If there are any questions, please call CDC+ Customer Service at 1-866-761-7043.