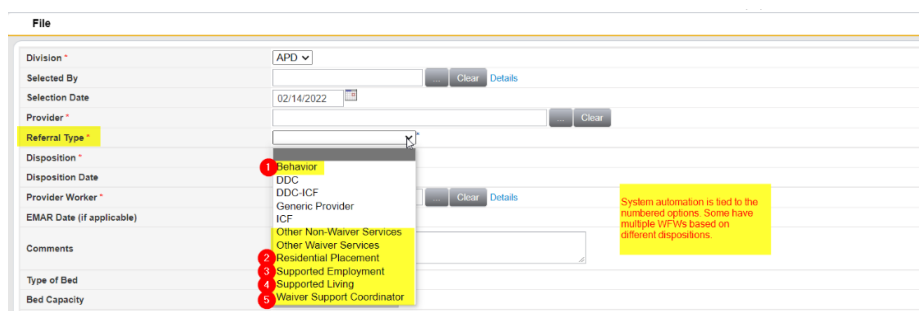


Adding Provider Selections

Provider Selection records are needed to allow providers and their workers access to the Consumer’s record within APD iConnect. This also allows for providers to document their service deliveries and to complete other necessary tasks within APD iConnect. Providers are not able to complete these tasks without the WSC adding provider selection records to the Provider Selection tab within the consumer’s record.

Additionally, when a consumer selects a new provider, the WSC is required to close the previous provider selection record (the Closure process is at the end of this guide) and open a provider selection for the new provider. **Provider Selection Records are only to be added when the provider and their staff are live and using APD iConnect.** The provider selection will be made to the staff who needs to access the consumer record for documentation purposes.

In this Catalog, WSCs will be able to locate a provider, by service, and review the available instructions to add the provider selection records.



Note: It is extremely important to ensure that the correct Referral Type and Disposition are selected as there are ticklers associated with specific options.

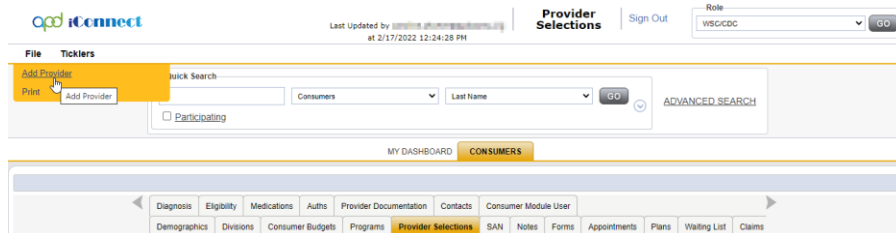
Roles Involved

- **WSC/CDC**

For each consumer’s record, complete the following steps. They can be completed with only the WSC/CDC role. WSC supervisors who are also WSCs (i.e. have the WSC/CDC role), can complete this for consumers on the direct report’s caseload.

To Begin

1. Navigate to the Consumer's record and click Provider Selection > File > Add Provider.



- The provider detail page will display. Please proceed to the appropriate type of provider selection from the options below:

Provider Selection Instructions per Service:

Use the following listing to locate the appropriate provider selection for specific instructions for the applicable service.

Other Waiver Services	4
Consumable Medical Supplies.....	4
Durable Medical Equipment and Supplies	4
Environmental Accessibility Adaptations.....	4
Life Skills Development 1 (Companion)	4
Life Skills Development 3 (Adult Day Training - ADT).....	4
Nursing Services.....	4
Occupational Therapy	4
Personal Emergency Response System.....	4
Personal Support Services.....	4
Physical Therapy	4
Residential Habilitation (Not Admission or Discharge)	3
Respiratory Therapy	4
Respite Services	4
Special Medical Home Care.....	4
Specialized Mental Health Counseling.....	4
Speech Therapy.....	4
Transportation Services	4
Supported Living Services	5
Life Skills Development 2 (Supported Employment)	7
Behavior Analysis	8

Residential Habilitation Admission	9
Residential Habilitation Discharge	10
Waiver Support Coordination Provider Selection	10
Provider Selection Closure	9

Other Waiver Services

“Other Waiver Services” should be utilized when creating provider selections for the following types of providers:

- Consumable Medical Supplies
- Durable Medical Equipment and Supplies
- Environmental Accessibility Adaptations
- Life Skills Development 1 (Companion)
- Life Skills Development 3 (Adult Day Training - ADT)
- Nursing Services
- Occupational Therapy
- Personal Emergency Response System
- Personal Support Services
- Physical Therapy
- Residential Habilitation
- Respiratory Therapy
- Respite Services
- Special Medical Home Care
- Specialized Mental Health Counseling
- Speech Therapy
- Transportation Services

This Provider Selection Record does not trigger ticklers.

1. Update the following fields:
 - a. Division = default to APD
 - b. Selected by = defaults to Self
 - c. Selection date = defaults to today
 - d. Provider = select the ellipsis to search for and select the desired service provider agency
 - e. Referral Type = Other Waiver Services
 - f. Disposition = Open
 - g. Disposition Date = defaults to today
 - h. Provider Worker = search for and select the Provider’s Worker (aka staff) name
 - i. *Please note – In cases where multiple staff work with the individual or would document service provision, the agency owner/designee*

may be selected as there is no need to include multiple workers on the record for accessibility.

- ii. For EVV required services, please include the Provider EVV Manager as the worker
- iii. **DO NOT Leave the WSC's Name in this field**
- i. WSC Transfer Effective Date = leave blank
- j. WSC Transfer End Date = leave blank
- i. Comments = Include information as needed
 - i. If this provider serves multiple services, include the list of services provided in the comments.
 - ii. **IMPORTANT: Ensure that the provider selection is listed for services that need ticklers. IF a provider renders supported living and personal supports, ensure that you do not use referral type Other Waiver Services, but Supported Living as Supported Living referrals trigger important ticklers.**
- j. Click File > Save and Close Provider

Supported Living Services

This Provider Selection Record triggers ticklers, therefore it is very important that the WSC make the correct selections when adding this record.

1. Update the following fields:
 - a. Division = default to APD

- b. Selected by = defaults to Self
- c. Selection date = defaults to today
- d. Provider = select the ellipsis to search for and select the desired service provider agency
- e. Referral Type = Supported Living
- f. Disposition = Open
- g. Disposition Date = defaults to today
- h. Provider Worker = search for and select the **Supported Living Coach**
 - i. *Please note – An individual worker cannot be selected if he/she has not logged in to APD iConnect. In this case, the agency owner may be selected, but should be updated once the staff signs into APD iConnect.*
 - ii. ***DO NOT Leave the WSC's Name in this field***
- k. WSC Transfer Effective Date = leave blank
- l. WSC Transfer End Date = leave blank
- k. Comments = Include information as needed
 - i. If this provider serves multiple services, include the list of services provided in the comments.
 - ii. ***IMPORTANT: Ensure that the provider selection is listed for services that need ticklers. IF a provider renders supported living and personal supports, ensure that you do not use referral type Other Waiver Services, but Supported Living as Supported Living referrals trigger important ticklers.***
- i. Click File > Save and Close Provider

File	
Division *	APD ▾
Selected By	WscPlaceholder, Central ... Clear Details
Selection Date	02/28/2022 📅
Provider *	Test Provider ... Clear
Referral Type *	Supported Living ▾*
CAUTION	"WSC-SELECTED" is a disposition used by APD staff only. Incorrect use will trigger extra ticklers for WSCs
Disposition *	Open ▾
Disposition Date	02/28/2022 📅
Provider Worker *	Worker1, Provider ... Clear Details
Comments	Selection Record is being created to provider Provider Agency level access to the consumer's record.

Life Skills Development 2 (Supported Employment)

This Provider Selection Record does not trigger ticklers, therefore it is very important that the WSC make the correct selections when adding this record.

1. Update the following fields:
 - a. Division = default to APD
 - b. Selected by = defaults to Self
 - c. Selection date = defaults to today
 - d. Provider = select the ellipsis to search for and select the desired service provider agency
 - e. Referral Type = Life Skills Development 2
 - f. Disposition = Open
 - g. Disposition Date = defaults to today
 - h. Provider Worker = search for and select the **Supported Employment Coach**
 - i. *Please note – An individual worker cannot be selected if he/she has not logged in to APD iConnect. In this case, the agency owner may be selected. There is no need to include multiple workers on the record for accessibility.*
 - ii. **DO NOT Leave the WSC's Name in this field**
 - i. WSC Transfer Effective Date = leave blank

- j. WSC Transfer End Date = leave blank
- k. Comments = Include information as needed
 - iii. If this provider serves multiple services, include the list of services provided in the comments.
 - iv. ***IMPORTANT: Ensure that the provider selection is listed for services that need ticklers. IF a provider renders supported living and personal supports, ensure that you do not use referral type Other Waiver Services, but Supported Living as Supported Living referrals trigger important ticklers.***
- l. Click File > Save and Close Provider

Behavior Analysis

This Provider Selection Record triggers ticklers, therefore it is very important that the WSC make the correct selections when adding this record.

1. Update the following fields:
 - a. Division = default to APD
 - b. Selected by = defaults to Self
 - c. Selection date = defaults to today
 - d. Provider = select the ellipsis to search for and select the desired service provider agency
 - e. Referral Type = Behavior
 - f. Disposition = Open
 - g. Disposition Date = defaults to today
 - h. Provider Worker = search for and select the **Behavior Analysis Service Provider** (aka staff providing service) name
 - i. *Please note – An individual worker cannot be selected if he/she has not logged in to APD iConnect. In this case, the agency owner may be selected, but should be updated once the staff signs into APD iConnect.*
 - ii. ***DO NOT Leave the WSC's Name in this field***
 - i. WSC Transfer Effective Date = leave blank
 - j. WSC Transfer End Date = leave blank
 - k. Comments = Include information as needed
 - iii. If this provider serves multiple services, include the list of services provided in the comments.
 - iv. ***IMPORTANT: Ensure that the provider selection is listed for services that need ticklers. IF a provider renders behavior***

assistance and behavior analysis, ensure that you do not use referral type Other Waiver Services, but Behavior as Behavior referrals trigger important ticklers.

- I. Click File > Save and Close Provider

Residential Habilitation Admission

This Provider Selection Record triggers ticklers and is crucial for Residential Planning, therefor it is very important that the WSC make the correct selections when adding this record. When an individual moves into a Residential Placement, the WSC will create the following Provider Selection Record for Admission. The WSC will add a Provider Selection record for the **Licensed home (Not Parent Corporation)**.

1. Update the following fields:
 - a. Division = default to APD
 - b. Selected by = defaults to Self
 - c. Selection date = defaults to today
 - d. Provider = Search for and select the name of the Licensed Home
 - e. Referral Type = Residential Placement
 - f. Level of Res Hab = Select the level
 - g. Admission Date = Date of Admission
 - h. Disposition = Admitted
 - i. Disposition Date = defaults to today
 - j. Provider Worker = search for and select the Waiver Support Coordinator's name.
 - I. Click File > Save and Close Provider
2. To address the "Update Bed Information" tickler, within the open Provider Selection record, click on the Beds subpage
 - a. Type of Bed = select from the drop-down menu
 - b. Start Date = Date of Admission
 - c. Status = Admitted
 - d. Click File > Save and Close

The screenshot shows a software window titled 'oqd iConnect' with a 'Beds' subpage. The form contains the following fields and values:

Type of Bed*	APD Waiver (select waiver)
Capacity	1000
Start Date*	10/1/2023
End Date	
Status*	Admitted

Residential Habilitation Discharge

1. If the individual has any existing Residential Placement provider selection records, the WSC will close them at this time. Open the Provider Selection record and update the following field:
 - a. Disposition = Closed
 - b. Click File > Save and Close

Waiver Support Coordination Provider Selection

WSC Provider Selection Records are created by APD staff. In the event there is no Provider Selection Record on file, the WSC will create one. **Selecting Open as the Disposition will prevent Workflow Wizards from triggering ticklers.**

1. Update the following fields:
 - a. Division = APD
 - b. Selected by = defaults to Self
 - c. Selection date = defaults to today
 - d. Provider = select the ellipsis to search for and select the desired service provider agency
 - e. Referral Type = Waiver Support Coordinator
 - f. Disposition = **Open**
 - g. Disposition Date = defaults to today
 - h. Provider Worker = search for and select the Waiver Support Coordinator's name if it is not you
 - i. *Please note – An individual worker cannot be selected if he/she has not logged in to APD iConnect. In this case, the agency owner may be selected, but should be updated once the staff signs into APD iConnect.*
 - i. WSC Transfer Effective Date = leave blank
 - j. WSC Transfer End Date = leave blank
 - k. Comments = Add a comment that the selection record is being created to provide Provider Agency level access to the consumer's record.
 - l. Click File > Save and Close Provider

File

Division *	APD ▾
Selected By	WscPlaceholder, NorthEast ... Clear Details
Selection Date	02/28/2022 📅
Provider *	WSC Qualified Organization 2022 ... Clear
Referral Type *	Waiver Support Coordinator ▾*
Disposition *	Open ▾
Disposition Date	02/28/2022 📅
Provider Worker *	WscPlaceholder, NorthWest ... Clear Details
WSC Transfer Effective Date	📅
WSC Transfer End Date	📅
Comments	<input type="text"/>

2. If a Waiver Support Coordination Provider Selection Record is saved with the Disposition of “WSC – Selected,” a workflow wizard will trigger the following ticklers:

- a. Notify WSC of New Consumer
- b. Verify QSI is Current
- c. Verify Completion and get consumer signature on the Waiver Eligibility Worksheet and Save to a Note
- d. Create Update Plan add WSC Service
- e. Send Waiver Enrollment Request
- f. Verify Allocation Algorithm Amount from EZ iBudget Calculator
- g. Verify Medicaid Eligibility and Type
- h. Close any duplicate referrals for this WSC Selection

IMPORTANT: This selection should only be made when the individual is being enrolled onto the waiver and assigned a WSC for the first time.

3. If a Waiver Support Coordination Provider Selection Record is saved with the Disposition of “WSC – Transfer In,” a workflow wizard will trigger the following ticklers:

1. Document WSC Transition Meeting (assigned to the WSC)

IMPORTANT: This selection should only be made when the individual is transferred to this WSC.

Provider Selection Closure

Provider Selections must be closed when an individual no longer receives services from a provider:

1. Open the Provider Selection record and update the following fields:
 - a. Disposition = Closed
 - b. Disposition Date = defaults to today or update to the end date of Authorization
 - c. Click File > Save and Close