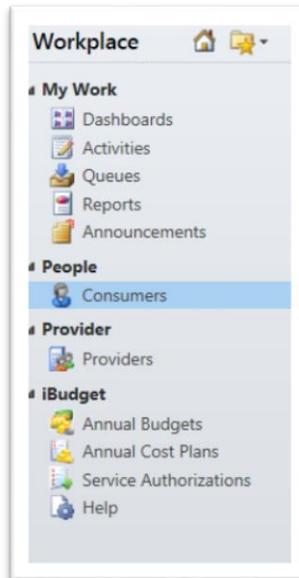




ANNUAL COST PLAN ENHANCEMENTS QUICK REFERENCE GUIDE

## INSTRUCTIONS FOR COPYING AND MODIFYING ANNUAL COST PLAN

1. Log into iBudget
2. Click the “Consumer” tab under “My Workplace/People



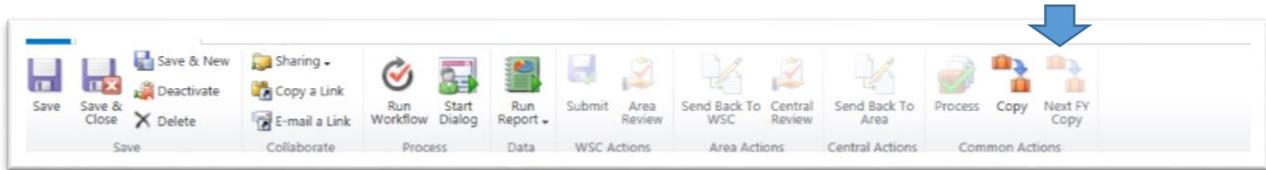
3. Double click on the Consumer. The Information screen will be displayed.
4. Click “Annual Cost Plans” tab under Related/Common.



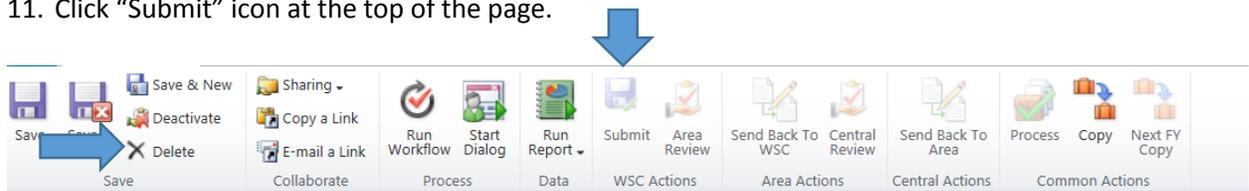
### **Copy the Annual Cost Plan to Next Fiscal Year:**

5. The Annual Cost Plan will be displayed.

6. Double click the currently approved 2014-2015 Annual Cost Plan. The cost plan information will be displayed.
7. Click the “Next FY Copy” icon at the top of the page. A dialogue box will be displaying asking if you are sure you want to copy the cost plan.



8. Click “OK” to continue
9. Double click the 2015-2016 Annual Cost Plan. The cost plan information will be displayed.
10. Click “Yes” to confirm consumer accepts cost plan. Click “No” to confirm consumer did not accept the cost plan. “Input the reason in the Explanation for Consumer not accepting cost plan into the box”.
11. Click “Submit” icon at the top of the page.

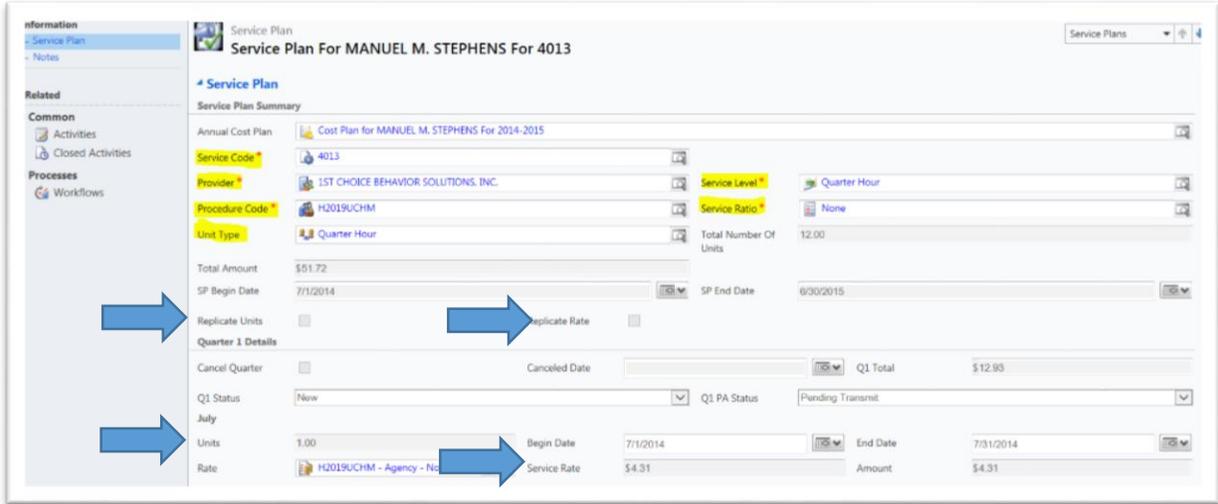


12. Click “OK” in the submit confirmation box. The system will return a submit confirmation box.
13. The Annual Cost Plan status will change to “Pending WSC Review”.
14. Click the “Service Plan” link on the left side of the page under Related/Common. A list of service plans will be displayed.
15. Verify all of the information from the service combinations of service code, provider, service level, procedure code, service ratio and unit type carried over from the 2014-2015 annual cost plan to the new cost plan.
16. If there is a service plan that is no longer needed, highlight the service plan and click the delete icon to remove the service plan (shown above). For example: One time service and providers that are no longer active can be deleted.

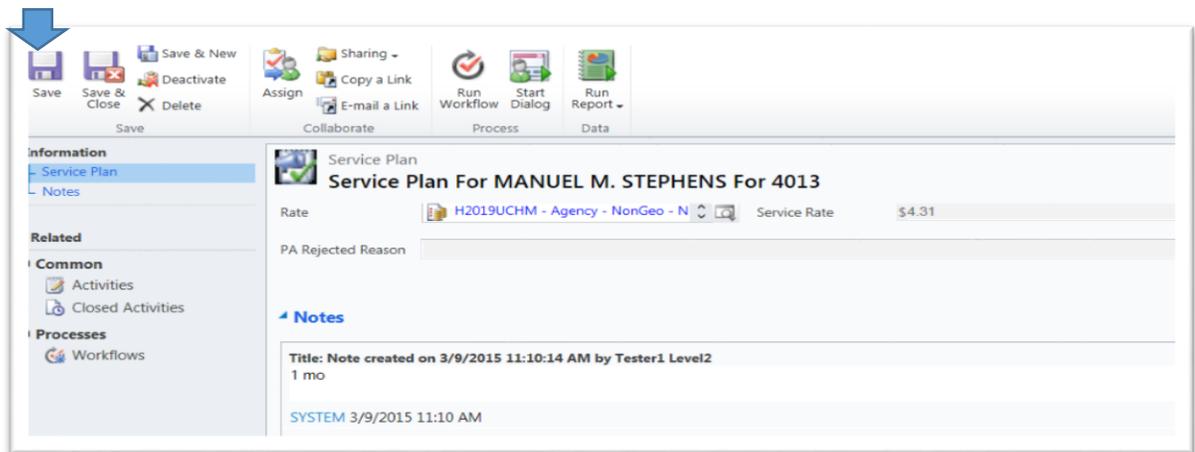
**Adding the Units and Rates:**

17. Enter “1” or “the appropriate number of units depending on the service” in the first month’s unit field under Quarter 1 Details as shown above.

18. Click the “Tab Key” one time. The system will populate the dates for the month
19. Click the box next to “Replicate Units” above Quarter 1 Details. The system will populate the unit fields with the same numerical value as the first month for the remainder of the months.



20. Verify that the system automatically populated the units and dates for the remaining of the months.
21. Add “Notes” to the service plan. The system will save notes with current user name, date, and time.
22. Click “Save”.



23. The system will refresh and save the service plan. Keep in mind, there are some service codes (Transportation, Environmental Accessibility Adaptions, Dental, and Durable Medical

Equipment) that require to you manually input the rate. If so, you will receive a pop-up box asking you to input the service rate.

24. Enter the appropriate service rate (*which is a dollar amount*) for the services that require a manual input in the first month's unit field under "Begin Date" as shown above.
25. Click the box next to "Replicate Rates" above Canceled Date. The system will populate the dollar amount for the rates from the first month through the remainder of the service plan.
26. Verify that the system automatically populated the rate amount for the entire plan.
27. Add "Notes" to the service plan. The system will save notes with current user name, date, and time.
28. Once you have updated all of the service plans, Click "Save & Close"
29. Enter Comments into WSC Processing Comment field.
30. Click the "Save" icon at the top of the page. The Processing comments will be saved.
31. Click the "Process" icon at the top at the page. A confirmation box will be displayed.
32. Click OK. The dialogue box will be closed.
33. The system will automatically change the status to "Current Approved" or "Pending Area Review".

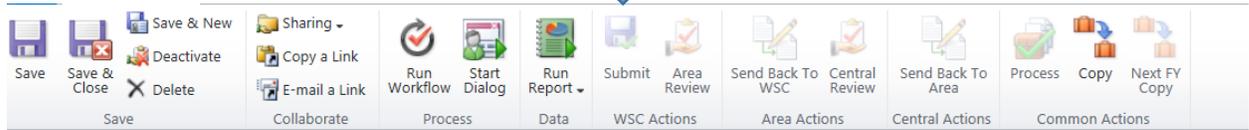
#### **Pending Area Review Messages:**

34. Below are the following reasons for Area Review. The messages are located in the Area Review comment box. **For example:**
  - a. There is a First Ever Cost Plan for this consumer will be automatically sent to Area Office Review.
  - b. Service Code 4013 - The following service(s) Behavioral Services-Assistant have triggered an automatic area review. Please review accordingly.
  - c. Critical Services - One or more of the Consumer's needed services have not been budgeted in the Cost Plan: Dietitian Services and Occupational Therapy.

#### **Modify the Current Annual Cost Plan:**

35. Double click on the "2014-2015 Annual Cost". The annual cost plan information page will be displayed.
36. Click "Copy" at the top of the page. The confirmation box will be displayed.
37. Click "OK" in the submit confirmation box. The dialogue box will be closed.
38. Click "Yes" to confirm consumer accepts cost plan.

39. Click "Submit" icon at the top of the page.

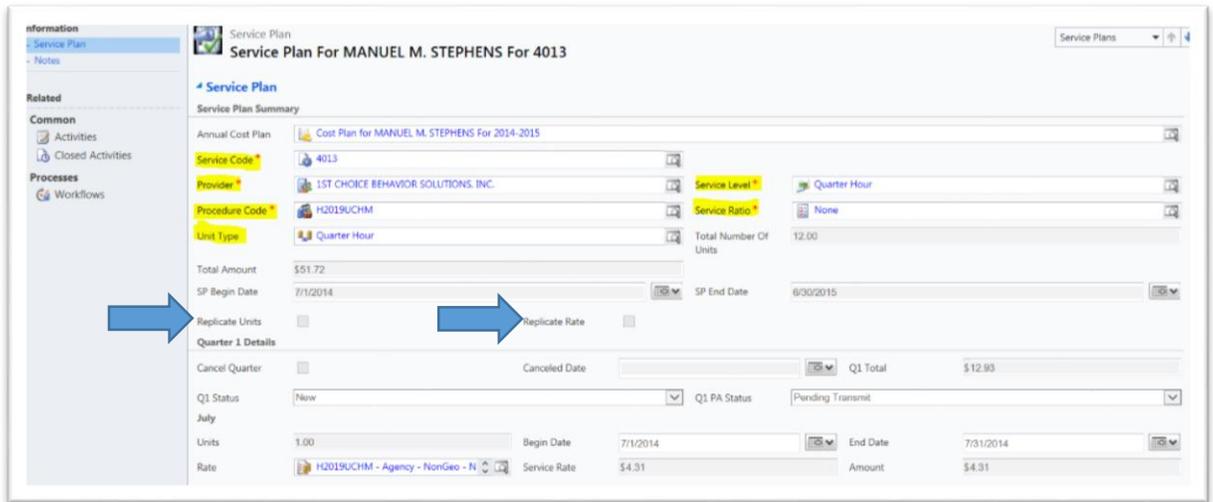


40. Click "OK" in the submit confirmation box. The system will return a submit confirmation box.

41. Click the "Service Plan" link on the left side of the page under Related/Common. A list of service plan will be displayed.

42. Select the service plan you want to modify.

43. If you need to modify the units and/or rates. You can use the "Replicate Units" and "Replicate Rates" features.



44. Enter Comments into WSC Processing Comment field.

45. Click the "Save" icon at the top of the page. The Processing comments will be saved.

46. Click the "Process" icon at the top at the page. A confirmation box will be displayed.

47. Click OK. The dialogue box will be closed.

48. The system will automatically change the status to "Current Approved" or "Pending Area Review".

### **Pending Area Review Messages:**

49. Below are the following reasons for Area Review. The messages are located in the Area Review comment box. **For example:**

- a. Reduction in services from the previous fiscal year.

- b. Services that are in automatic area review.
- c. Thresholds