

**WSC ADVISORY #2016-011**  
**IBUDGET RULE IMPLEMENTATION**

**ACTION REQUIRED**

The new iBudget Rules, 65G-4.0213 through 4.0218, Florida Administrative Code became effective on July 7, 2016. The iBudget rule is attached to this advisory and can also be viewed online at <http://apd.myflorida.com/ibudget/rules-regs.htm>. Training materials and process information for Waiver Support Coordinators (WSCs) are also posted online with this advisory at <http://apdcares.org/waiver/support-coordination/>.

Under the iBudget Rule, WSCs are required to engage in important activities to ensure that individuals receive the services they need. WSCs must view the *iBudget Rule* Power Point Training and *iBudget Rule Implementation WSC Process Steps* posted with this advisory soon as possible to ensure that they have the information to assist individuals on their caseloads. WSCs who need assistance regarding specific clients should work with the APD Regional Offices. WSCs who have procedural or training questions related to the rule or implementation may also send them by email to [iBudgetQuestions@apdcares.org](mailto:iBudgetQuestions@apdcares.org).

Most individuals will receive the new algorithm at the time of their annual support plan starting January 2017. Please refer to the *iBudget Rule Implementation WSC Process Steps*. The algorithm is only the starting point in determining an individual's iBudget Amount. After running the algorithm, the WSC meets with the individual through the Allocation Implementation Meeting (AIM) process to determine if the individual has significant additional needs. An individual review is required to ensure that the individual receives services that meet their needs.

Since the iBudget Rule became effective on July 7, 2016, individuals who did not yet receive a Notice of iBudget Amount after enrollment or final notice related to a pending Significant Additional Needs (SAN) request using the old algorithm must also be provided information on the new algorithm prior to receiving a Notice of iBudget Amount. The new algorithm for individuals who are newer to the waiver and have never received a Notice of iBudget Amount or individuals who have a SAN request in process will be handled immediately as follows:

1. APD will send an email to the WSC with the new algorithm amount.
2. The WSC will complete the AIM process with the individual and their individual representative and document it on the AIM Worksheet. If an AIM or SAN were in process under the old algorithm amount, the WSC may conduct the AIM by telephone and document the conversation on the first page of the AIM Worksheet. The version of the AIM Worksheet required by rule is included with this advisory and also posted online at <http://apd.myflorida.com/ibudget/users.htm>.
3. The WSC will send the AIM to the Region office. If the individual is not requesting funds that exceed the algorithm amount, the WSC can submit the AIM Worksheet to the APD Regional office email address for AIMS as follows: [northwest.aim@apdcares.org](mailto:northwest.aim@apdcares.org); [northeast.aim@apdcares.org](mailto:northeast.aim@apdcares.org); [central.aim@apdcares.org](mailto:central.aim@apdcares.org); [suncoast.aim@apdcares.org](mailto:suncoast.aim@apdcares.org); [southeast.aim@apdcares.org](mailto:southeast.aim@apdcares.org); or [southern.aim@apdcares.org](mailto:southern.aim@apdcares.org). If the individual is requesting funds that exceed the algorithm amount, the WSC will submit the AIM to the Region office either through the online SAN system or via email if the AIM was already in process previously. The Region can provide information on the best way to send the AIM to avoid entering duplicate information in the SAN online system.
4. After finalizing the individual review, the Regional office will issue a Notice of iBudget Amount to the individuals and their individual representative. A copy will be provided to the Waiver Support Coordinator so that they can review the notice with the individual and their individual representative.

As always, WSCs must notify the APD Regional office immediately regarding any emergency service needs.