

iBudget Rule Implementation Waiver Support Coordinator (WSC) Process Steps

Rules 65G-4.0213 through 4.0218, Florida Administrative Code became effective on July 7, 2016. The iBudget rule establishes the new algorithm for individuals enrolled in the iBudget Waiver program. The algorithm will be re-run for individuals at the time of their support plan or if they request a SAN prior to their support plan date during the implementation period. The implementation period for the new algorithm will be at the time of any annual support plans that occur between January 1, 2017 through December 31, 2017. Waiver Support Coordinators (WSCs) play a key role in working with individuals on their caseloads by making sure that services meet their needs. The following process will be followed to ensure an individual review for each individual served.

Detailed training materials for WSCs are posted online at <http://apdcares.org/waiver/support-coordination/>. WSCs who have procedural questions may e-mail iBudgetQuestions@apdcares.org. WSCs may contact the Regional office for assistance on specific cases. A regular FAQ will be posted with relevant questions received.

A. Implementation of the New iBudget Algorithm Amount at the time of the Support Plan

1. At least 60 days prior to the support plan effective date (as indicated in the ABC system), the APD Region will provide the WSC with the algorithm for the individual. The schedule for receiving the algorithm will be as follows:

Date Algorithm Provided	Support Plan Date in ABC
November 1, 2016	January 2017
December 1, 2016	February 2017
January 1, 2017	March 2017
February 1, 2017	April 2017
March 1, 2017	May 2017
April 1, 2017	June 2017
May 1, 2017	July 2017
June 1, 2017	August 2017
July 1, 2017	September 2017
August 1, 2017	October 2017
September 1, 2017	November 2017
October 1, 2017	December 2017

2. The WSC will meet with the individual and conduct the Allocation Implementation Meeting (AIM) and document this using the AIM Worksheet.

This can occur during meetings regarding the annual support plan review. The AIM Worksheet is located at <http://apd.myflorida.com/ibudget/users.htm> and incorporated by reference into the rule.

3. In accordance with Rule 65G-4.0216, the WSC must complete the AIM and submit the AIM Worksheet to APD within 30 days of receiving the algorithm amount.
4. During the AIM review, the WSC will discuss the Allocation Algorithm Amount with the individual, or individual's representative and, if applicable, the client advocate, in order to determine if the individual has any Significant Additional Needs. Please see attached for a definition of significant additional needs as provided in Chapter 393.0662, Florida Statutes and Rule 65G-4.0218.
5. The WSC will document the individual's needs on the AIM Worksheet and provide supplemental documentation as needed to demonstrate medical necessity. Please refer to Rule 65G-4.0218, FAC for the documentation requirements.
6. If the individual is requesting services that exceed the algorithm amount due to significant additional needs, the WSC will submit the AIM Worksheet and documentation to APD on the iBudget SAN system. The SAN system has two fields for the WSC to document the AIM and date of the AIM meeting.
7. 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; northeast.aim@apdcares.org; central.aim@apdcares.org; suncoast.aim@apdcares.org; southeast.aim@apdcares.org; or southern.aim@apdcares.org.
8. The Agency will conduct an Individual Review to determine whether services requested meet health and safety needs and waiver coverage and limitations. The Agency will issue a decision of the iBudget Amount within 30 days of receipt of the AIM Worksheet form. The individual or their representative will be advised of the Agency's decision for the amount of the individual's final iBudget Amount within 30 days. If additional documentation is requested, the deadline for the Agency's response shall be extended to 60 days following the receipt of the original request.
9. The Agency shall approve an increase to the iBudget Amount if additional funding is required to meet the Significant Additional Needs subject to the provisions of the iBudget rules. The Agency, upon completion of its review

shall notify in writing the individual, the WSC and the client advocate, if any, of its decision.

10. The WSC will review the notice with the individual and individual representative.

11. The Agency will update the budget in the iBudget system.

12. The WSC will build the cost plan.

B. Implementation of new algorithm for individuals who are newer to the waiver and have never received a Notice of iBudget Amount or individuals who have a Significant Additional Needs (SAN) request in process

Since the iBudget Rule became effective on July 7, 2016, individuals who did not yet receive a Notice of iBudget Amount or final notice related to a pending SAN 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 with the individual and their legal 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; northeast.aim@apdcares.org; central.aim@apdcares.org; suncoast.aim@apdcares.org; southeast.aim@apdcares.org; or southern.aim@apdcares.org.
4. 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.

5. After finalizing the individual review, the Regional office will issue a Notice of iBudget Amount to the individuals and their legal representative. A copy will be provided to the Waiver Support Coordinator so that they can review the notice with the individual and their legal representative.
6. The WSC can update the cost plan in accordance with normal processes.

C. SAN Requests Received prior to an annual support plan scheduled between January 1, 2017 and December 31, 2017

1. During statewide implementation of the new algorithm, if the WSC needs to submit a SAN request prior to the individual's support plan and the new algorithm implementation, the WSC should notify the Region so that the Region can run the new algorithm and provide it to the WSC. The WSC will request the new algorithm from the Region by email.
2. The WSC will complete the AIM process with the consumer and document on the AIM Worksheet.
3. The WSC will send the AIM to the Region office. If the individual is not requesting funds that exceed the new algorithm amount, the WSC can submit the AIM Worksheet to the APD Regional office email address for AIMS as follows:
northwest.aim@apdcares.org; northeast.aim@apdcares.org;
central.aim@apdcares.org; suncoast.aim@apdcares.org;
southeast.aim@apdcares.org; or southern.aim@apdcares.org.
4. If the individual is requesting services that exceed the new algorithm amount, the WSC will submit the AIM Worksheet online in the SAN system.
5. APD will finalize the individual review and issue a Notice.
6. APD will update the budget in the iBudget system and the WSC can build the cost plan in accordance with normal processes.
7. If there is an emergency situation that requires attention, the WSC must notify the Region office immediately.

D. Ongoing Algorithm Changes After the Individual Receives the Notice of iBudget Amount under the new algorithm

1. After an individual receives their Final Notice of iBudget Amount, the Regional office will re-run the algorithm under the following circumstances:
 - a) Age change that impacts the algorithm
 - b) Living setting change the impacts the algorithm
 - c) QSI changes that impact the algorithm
2. The WSC will complete the AIM process with the consumer and document on the AIM Worksheet.
3. The WSC will send the AIM to the Region office. If the individual is not requesting funds that exceed the new algorithm amount, the WSC can submit the AIM Worksheet to the APD Regional office email address for AIMs as follows:
northwest.aim@apdcares.org; northeast.aim@apdcares.org;
central.aim@apdcares.org; suncoast.aim@apdcares.org;
southeast.aim@apdcares.org; or southern.aim@apdcares.org.
4. If the individual is requesting services that exceed the new algorithm amount, the WSC will submit the AIM Worksheet online in the SAN system.
5. APD will finalize the individual review and issue a Notice.
6. APD will update the budget in the iBudget system and the WSC can build the cost plan in accordance with normal processes.
7. If there is an emergency situation that requires attention, the WSC must notify the Region office immediately.

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