WSC ADVISORY #2018-031
APD ICONNECT PREPARATION
ACTION REQUIRED

This advisory provides information for Waiver Support Coordinators (WSCs) to take action in preparing for the implementation of the Agency for Persons with Disabilities (APD) iConnect system in October 2018.

When the iConnect system is implemented in October 2018, the cost plans and budgets that run for Fiscal Year 2018-2019 will be split between the iBudget and iConnect Systems. WSCs will use the iBudget system to maintain services running from July 1, 2018, through December 31, 2018. WSCs will use the iConnect system to maintain services running from January 1, 2019, through June 30, 2019.

In September 2018, APD will migrate data within the two systems in accordance with the table below.

	iBudget System	**iConnect System**
Budget	Budgets will be calculated based on units allocated in service plans from July 1, 2018, through December 31, 2018.	Budgets will be calculated based on units allocated in service plans from January 1, 2019, through June 30, 2019, <u>and </u>any funds remaining in reserves.
Service Plans	Service plans will reflect all planned services authorized from July 1, 2018, through December 31, 2018. Service plans from January 1, 2019, through June 30, 2019, will appear in a deleted status and cannot be altered.	Planned services will reflect all services authorized from January 1, 2019, through June 30, 2019.

All cost plans must be in approved status prior to data migration.   WSCs must take the following steps in the iBudget systems by September 12, 2018, to prepare for this data migration.

1. Submit any cost plans that are pending status so that they can be approved by APD.

2. WSCs must review all cost plans and service plans to ensure that all services are allocated to the correct months throughout the year.

   a. Ensure that allocated units are correct for the time period of the service plan.

   b. Ensure the service plans entered are in compliance with the iBudget Waiver Handbook requirements.

c. Note that any funds remaining in reserves will be carried into the iConnect system. If one-time services are planned but not allocated into the existing service plans, the funds for those services will be carried into the iConnect system for allocation between January 1, 2019, through June 30, 2019.

3. For CDC+ consumers only, there is no need to make service allocation changes to CDC+ Participant cost plans unless additional funds have been awarded, as CDC+ Participants receive their full iBudget amount, including any funds left in reserve, in equal distributions throughout the fiscal year by way of the CDC+ Monthly Budget Amount. Only Consultant fees, One Time Expenditures, and Short-Term Expenditures are excluded from their monthly budget. Therefore, moving currently allocated funds from one month to the next will not result in a change in monthly budget.

Additionally, since APD is migrating data from the ABC and iBudget systems into iConnect, it is also critical for WSCs to ensure accurate demographics in the ABC system for their caseloads. **WSCs must take the following steps in the ABC system by September 20, 2018, to ensure that accurate demographics are migrated into the iConnect system.**

1. Review demographic information in the ABC system and make any updates to ensure correct information. Document that the demographic information was verified at the bottom of the ACLM2 screen in the ABC system by putting an "X" in the appropriate box for all customers, regardless of whether edits are being made. Please ensure the following:

    a. The address box field(s) for all address types (i.e. consumer, legal representative, HIPAA, medical proxy, etc.) must only contain valid U.S. Postal Service address information.
        i. All non-address information such as phone numbers, email addresses, notes, etc. within the address box field(s) **must** be removed.

    b. The customer's home address must be their physical location address. Box one should contain the street number and name. Box two should be used only if the person has an apartment or suite number etc., otherwise, leave blank.

    c. For address types (i.e. consumer mailing, legal representative, HIPAA, medical proxy, etc.), the first address box should contain the street address (street number and name) or P.O. Box.
        i. Do not list a street address in box one and a P.O. Box in box two. Box two should be used only if the person has an apartment number, suite number, etc., otherwise, leave blank.

The iBudget system will be unavailable for WSCs from September 20, 2018 to September 28, 2018. If the WSC has an emergency situation that requires service authorization during this time period, they must contact the APD Region office for assistance. APD will provide instructions regarding how service authorizations and Significant Additional Needs (SANs) processing will be handled during that time period under a separate advisory.

After October 1, 2018, if the WSC needs to move unused funds from July 1, 2018-December 31, 2018, in iBudget to the iConnect planned services running from January 1, 2019, through June 30, 2019, APD will provide a process to do so through a future advisory. However, please note that this will be a manual process. Therefore, WSCs should make every effort to review plans for accuracy prior to September 12, 2018.

WSCs who need assistance or have questions may contact the APD Regional office or iConnect@apdcares.org.