

Area Office User Guide

Instructions for Specific Functions iBudget Florida Application

October 14, 2014



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Help Desk

To speak with an Information Technology (IT) staff member regarding the iBudget Florida application, please contact APD's Help Desk. Call (850) 488-4357 between 8 a.m. and 6 p.m. (Eastern time), Monday through Friday. You can also submit a helpdesk ticket 24/7 by clicking on the link below.

https://apdflorida.zendesk.com/home

Getting Started

Log onto the iBudget application using your APD user name and password (see Figure 1.1).

User name Password Domain: APD Remember my credentials
OK Cancel

Figure 1.1

General Information

The iBudget system consists of four work sections and subgroups on the main screen under Workplace: The sections are *My Work, People, Provider*, and *iBudget*. Below is a snapshot of the work sections and subgroups (see Figure 1.2).



Figure 1.2

To *View* the features of a subgroup, first click the subgroup then click the drop-down list to filter the list based on available criteria. *All Activities* available have the following options: *all activities, task, fax, phone call, email letter, appointment, service activity, campaign response, campaign activity and recurring appointment.* You may or may not be utilizing all of the available options. The *System View* also has a list of options to filter to a specific content type you would like to view (see Figure 1.3).

Due: All All Activities System Views Subj Task All Activities Priority St Ibud Fax Closed Activities Normal Normal Ibud Phone Call My Activities Normal Normal Ibud E-mail My Closed Activities Normal Normal Ibud E-mail My Team Members' Activities Normal Normal Ibud Service Activity Normal Normal Normal Normal Ibud Service Activity Normal Normal Normal Normal Normal Ibud Campaign Response Namil Completed Tester / Level 1 Normal Ibud Campaign Activity Namil Completed Tester 1 Normal Normal Ibud Recurring Appointment Mail Completed Tester 1 Normal Normal Ibud Recurring Appointment Mail Completed Tester 1 Normal Normal Ibud Recurring Appointment Mail Completed Tester 1 Norm	Activ	vities All	Activities 🕶					Search for r	ecords	
Subj Task All Activities Priority St Ibud Fax Closed Activities Normal Ibud Phone Call My Activities Normal Ibud E-mail My Closed Activities Normal Ibud Letter My Team Members' Activities Normal Ibud Appointment Scheduled Activities Normal Ibud Service Activity Normal Normal Ibud Campaign Response Mail Completed Tester / Level 1 Normal Ibud Recurring Appointment mail Completed Tester 1 Level 1 Normal Ibud Recurring Appointment mail Completed Tester 3 Level1 Normal Ibud Recurring Appointment mail Completed Tester 3 Level1 Normal Ibudget cost plan status change Cost Plan for E-mail Completed Tester 3 Level1 Normal	Due:	AI 🕑	All Activities		۲		System Views			
Image: Bud Image: Fax Image: Fax Image: Fax Normal Image: Bud Image: Fax My Activities Normal Image: Bud Image: Fax My Activities Normal Image: Bud Image: Fax My Activities Normal Image: Bud Image: Fax My Closed Activities Normal Image: Bud Image: Fax My Closed Activities Normal Image: Bud Image: Fax My Closed Activities Normal Image: Bud Image: Fax My Team Members' Activities Normal Image: Bud Appointment Image: Fax Normal Normal Image: Bud Service Activity Image: Fax Normal Normal Image: Bud Campaign Response Image: Fax Normal Normal Image: Bud Recurring Appointment Image: Fax Completed Tester 1 Level 1 Normal Image: Budget cost plan status change Cost Plan for E-Image: Fax Completed Tester 3 Level1 Normal Image: Amount Budget Amount Budget Amount Budget Amount Budget Famage: Fax <		Subje 💐	Task		۲		All Activities		Priority	Starl 🕑
Image: Bud Image: Im	✓ 🖂	iBud 🏈	Fax		۲		Closed Activities		Normal	
Image: Service Activity My Closed Activities Normal Image: Service Activity My Team Members' Activities Normal Image: Service Activity Service Activity Normal Image: Service Activity Normal Normal Image: Completed Tester Development Normal Normal Image: Recurring Appointment Image: Cost Plan for E-mail Completed Tester3 Level1 Image: Reduct the schedered for Annual Rudet the schedered for Annual Rudet the schedered for Normal		iBud 🔊	Phone Call		۲		My Activities		Normal	
Image: Service Activity My Team Members' Activities Normal Image: Service Activity Service Activity Scheduled Activities Normal Image: Service Activity Service Activity Service Activity Normal Image: Service Activity Service Activity Service Activity Normal Image: Service Activity Service Activity Service Activity Normal		iBud 🖂	E-mail		•		My Closed Activities		Normal	
Image: Service Activity Appointment Scheduled Activities Normal Image: Service Activity Service Activity Scheduled Activities Normal Image: Service Activity Campaign Response Scheduled Activities Normal Image: Service Activity Campaign Response Scheduled Activities Normal Image: Service Activity Campaign Response Scheduled Activities Normal Image: Service Activity Mail Completed Tester 1 Level 1 Normal Image: Service Activity Mail Completed Tester 1 Level 1 Normal Image: Service Activity Mail Completed Tester 3 Level 1 Normal Image: Service Activity Service Activity Service Activities Normal Image: Service Activity Service Activities Service Activities Normal Image: Service Activity Service Activity Ser		iBud 📄	Letter				My Team Members' Activities		Normal	
Image: Service Activity Service Activity Service Activity Normal Image: Service Activity Campaign Response Normal Image: Service Activity Normal Normal Image: Service Activity<		iBud 📷	Appointment				Open Activities		Normal	
Image: Service Activity Service Activity Normal Image: Create Personal View Normal Image: Completed Tester 1 Level 1 Image: Normal Normal Image: Cost plan status change Cost Plan for E-mail Completed Tester 3 Level 1 Image: Cost plan status change Cost Plan for E-mail Completed Tester 3 Level 1 Image: Cost Plan for E-mail Completed Image: Cost Plan for E-mail Completed Tester 3 Level 1		iBud	Service Activity		Ĺ		Scheduled Activities		Normal	
Imail Completed Tester 1 Level 1 Normal Imail Completed Arthur Barndt Normal Imail Completed Tester 3 Level 1 Normal Imail Completed Tester 3 Level 1 Normal Imail Completed Tester 3 Level 1 Normal		iBud 📟	Connection Deserves		1		Create Personal View		Normal	
Image: Bud Structure Campaign Activity Image: Mail Completed Tester 1 Level 1 Normal Image: Recurring Appointment Image: Mail Completed Arthur Barndt Normal Image: Budget cost plan status change Cost Plan for E-mail Completed Tester 3 Level 1 Normal Image: Recurring Appointment Image: Cost Plan for E-mail Completed Tester 3 Level 1 Normal		iBud 🖾	Campaign Response		•	maii	Completed	Tester/ Level1	Normal	
Anner Recurring Appointment mail Completed Arthur Barndt Normal Image: Budget cost plan status change Cost Plan for E-mail Completed Tester3 Level1 Normal		iBud 🔡	Campaign Activity		۲	mail	Completed	Tester 1 Level 1	Normal	
Image:		Annı 💽	Recurring Appointment		۲	mail	Completed	Arthur Barndt	Normal	
Annual Rudget has shapped for the Annual Rudge E mail Completed Tinual Kurneti Manual		iBudget co	ost plan status change	🛓 Cost Plan for	E-	mail	Completed	Tester3 Level1	Normal	~
Annual budget has changed for 📷 Annual budg E-mail Completed Hirupai Kurapati Normai		Annual Bu	dget has changed for	🧟 Annual Budg	E-	mail	Completed	Tirupal Kurapati	Normal	

Figure 1.3

Sorting

There are several ways to sort data (ascending (a-z) or descending (z-a)) within the column headers. You can sort by the last name of the consumer by clicking on the column header with the arrow to the right of the consumer's last name (see below).

Consumers	Active Consumers •					Search for r	ecoras	
First Name	Last Name 🔺 Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County

To sort by multiple columns on any screen in the iBudget application, hold the *Shift* button and click the column header names to be included in the sort.

Lastly, you can sort by clicking on the alphabet of the consumer's last name to limit the sorted list to only those records having data in the sorting column that begin with the letter selected (view below).



Extending a List

If the list presented is more than one page, in the bottom right of the screen there will be a paging option to scroll to the next page or to go back to the previous page [4 4 Page 1].

Refresh

If at any time you wish to refresh your view of a list, you may click the *Refresh* icon electric located in the upper right corner of the list.

<u>Search</u>

Whenever a search box is provided, you can use it to limit the information being displayed. Asterisks (*) can be used to search for a word within a phrase, such as the word "Happy" in the phrase "Lowe's Happy Home Away from Home" group home. Type *happy* in the *Search* text box and click the *Search* icon (magnifying glass) You can also search by a consumer's Social Security number and last name.

Many pages have links to related information. If the value in a data box is underlined the value is a link to the related information.

Service Code *	4270	Q

If a data field has a look-up icon at the far right of the field, the *Search* icon may be used to open a *Look Up Record* window to look for, view, and search to find the matching records. Filter the results and view different columns of data by using the view options. Then, select the record you want to view and click OK or double click on the selected record (see Figure 1.4).

Search:		
Description	Service Code 🔺	Service Family
Adult Dental	4001	Wellness Management
Behavior Analysis - Level 3	4010	Therapeutic Supports
Behavior Analysis - Level 2	4011	Therapeutic Supports
Behavior Analysis - Level 1	4012	Therapeutic Supports
Behavioral Services - Assistant	4013	Therapeutic Supports
Behavior Analysis Assessment	4014	Therapeutic Supports
Consumable Medical Supplies - CDC	4030	Wellness Management
Dietitian Services	4040	Wellness Management
Durable Medical Equipment	4050	Environmental and Adapt
Environmental Accessibility Adaptations	4060	Environmental and Adapt
Environmental Accessibility Adaptations Assessment	4061	Environmental and Adapt
Family and Legal Representative Training	4070	Life Skills Development
Life Skille Davalanment Lavel 1 (Community Inducion)	4000	Life Chille Development
1 - 50 of 115 (0 selected)		H ◀ Page 1

Figure 1.4

Subgroups

Many of the screens have one or more of the following links in the *Related Common* menu on the left side of the page.

Information
– Consumer
L Notes
Related
4 Common
Activities
Closed Activities
Main Approved Services
🥰 Annual Budgets
🛃 Annual Cost Plans
ڸ Service Authorizations
🔁 Claims
Processes
Concentration Workflows

Information:

Consumer - Provides detailed demographic information about the consumer, legal guardian and waiver service coordinator.

Notes – Available for the Waiver Service Coordinator or APD Staff to input important documentation regarding the consumer.

Related/Common:

Activities – Open tasks that must be reviewed and completed.
Closed Activities – Tasks that have been completed.
Approved Services – Services approved for the consumer.
Annual Budgets - Consumer's allocated amount for previous and present fiscal years.
Annual Cost Plans – Consumer's annual cost plan for previous and present fiscal years.
Service Authorizations – Displays the status of all service authorizations for each consumer.
Claims – Claims that are paid to providers for services rendered.

Additional Icons:

A new browser window will open each time the user accesses a new object. Please note that depending on your browser settings a new tab may open up at the top.



The new browsers are tabs for Consumer, Annual Cost Plan, and Service Plan. The new browser window allows you to view previous information without having to close the information you are currently viewing.

When you have finished with the information on that tab, be sure to either click *Save and Close* at the top

left of the page or click the kine icon in the upper right corner to exit the application. This will reduce the number of open pages.

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Completing Activities

1. Click on Activities - You will see the outstanding *Activities* associated with your user ID (see Figure 1.5).

Activities View	Add Note	Assign Copy a Link - Collab	Run Workflow Process	Run Report -	port to Excel Iter Data	Advanced Find			
Norkplace 🚮 🙀 -	Activ	vities							Search for records
My Work	Due:	All							
Activities		Activity Type Subject	Ł			Regarding	Priority	Due Date 🔺	Start Date
Queues	2	Task Cost P	lan requires Area Rev	iew - Regarding	Cost Plan	🛃 Cost Plan F.	. Normal	5/29/2013 11:03 AM	5/29/2013 11:03 AM
Announcements	2	Task Cost P	lan requires Area Rev	iew - Regarding	Cost Plan	🛃 Cost Plan F.	. Normal	9/6/2013 11:17 AM	9/6/2013 11:17 AM
People	2	Task Consu	mer has dipped into	Reserve Funds - I	Regarding	실 Cost Plan F.	. Normal	9/9/2013 11:09 AM	9/9/2013 11:09 AM
S Consumers	2	Task Cost P	an requires Area Rev	iew - Regarding	Cost Plan	Cost Plan F.	. Normal	1/14/2014 8:30 AM	1/14/2014 8:30 AM
Provider	1	Task Cost P	lan requires Area Rev	iew - Regarding	Cost Plan	🛃 Cost Plan F.	. Normal	1/14/2014 8:33 AM	1/14/2014 8:33 AM
Providers	2	Task Cost P	lan requires Area Rev	iew - Regarding	Cost Plan	🛃 Cost Plan F.	. Normal	1/14/2014 8:35 AM	1/14/2014 8:35 AM
iBudget Annual Budgets Annual Cost Plans Service Authorizations									

Figure 1.5

2. An activity must be "completed" to remove it from your *Activities* list. To access a specific activity, double click on it (see Figure 1.6). Review the activity and take the appropriate action.

File Activities View	Charts			пстозон: супатны с	.nava		/
Mark omplete	Add Assign Re-	are Start Workflow Dialog	Run Report +	Advanced Find			
Actions	Activities My	Activities -	Data				Search for records
My Work	Due: All		•				
Activities	Activity Type	Subject		Regarding	Priority	Due Date 🔺	Start Date
dueues	🗐 🥏 Task	Cost Plan requires Area Ret	view - Regarding Cost Plan	🛃 Cost Plan F	Norm	3 AM	5/29/2013 11:03 AM
Announcements	🛄 🥏 Task	Cost Plan requires Area Re	view - Regarding Cost Plan	Cost Plan F	Normal	AW ATTE CTO2/0/6	9/6/2013 11:17 AM
People	🛅 🍠 Task	Consumer has dipped into	Reserve Funds - Regarding	🛃 Cost Plan F	Normal	9/9/2013 11:09 AM	9/9/2013 11:09 AM
& Consumers	🔄 💐 Task	Cost Plan requires Area Ret	view - Regarding Cost Plan	Cost Plan F	Normal	1/14/2014 8:30 AM	1/14/2014 8:30 AM
Provider	🖾 🍠 Task	Cost Plan requires Area Ret	view - Regarding Cost Plan	🛃 Cost Plan F	Normal	1/14/2014 8:33 AM	1/14/2014 8:33 AM
Reviders	Task	Cost Plan requires Area Rep	view - Regarding Cost Plan	Cost Plan F	Normal	1/14/2014 8:35 AM	1/14/2014 8:35 AM
iBudget Annual Budgets Annual Cost Plans Service Authorization	5						



3. Once the individual task has been completed, click the *Mark Complete* or the *Close Task* icon at the top of the page (see Figure 1.7). Note: Selecting the *Mark Complete* icon will close the task automatically.

Fil	11		jining curi
Mark Complete Save Save & Attach File	Add Close To Note Task Opportunity	e Sharing - Assign Copy a Link Assign E-mail a Link Workflow Dialo	t Run g Report -
Save Inc	lude Actions Convert Activity	Collaborate Process	Data
Information	Task		
– Task		Paviow Pagarding Cost Dian D	OF ISAAC D. STCLAIR For 2012 201
L Notes		Review - Regarding Cost Plan P	OF ISAAC D. STCLAIR FOF 2013-201
Related	 Task Subject * Cost Plan requires Arr Following cost plan requires area review 	ea Review - Regarding Cost Plan For ISAAC D. STCL	AIR For 2013-2014
	Consumer: ISAAC D. STCLAIR Fiscal year:2013-2014 Cost Plan:Cost Plan For ISAAC D. STCLAIR F Please review this cost plan.	or 2013-2014Submitted By WSC: Gabrielle Morales	sSubmitted By WSC On:5/22/2013 11:03 AM
	Regarding 🛃 Cost Plan For ISA	AC D. STCLAIR For 2013-2014	
	Owner* Gabrielle Morale	s	
	Duration		Priority Normal
	Due 5/29/2013	11:03 AM	
	Category		Sub-Category

Figure 1.7

4. If you select the *Close Task* icon a pop-up box will automatically appear. The selected status of the task to be closed must indicate completed (see Figure 1.8).

Close Task	Webpage Dialog
🖉 http://crm	uat.apd. fl.local /APDTraining/_grid/cmds/dlg_deactivate.aspx?c
Close Task You have selec	cted 1 Task to close.
Select the stat	tus of the closing Task.
Status:	Completed
	OK Cancel
htt 🚭 Internet	t Protected Mode: Onnal
0	06/2012 IEE V 11/17 AM

Figure 1.8

5. Click OK (see Figure 1.9).

Close Tas	k Webpage Dialog
E http://cr	muat.apd. fl.local /APDTraining/_grid/cmds/dlg_deactivate.aspx?c
You have sel	cted 1 Task to close.
Select the st	atus of the closing Task.
Status:	Completed
	ОК
htt 😜 Intern	et Protected Mode: On

Figure 1.9

Assigning Activities from Your Activities Page

On occasion, a Area Office staff member may need to assign a task to another staff member to follow up or complete. When this is the case, the first staff member must verify that all the steps mentioned below have been completed so that the second staff member may complete the process.

1. Click on Activities and you will see the outstanding *Activities* associated with your user ID (see Figure 1.10).

File Activities View	Charts					CNIM		
Mark omplete	Add Note	Assign Germail a Link +	Run Workflow Dialog	Run Report +	Excel Advanced Find			
Actions	Include	Collaborate	Process	Data				
Norkplace 🛛 😭 🙀 -	Activ	vities My Activities						Search for records
My Work	Due	All		1				
Activities		Subje	t	-	Regarding	Priority	Due Date 🔺	Start Date
dueues		Task Cost F	Plan requires Area Rev	iew - Regarding Cost Pla	n 📴 Cost Plan F.	Normal	5/29/2013 11:03 AM	5/29/2013 11:03 AM
Announcements	1 2	Task Cost I	Plan requires Area Rev	iew - Regarding Cost Pla	n 🛃 Cost Plan F.	Normal	9/6/2013 11:17 AM	9/6/2013 11:17 AM
People	2	Task Const	umer has dipped into	Reserve Funds - Regardir	ig 📙 Cost Plan F.	Normal	9/9/2013 11:09 AM	9/9/2013 11:09 AM
& Consumers	2	Task Cost F	Plan requires Area Rev	iew - Regarding Cost Pla	n 🛃 Cost Plan F.	Normal	1/14/2014 8:30 AM	1/14/2014 8:30 AM
Provider	2	Task Cost F	Plan requires Area Rev	iew - Regarding Cost Pla	n 🛃 Cost Plan F.	Normal	1/14/2014 8:33 AM	1/14/2014 8:33 AM
providers	2	Task Cost F	Plan requires Area Rev	iew - Regarding Cost Pla	n 📙 Cost Plan F.	Normal	1/14/2014 8:35 AM	1/14/2014 8:35 AM
iBudget Annual Budgets Annual Cost Plans Service Authorizations								

Figure 1.10

2. Select the task(s) you wish to assign by clicking on the box left of the task(s) (see Figure 1.11).

File Activities View	Charts			IV	าเตองแบงทอกแร	CNIM		
Mark omplete	Add	Assign Share	Run Workflow Dialog	Run Report +	Advanced Find			
Actions	Include	Collaborate	Process	Data				Canada dan sananda
workplace 😭 🙀	Acti	vities My Activities	•	-				Search for records
My Work	Due:	All						
Activities		itu Tuna Cubia	*		Regarding	Priority	Due Date 🔺	Start Date
Queues			requires Area Rev	iew - Regarding Cost Plan	Cost Plan F.	Normal	5/29/2013 11:03 AM	5/29/2013 11:03 AM
Announcements	E 2	Cost	nan requires Area Rev	iew - Regarding Cost Plan	Cost Plan F.	Normal	9/6/2013 11:17 AM	9/6/2013 11:17 AM
People	2	Task Cons	umer has dipped into	Reserve Funds - Regarding	실 Cost Plan F.	Normal	9/9/2013 11:09 AM	9/9/2013 11:09 AM
Consumers	2	Task Cost I	Plan requires Area Rev	iew - Regarding Cost Plan	Cost Plan F.	Normal	1/14/2014 8:30 AM	1/14/2014 8:30 AM
Provider	🛛 🖾	Task Cost I	Plan requires Area Rev	iew - Regarding Cost Plan	실 Cost Plan F.	Normal	1/14/2014 8:33 AM	1/14/2014 8:33 AM
Providers		Task Cost	Plan requires Area Rev	iew Regarding Cost Plan	Cost Plan F.	Normal	1/14/2014 8:35 AM	1/14/2014 8:35 AM
iBudget Annual Budgets Annual Cost Plans Service Authorizations								



3. A check mark will appear by the selected task (see Figure 1.12). Click the *Assign* icon at the top of the page (see Figure 1.12).

Activities View C Cancel Carcel Set Regarding Vark Actions Inco	hans Add Add Attivities My A	rre by a Link . hail a Link . rate Process	Report + Data	Advanced Find			Search for records
forkplace 🖬 👷							Statement
Activities	Due: All	Subject		Pegarding	Priority	Due Date	Start Date
Squeues Reports		quires Area Revi	ew - Regarding Cost Plan	Cost Plan F	Normal	5/29/2013 11:03 AM	5/29/2013 11:03 AM
Announcements	Task	Cost Plan requires Area Revie	ew - Regarding Cost Plan	Cost Plan F	Normal	9/6/2013 11:17 AM	9/6/2013 11:17 AM
Consumers	Task	Cost Plan requires Area Revie	ew - Regarding Cost Plan	Cost Plan F	Normal	1/14/2014 8:30 AM	1/14/2014 8:30 AM
Provider	🔲 🛃 Task	Cost Plan requires Area Revi	ew - Regarding Cost Plan	Cost Plan F	Normal	1/14/2014 8:33 AM	1/14/2014 8:33 AM
😼 Providers	🔟 Ż Task	Cost Plan requires Area Revie	ew - Regarding Cost Plan	🛓 Cost Plan F	Normal	1/14/2014 8:35 AM	1/14/2014 8:35 AM
Budget 2 Annual Budgets 2 Annual Cost Plans 3 Service Authorizations							



4. The Assign to Team or User pop-up box will automatically appear showing how many tasks have been selected to be assigned. Click on the magnifying glass under Assign to another user or team to find the user or team to assign the task (see Figure 1.13).

Assign to Team or User		
You have selected 3 items. To whom	would you like to assign them?	?
Assign to another user or team		
Assign the selected item(s) to the fol	lowing user or team:	
Help	OK.	Cancel



5. The *Look Up Record* pop-up box will automatically appear. In the *Search* box, type in the name of the user or team you are assigning the task. Then select the user or team and click OK. (see Figure 1.14).

ok for:	User	•		
View:	User Lookup View			
Search:	Tester 1 Level 1			
Full	Name	Main Phone	Business Unit	6
Saty	a Puvvada	8509213091	APDTest	-
Tiru	pal Kurapati	850-488-4357	APDTest	
Sha	rath Tigulla	850-921-4101	APDTest	
Ema	il Sender DO NOT P		APDTest	
Meg	ghan Murray		APDTest	
Mira	anda Johnson	850-414-9132	Central Office	
Mik	e Sodders		APDTest	
Tiru	pal Kurapati	850-488-4357	APDTest	
Saty	a Puvvada	8509213091	APDTest	
Erin	Levin	850/570-0459	APDTest	
Test	er 1 Level 1	99999999999	Test BU	
Che	ryl Smith	850-921-4189	Area Office 2	
1 - 50 of	89 (0 selected)		H H F	Page 1
Prope	rties <u>N</u> ew			

Figure 1.14

6. The task has now been assigned. Repeat steps 1 through 5 as needed.

Accessing the Queue

1. To access your Area Office queue, select *Queues* (see Figure 1.15).



Figure 1.15

2. You must change the default filter by selecting the drop down arrow next to *Queue Items*. Change the default view to *All Items* (see Figure 1.16).

File Queue Ite	ems (View	Ch Start Dialog	Run Report	V	Export to Excel Filter Advanced Find					
Collaborate		Proce	\$5			Data					
Workplace		- 🙀	Q	ueue Ite	ms	Items I am working o	n •				
My Work			Qu	eue:	All	System Views					
Activities				Title		All Items		d Qu	ieue 🔻	Туре	Queue
🍐 Queues						Items available to work	on				
Reports						Items I am working on					
People	ents					Create Personal View					
Provider Providers										No records a	re available in this view.



3. To select the appropriate queue select the drop down arrow next to *Queues*. Scroll down to find your corresponding Region queue (see Figure 1.17).

Copy a Link E-mail a Link Run Workflow	Start Run Dialog Report	Filter Advanced				
Collaborate Proces	s	Data				
Workplace 🛛 🚮 🏹 🗸	Queue Iten	ns All Items -	1			
My Work	Queue:	Area Office 1 Queue				
Activities	Title	APDENET\whitlej's WIP Bin queue APDENET\wildj's WIP Bin queue	tered Queue 🔻	Туре	Queue	Wori
dueues	Cost P	APDENET/willist's WIP Bin queue	 3/28/2014 3:34 PM	Task	Area Office 1 Queue	
Appoincements	Consu	APDENET\wilsonn's WIP Bin queue	 3/28/2014 3:32 PM	Task	Area Office 1 Queue	
Beenle	Cost P	APDENET/Winter Mclemore's WIP Bin queue	3/28/2014 3:12 PM	Task	Area Office 1 Queue	
Consumers	Consu	APDENET/wrightm's WIP Bin queue	 3/28/2014 3:07 PM	Task	Area Office 1 Queue	
Provider	Cost P	APDENET/yochemj's WIP Bin queue	 1/9/2014 1:50 PM	Task	Area Office 1 Queue	
R Providers	Consu	APDENET\Yolanda Morris's WIP Bin queue	 1/9/2014 1:47 PM	Task	Area Office 1 Queue	
iBudget	Cost P	apdenet/youmane's WIP Bin queue	1/9/2014 12:33 PM	Task	Area Office 1 Queue	
annual Budgets	🔲 💐 Cost P	Area Office 1 Queue	1/9/2014 12:31 PM	Task	Area Office 1 Queue	
🧕 Annual Cost Plans	Cost P	Area Office 10 Queue Area Office 11 Queue	1/9/2014 12:29 PM	Task	Area Office 1 Queue	
Service Authorizations	Cost P	Area Office 12 Queue	1/9/2014 12:26 PM	Task	Area Office 1 Queue	
👌 Help	🔲 🂐 Cost P	Area Office 14 Queue	 1/8/2014 2:43 PM	Task	Area Office 1 Queue	
	Consu	Area Office 15 Queue	 1/8/2014 2:39 PM	Task	Area Office 1 Queue	
Medualana	🔲 义 🛛 Cost P	Area Office 23 Queue	1/8/2014 1:15 PM	Task	Area Office 1 Queue	
workplace	1 - 50 of 79 (0	Area Office 3 Queue				

Figure 1.17

4. Once you have selected your Area Office queue, you will be able to see all of the outstanding activities for your region. Now click on View, across the top there are several options: Set as Default View, Filter, Save Filters, Save As, New Personal View, and Refresh. Click on Set as Default View to make this your default view every time you select Queues (see Figure 1.18).



Figure 1.18

Closing and Assigning Tasks from the Queue

There are multiple ways to close a task from the queue. Follow the steps below to close and remove tasks from the queue or assign the task to the appropriate staff member.

Closing Multiple Tasks at a Time

1. To close multiple tasks at one time, hold down the CTRL key and select the task(s) you wish to close by clicking on the box left of the task(s). A check mark will appear by the selected task (see Figure 1.19).

File Queue Items Copy a Link • E-mail a Link • Collaborate	View C View C Run Start prkflow Dialog Process	harts Run Report → Filter Data	Advanced Find					
Workplace 🚮	Q- 0	ueue Items All Items -						Search for records
My Work	Q	ueuer		Entered Queue 👻	Туре	Queue	Worked By	Owner (Object)
Reports	V V	 Plan requires Area Revie Consumer has dipped into R 	Regarding Cost Plan Leserve Funds - Regarding	1/13/2014 9:48 AM 1/13/2014 9:46 AM	Task Task	Area Office 2 Queue Area Office 2 Queue		<u>Cheryl Smith</u> <u>Tester2 Level1</u>
People Sconsumers	V V	Cost Plan requires Area Revie	w - Regarding Cost Plan leserve Funds - Regarding	1/9/2014 12:47 PM 1/9/2014 12:47 PM	Task Task	Area Office 2 Queue Area Office 2 Queue		Tester7 Level1 Tester7 Level1
Provider Providers		Cost Plan requires Area Revie	eserve runos - Régarding ew - Regarding Copied Co ew - Regarding Copied Co	1/8/2014 12:44 PM 1/8/2014 1:35 PM 1/8/2014 1:24 PM	Task Task Task	Area Office 2 Queue Area Office 2 Queue Area Office 2 Queue		Tester10 Level1 Tester10 Level1

Figure 1.19

2. Select *Run Workflow* (see Figure 1.20).

File Queue Items View Copy a Link • E-mail a Link • Collaborate Proces	Report - Data				
Workplace 🛛 🖓 -	Queue Items All Items -				Search for records
My Work	Queue: Area Office 2 Queue	Entered Oueue 👻	Type	Queue Worked By	Owner (Object)
 Queues Reports Announcements 	Cost Plan requires Area Review - Regarding Cost Plan	1/13/2014 9:48 AM 1/13/2014 9:46 AM	Task Task	Area Office 2 Queue Area Office 2 Queue	Cheryl Smith Tester2 Level1
People Sconsumers	Cost Plan requires Area Review - Regarding Cost Plan	1/9/2014 12:47 PM 1/9/2014 12:47 PM	Task Task	Area Office 2 Queue Area Office 2 Queue Area Office 2 Queue	<u>Tester7 Level1</u> <u>Tester7 Level1</u> Tester7 Level1
Provider Providers	Consumer has appea into Reserve runds - Regarding Soft Plan requires Area Review - Regarding Copied Co Cost Plan requires Area Review - Regarding Copied Co Cost Plan requires Area Review - Regarding Copied Co	1/8/2014 1:35 PM 1/8/2014 1:35 PM	Task Task	Area Office 2 Queue Area Office 2 Queue	Testeri0 Leveli Testeri0 Leveli

Figure 1.20

3. The *Look Up Record* pop-up box will automatically appear. You do not need to input any information to search for the tasks. They will automatically be displayed in the box under *Process Name*. Select the box next to *Close Task* and a check will appear and then select *OK* (see Figure 1.21).

Process Name Created On Modified On Status Ox Close Task 7/5/2012 7:52 AM 4/23/2014 6:16. Activated Sa 1 - 1 of 1 (1 selected)	ook for: Process View: On Demand Search: Search for r	d Workflows records	پ ب و	Show Only My	Records	
Close Task 7/5/2012 7:52 AM 4/23/2014 6:16. Activated Sa 1 - 1 of 1 (1 selected) M 4 Page	Process Name	1	Created On	Modified On	Status	Owne 😂
↓ 1 - 1 of 1 (1 selected)	Close Task		7/5/2012 7:52 AM	4/23/2014 6:16.	Activated	Satya Pu
Properties New	1 -1 of 1 (1 selected)					► Page 1

Figure 1.21

4. The tasks will be closed and removed from the queue.

Close an Individual Task from the Queue

1. To close an individual task from the queue double click the task you want to close (see Figure 1.22).



Figure 1.22

2. To close the task, you can either select *Mark Complete* or *Close Task*. Note: Selecting *Mark Complete* will automatically remove the task from the queue (see Figure 1.23).



Figure 1.23

3. If you select *Close Task*, a *Close Task* pop-up box will automatically appear. The status of the task to close will default to "Completed" (see Figure 1.24).

Close Task	k Webpage Dialog
http://cm	muat.apd. fl.local /APDTraining/_grid/cmds/dlg_deactivate.aspx?c
Close Task You have sele	ected 1 Task to close.
Select the sta	atus of the closing Task.
Status:	Completed
	OK Cancel
htt 😌 Intern	et Protected Mode: On

Figure 1.24

4. Select *Ok*. This will remove the task from the queue. If you need to cancel closing the task click on the drop down box and select cancelled (see Figure 1.24).

http://crmuat.apd.fl.local/APDTraining/_grid/cmds/dlg_deactivate.aspx?c Close Task
Close Task RC
You have selected 1 Task to close.
Select the status of the closing Task.
Status: Completed 💌
ОК htt 😔 Internet Protected Mode: On

Assigning on Tasks from the Queue

1. To assign tasks from the queue, double-click the task you want to assign (see Figure 1.25).

File Queue Ite Copy a Link + E-mail a Link +	Run Workflow	Charts	Run eport -	🐼 Export to Excel 𝕂 Filter	Advanced Find					
Collaborate	Proce	55		Data						
Workplace	🗳 🙀 •	Queu	e Item	ns All Items -						
4 My Work		Queue	: [Area Office 2 Queu	e	•				
Activities			Title				Entered Queue 🕶	Туре	Queue	Wor
dueues		7	Cost Pl	lan requires Area Re	view - Regard	ing Cost Plan	1/13/2014 9:48 AM	Task	Area Office 2 Queue	
Reports	inte	2	Consu	mer has dipped into	Reserve Fun	ds - Regarding	1/13/2014 9:46 AM	Task	Area Office 2 Queue	
People		2	Cost Pl	lan requires Area Re	view - Regard	ing Cost Plan	1/9/2014 12:47 PM	Task	Area Office 2 Queue	



2. A pop-up box will open with the task information. Instead of selecting the Assign button. We are asking WSC(s) to click the *Work on* feature. It will allow WSC(s) to remain the owner in the queue. Also, the Area Staff can sort by the consumer or WSC name. (see Figure 1.26).



Figure 1.26

3. The Assign to Team or User pop-up box will automatically appear showing how many tasks have been selected to be assigned. Click on the search magnifying glass next to the box under Assign to another user or team to find the user or team to assign the task to (see Figure 1.27).

Assign to Team or User You have selected 1 item. To whom would you like to a	ssign it?		
Assign to another user or team			
Assign the selected item(s) to the following user or tea	m:		ĵ.
		F	
Help	OK	Cancel	
Theip	UN	cancer	

Figure 1.27

4. The *Look Up Record* pop-up box will automatically appear. In the *Search* box, type in the name of the user or team you are assigning the task. Then select the user or team and click OK. (see Figure 1.28).

ok for: View:	User Lookup View			
Search:	Tester 1 Level 1	2		
Full	Name	Main Phone	Business Unit	
Saty	ya Puvvada	8509213091	APDTest	-
Tiru	pal Kurapati	850-488-4357	APDTest	
Sha	rath Tigulla	850-921-4101	APDTest	
Ema	il Sender DO NOT REPLY		APDTest	
Meg	ghan Murray		APDTest	
Mira	anda Johnson	850-414-9132	Central Office	
Mik	e Sodders		APDTest	
Tiru	pal Kurapati	850-488-4357	APDTest	
Saty	ya Puvvada	8509213091	APDTest	
Erin	Levin	850/570-0459	APDTest	
Test	ter 1 Level 1	99999999999	Test BU	
Che	ryl Smith	850-921-4189	Area Office 2	•
L - 50 of	f 89 (0 selected)		H 4	Page 1 🕨

Figure 1.28

5. The task has been assigned. Repeat as needed.

Accessing Consumer Information

1. You will use the *Consumers* option under *People* in the *Workplace* menu on the left side of the page to access the consumer information. Clicking this link will provide a list of consumers you are authorized to view (see Figure 1.30).

Mar Mark	First Name	Last Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situi
Activities	LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
dueues	CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMELY HC
Reports	BRIANA	ABEL	IBGT	8751399318	5/11/1976	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
Announcements	CHANEL	ABERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GRO
People			IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers			IBGT	6588201665	2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
Budget	LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Senire Authorizations	KENDALL	ACKERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
Service reaction controls	FRANK	ACKERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
	MATTHIAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
	ALVADO	ACLINA	IR/CT	22 77205614	A/75/1066	772 04 0782	0000001575	Male	02	IACKON	CAMALL CO
Vorkplace	1 50 of 2050 10 cal	adad)								-	M d Dana 1 b

Figure 1.30

2. You may change the view by selecting the drop down arrow next to "Active Consumers" to indicate whether you wish to view active or inactive consumers.

1

My Work	First Name	Last Name 🔺	Selecta	Medicaid Number Date C	of Birth	Social Security Number	PIN	Gender	District	County	Living Situ
Activities	LIB6Y	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
Jueues	CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
Reports	BRIANA	ABEL	IBGT	8751399318	5/11/1976	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
Announcements	CHANEL	ABERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GR
People	ALAYNA	ABNER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers	REYNA	ABRAMS	IBGT	6588201665	2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	WADE WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
iBudget	E LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Senice Authorizations	KENDALL	ACKERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
A active contractions	FRANK	ACKERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GRO
	MATTHIAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
	AIVAPO	ACUNA	IBGT	3877805614	1/15/1066	772.04 9783	0000001575	Male	07	IACKSON	SMALL CR
Workplace	1 - 50 of 3060 (0 set	lectedi								-	Id d Page 1

Workplace 🚮 🙀 -	Consumers	Active Consumer	5 *					Search fo	ir records		
My Work	First Name	System Views			Data Of Ridth	Sacial Security Number	PIN	Gender	District	County	Living Situ:
Activities	🖾 цібву	Active Consumers				-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
Jueues	CYNTHIA	Inactive Consume	rs			-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
Reports	E BRIANA	Marilian			5/11/1976	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
Announcements	CHANEL	Inty views			5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GRO
People	E ALAYNA	Boay Under 21			7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers	E REYNA	ibudget DOB uni	Jer 21		2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALANA	NE Region Call			3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	WADE	Create Personal V	liew		7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
iBudget	LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GRO
Senice Authoritations	KENDALL	ACKERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
Service Houringations	FRANK	ACKERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GRO
	MATTHIAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
	TT ALVARO	ACLINA	IR/ST	28,77805614	1/75/1966	212 01 0283	0000001575	Male	02	IACKON	CHAN GR
Workplace	1 - 50 of 3060 (0	selected)									H 4 Page 1
Settings	A11	A B C	DE	E G H	T I K	I M N	0 8 0	p s	ти	V W Y	¥ 7

3. To select a consumer, double click the consumer's name in the list (see Figure 1.30). This will display the *Consumer Information* page (see Figure 1.31).

Information Consumer Notes Related Common	Consumer MARTHA Consumer Demographic Data	A BROWNI		Consumers 👻 🛧
Activities	First Name *	MARTHA	Last Name *	BROWNE
Closed Activities	Middle Initial		SFX	
Approved Services	Gender	Female	PIN*	0001016644
Annual Budgets	Date Of Birth*	1/14/1960	Medicaid Number	6848531645
Service Authorizations	Social Security Number	495-91-5954		
Claims	Phone Number		Email	
	Address Line 1	17 ADDRESS70	Address Line 2	
	City	GULF BREEZE	State	💋 Florida

Figure 1.31

Approved Services

Approved Services is a section in iBudget that shows what a consumer is allowed to have on their cost plan and what services a provider can provide.

Consumer-Approved Services

In order for a cost plan to be built in the iBudget application, a consumer must have approved services. The pre-approved services are a necessity for the health and safety of the consumer.

- 1. Under People, click *Consumers* on the left side of the page (see Figure 2.1).
- 2. Double click on a consumer from the list (see Figure 2.1).

	First Name	Last Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ:
Activities	LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
Jueu	CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
Repor	BRIANA	ABEL			5/11/1976	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
	CHANEL	ABERI			5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GRO
People	ALAYNA	ABNER	1001	2333427000	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers	REYNA	ABRAMS	IBGT	6588201665	2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
iBudget	LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Sensice Authorizations	KENDALL	ACKERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
	FRANK	ACKERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
	MATTHEAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
	MINARO	ACLINA	IR/CT	29.77905614	1/75/1066	235 UT 0385	0000001575	Male	07	INCROM	CAAAAA CD:
Workplace	1 - 50 of 3060 (0 sel	ected)									H 4 Page1 >
Workplace Settings	1 - 50 of 3060 (0 sel	ected) A B C	D E	FGH	ТЈК	L M N	0 P 0	R S	τu	v w x	14

Figure 2.1

3. The consumer's information will be displayed (see Figure 2.2).

Information Consumer Notes Related	Consumer MARTH	A BROWNE			Consumers 👻 🕈
 Common Activities Closed Activities Approved Services Annual Budgets Annual Cost Plans Service Authorizations Claims 	First Name * Middle Initial Gender Date Of Birth * Social Security Number Phone Number Address Line 1 City	MARTHA Female 1/14/1960 495-91-5954 17 ADDRESS70 GULF BREEZE	Last Name * SFX PIN * Medicaid Number CDC ID Email Address Line 2 State	BROWNE 0001016644 6848531645	



4. Click Approved Services under the Subgroup Common on the left side of the page (see Figure 2.3).

Information Consumer Notes	Consumer MARTH	A BROWNE				Consumers	•
Related	Consumer						
Common	Demographic Data						
Activities	First Name *	MARTHA		Last Name *	BROWNE		
Closed Activities				SFX			
Approved Services		Female	Ŧ	PIN*	0001016644		
Annual Budgets	Date Of Birth*	1/14/1960	•	Medicaid Number	6848531645		_
Service Authorizations	Social Security Number	495-91-5954		CDC ID			
Claims	Phone Number			Email			
	Address Line 1	17 ADDRESS70		Address Line 2			
	City	GULF BREEZE		State	🧾 Florida		9



5. Click Add New Approved Service (see Figure 2.4).



Figure 2.4

6. Click the *Look Up* icon in the *Service Code* field to select the new service code and description (see Figure 2.5).

File	Approved Service Add	i			APUTraining 😞
Save	Save & Close	Assign Copy a Link	Run Start Workflow Dialog	Run Report + Data	
Inform	ation				
- Appr	oved Service	Approved Ser	rvice		Approved Services 🔻 🛉 🌵
L Note	s	New			
		Approved Servi	ce		
Relate	d	Approved Service			
A Proce	esses				
G#	Workflows	Approved Service Name			
		Consumer	8 MARTHA BROWN	NE	a

Figure 2.5

7. The *Look up Record* box will automatically appear. Click the box next to the description of the service code(s) selected and click *OK* (see Figure 2.6).

Look Vi	for: Service Code	Show Only My	/ Records
Sea	rch: Search for records		
	Description	Service Code 🔺	Service Family Is 🥲
✓	Adult Dental	4001	Wellness Management
	Behavior Analysis - Level 3	4010	Therapeutic Supports Y
	Behavior Analysis - Level 2	4011	Therapeutic Supports Y
	Behavior Analysis - Level 1	4012	Therapeutic Supports Y
	Behavioral Services - Assistant	4013	Therapeutic Supports
	Behavior Analysis Assessment	4014	Therapeutic Supports Y
	Consumable Medical Supplies - CDC	4030	Wellness Management
	Dietitian Services	4040	Wellness Management Y
	Durable Medical Equipment	4050	Environmental and A N
	Environmental Accessibility Adaptations	4060	Environmental and A N
	Environmental Accessibility Adaptations Assessment	4061	Environmental and A N
	Family and Legal Representative Training	4070	Life Skills Development
<			>
1 -	50 of 118 (1 selected)		🕅 🖣 Page 1 🕨
Pr	operties New		1
		<u> </u>	Remove Value

Figure 2.6

8. In the *Begin Date* field enter the start date for the service (see Figure 2.7).

File Approved Service Add	1				APD training @
Save & New Close	Assign Sharing -	Run Workflow	Run Report -		
Save	Collaborate	Process	Data		
Information Approved Service Notes Related Processes	Approved Service Approved Service	vice ce			Approved Services 👻 🛧 🕸
G Workflows	Approved Service Name Consumer	S MARTHA BROW	NE		
	Service Code	4001		Begin Date	

Figure 2.7

9. Click Save; Save and Close or Save & New (see Figure 2.8).

File Approved Service Ad	id					APD1raining @	
Save Save	Sharing -	Run Workflow Start Dialog Process	Run Report + Data				
Information	Approved Sen	vice				Annround Services *	L A
- Approved Service	New New					Approved Services	1 4
= notes	-						
Related	Approved Service	e					
4 Processes	Approved Service			 			
G Workflows	Approved Service Name						
	Consumer	MARTHA BROW	NE				Q
	Service Code	4 001		Begin Date	10/1/2014	×	<u>o</u> v

Figure 2.8

10. Repeat steps 4 through 9 until all approved services have been entered.

How to Add Provider Services

For provider services to be added into iBudget, the Field Office provider enrollment staff person will add the iBudget service codes to the ABC screen AVEMNCS. Once added, the service codes will be reflected in iBudget overnight, with the exception of weekends when they will reflect by the following Monday.

In cases of an emergency, where services are needed in iBudget immediately, please contact State Office provider enrollment staff.

Effective July 1, 2013, all APD waiver providers will maintain one active Medicaid provider ID. This change will only impact current waiver providers with multiple active Medicaid provider IDs. WSC/Consultants should build their Fiscal Year 13-14 service plans using the provider number that contains the Developmental Disability (DD) contract. An error message will occur if any other number is used.

Effective July 1, 2013, active CDC+ waiver provider numbers will be transferred to the DD Medicaid provider ID through an automated process in FMMIS.

If a Waiver Support Coordinator (WSC) does not know which number has the "DD" contract, they have been instructed to contact their Field Provider Enrollment Specialist.

Budget Reductions

There may be instances in which a consumer's annual budget amount needs to be reduced (i.e., as a result of cost plan reviews, living setting changes, or changes in QSI scores.) To reduce the annual budget amount, follow these steps:

- 1. Click *Consumers* in the *Workplace* menu (see Figure 3.1).
- 2. Locate the consumer you wish to change. Highlight the consumer and double click. This will open the *Consumer Information* page (see Figure 3.1).

	First Name	Last Name	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ:
My Work	LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
A Queues	CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMELY HC
Reports	BRIANA	ABEL	IBGT	8751399318	5/11/1976	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
Announcements		ERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GRO
People		NER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers	REVINA	ABRAMS	IBGT	6588201665	2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7*		Male	02	WASHINGTON	FAMILY HC
iBudget	LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000102099	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Service Authorizations	KENDALL	ACKERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
Service restrictions	FRANK	ACKERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
	MATTHIAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
	MINADO	ACT 1614	IR/CT	28 7780561.4	A/75/1066	772 04 0782	0000001575	Male	07	IACKON	CAMALL CO
Workplace	1 - 50 of 3060 (0 set	ected)									H 4 Page 1 1
Settings	1 - 30 01 3000 [0 30										it thuges a

Figure 3.1

- 3. On the left side under the *Related Common* menu click *Annual Cost Plan* (see Figure 3.2).
- 4. Verify that the cost plan is in either *Draft* or *Pending Review* status (see Figure 3.2).

File Consumer Add C	Annual Co: Activate Deactivate Delete Annual Cost Plan tecords	st Plans	Assign Annual Plans	Cost	Filter	Save Filters	Set As Default View	t Run S Workflow D	itart Report -	ata	PDTraining 🛆
nformation - Consumer - Notes	Consumer MARTHA	BROWNE								Consume	ers 🔻
2 .1.1.1	- 🛃 Annual Cost	Plans Annual C	Cost Plan As	sociated *				S	earch for records		
selated	🔲 Fiscal Year 🕶	Effective Date	Waiver Co	Cost Plan		Total Alloc	ated Amo Total Bud	lgeted Amo To	tal Remaining Bal	Created By	Created On
Common	2013-2014		IBGT	Draft	None		\$12,000.00	\$9,200.52	\$2,799.48	SYSTEM	1/7/2014 10
Closed Activities	2013-2014	7/1/201	B IBGT	Current Approv	Approved		\$12,000.00	\$9,409.32	\$2,590.68	Gabrielle Moral	8/30/2013 10
Audit History Approved Servir Annual Budgets Annual Cost Plans Service Authorizations Claims Processes Workflows											



- 5. Click on Annual Budgets (see Figure 3.3).
- 6. Double click on the allocated amount.

Activate Activate Activate Activate Activate Activate Activate Activate Activate Activate Activate Activate	Assign Annual Budgets Collai	Share Copy a Link E-mail a Link borate	ter Save Filters as	New View Set As Default View	Chart Pane - Workflow Proc	Start Dialog Report -	Export Annual Budgets Data	
information Consumer Notes	Consumer MARTH	A BROWNE					Const	umers 👻 🛧 🤟
Related	Fiscal Year -	dgets Annual Bu Begin Date	Idget Associated V	Allocated Amount	Created By	Sear Created On	rch for records Modified By	Modified On
Common Activities Closed Activities	2013-2014	7/1/20	13 6/30/2014	\$12,000.00	Gabrielle Morales	10/24/2012 11:50	Deanna Mclean	10/24/2012 2:09
Approved Services								
	↓ 1 - 1 of 1 (0 selecte ▲ II # ▲	d) 8 C D	F F G H	IJKL	MNOI	PORS	T U V	H ∉ Page 1 ► W X Y Z

Figure 3.3

- 7. This will bring you to the *Annual Budget* information screen. Double Click on the *Allocated Amount* (see Figure 3.4).
- 8. Change the amount to the appropriate budget amount (see Figure 3.4).
- 9. Always verify the reduced amount of the budget to ensure it is not less than the allocated amount of the cost plan. If the amount is less than the allocated amount, the system will populate an error message and will not allow you to save.
- 10. Click Save and Close (see Figure 3.4).

Save Save & Delete	Assign	Run Workflow	Run Report -				
Save	Collaborate	Process	Data				
information – Annual Budget – Notes	Annual Budg	^{get} Budget for MA	ARTHA BROWNE For	FY 2013-2014		Annual Budgets	•
Related	Annual Budget						
Common	Consumer*		NE 🗖	Fiscal Year*	2013-2014		4
Closed Activities	Begin Date*	7/1/2013		End Date *	6/30/2014		
	Allocated Amount*	\$12,000.00					
	Yearly Budget	\$10,200.00		Approximate Monthly Allocated Amount	\$887.67		
	Flex Amount	\$1,200.00		Reserve Amount	\$600.00		
	Certification						
	I Certify I have verified the Allocated Amount	● No C Yes		Date Last Certified			



11. The Annual Budgets screen will show the reduction under allocated amount (see Figure 3.5).

Add New Annual Budget	Budget Assign Annual Budgets Collab	Share Copy a Link E-mail a Link porate	Save Filters	s New View Set A	s Default View View	Run Workflow Proces	Start Run Dialog Report	Export Annual Budgets Data	
Information Consumer Notes	Consumer CHANEL	L. ABERNATHY						Consumers	• • •
Polated	4 Annual Budg	gets Annual Budge	et Associated Vi	ew 🔹			Search for rec	ords	Q
Related	- Fiscal Year 🔺	Begin Date	End Date	Allocated Amoun	Created	By Cr	eated On	Modified By	Mod 2
Activities Activities Closed Activities Approved Services Annual Budgets Annual Cost Plans Service Authorizations Claims	2013-2014	7/1/2013	6/30/2014	\$28.	100.00 Satya Pi	rvvada 9/	13/2012 7:50	Eva Fambro-Price	8/28/20

Figure 3.5

Review, Approve, or Deny a Cost Plan

The Area Office staff review cost plans and will sometimes send them to the State Office for additional review, or they approve cost plans which creates service authorizations that are sent to the Agency for Health Care Administration (AHCA) for a Provider Authorization (PA) number.

Reasons for Area Office Review

Certain situations result in Area Office review of a cost plan. A cost plan will automatically be checked for the possibility of sending to the Area Office for review each time a WSC clicks the *Save and Process* button. When the Area Office receives one of these cost plans in its queue or as an activity on the *Activities* page, a staff member will then read the reason in the *Reason for Field Review* box and verify that all health and safety needs have been met before approving the cost plan.



Figure 4.1

In the Area Office Processing box, you might see the following reasons for a review:

- 1. Reason: Automatically sent to Area Office Review
 - a. <u>Description</u>: This happens when it is the first cost plan for a consumer or when the WSC wants the Area Office to check something before approving.
- 2. **Reason:** Services from the following critical/needed groups:
 - a. <u>Description</u>: This happens when a service plan has not been built for an approved critical service or if the minimal amount has not been met. It will list the specific service that needs to be reviewed.
- 3. **Reason:** One or more of the consumer's needed services have not been budgeted in the cost plan
 - a. <u>Description</u>: This happens when there is no service plan for a service that is needed to meet the health and safety requirements of the consumer. To verify this, click on *Consumer Approved Services* to make sure there is a service plan for all services listed.
- 4. **Reason:** The service Environmental Accessibility Adaptations has triggered an automatic Area Office review. Please verify that the total expenditure is not greater than \$20,000 within the last five years.
 - a. <u>Description</u>: Environmental Accessibility Adaptations has a maximum allowed amount of \$20,000 per every five years of services. This alert reminds the Area Office staff to verify that limit has not been met yet for this consumer.
- 5. **Reason:** One or more of the consumer's needed services have been budgeted less than the current approved cost plan.

a. <u>Description</u>: When a cost plan is built and copied for changing, those changes are tracked to create a history or *Historical* cost plan. The plans are then compared to the current approved plan to make sure that the changes will not affect the health and safety of the consumer. When this alert appears, it means that a needed service has been reduced. The Area Office needs to verify that this lesser amount will still meet the health and safety requirements of the consumer.

6. **Reason:** Waiver Support Coordination has not been budgeted as required.

- a. <u>Description</u>: Waiver Support Coordination is a required service for all cost plans. This alert verifies that it has been budgeted for every month of service in the cost plan. To check this, open the service plan for Support Coordination in the cost plan and verify that the amounts for each month are correct.
- b. <u>Description</u>: When the cost plan is over the approved threshold amount.
- c. <u>Description</u>: When the Like Skills Development 3 ratio of 1:5.

Approving a Cost Plan

There are several steps to properly approve a cost plan. The steps mentioned below must occur for every cost plan that is sent for Area Office review.

Verifying Cost Plan Budget Amounts

- 1. Click *Consumers* in the *Workplace/People* menu (see Figure 5.1).
- 2. Double click on the consumer within the list (for example: Browne, Martha) (see Figure 5.1).

	First Name	Last Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ:
Activities	LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMELY HC
dueues	CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
P Reports	BRIANA	ABEL	IBGT	8751399318	5/11/1976	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
Announcements	CHANEL	ABERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GR
People		NER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers		RAMS	IBGT	6588201665	2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMELY HC
Budget	LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	le cr	0000030430	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Annual Cost Plans	KENDALL	ACKERMAN			1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
Service Automizations	FRANK	ACKERMAN	BGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
	MATTHIAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
	ALVADO	A/3181A	IR/CT	22 77205614	A/75/1066	772 04 0282	000001575	Male	0.2	LACKCON	CAAALI COA
/orkplace	1 50 of 2050 (0 cal	actad)									M d Dana 1 N



3. The *Consumer Information* page will be displayed (see Figure 5.2).

Information - Consumer - Notes	Consumer MARTH	A BROWNE				Consumers 👻 🏠
Related	Consumer Demographic Data					
Activities	First Name *	MARTHA		Last Name *	BROWNE	
Closed Activities	Middle Initial			SFX		
Approved Services	Gender	Female	Ŧ	PIN*	0001016644	
Annual Budgets	Date Of Birth*	1/14/1960	•••	Medicaid Number	6848531645	
Annual Cost Plans	Social Security Number	495-91-5954		CDC ID		
Claims	Phone Number			Email		
	Address Line 1	17 ADDRESS70		Address Line 2		
	City	GULF BREEZE		State	🛃 Florida	9

Figure 5.2

- 4. Click *Annual Cost Plans* in the *Related Common* subgroup on the *Consumer Information* page (see Figure 5.3).
- 5. Double click the cost plan in the list that is in *Pending Review* or *Pending Area Office Review* status to view cost plan amounts (see Figure 5.3).

- Consumer - Notes	8	Consumer MARTHA	BROWNE								Consumers	•
	1-6	Annual Cost	Plans Annual Co	st Plan Ass	ociated View -				Se	arch for records		Q
Related		Fiscal Year 👻	Effective Date	Waiver Co	Cost Plan Statu	Processing Status	Total Allocated Amo	Total B-	jeted Amo	Total Remaining Bal	Created By	Created On O
Common		2013-2014	4/14/2014	IBGT	Pending Review	Pending Area Office Review	\$12,000.00	<		799.48	SYSTEM	1/7/2014 10:3
Closed Activities	10	2013-2014	7/1/2013	IBGT	Current Approv	Approved	\$12,000.00		\$9,409.32	\$2,590.68	Gabrielle Moral	8/30/2013 10:0
Approved Services		2013-2014	7/1/2013	IBGT	Draft	None	\$12,000.00		\$1,508.52	\$10,491.48	Gabrielle Moral	10/24/2012 3:0
Annual Budgets	71	2012-2013	4/1/2013	IBGT	Current Approv	Approved	\$3,000.00		\$2,914.93	\$85.07	Gabrielle Moral	10/24/2012 2:0
Annual Cost Plans	ľ											

Figure 5.3

6. This brings up the Annual *Cost Plan Information* page. Verify that the amounts are correct (see Figure 5.4). Be sure to check the *Notes* at the bottom of the page for notes (See Figure 5.5).

– Annual Cost Plan – Notes	Annual Cost	^{t Plan} Cost Plan For MARTHA	BROWNE For 2013-201	4				Annual Cost Plans 🔻 🕆
Related	Annual Cost Pla	an						
Common Activities	Consumer*	8 MARTHA BROWNE		Fisc	al Year*	2013-2014		9
Closed Activities	Annual Budget	nnual Budget for MARTHA E	ROWNE For FY 2013-2014					a
Monthly Cost Plans	Submitted Date	4/14/2014		😥 🗸 Wai	iver Code	IBGT		
00	Amounts							
	85% Target Amount	\$10,200.00	Budgeted Target Amount	\$9,200.52		a Target	\$999.48	
	10% Flexible Amount	\$1,200.00	Budgeted Flexible Amount	\$0.00		Remaining Flexible Amount	\$1,200.00	
	5% Reserve Amount	\$600.00	Budgeted Reserve Amount	\$0.00		Remaining Reserve Amount	\$600.00	
	Totals							
	Total Allocated Amount	\$12,000.00	Total Budgeted Amount	\$9,200.52		Total Remaining Balance Amount	\$ 2,799.48	
	Processing							
	Effective Date *	4/14/2014		Con	sumer Accepts	C No (Yes		





Components of the Cost Plan

1. Click the *Monthly Cost Plans* link in the *Related Common* menu to check the monthly expenditures against monthly budgets (see Figure 5.6).

	LIST LOOIS		osoft Dynamics CRM			Gabrielle Morales	
File Annual Cost Plan Add	Monthly Cost Plans					APDTest 🛆	
dd New Monthly Cost Plan	Assi nthly Cost Plan	gn Monthly Cost Plans Collaborate	Filter	Chart Pane - Workflow Dialog	Run Report +	t Monthly Cost Plans	
formation							
Annual Cost Plan Notes	Cost P	ost Plan Ian For MARTHA BRO	WNE For 2013-2014	1	A	nnual Cost Plans 🔻 🕇	
	-	Cost Plans Monthly Cost P	an Associated View -		Search for rec	ords	
	,						_
elated	Month	Monthly Allocated Amount	Monthly Budgeted Amount	Monthly Balance Amount	Currency 🔺	Owner	-
Common	Month July	Monthly Allocated Amount \$866.30	Monthly Budgeted Amount \$884.11	Monthly Balance Amount \$0.00	Currency 🔺 US Dollar	Owner Gabrielle Morales	
elated Common Common Concernation Concernati	Month July August	Monthly Allocated Amount \$866.30 \$866.30	Monthly Budgeted Amount \$884.11 \$734.11	Monthly Balance Amount \$0.00 \$132.19	Currency 🔺 US Dollar US Dollar	Owner Gabrielle Morales Gabrielle Morales	
elated Common Content Activities Closed Activities Closethy Cost Place	Month July August	Monthly Allocated Amount \$866.30 \$866.30 \$888.36	Monthly Budgeted Amount \$884.11 \$734.11 \$884.11	Monthly Balance Amount \$0.00 \$132.19 \$0.00	Currency 🔺 US Dollar US Dollar US Dollar	Owner Gabrielle Morales Gabrielle Morales Gabrielle Morales	
elated Common Control Activities Closed Activities Monthly Cost Plans Control	Month July August	Monthly Allocated Amount \$866.30 \$868.30 \$838.36 \$838.36	Monthly Budgeted Amount \$884.11 \$734.11 \$884.11 \$734.11	Monthly Balance Amount \$0.00 \$132.19 \$0.00 \$132.19	Currency 🔺 US Dollar US Dollar US Dollar US Dollar	Owner Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales	
telated Common Common Closed Activities Closed Activities Monthly Cost Plans Service Plans	Month July August November	Monthly Allocated Amount \$866.30 \$868.30 \$838.36 \$838.36 \$866.30 \$838.36	Monthly Budgeted Amount \$884.11 \$734.11 \$884.11 \$734.11 \$734.11	Monthly Balance Amount \$0.00 \$132.19 \$0.00 \$132.19 \$132.19 \$104.25	Currency US Dollar US Dollar US Dollar US Dollar US Dollar	Owner Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales	
elated Common Colosed Activities Monthly Cost Plans Service Plans	Month July August November December	Monthly Allocated Amount \$866.30 \$866.30 \$888.36 \$888.36 \$888.36 \$888.36 \$888.36	Monthly Budgeted Amount \$884.11 \$734.11 \$884.11 \$734.11 \$734.11 \$734.11	Monthly Balance Amount \$0.00 \$132.19 \$0.00 \$132.19 \$104.25 \$104.25 \$132.19	Currency 🔺 US Dollar US Dollar US Dollar US Dollar US Dollar US Dollar	Owner Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales	
telated Common Common Closed Activities Closed Activities Closed Activities Closed Plans Common	Month July August November December January	Monthly Allocated Amount \$866.30 \$866.30 \$838.36 \$888.36 \$888.36 \$888.36 \$886.30 \$866.30	Monthly Budgeted Amount \$884.11 \$734.11 \$884.11 \$734.11 \$734.11 \$734.11 \$734.11 \$734.11	Monthly Balance Amount \$0.00 \$132.19 \$0.00 \$132.19 \$104.25 \$132.19 \$132.19	Currency A US Dollar US Dollar US Dollar US Dollar US Dollar US Dollar US Dollar	Owner Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales	
telated Common Common Closed Activities Closed Activities Closed Activities Common Closed Plans Common Plans	Month July August November December January February	Monthly Allocated Amount \$866.30 \$866.30 \$838.36 \$866.30 \$888.36 \$886.30 \$886.30 \$886.30 \$886.30 \$886.30	Monthly Budgeted Amount \$884.11 \$734.11 \$884.11 \$734.11 \$734.11 \$734.11 \$734.11 \$734.11 \$734.11	Monthly Balance Amount \$0.00 \$132.19 \$0.00 \$132.19 \$104.25 \$132.19 \$132.19 \$132.19 \$48.36	Currency A US Dollar US Dollar US Dollar US Dollar US Dollar US Dollar US Dollar	Owner Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales Gabrielle Morales	



- 2. Click the Service Plans link under the Related Common menu (see Figure 5.7).
- 3. Double click each service plan to review the budgeted amount for the service.

Hormation - Annual Cost Plan - Notes	Copi	Cost Plan ed Cost Plan For MARTH	HA BROWNE For	2013-2014					Ann	ual Cost Plans	• • •
	- 🛞 Service	Plans Service Plan Associat	ed View -					Search for records	5		ρ
Related	Service Co	de 🔺 🛛 Description (Service Code)	Provider	Procedure Cod	Service Ratio	Total Number O	Total Amount	SP Begin Date	SP End Date	Created By	C O
Common	4001	Adult Dental	BOSSO, KATHY DMD	D0160UC	None	4.00	\$600.00	7/1/2013	6/30/2014	SYSTEM	1/7
Closed Activities	4082	Life Skills Development	ABILITIES CENTER OF	\$5102UC	1:10	750.0		7/1/2013	6/30/2014	SYSTEM	1/7,
Monthly Cost Plans	1 4140	Personal Supports	A & E CAREGIVERS L	S5130UC	1:2	1,320		7/1/2013	6/30/2014	SYSTEM	1/7
Service Plans		rt Coordination	ADEPT COMMUNITY	G9012UC	None	12.00	\$1,508.52	7/1/2013	6/30/2014	SYSTEM	1/7



4. Click the *Notes* tab to check for service plan notes. Service plan notes are the notes that appear on the provider service authorization (see Figure 5.8).

nformation - Service Plan - Notes	Service Plan Copied Service Plan For MARTHA BROWNE For 4001	Service Plans	•	¥
Related Common ② Activities ③ Closed Activities	Notes Enter a note Title: Note created on av 13 10:32:35 AM by Gabrielle Morales Spanning the first quarter and the last quarter for a cleaning at \$300. If more funds are needed or follow up appointments please contact Gabrielle Morales at gabrielle.morales@apdca SYSTEM 1/7/2014 10:36 AM	res.org.		

Area Office User Guide 10/14/2014 8.1a Figure 5.8

Page 39

- 5. If cost plan issues are found, take appropriate action to resolve the issues. This can be done by fixing the issues yourself or sending the cost plan back to the WSC for review (see Figure 5.9).
- 6. When the Area Office is requesting input from the State Office, click the *Central Review* icon at the top of the page. This will send the cost plan to State Office for input prior to processing the cost plan (see Figure 5.9).

******WSC, Area Office, and State Office enter notes into the system, click Save, and then click the appropriate button ******

File Annual Cost Plan Ad	d								
Save & New Save & Save & New Close X Delete Save	Assign Copy a Lin Collaborate	ak nk Workfow Dialog Process Data WSC Acti	Area eview Send Back To C WSC P	entral eview cres s Central Action	Process ns Common A	Actions			
nformation - Annual Cost Plan - Notes	Annual Cost	t Plan Cost Plan For MARTHA BROWN	E For 2013-201	4					Annual Cost Plans 👻 🕆
Related	Annual Cost Pla Annual Cost Plan	an							
Activities	Consumer*	S MARTHA BROWNE		G Fis	cal Year*	2013	-2014		9
Closed Activities	Annual Budget	Annual Budget for MARTHA BROWNE For	FY 2013-2014						1
🤙 Monthly Cost Plans	Submitted Date			(Tenar) Wa	iver Code	In cr.			
Service Plans	Amounts	4/14/2014			aner cobe	1001			
	85% Target Amount	\$10,200.00	Budgeted Target Amount	59,200.52			Remaining Target Amount	5999.48	
	10% Flexible Amount	\$1,200.00	Budgeted Flexible Amount	50.00			Remaining Flexible Amount	\$1,200.00	
	5% Reserve Amount	\$600.00	Budgeted Reserve	\$0.00			Remaining Reserve	\$ 600.00	
	Totals		Allount				Allount		
	Total Allocated Amount	\$12,000.00	Total Budgeted Amount	\$9,200.52			Total Remaining Balance Amount	\$ 2,799.48	
	Processing								
	Effective Date *	4/14/2014			nsumer Accept	S C No	(Yes		

Figure 5.9

7. If the *Cost Plan Status* is *Pending Review* and the *Processing Status* indicates *Pending Area Office Review*, the Area Office will see a date in the *Effective Date* field. The Area Office must enter comments in the *Area Office Processing Comments* box for the cost plan. Then click Save (see Figure 5.10).

information - Annual Cost Plan - Notes	Annual Cost Plan Copied Cost Plan For MARTHA BROWNE For 2013-2014	Annual Cost Plans 💌 🛧
	WSC Processing	
Related	Processed By WSC WSC	Processed
Common Activities Closed Activities Monthly Cost Plans Service Plans	WSC Processing Please correct the dates for transportation to 4/1.	
	Area Office Processing	
	Reason for Area 4/14/2014 - Manually sent to Area Office Review Review	
	Processed By Area Office User Area Office Processed By Area Processed By Area Processed By Area Processed By Area Processed By Area Processed By Area	Office essed Date
	Figure 5.10	

Area Office User Guide 10/14/2014 8.1a Figure 5.10 Page 40 8. Click the *Process* icon at the top of the *Annual Cost Plan* page (see Figure 5.11).



Figure 5.11

9. A confirmation box will appear asking, "Are you sure you want to process this cost plan?" Click OK (see Figure 5.12).





10. The Cost Plan Status will change from Pending Review to Current Approved (see Figure 5.13).

- Consumer - Notes	-	Consumer MARTH	A BROWNE									Consumers	• † 4
	1.4	Annual Cos	t Plans Annual Co	st Plan Ass	ociated View +					Search	for records		\$
Related	- 13	Fiscal Year	Effective Date	Waiver Co	Cost Plan Statu	Processin	Total Allo	ated Amo	Total Budgeted Amo	Total Remaining Bal	Created By	Created On	Modified By
Common	13	2012-2013	4/1/2013	IBGT	Current Approv	Approved		\$3,000.00	\$2,914.93	\$85.07	Gabrielle Moral	10/24/2012 2:00	Gabrielle Mor
Closed Activities		2013-2014	7/1/2013	IBGT	Current Approv	Approved	1	\$12,000.00	\$9,409.32	\$2,590.68	Gabrielle Moral	8/30/2013 10:00	Gabrielle Mor
Approved Services		2013-2014	7/1/2013	IBGT	Draft	None			\$1,508.52	\$10,491.48	Gabrielle Moral	10/24/2012 3:08	SYSTEM
Annual Budgets	23	2013-2014	4/14/2014	IBGT	Pending Review	Pending	< label{eq:started_startes		\$9,200.52	\$2,799.48	SYSTEM	1/7/2014 10:36.	Gabrielle Mor
Annual Cost Plans													
Service Authorizations													



11. If the cost plan needs to be submitted for State Office review, click the *Central Review* icon (see Figure 5.14).

File Annual Cost Plan Ad	d			3					APDTest a
Save & New Save & Save & New Save & Archivate Save & Xreete Save	Assign I a Lin Collaborate	k nk Workflow Dialo Process Data WSC Act	Area Erview Area Action	entral terriew s Central	tons Common	Actions			
nformation - Annual Cost Plan - Notes	Annual Cost	t Plan Cost Plan For MARTHA BROWN	NE For 2013-201	.4	1				Annual Cost Plans 💌 🛧
Related	Annual Cost Pla	n							
Common	Consumer*	S MARTHA BROWNE			Fiscal Year*	2013	-2014		
Closed Activities	Annual Budget	Annual Budget for MARTHA BROWNE For	FY 2013-2014	-					
Low Monthly Cost Plans	Submitted Date	4/14/2014			Waiver Code	IBGT			
	85% Target Amount	\$10,200.00	Budgeted Target Amount	59,200.52			Remaining Target Amount	5999.48	
	10% Flexible Amount	\$1,200.00	Budgeted Flexible	\$0.00			Remaining Flexible Amount	\$1,200.00	
	5% Reserve Amount	\$600.00	Budgeted Reserve Amount	\$0.00			Remaining Reserve Amount	\$600.00	
	Total Allocated Amount	512,000.00	Total Budgeted Amount	\$9,200.52			Total Remaining Balance Amount	\$2,799.48	
	Effective Date *	4/14/2014			Consumer Accept	ts C No	ℱ Yes		

Figure 5.14

12. A confirmation box will appear asking, "Are you sure you want to process this cost plan?" Click *OK* (see Figure 5.15).

				New No. 11-1		
Annual Cost Plan Ad Annual Cost Plan Ad Save & New Save & Deactivate Save & Delete Save	d Assign Copy a Link Collaborate	Run Stat Workflow Dialog Process Data	Submit Area Review WSC Actions	Send Back To Area Central Actions Common A	Copy	
Information Annual Cost Plan Notes Related	Annual Cost P Copied Co Annual Cost Plan Annual Cost Plan	Plan Dost Plan For MARTHA	BROWNE For 2013-2014			
Activities	Consumer * Annual Budget	🕵 MARTHA BROWNE	Message from webpage	X	2013-2014	
i Monthly Cost Plans 🛞 Service Plans	Submitted Date 4	/14/2014	Are you sure you want to	process this cost plan?	IBGT	
	85% Target Amount	10,200.00		ок	Remaining Target Amount	59
	10% Flexible S Amount	1,200.00	Allount		Remaining Flexible Amount	\$1
	5% Reserve Amount	600.00	Budgeted Reserve \$0.0 Amount	0	Remaining Reserve Amount	\$6
	Takala					- 1

Figure 5.15

- 13. The *Processing Status* will change to *Pending State Office Review*.
- 14. An activity is created for State Office to review the cost plan.

Activities Submitted to the Area Office Queue

1. Click *Queues* under *My Work* in the *Workplace* section on the left side (see Figure 6.1).



Figure 6.1

2. If you did not set your default view, change the drop down menu *Queue Items* to *All Items* and change *Queue*: to your Area Office (see Figure 6.2).



Figure 6.2

3. Double click the task to read the notes (see Figure 6.3).

Work	Queue: All Queues						
Activities	Title Title	Entered Queue +	Туре	Queue	Worked By	Owner (Object)	
Queues	🔽 🎐 Cost Plan requires Area Review - Regarding Cost Plan	1/13/2014 9:48 AM	Task	Area Office 2 Queue		Cheryl Smith	
Announcements	🔄 😨 Consumer has dipped into Reserve Funds - Regarding	1/13/2014 9:46 AM	Task	Area Office 2 Queue		Tester2 Level1	
nie	🔲 🧟 Cost Plan requires Area Review - Regarding Copied Co	1/9/2014 1:50 PM	Task	Area Office 1 Queue		SANDRA HILL	
Consumers	🔟 🕄 Consumer has dipped into Reserve Funds - Regarding	1/9/2014 1:47 PM	Task	Area Office 1 Queue		Tester22 Level1	
vider	🔲 🗐 Cost Plan requires Area Review - Regarding Cost Plan	1/9/2014 12:47 PM	Task	Area Office 2 Queue		Tester7 Level1	
Providers	🗐 🗐 Consumer has dipped into Reserve Funds - Regarding	1/9/2014 12:47 PM	Task	Area Office 2 Queue		Tester7 Level1	
laet	Cost plan has been submitted for processing.	1/9/2014 12:47 PM	E-mail	APDENET\T7L1's WIP Bin			
Annual Budgets	🔲 🕏 Consumer has dipped into Reserve Funds - Regarding	1/9/2014 12:44 PM	Task	Area Office 2 Queue		Tester7 Level1	
Annual Cost Plans	🔲 🗐 Cost Plan requires Area Review - Regarding Cost Plan	1/9/2014 12:33 PM	Task	Area Office 1 Queue		Tester22 Level1	
Service Authorizations	🔟 🥏 Cost Plan requires Area Review - Regarding Cost Plan	1/9/2014 12:31 PM	Task	Area Office 1 Queue		Tester22 Level1	
	🔟 🗐 Cost Plan requires Area Review - Regarding Cost Plan	1/9/2014 12:29 PM	Task	Area Office 1 Queue		Tester22 Level1	
	🔟 🗐 Cost Plan requires Area Review - Regarding Cost Plan	1/9/2014 12:26 PM	Task	Area Office 1 Queue		Tester22 Level1	
luniare	🗌 🗐 Cost Plan requires Area Review - Regarding Copied Co	1/8/2014 2:43 PM	Task	Area Office 1 Queue		SANDRA HILL	
kplace	1 - 50 of 1113 (1 selected)						H 4 Page 1 1

Figure 6.3

- 4. Click the appropriate action for that task (see Figure 6.4).
 - a. If you are assigning the task to someone else, click Assign.
 - b. If the task has been completed, click *Close Task*.

File Mark omplete - Task - Notes Related	Task Save Save	Save & Close	Q Attach File Inclu	Add Note Ide	Close Task Actions Task Cost F	To Opportunity Convert Activ Plan requires Cost Plan req an requires area rea	To Case Assign ivity (S Area Revie quires Area Review - eview	Sharing - Copy a Link Collaborate	Run St Workflow Dia Process	art Run Report Data	• • • •2014	ERG For 201	Tasks	•
				Fiscal Cost P Please Regare	year:2013-: lan:Cost Pla review this fing	2014 an For ETHAN A. BE s cost plan.	RG For 2013-2014Si an For ETHAN A. BER	ubmitted By WSC: Tr 1G For 2013-2014	ester2 Level1Sub	mitted By WSC	On:1/13/2014 9:4	8 AM		

Figure 6.4

- 5. Click Run Workflow. The Look Up Record box will automatically appear (see Figure 6.5).
- 6. Select the check box next to Close Task.
- 7. Click OK. Repeat steps as needed

ok for: Process		v	Show Only My	incerta s	
View: On Deman	d Workflows	v			
earch: Search for	records	Q			
Process Name	l	Created On	Modified On	C 1.1	
				Status	Owne
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own <u>Satya</u>
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own <u>Satya</u>
Close Task		(3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own <u>Satya</u>
Close Task		(3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own <u>Satya</u>
Close Task		(3/2014 7:49 PM	3/10/2014 5:32.	Activated	Owne Satya
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	Owne <u>Satya</u>
Close Task		(3/2014 7:49 PM	3/10/2014 5:32.	Activated	Owne <u>Satya</u>
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	Owner Satya
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	<u>Satya</u>
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	<u>Satya</u>
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	<u>Satya</u>
Close Task		(3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own <u>Satya</u>
Close Task		(3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own <u>Satya</u>
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own <u>Satya</u>
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	<u>Satya</u>
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own <u>Satva</u>
Close Task		3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own Satya
Close Task - 1 of 1 (1 selected	0	3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own Satya
Close Task)	3/2014 7:49 PM	3/10/2014 5:32.	Activated	Own Satya

Figure 6.5

6. Click the *Refresh List* icon (see Figure 6.6). Repeat steps as needed.

Queue items Ail items -						
Queue: All Queues						
Title	Owner (Object)	Entered Queue 🛩	Туре	Queue	Worked By	0 <

Figure 6.6

- 7. If you need to add a note or attach a file, click the *Add a Note* or *Attach a File* buttons (see Figure 6.7).
- 8. Once your task is completed, click *Save* and *Close*.

File Task			Gabrielle Morales V APDTest
Mark, Save Save Cose Save Lose Incention Task Notes Related	Add Actions Add Actions Task Cost Plar Task Subject * Following cost plan Consumer: ISAAC D. Fiscal year: 2013-2014 Cost Plan:Cost Plan Please review this co	Image: Starting - To Case productive of the start of	Tasks V
	Regarding Owner * Duration	Cost Plan For ISAAC D. STCLAIR For 2013-2014 G Gabrielle Morales Priority Normal	ब ब •
	Due Category	5/29/2013 11:03 AM Sub-Category	

Figure 6.7

How to Share and Unshare Records with a Team

For a WSC to work with consumers in more than one field, the consumer records must be shared with the WSC team for the additional fields. This section discusses sharing consumer records and unsharing them with the steps to remove share permissions as needed.

Sharing Records with a Team

Example: User T9L1 is assigned to field 1 but has consumers in field 2. Therefore, T9L1 must share the consumer records in field 2 with the field 2 WSC team.

- 1. Click the Consumers option under People in the Workplace menu (see Figure 7.1).
- 2. Click the consumer's record to be shared (see Figure 7.1).



Figure 7.1

3. Click *Share* (see Figure 7.2).

File Consumers View	Chart-				,,					Gabriele	APDTest
Activate Deactivate Records	re ny a Link ail a Link • Workflo ate Pro	Start Run W Dialog Report	Export to B Filter Data	Advanced Find							
Workplace 🚮 🙀 -	Consumers A	ctive Consumer	s •					Search fo	r records		
Mar Work	First Name	Last Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ
Activities	LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC.
dueues	CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
Reports	BRIANA	ABEL	IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
G Announcements	CHANEL	ABERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GR
People	C ALAYNA	ABNER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers	REYNA	ABRAMS	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	WADE	ACEVEDO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
iBudget	LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Service Authorizations	KENDALL	ACKERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
A Help	FRANK	ACKERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
	MATTHIAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC

Figure 7.2

4. On the sharing page "Who would you like to share the selected consumer with?" click Add User/Team. Then click OK (see Figure 7.3).

Common Tasks	Na	ame	Read	Write	Delete	Append	Assign	Share
Add User/Team	<u>8</u>	Area 1 Team	7	~		~	~	~
 Remove Selected It is ins Toggle All Permissions of the Selected Items 	<u>8</u> 8	Area 7 Team	•	2		2	2	v
Reset								

Figure 7.3

5. The *Look Up Records* box will automatically appear. At the top left of the page click the drop-down arrow in the *Look for* field to select Team (see Figure 7.4). A list of Teams will appear in the box under Team Name. If the teams do not appear input all or part of the name of the team into the search box by clicking the search icon. Double click on the team you wish to share your consumer.

Look Up Records
Select the type of record you want to find and enter your search criteria. Filter your results and view different columns
of data by using the View options. Repeat this process for different types of records.
ook for: Team
View: Teams Lookup View
Search: Search for records
Team Name
Area 1 Team
Area 10 Team
Area 11 Team
Area 12 Team
Area 13 Team
1 - 50 of 304 (1 selected)
Selected records:
Add Remove
Properties New

Figure 7.4

6. You will return to the sharing page (see Figure 7.5).

ommon Tasks	Name	Read	Write	Delete	Append	Assign	Share
Add User/Team	Area 1 Team	~	~	Γ	2	7	7
Remove Selected Items	Area 7 Team	2	7	V	2	7	7
Toggle All Permissions	Area 10 Team	হ					
Reset							
_							



7. Then, use the check boxes next to the name of the user or team to specify which permissions you are giving to each user or team. Click all of the boxes that are circled in Figure 7.6. Click *OK*.

	Name	Read	Write	Delete	Append	Assign	Share
Add User/Team	💰 Area 1 Team	7	~		2	~	
Remove Selected Items	💰 Area 7 Team	7	7	×	7	v	
 Toggle All Permissions of the Selected Items 	🐒 Area 10 Team	Z	Г	E		Г	
2 Reset	-						N

Figure 7.6

The consumer record and all of its dependent records have now been shared with the team you selected.

Unsharing Records with a Team

This section discusses unsharing consumer records with the steps to remove share permissions.

Example: User T9L1 is assigned to field 1 but has consumers in field 2. The consumer has been shared with field 1. The consumer then moves to field 2. Therefore, T9L1 must unshare the consumer record with field 1.

1. Click the consumer's record to be unshared (see Figure 7.7).

ile Consumers	View C	harts Ado	1					e meterre :				Gabrielle	APDTest a
Activate Deactivate Records	🔪 Share 🍙 Copy a 🛃 E-mail : ollaborate	Link - Wo	Run Sta orkflow Dial Process	t Run Report	Filter Data	el Advanced Find							
orkplace 🚮 📮	-	Consumers	Active	Consumer	s *					Search fo	or records		
Mu Work		First Nam	e La	t Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ
Activities	17	LIBBY	AA	RON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
yueues	1	CYNTHIA	AB	вотт	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	AMILY HC
Reports	E	BRIANA	AB	EL	IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	
Announcements		CHANEL	AB	ERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	
eople		ALAYNA	AE	NER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	panala rate
S Consumers	2	REYNA	AE	RAMS	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	AMILY HC
rovider	10	ALANA	AB	REU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	C.	WADE	AC	EVEDO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
Budget	1	LINCOLN	AC	KER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	17	KAYSON	AC	KER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Service Authorizatio	ins E	KENDALL	AC	KERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
à Help	E	FRANK	AC	KERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
	17	MATTHIAS	AC AC	KERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC

Figure 7.7

2. Click Share (see Figure 7.8).

File Consumers	A AND A	dd					ant ++++			-	Gabrielle	APDTest a
Activate Deactivate Records	Share Copy a Link 🗸 E-mail a Link 👻 V borate	Run Norkflow Process	Run Report	Export to E Filter	Advanced Find							
Workplace 🛛 🖓	Consume	Active Co	nsumer	• •					Search fo	r records		
My Work	First Na	me Last N	ame 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ
Activities	LIBBY	AARO	N	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
Jueues	CYNTHL	A ABBO	π	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
Reports	BRIANA	ABEL		IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
Announcements	CHANE	L ABERI	ATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GR
People		ABNE	2	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
Consumers	REYNA	ABRA	MS	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALANA	ABREU	J	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	WADE	ACEVE	DO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
iBudget	E LINCOL	N ACKER	t	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKEP	t.	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Service Authorizations	E KENDAI	L ACKER	MAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
A Help	FRANK	ACKER	MAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
	MATTH	AS ACKEF	MAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC

Figure 7.8

3. On the sharing page under the *Name* column, click in the check boxes to the left of the user or team with whom you want to unshared, so that all boxes are unchecked. Click *OK* (see Figure 7.9).

Add User/Team					write	Delete	Append	Assign	Share
Demove Selected Items		<u>8</u>	Area 1 Team	T	7	Г	•	~	~
Toggle All Permissions		<u> 8</u>	Area 7 Team	_	v	\checkmark	~	~	~
of the Selected Items	7	💰 Ar	ea 10 Team	la la	~		•	7	~

Figure 7.9

4. Click *Remove Selected Items*. Click *OK* (see Figure 7.12).

Common Tasks	Name	Read	Write	Delete	Append	Assign	Share
🖁 Add User/Team	ea 1 Team	~		Г	~	~	~
Remove Selected Items	 ea 7 Team	2	7		2	7	~
 Toggle All Permissions of the Selected Items 	🖇 Area 10 Team	~	₹	Π	7	~	~

Figure 7.12

The share permissions have now been removed; the record is unshared.

