



# 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://apdfloida.zendesk.com/home>

# Getting Started

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

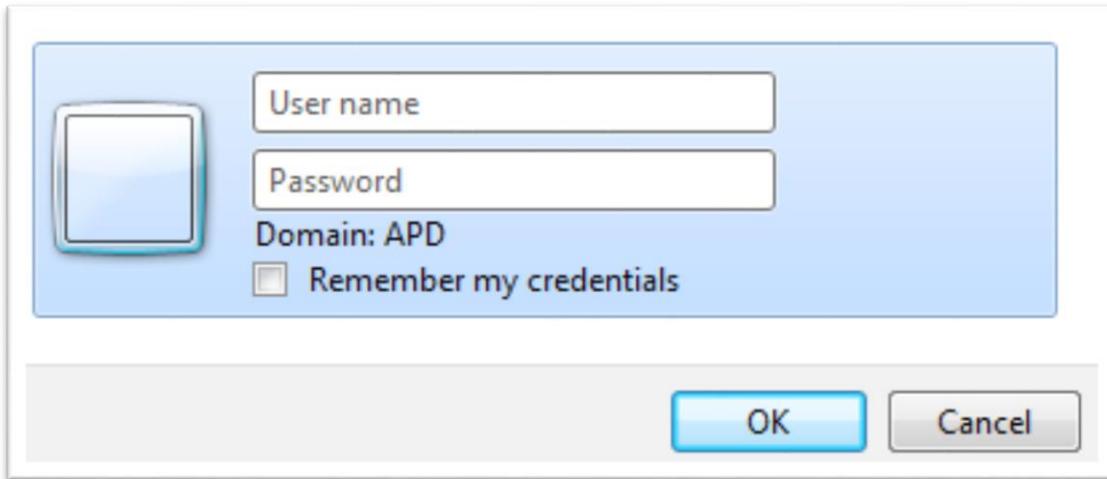


Figure 1.1

## 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).

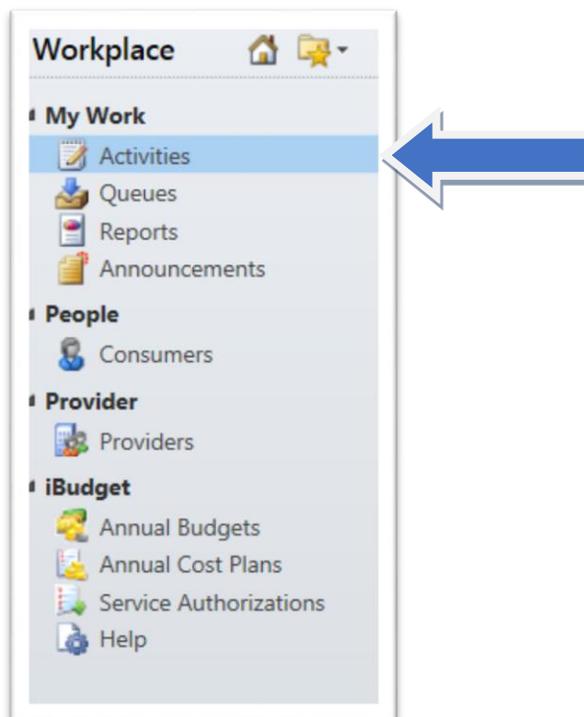


Figure 1.2

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, e-mail 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 type you would like to view (see Figure 1.3).

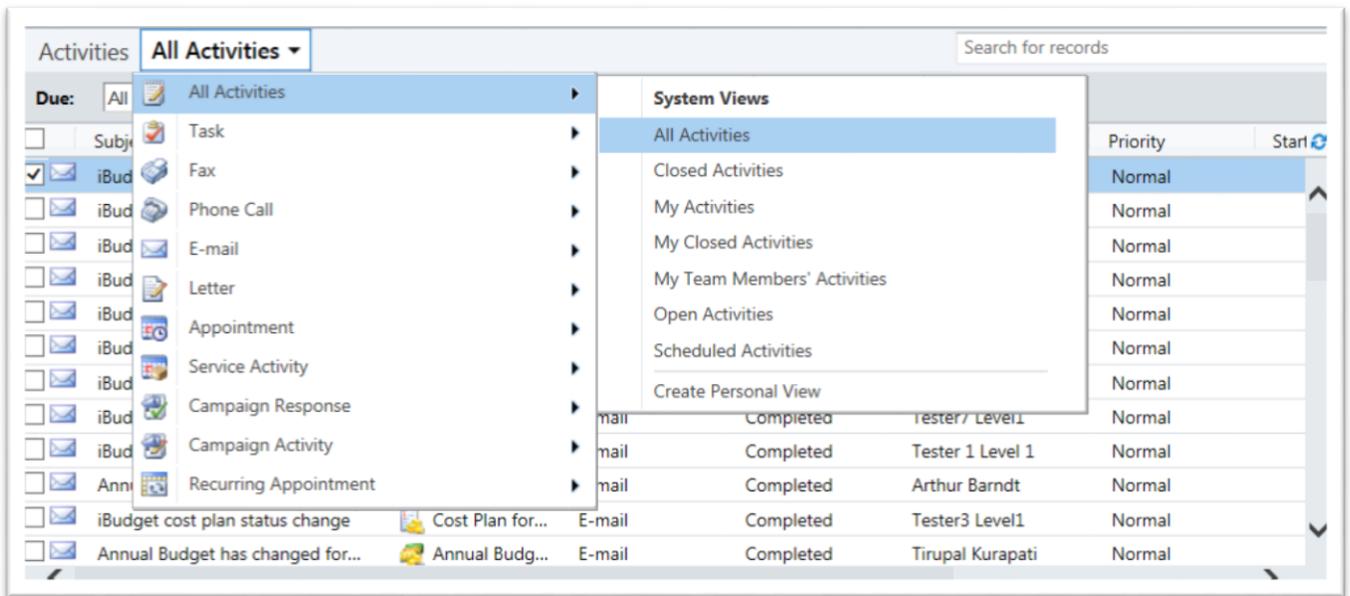


Figure 1.3

## 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).



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 .

## Refresh

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

## Search

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.



A screenshot of a data field. The field is labeled "Service Code\*" and contains the value "4270". To the right of the value is a small blue icon of a magnifying glass, which is the search icon. The field has a light gray border and a drop shadow.

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).

### Look Up Record

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for:   Show Only My Records

View:

Search:

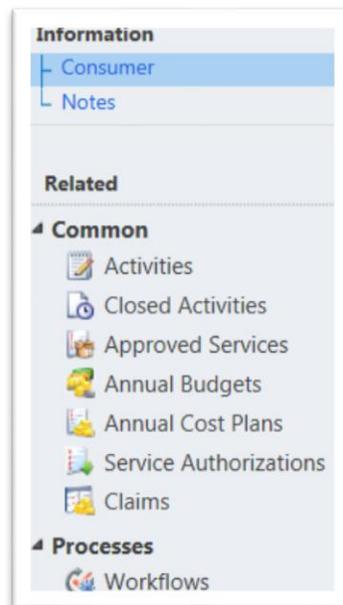
Description	Service Code ▲	Service Family
<input type="checkbox"/> Adult Dental	4001	Wellness Management
<input type="checkbox"/> Behavior Analysis - Level 3	4010	Therapeutic Supports
<input type="checkbox"/> Behavior Analysis - Level 2	4011	Therapeutic Supports
<input type="checkbox"/> Behavior Analysis - Level 1	4012	Therapeutic Supports
<input type="checkbox"/> Behavioral Services - Assistant	4013	Therapeutic Supports
<input type="checkbox"/> Behavior Analysis Assessment	4014	Therapeutic Supports
<input type="checkbox"/> Consumable Medical Supplies - CDC	4030	Wellness Management
<input type="checkbox"/> Dietitian Services	4040	Wellness Management
<input type="checkbox"/> Durable Medical Equipment	4050	Environmental and Adapt
<input type="checkbox"/> Environmental Accessibility Adaptations	4060	Environmental and Adapt
<input type="checkbox"/> Environmental Accessibility Adaptations -- Assessment	4061	Environmental and Adapt
<input type="checkbox"/> Family and Legal Representative Training	4070	Life Skills Development
<input type="checkbox"/> Life Skills Development - Level 1 (Community Inclusion)	4080	Life Skills Development

1 - 50 of 115 (0 selected) 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** - 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  icon in the upper right corner to exit the application. This will reduce the number of open pages.

## Completing Activities

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

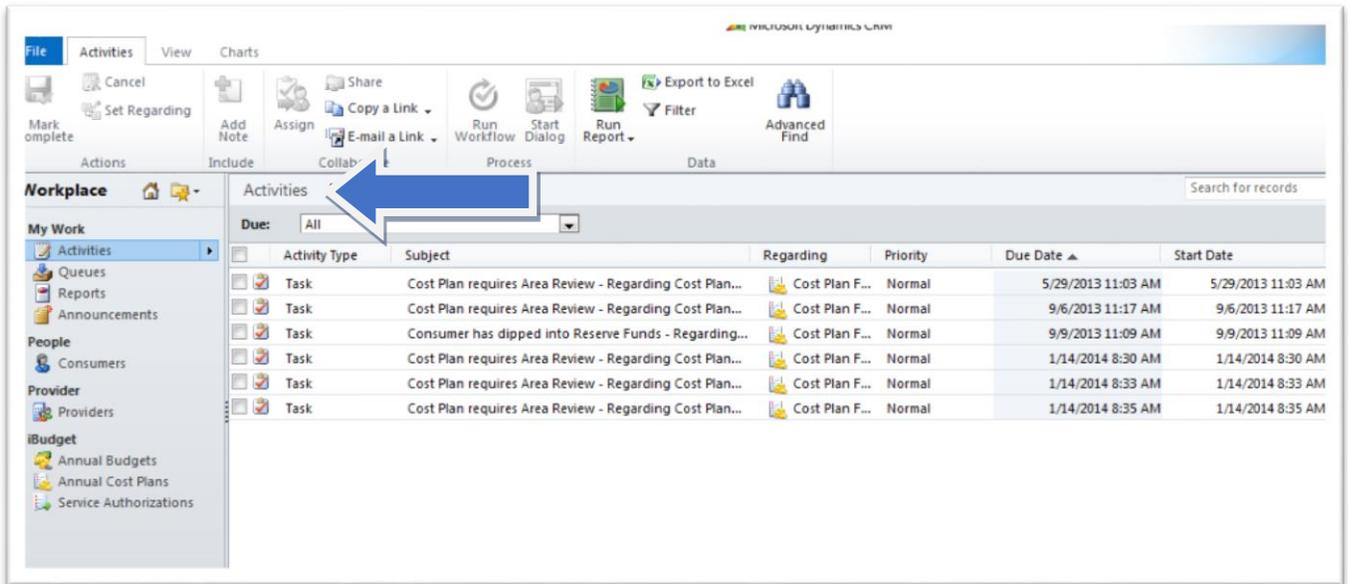


Figure 1.5

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.

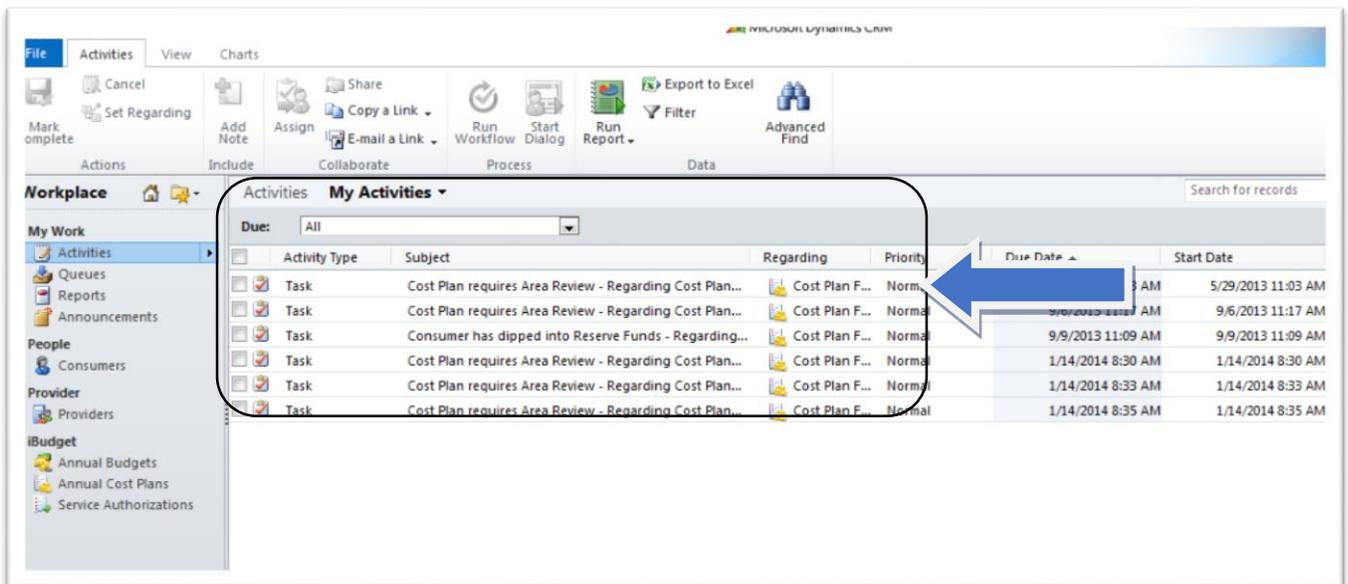


Figure 1.6

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.

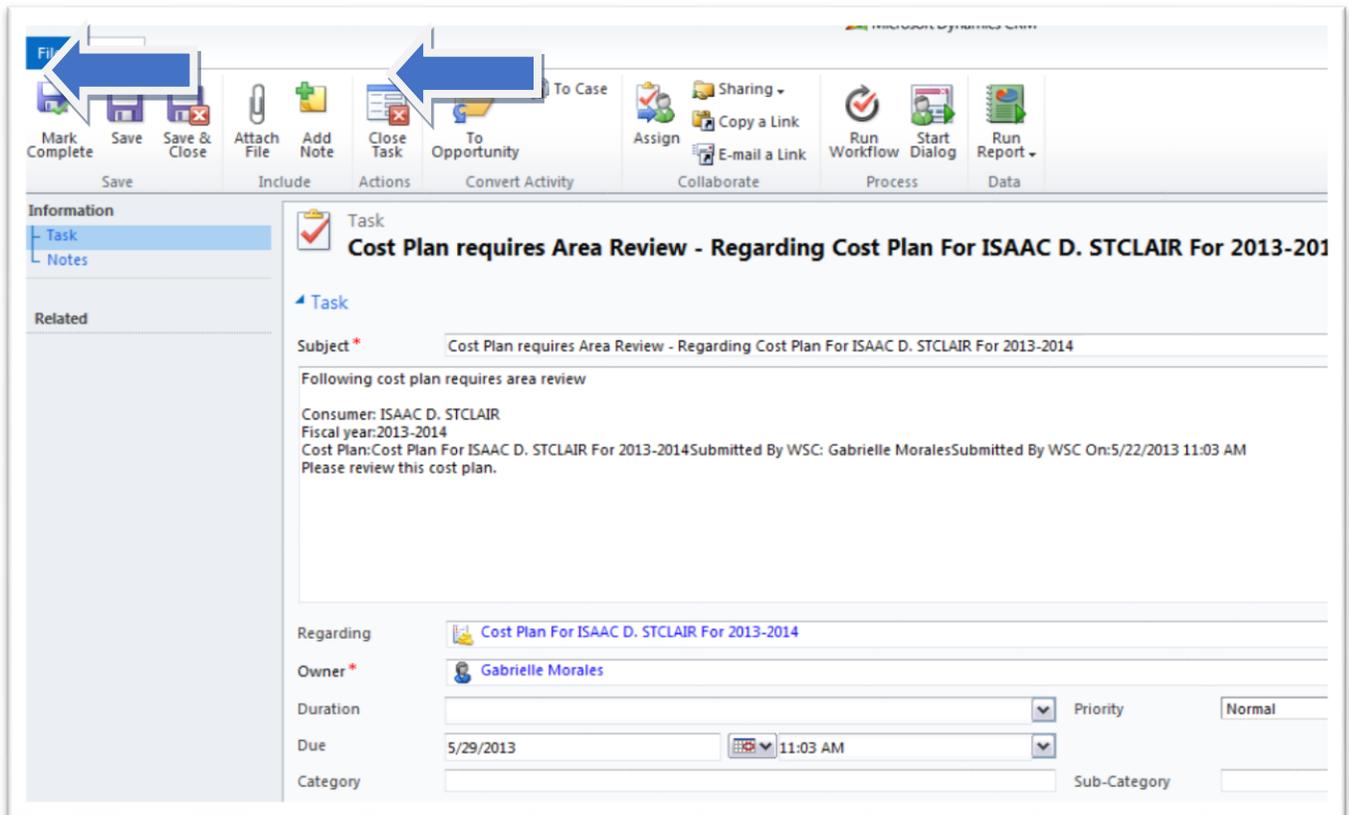


Figure 1.7

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).

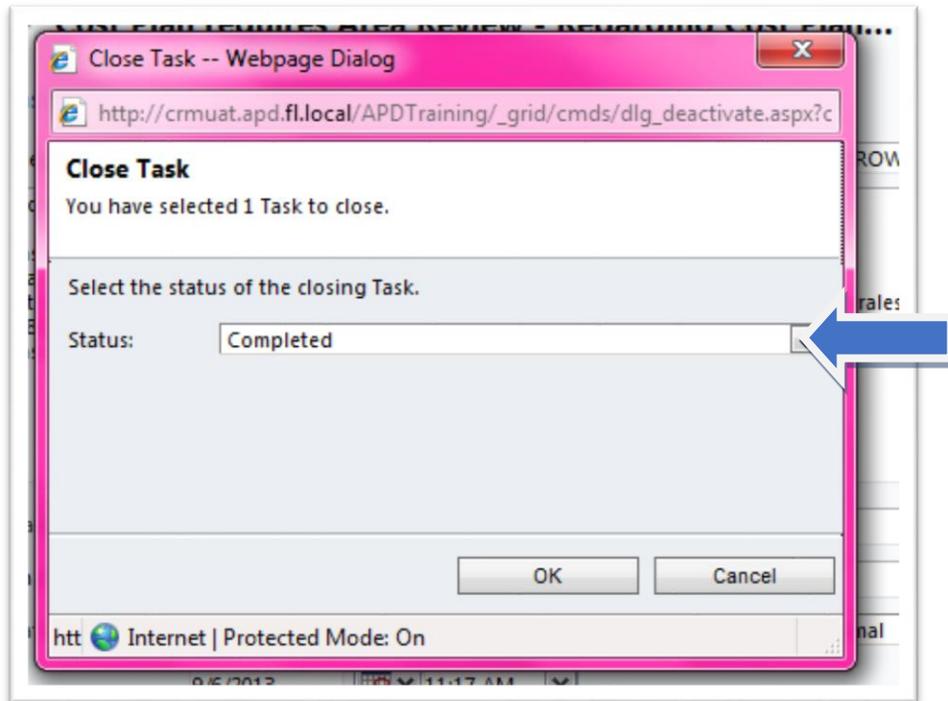


Figure 1.8

5. Click *OK* (see Figure 1.9).

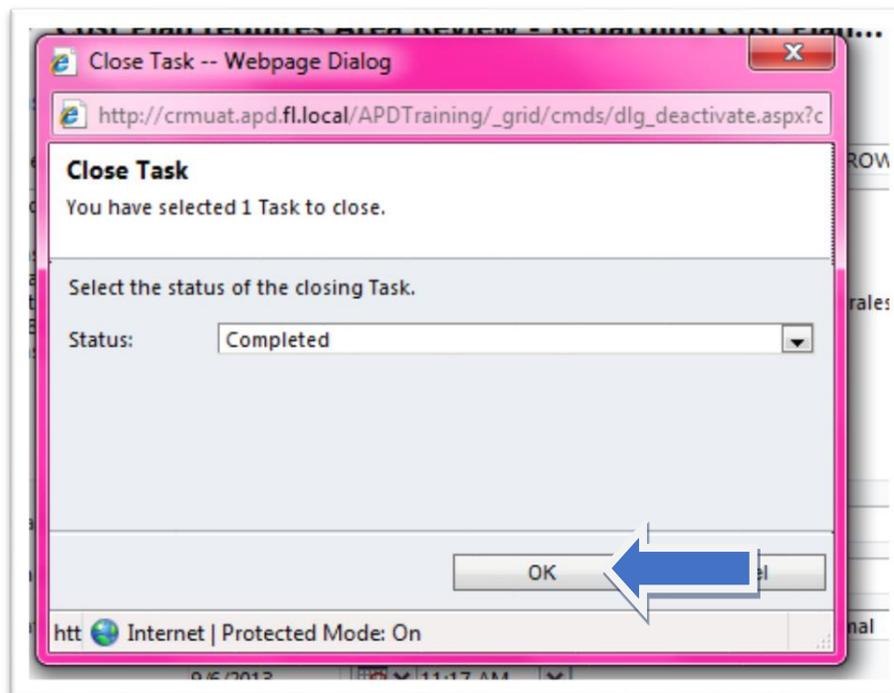


Figure 1.9

## 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).

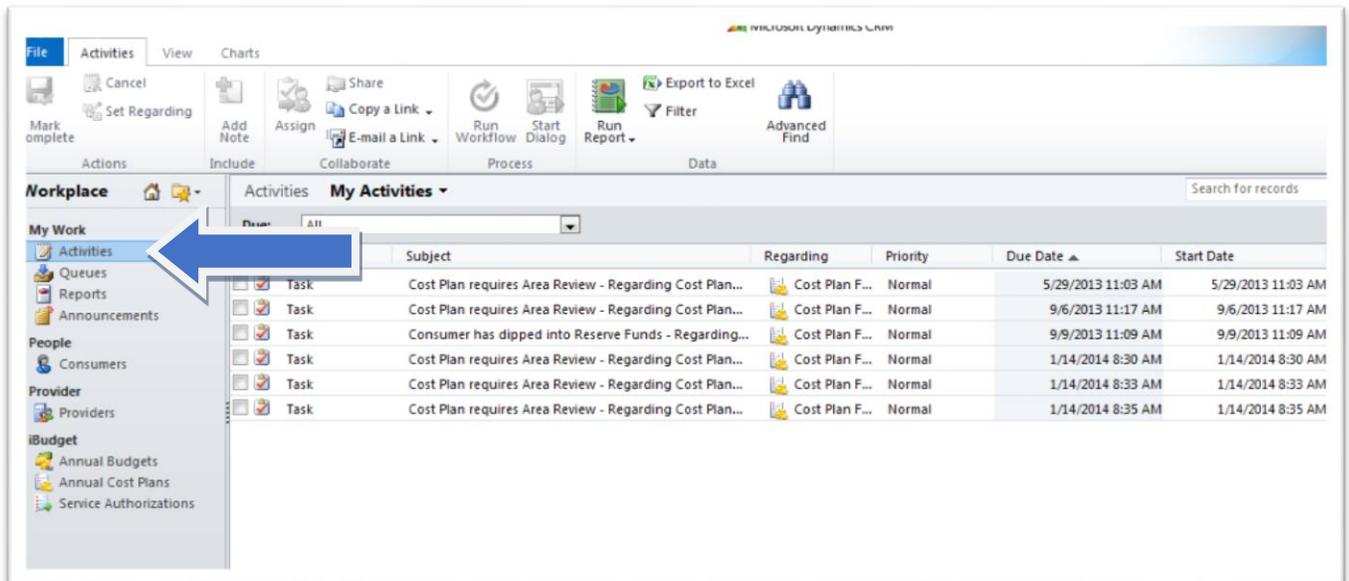


Figure 1.10

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

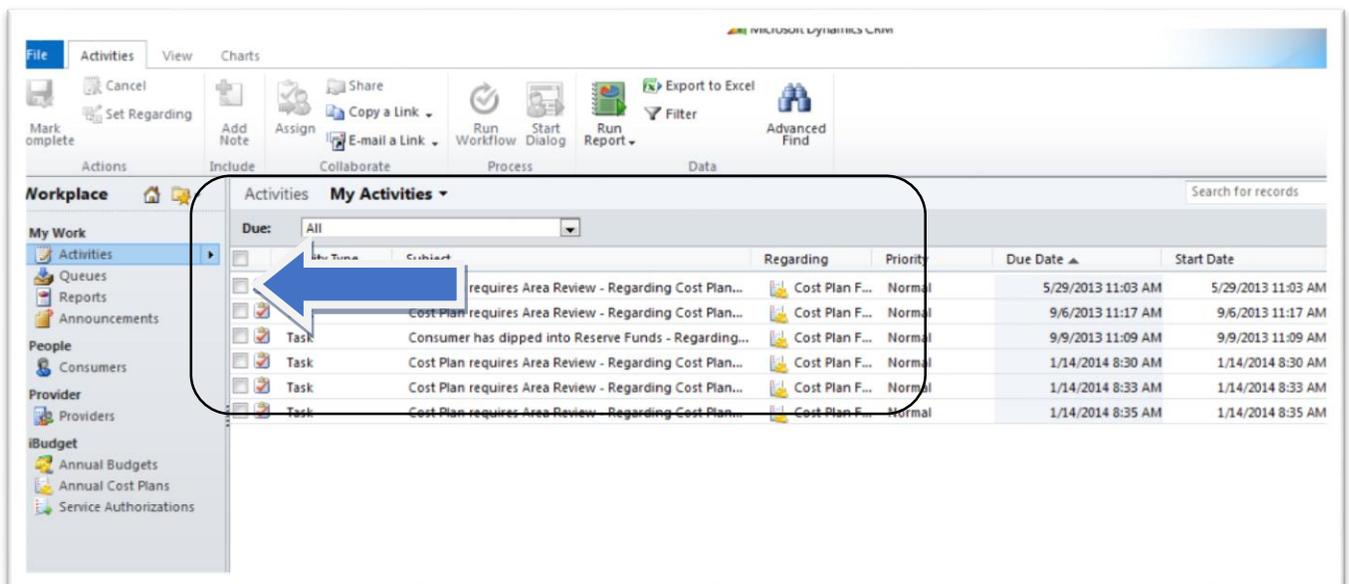


Figure 1.11

- 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).

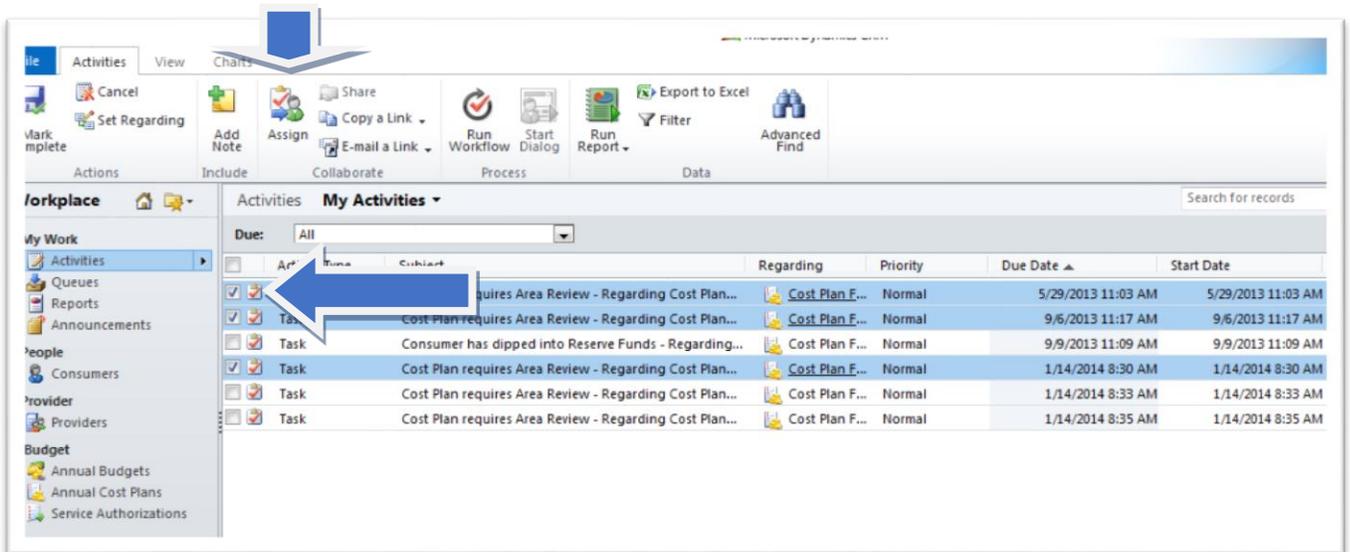


Figure 1.12

- 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).



Figure 1.13

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).

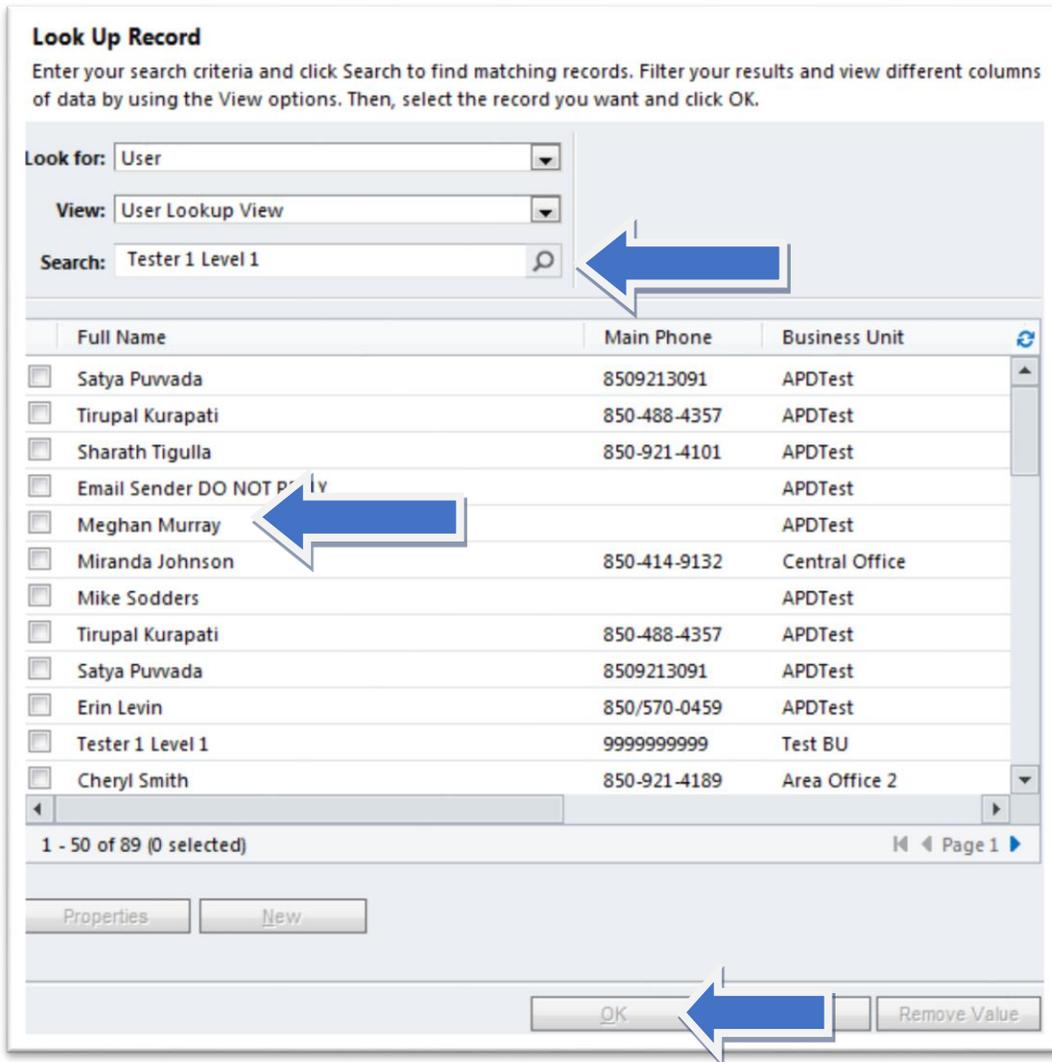


Figure 1.14

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).

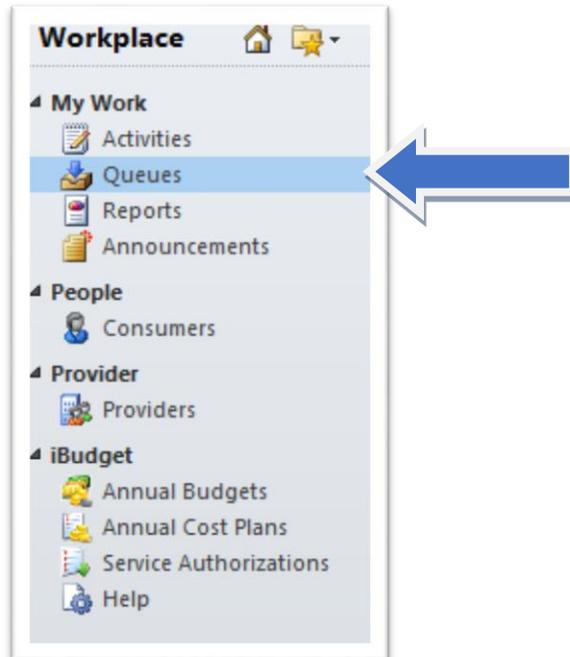


Figure 1.15

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).

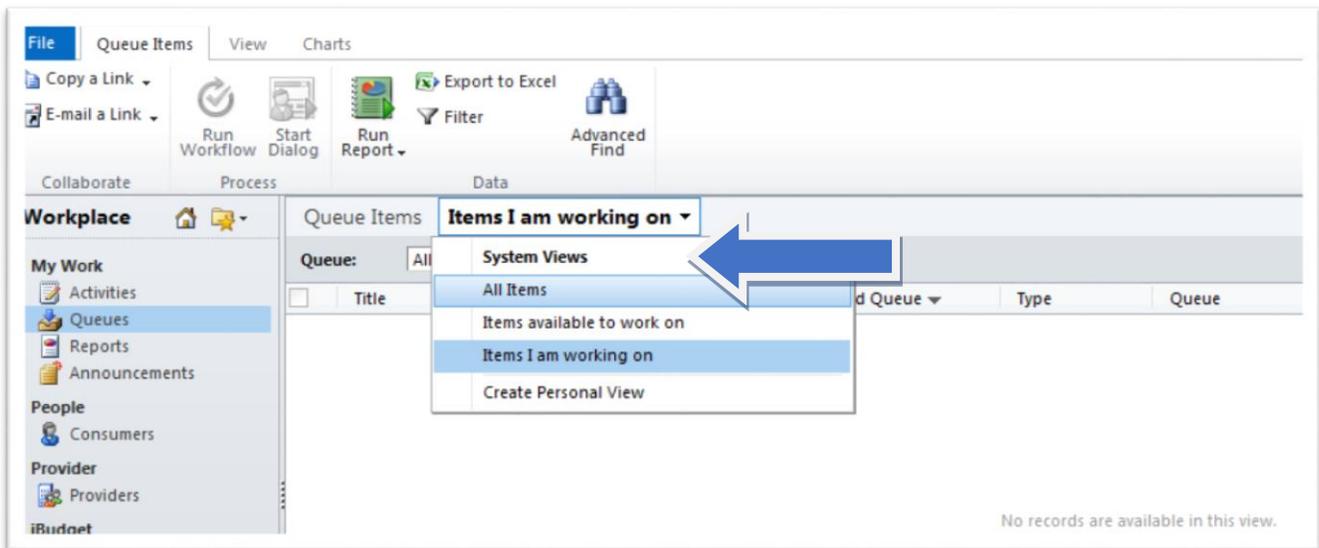


Figure 1.16

- 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).

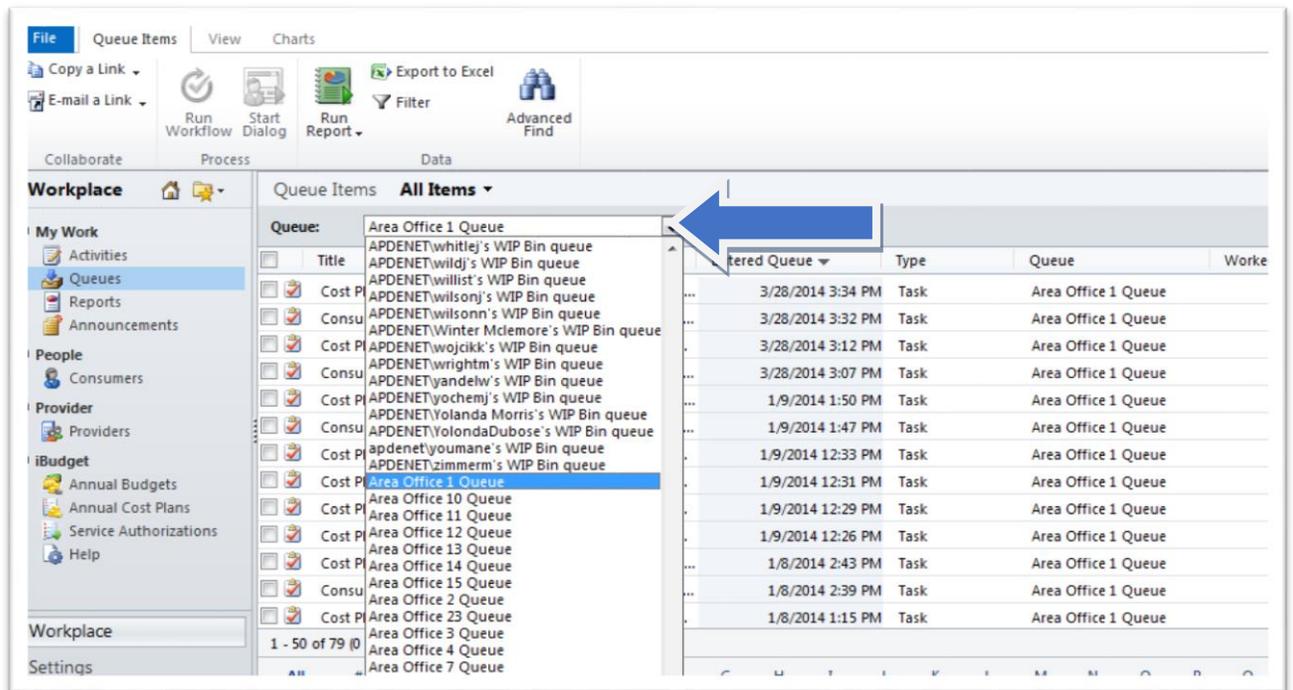


Figure 1.17

- 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).

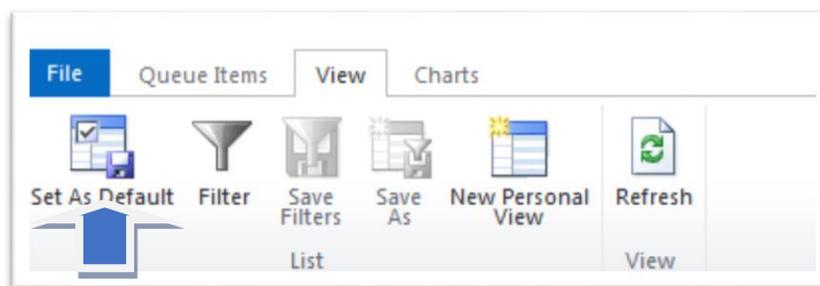


Figure 1.18

## 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).

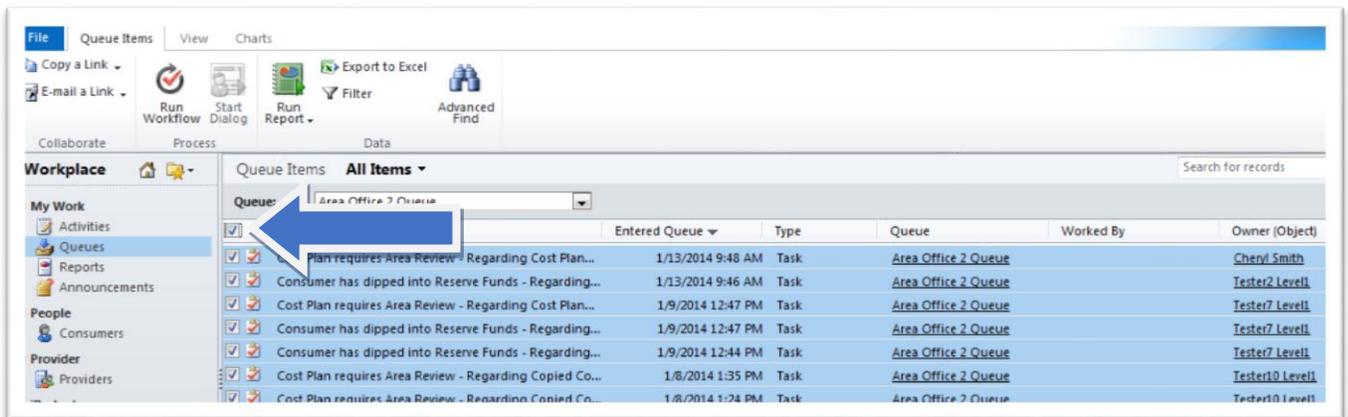


Figure 1.19

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

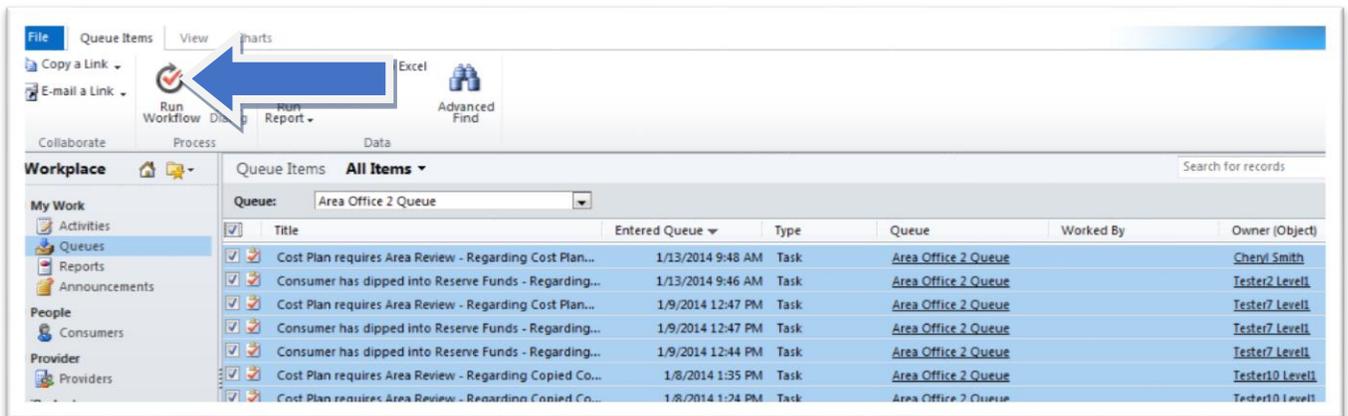


Figure 1.20

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).

**Look Up Record**  
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

look for: Process  Show Only My Records  
View: On Demand Workflows  
Search: Search for records

Process Name	Created On	Modified On	Status	Owner
<input checked="" type="checkbox"/> Close Task	7/5/2012 7:52 AM	4/23/2014 6:16.	Activated	Satya Pun

1 - 1 of 1 (1 selected) Page 1

Properties New OK Cancel Remove Value

**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).

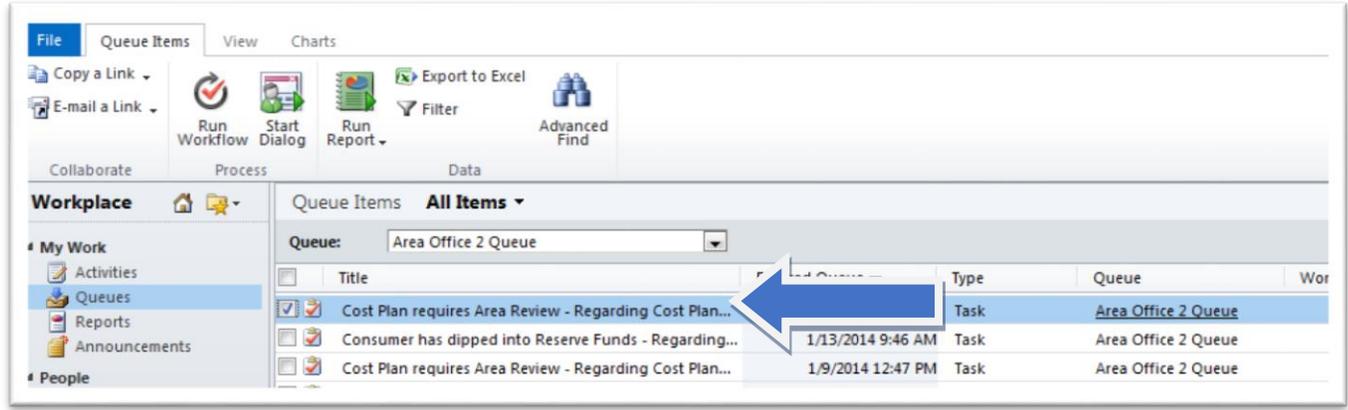


Figure 1.22

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).

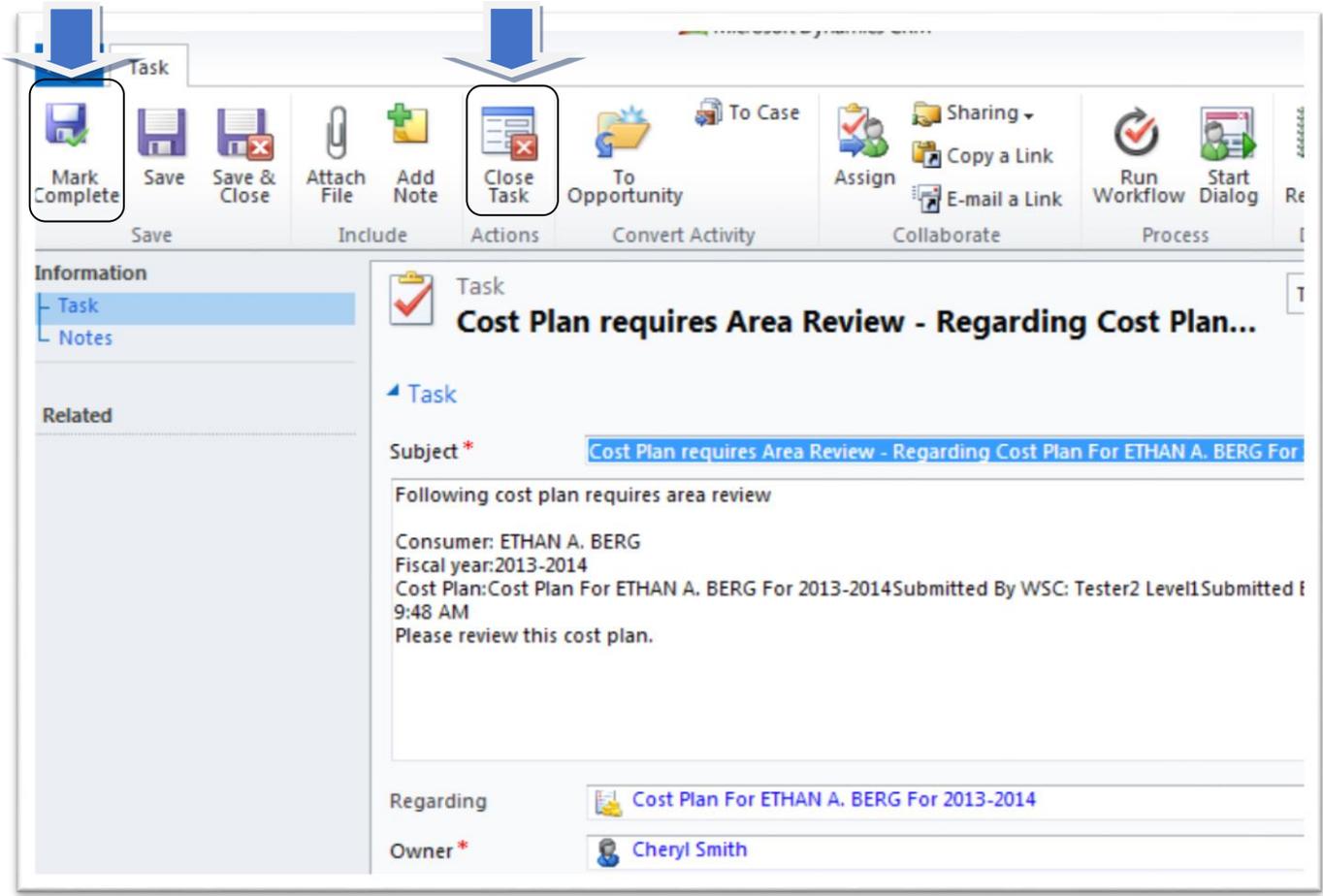


Figure 1.23

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).

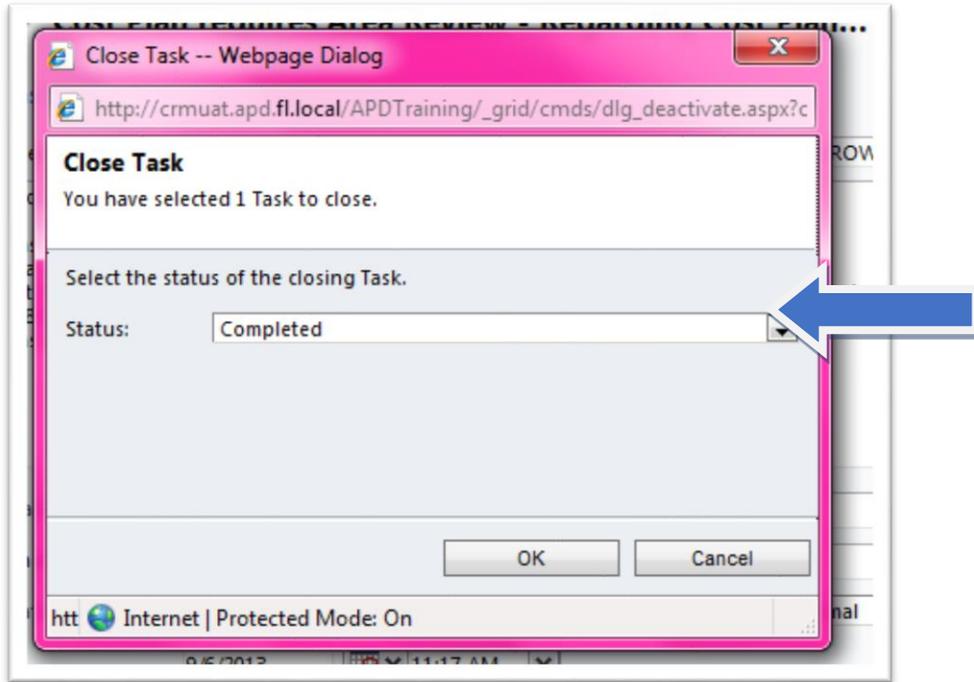
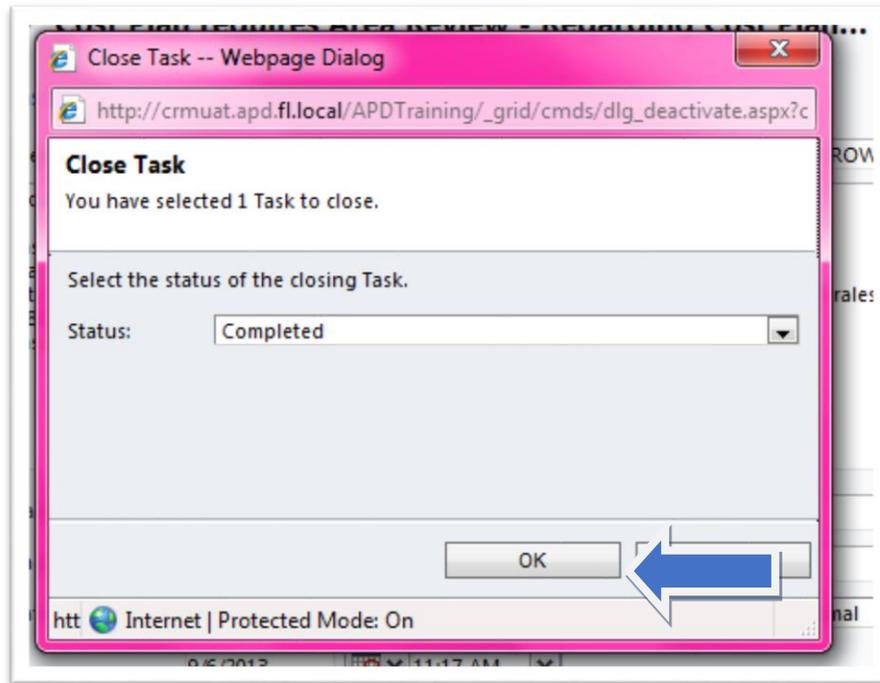


Figure 1.24

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).



## 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).

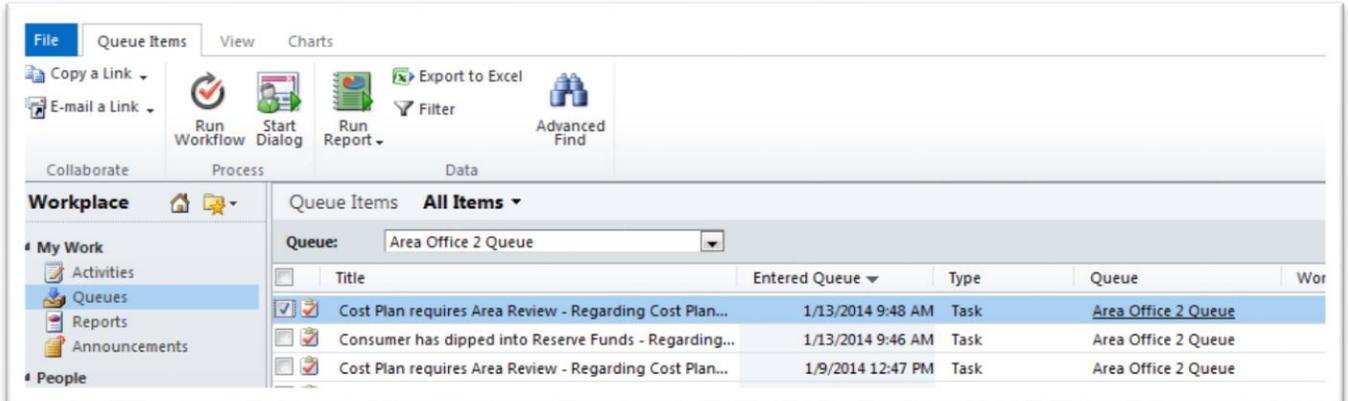


Figure 1.25

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).

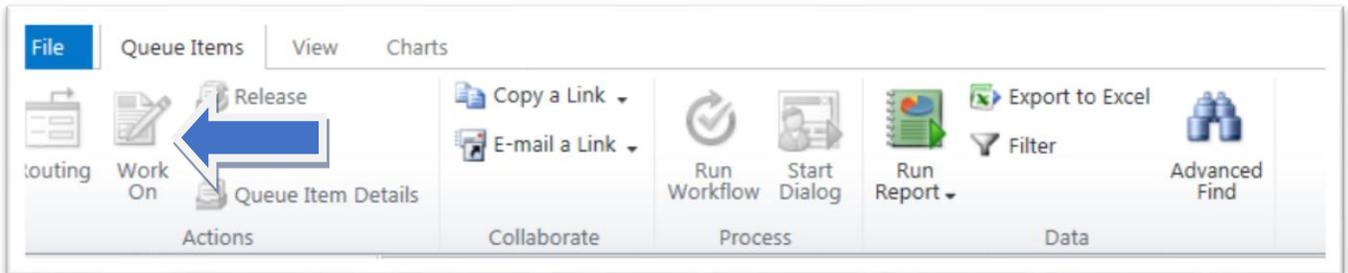
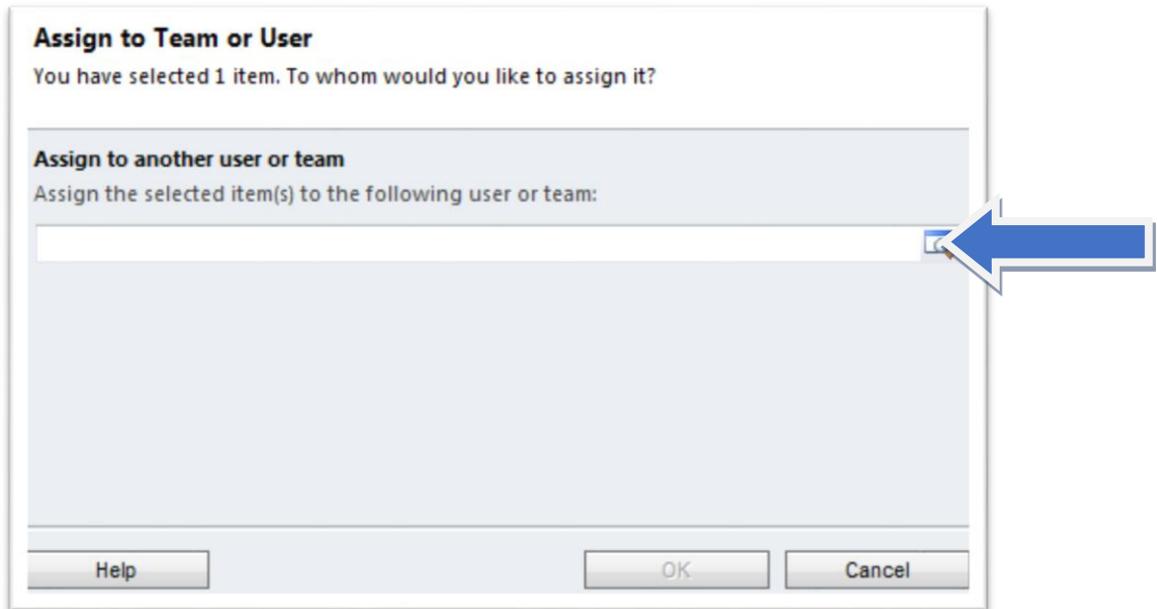


Figure 1.26

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).



**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).

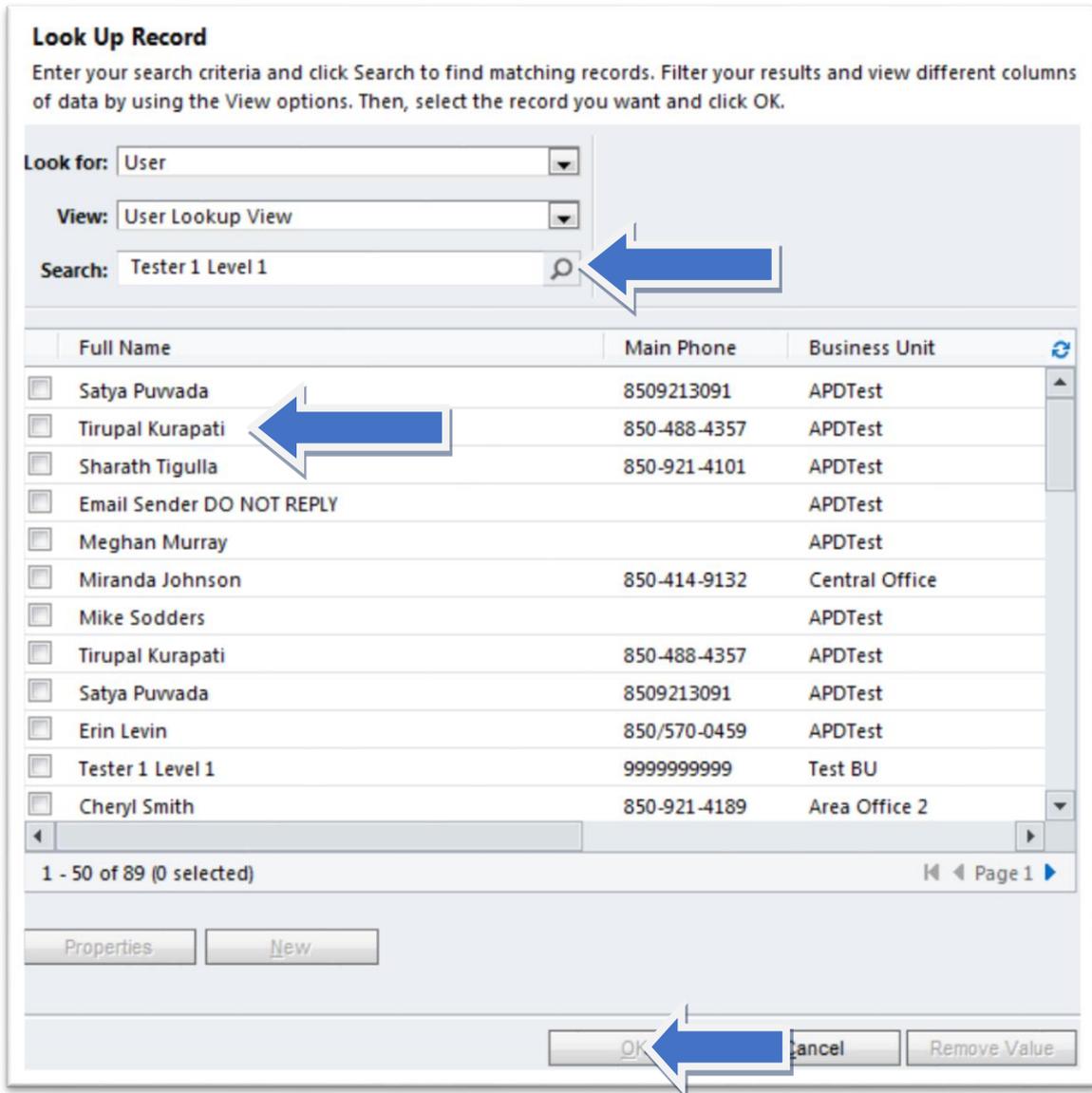


Figure 1.28

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).

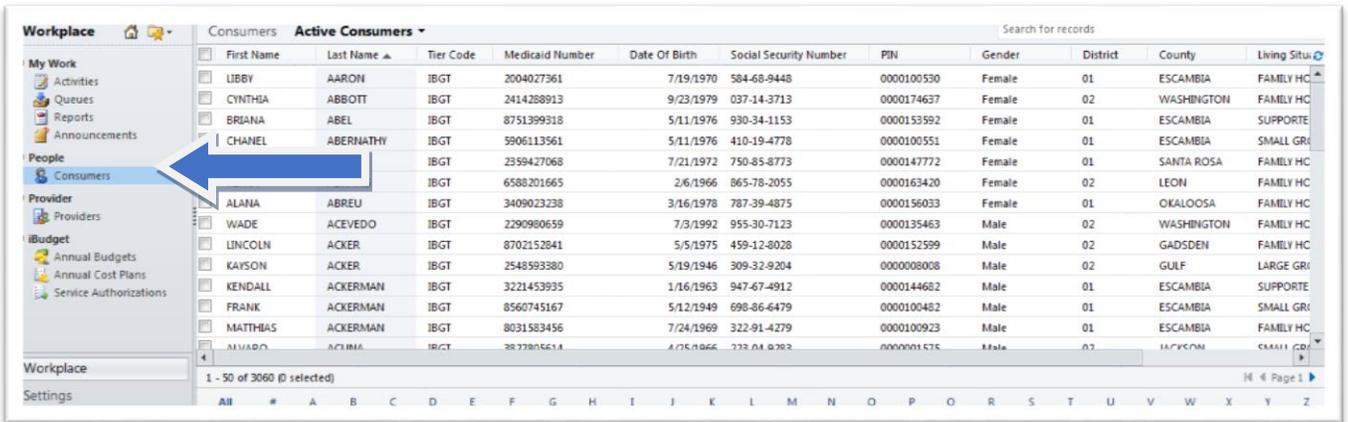
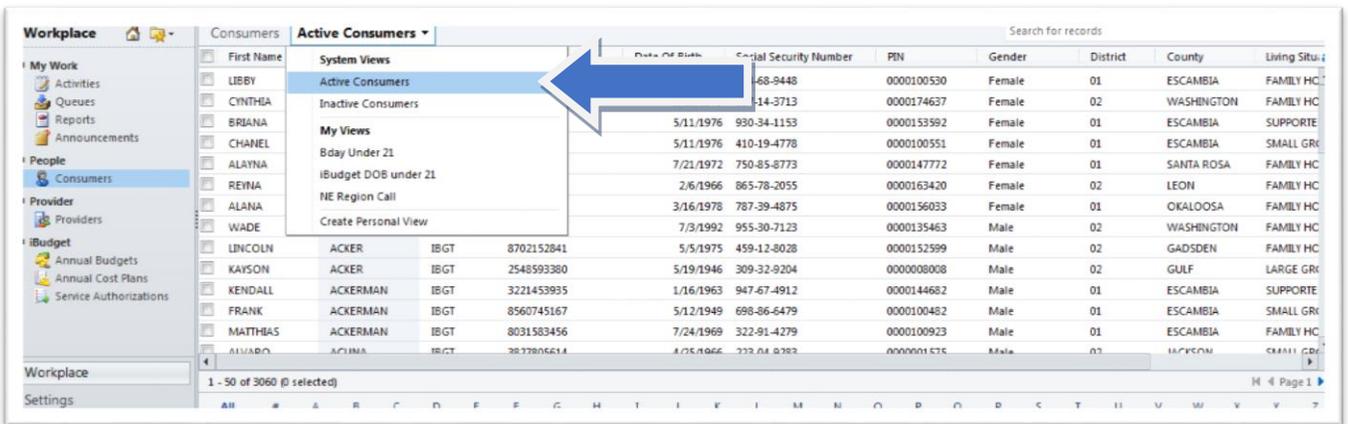
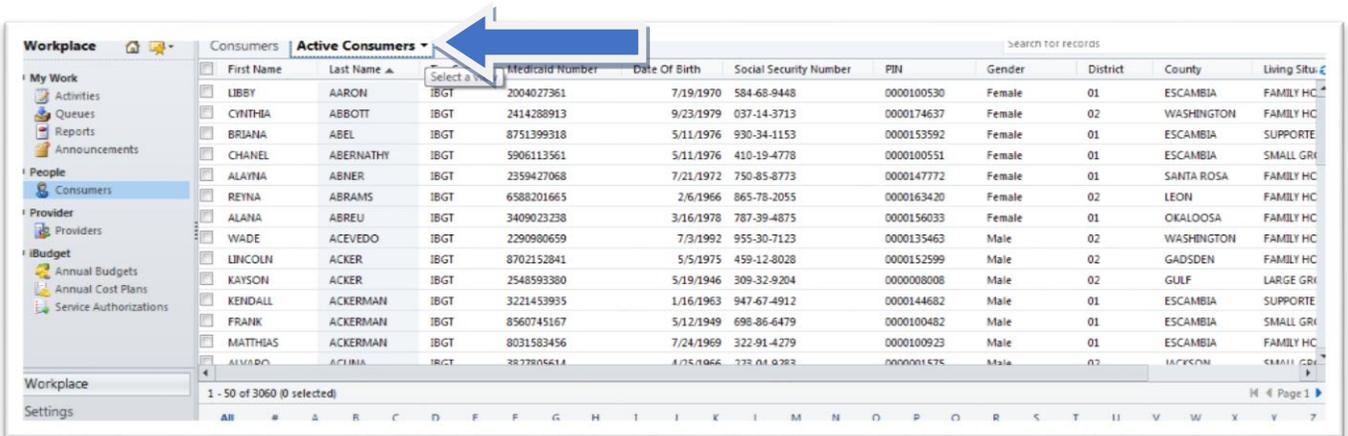


Figure 1.30

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.



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).

The screenshot displays the 'Consumer Information' page for a consumer named MARTHA BROWNE. A blue arrow points to the name 'MARTHA BROWNE' in the header. The page is organized into several sections:

- Information:** Consumer (selected), Notes
- Related:** Common
  - Activities
  - Closed Activities
  - Approved Services
  - Annual Budgets
  - Annual Cost Plans
  - Service Authorizations
  - Claims
- Demographic Data:**
  - First Name: MARTHA
  - Middle Initial: [Empty]
  - Last Name: BROWNE
  - Gender: Female
  - Pin: 9001016644
  - Date Of Birth: 1/14/1960
  - Medicaid Number: 6848531645
  - Social Security Number: 495-91-5954
  - CDC ID: [Empty]
  - Phone Number: [Empty]
  - Email: [Empty]
  - Address Line 1: 17 ADDRESS70
  - Address Line 2: [Empty]
  - City: GULF BREEZE
  - State: Florida

Figure 1.31

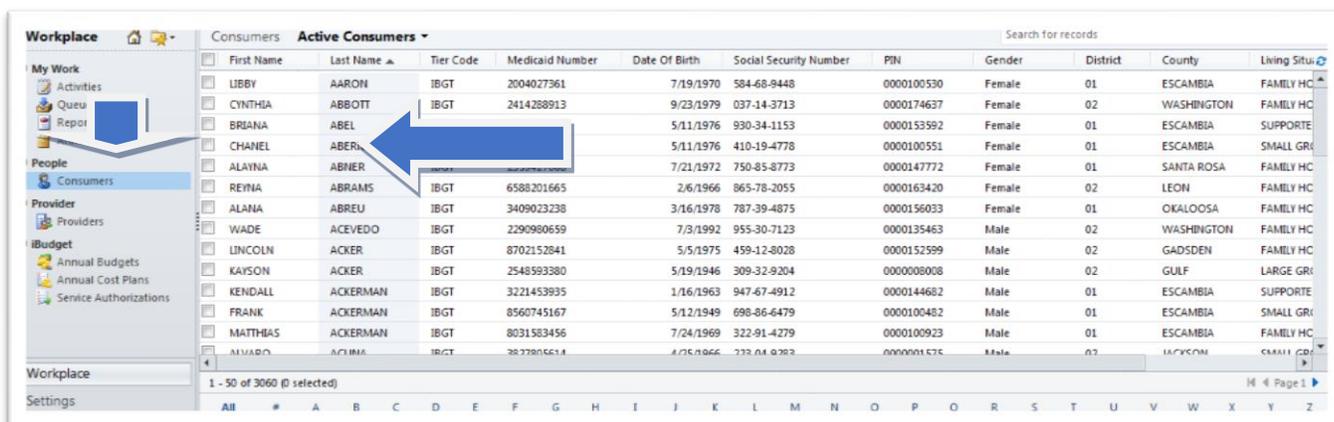
# Approved Services

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).



The screenshot shows the iBudget application interface. On the left is a navigation pane with categories: My Work, People, Provider, and iBudget. Under 'People', 'Consumers' is selected. The main area displays a table of 'Active Consumers'. A blue arrow points to the row for 'REYNA ABRAMS'.

First Name	Last Name	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ
LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
BRIANA	ABEL			5/11/1976	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
CHANEL	ABERN			5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GR
ALAYNA	ABNER			7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
REYNA	ABRAMS	IBGT	6588201665	2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
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
MATTHIAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
ALVARO	ACKERMAN	IBGT	3877806614	4/25/1966	773-04-9262	0000001575	Male	02	WALTON	SMALL GR

Figure 2.1

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

Information  
Consumer  
Notes

Related

Common  
Activities  
Closed Activities  
Approved Services  
Annual Budgets  
Annual Cost Plans  
Service Authorizations  
Claims

Consumer  
**MARTHA BROWNE**

Demographic Data

First Name \* MARTHA  
Middle Initial  
Last Name \* BROWNE  
SFX  
Gender Female  
PIN \* 0001016644  
Date Of Birth \* 1/14/1960  
Medicaid Number 6848531645  
Social Security Number 495-91-5954  
CDC ID  
Phone Number  
Email  
Address Line 1 17 ADDRESS70  
Address Line 2  
City GULF BREEZE  
State Florida

Figure 2.2

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

Information  
Consumer  
Notes

Related

Common  
Activities  
Closed Activities  
Approved Services  
Annual Budgets  
Annual Cost Plans  
Service Authorizations  
Claims

Consumer  
**MARTHA BROWNE**

Demographic Data

First Name \* MARTHA  
Middle Initial  
Last Name \* BROWNE  
SFX  
Gender Female  
PIN \* 0001016644  
Date Of Birth \* 1/14/1960  
Medicaid Number 6848531645  
Social Security Number 495-91-5954  
CDC ID  
Phone Number  
Email  
Address Line 1 17 ADDRESS70  
Address Line 2  
City GULF BREEZE  
State Florida

Figure 2.3

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

File Consumer Add Approved Services

Add New Approved Service  
Delete Approved Service  
Assign Approved Services  
Copy a Link  
E-mail a Link  
Filter  
Save Filters  
Save Filters as New View  
Set As Default View  
Chart Pane  
Run Workflow  
Start Dialog  
Run Report  
Export Approved Services

Information  
Consumer  
Notes

Related

Common  
Activities  
Closed Activities  
Approved Services  
Annual Budgets  
Annual Cost Plans  
Service Authorizations  
Claims

Consumer  
**MARTHA BROWNE**

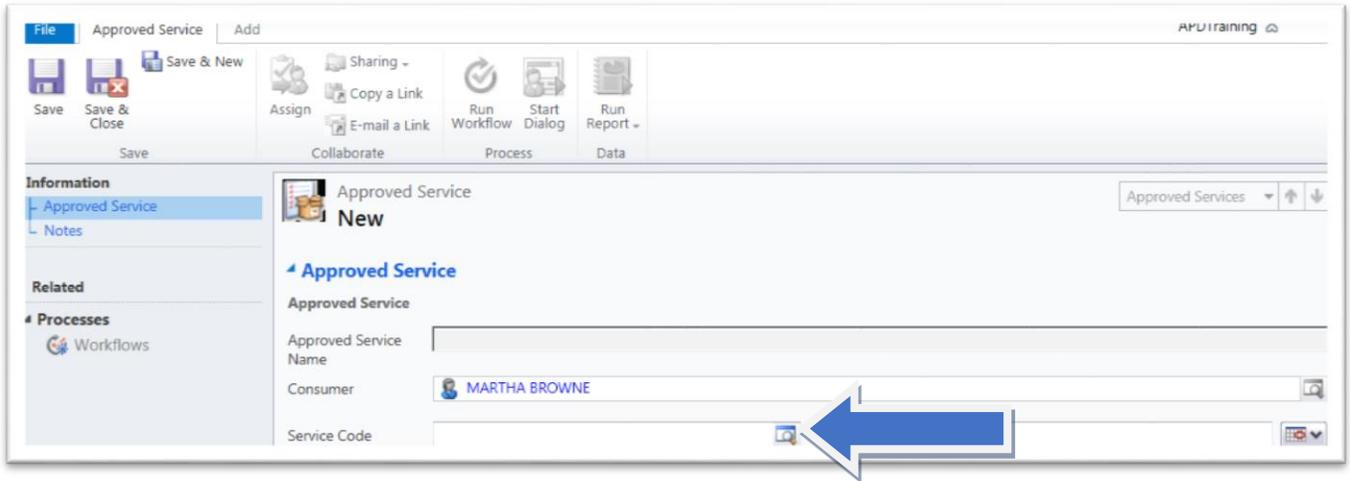
Approved Services Approved Service Associated View

Approved Service Name	Service Code	Begin Date	End Date	PA Number	PA Status	PA L
MARTHA BROWNE -- Adult Dental	4001	4/1/2013	12/30/9999			
MARTHA BROWNE -- Life Skills Development - Level 3 (ADT)...	4082	4/1/2013	12/30/9999			
MARTHA BROWNE -- Personal Supports	4140	7/1/2013	12/30/9999			
MARTHA BROWNE -- Personal Supports (day)	4141	4/1/2013	12/30/9999			
MARTHA BROWNE -- Support Coordination	4270	4/1/2013	12/30/9999			

1 - 5 of 5 (0 selected)

**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).



**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 for: Service Code  Show Only My Records

View: Service Code Lookup View

Search: Search for records

	Description	Service Code ▲	Service Family	Is
<input checked="" type="checkbox"/>	Adult Dental	4001	Wellness Management	M
<input type="checkbox"/>	Behavior Analysis - Level 3	4010	Therapeutic Supports	Y
<input type="checkbox"/>	Behavior Analysis - Level 2	4011	Therapeutic Supports	Y
<input type="checkbox"/>	Behavior Analysis - Level 1	4012	Therapeutic Supports	Y
<input type="checkbox"/>	Behavioral Services - Assistant	4013	Therapeutic Supports	M
<input type="checkbox"/>	Behavior Analysis Assessment	4014	Therapeutic Supports	Y
<input type="checkbox"/>	Consumable Medical Supplies - CDC	4030	Wellness Management	M
<input type="checkbox"/>	Dietitian Services	4040	Wellness Management	Y
<input type="checkbox"/>	Durable Medical Equipment	4050	Environmental and A...	M
<input type="checkbox"/>	Environmental Accessibility Adaptations	4060	Environmental and A...	M
<input type="checkbox"/>	Environmental Accessibility Adaptations -- Assessment	4061	Environmental and A...	M
<input type="checkbox"/>	Family and Legal Representative Training	4070	Life Skills Development	M

1 - 50 of 118 (1 selected) Page 1

Properties New

OK Remove Value

Figure 2.6

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

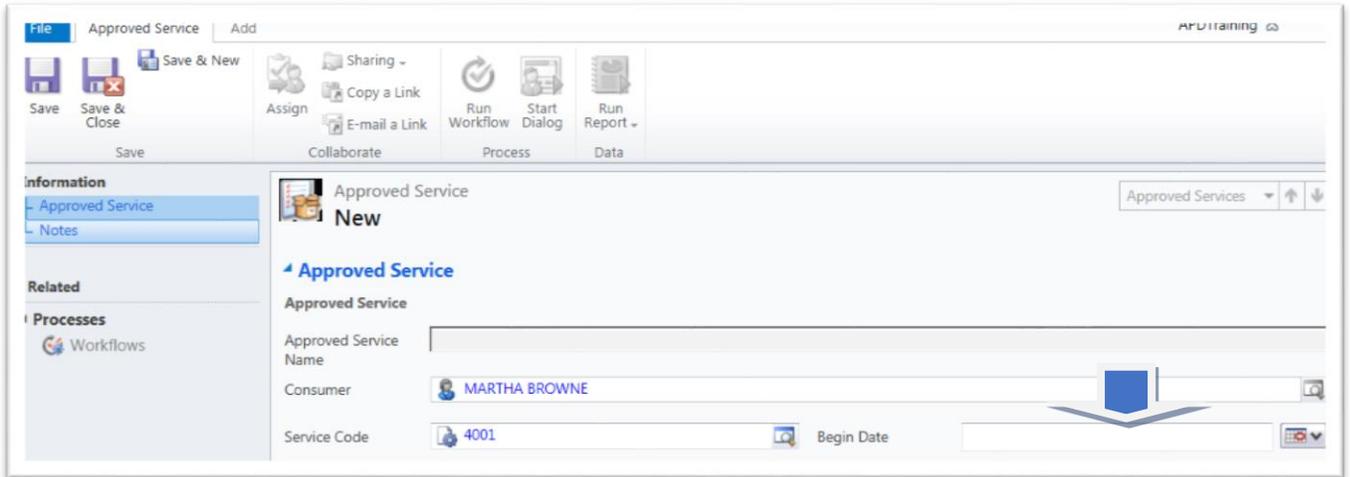


Figure 2.7

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

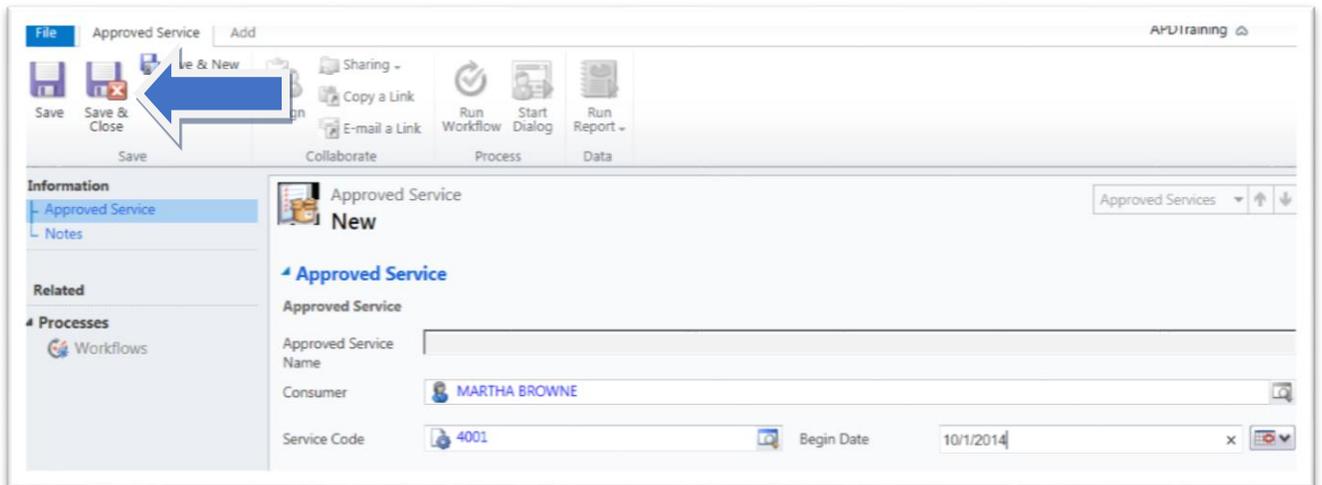


Figure 2.8

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).

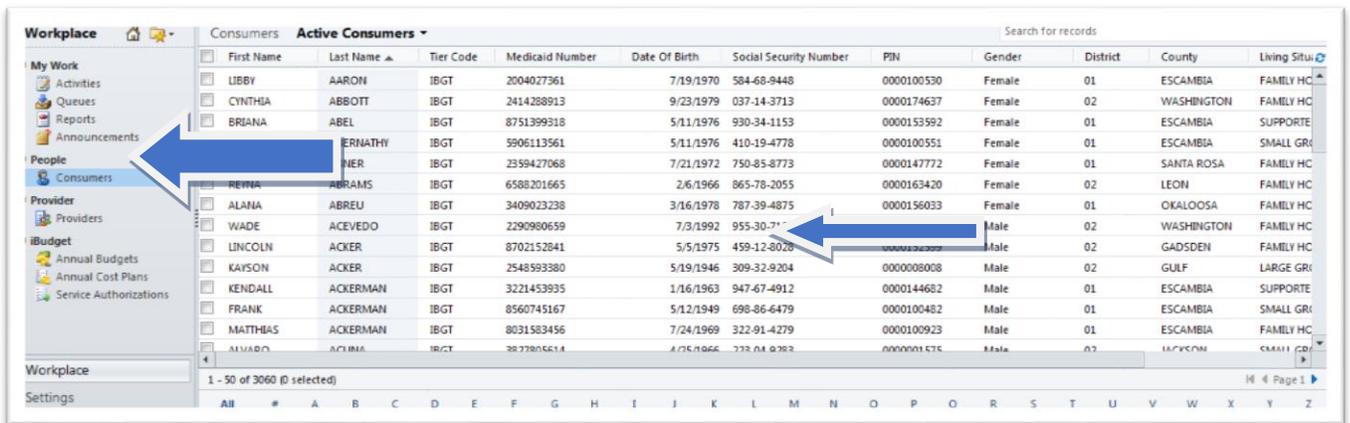


Figure 3.1

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).

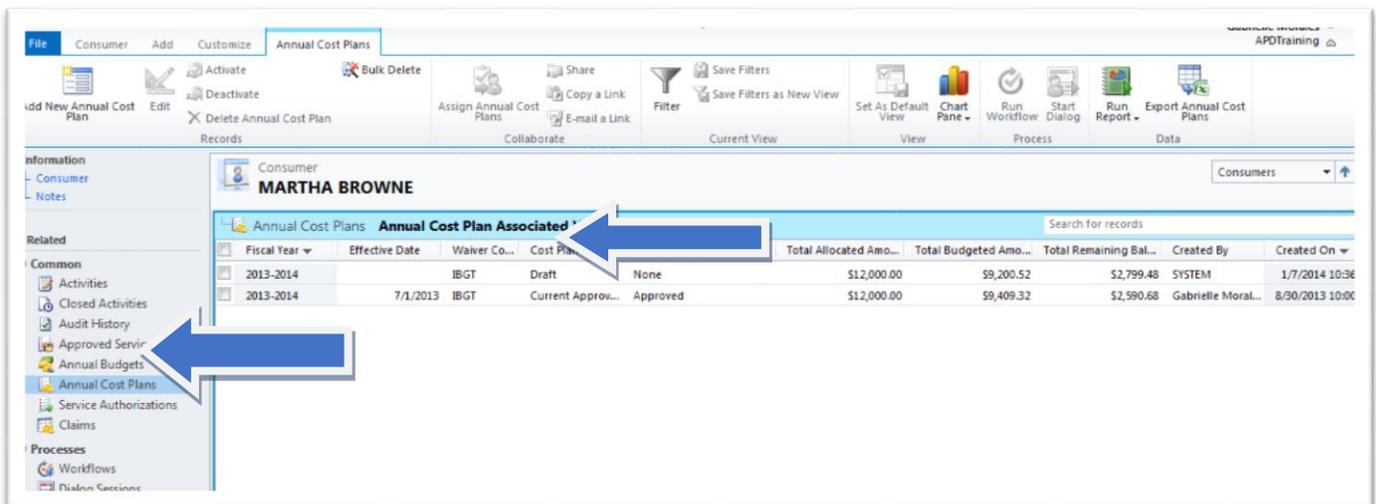


Figure 3.2

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

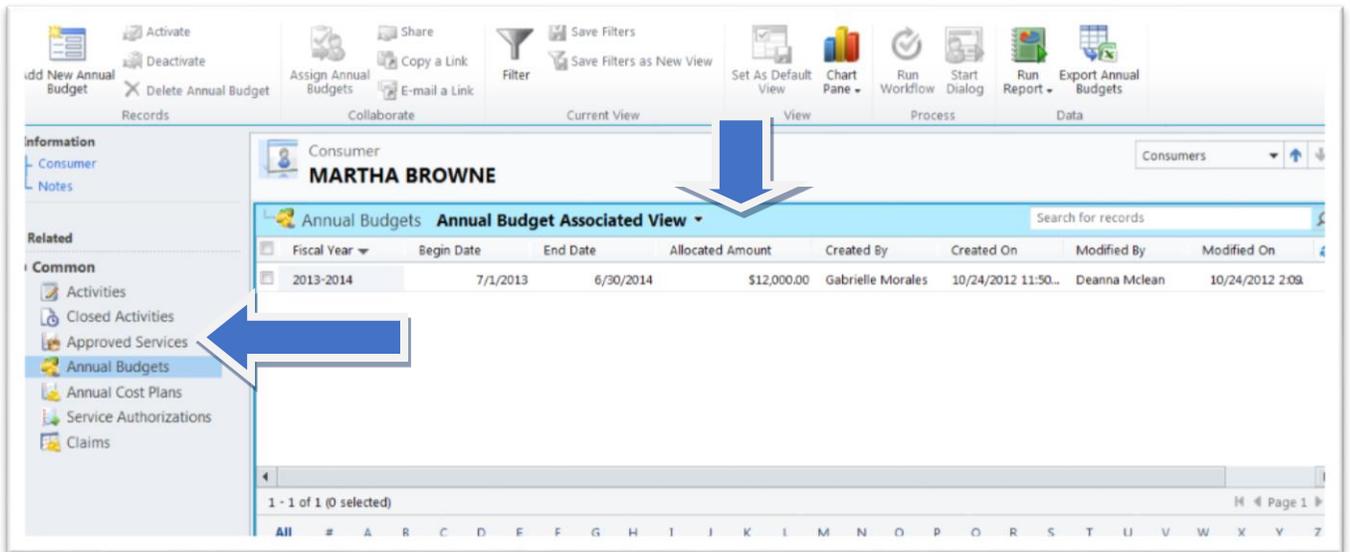


Figure 3.3

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).

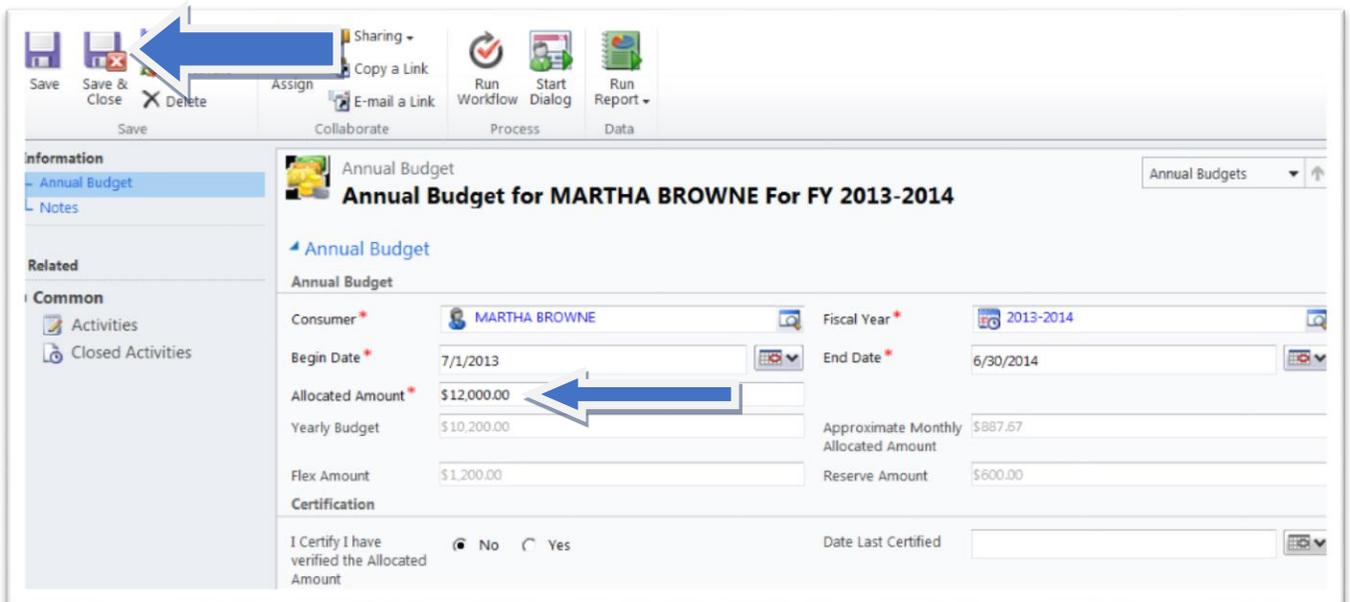


Figure 3.4

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

The screenshot displays the 'Annual Budgets' screen for a user named Chanel L. Abernathy. The interface features a ribbon with the following groups: Records (Add New Annual Budget, Activate, Deactivate, Delete Annual Budget), Collaborate (Assign Annual Budgets, Share, Copy a Link, E-mail a Link), Current View (Filter, Save Filters, Save Filters as New View), View (Set As Default View, Chart Pane), Process (Run Workflow, Start Dialog, Run Report), and Data (Export Annual Budgets). The left navigation pane shows 'Annual Budgets' selected under the 'Common' section. The main content area shows a table with the following data:

Fiscal Year	Begin Date	End Date	Allocated Amount	Created By	Created On	Modified By	Mod
2013-2014	7/1/2013	6/30/2014	\$28,000.00	Satya Puvvada	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.

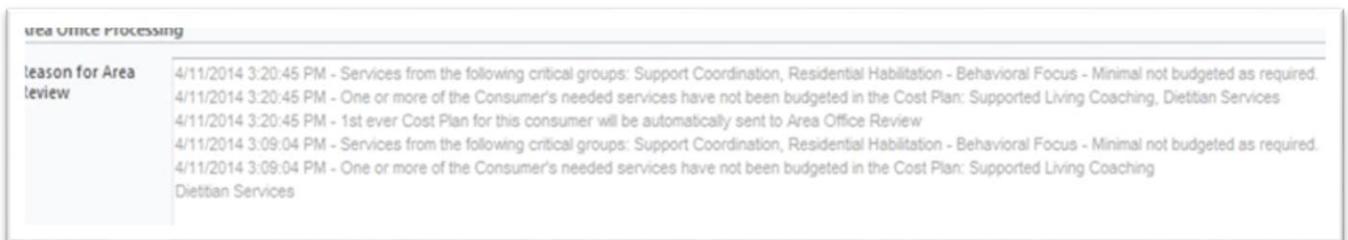


Figure 4.1

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

1. **Reason:** *Automatically sent to Area Office Review*
  - a. **Description:** 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. **Description:** 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. **Description:** 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. **Description:** 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. Description: 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. Description: 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. Description: When the cost plan is over the approved threshold amount.
  - c. Description: 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).

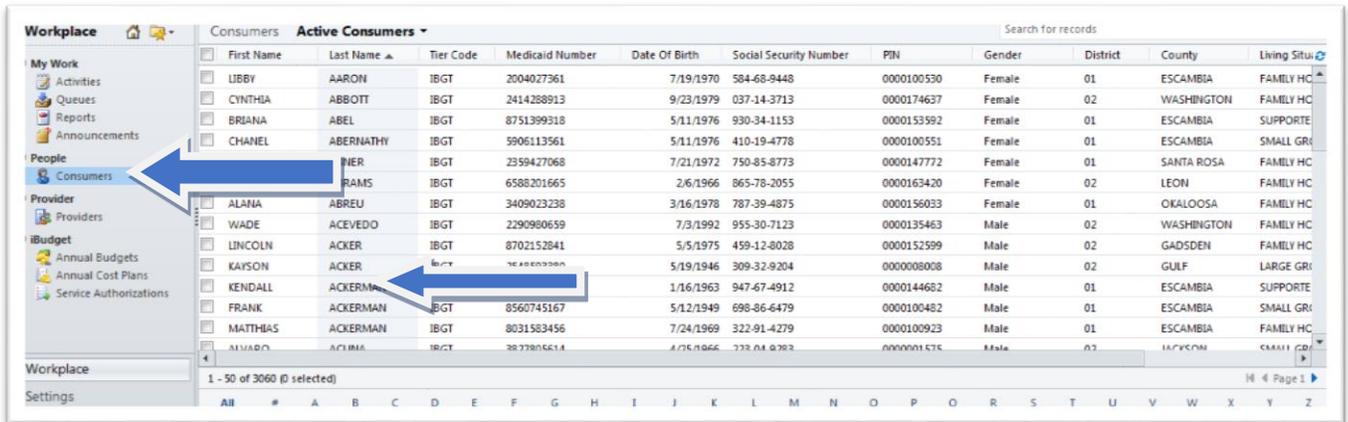


Figure 5.1

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

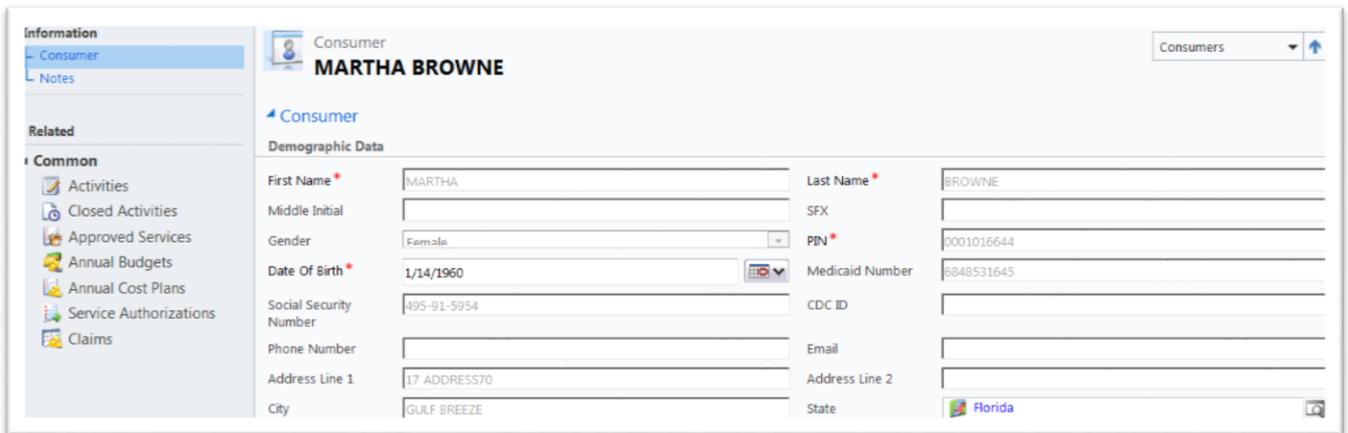


Figure 5.2

- Click *Annual Cost Plans* in the *Related Common* subgroup on the *Consumer Information* page (see Figure 5.3).
- 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).

Fiscal Year	Effective Date	Waiver Co...	Cost Plan Status	Processing Status	Total Allocated Amo...	Total Budgeted Amo...	Total Remaining Bal...	Created By	Created On
2013-2014	4/14/2014	IBGT	Pending Review	Pending Area Office Review	\$12,000.00	\$9,409.32	\$2,590.68	SYSTEM	1/7/2014 10:1
2013-2014	7/1/2013	IBGT	Current Approv...	Approved	\$12,000.00	\$1,508.52	\$10,491.48	Gabrielle Moral...	8/30/2013 10:6
2013-2014	7/1/2013	IBGT	Draft	None	\$12,000.00	\$1,508.52	\$10,491.48	Gabrielle Moral...	10/24/2012 3:6
2012-2013	4/1/2013	IBGT	Current Approv...	Approved	\$3,000.00	\$2,914.93	\$85.07	Gabrielle Moral...	10/24/2012 2:6

Figure 5.3

- 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).

Amounts	Budgeted Target Amount	Target
85% Target Amount	\$9,200.52	\$999.48
10% Flexible Amount	\$0.00	\$1,200.00
5% Reserve Amount	\$0.00	\$600.00
<b>Totals</b>	<b>Total Budgeted Amount</b>	<b>Total Remaining Balance Amount</b>
Total Allocated Amount	\$9,200.52	\$2,799.48

Figure 5.4

Enter a note

Figure 5.5

## 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).

Annual Cost Plan

**Cost Plan For MARTHA BROWNE For 2013-2014**

Month	Monthly Allocated Amount...	Monthly Budgeted Amount...	Monthly Balance Amount	Currency	Owner
July	\$866.30	\$884.11	\$0.00	US Dollar	Gabrielle Morales
August	\$866.30	\$734.11	\$132.19	US Dollar	Gabrielle Morales
September	\$838.36	\$884.11	\$0.00	US Dollar	Gabrielle Morales
October	\$866.30	\$734.11	\$132.19	US Dollar	Gabrielle Morales
November	\$838.36	\$734.11	\$104.25	US Dollar	Gabrielle Morales
December	\$866.30	\$734.11	\$132.19	US Dollar	Gabrielle Morales
January	\$866.30	\$734.11	\$132.19	US Dollar	Gabrielle Morales
February	\$782.47	\$734.11	\$48.36	US Dollar	Gabrielle Morales

Figure 5.6

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.

Annual Cost Plan

**Copied Cost Plan For MARTHA BROWNE For 2013-2014**

Service Code	Description (Service Code)	Provider	Procedure Cod...	Service Ratio	Total Number O...	Total Amount	SP Begin Date	SP End Date	Created By
4001	Adult Dental	BOSSO, KATHY DMD	D0160UC	None	4.00	\$600.00	7/1/2013	6/30/2014	SYSTEM
4082	Life Skills Development ...	ABILITIES CENTER OF...	S5102UC	1:10	750.00		7/1/2013	6/30/2014	SYSTEM
4140	Personal Supports	A & E CAREGIVERS L...	S5130UC	1:2	1,320.00		7/1/2013	6/30/2014	SYSTEM
	Coordination	ADEPT COMMUNITY...	G9012UC	None	12.00	\$1,908.52	7/1/2013	6/30/2014	SYSTEM

Figure 5.7

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).

Service Plan

**Copied Service Plan For MARTHA BROWNE For 4001**

Notes

Enter a note

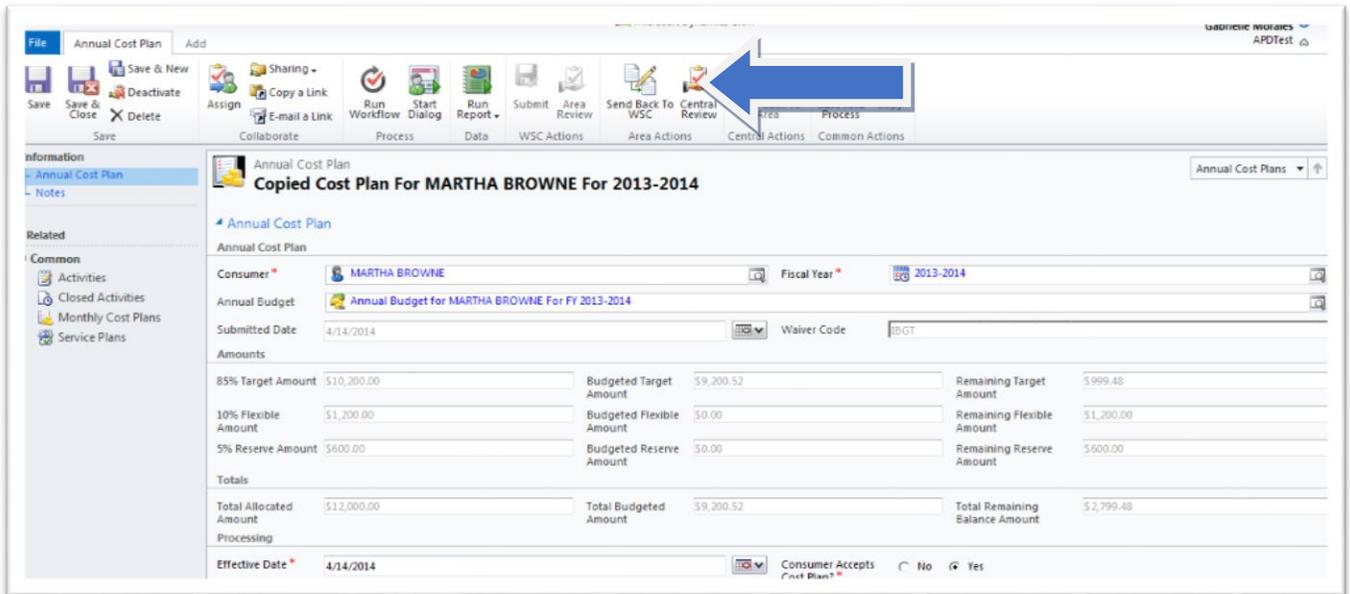
Title: Note created on 8/23/2013 10:52:55 AM by Gabrielle Morales  
Spanning the first quarter and the last quarter for a cleaning at \$300. If more funds are needed or follow up appointments please contact Gabrielle Morales at gabrielle.morales@apdcare.org.

SYSTEM1/7/2014 10:36 AM

Figure 5.8

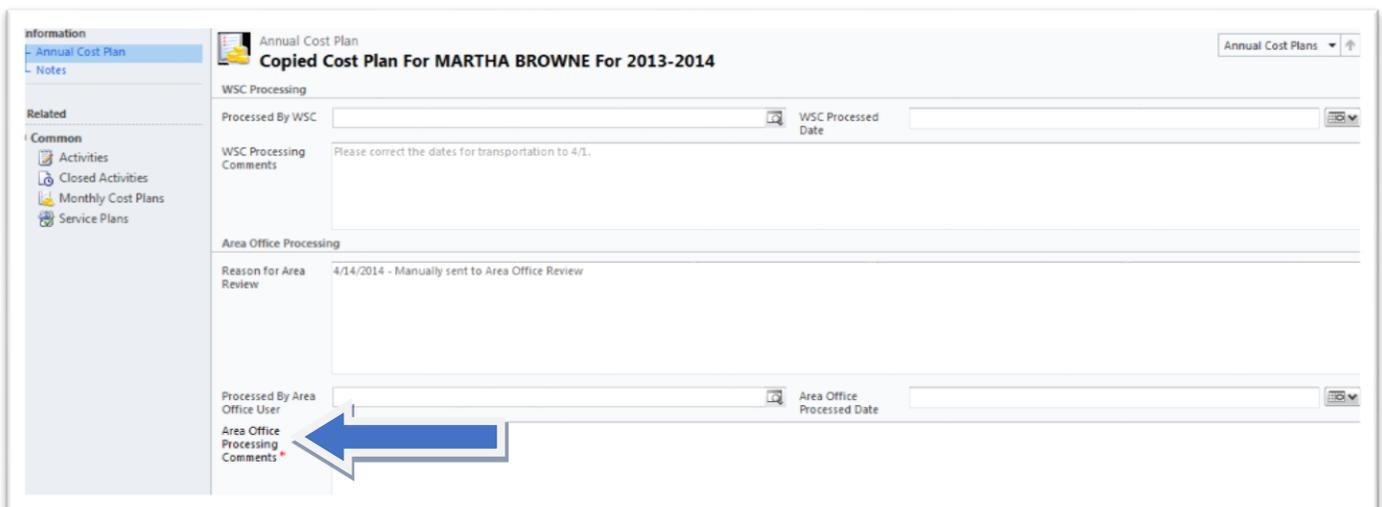
- If cost plan issues are found, take appropriate action to resolve the issues. This can be done by fixing the issues yourself or sending the cost plan back to the WSC for review (see Figure 5.9).
- When the Area Office is requesting input from the State Office, click the *Central Review* icon at the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



**Figure 5.9**

- 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).



**Figure 5.10**

8. Click the *Process* icon at the top of the *Annual Cost Plan* page (see Figure 5.11).

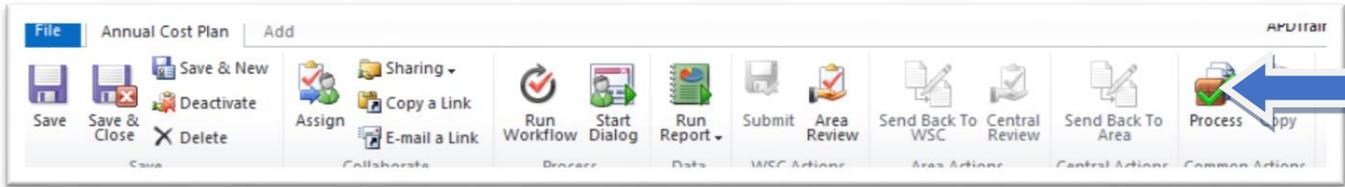


Figure 5.11

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

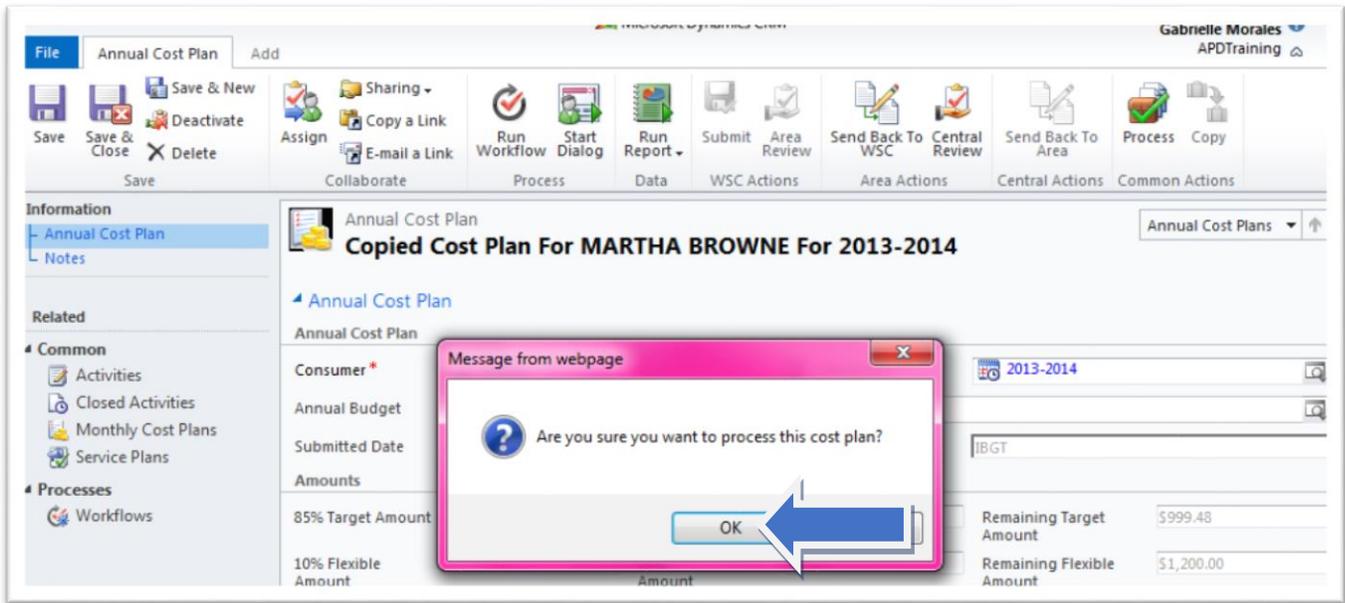


Figure 5.12

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



Figure 5.13

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

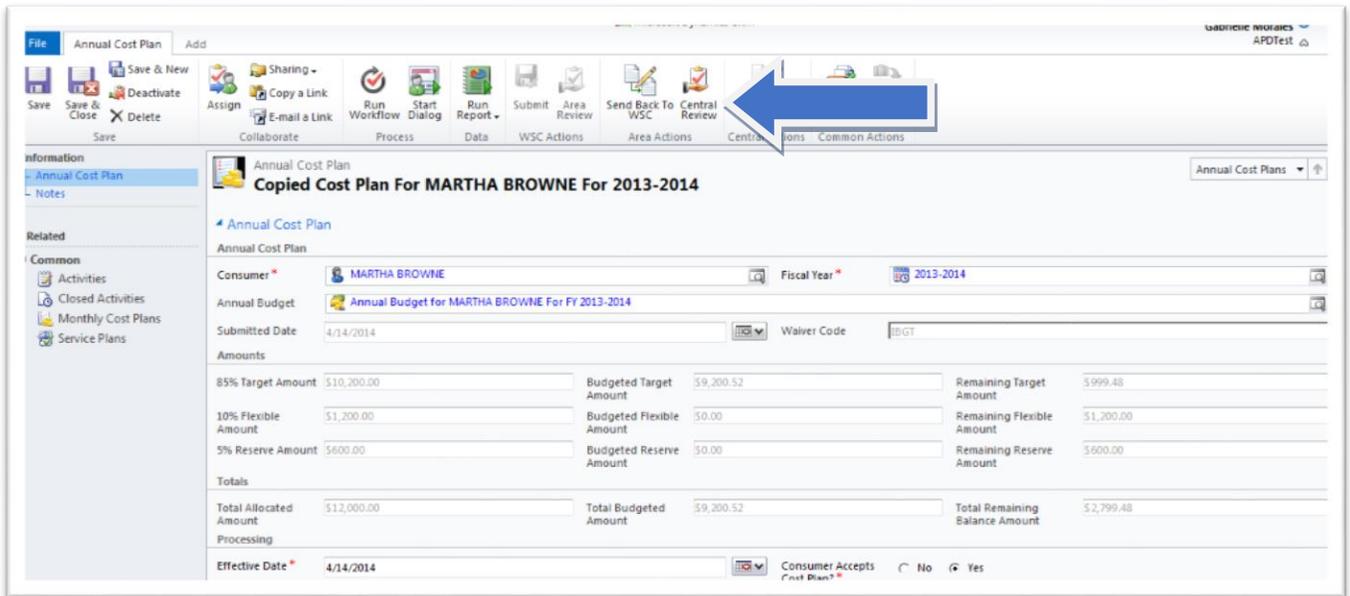


Figure 5.14

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

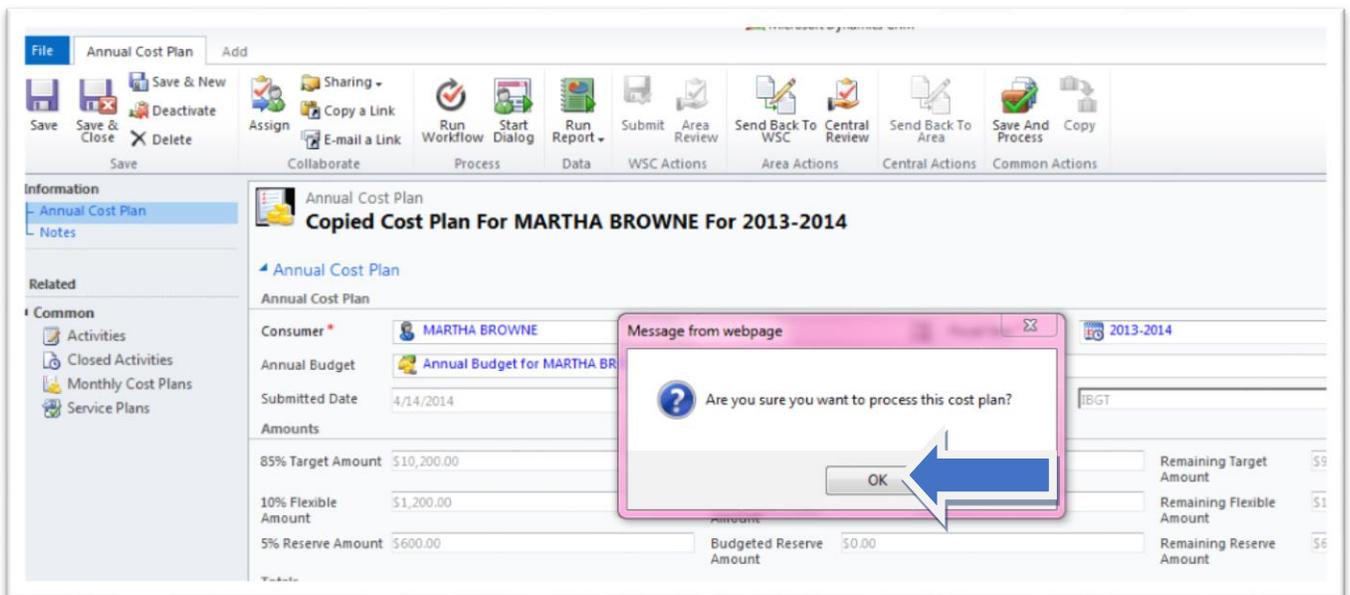


Figure 5.15

- The *Processing Status* will change to *Pending State Office Review*.
- 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).

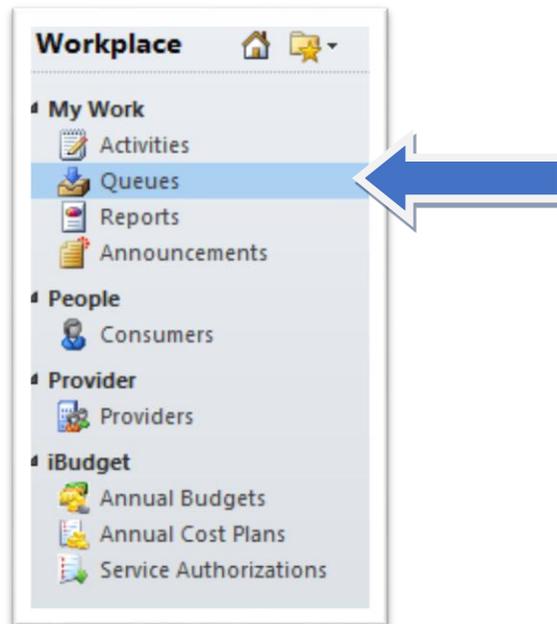


Figure 6.1

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).

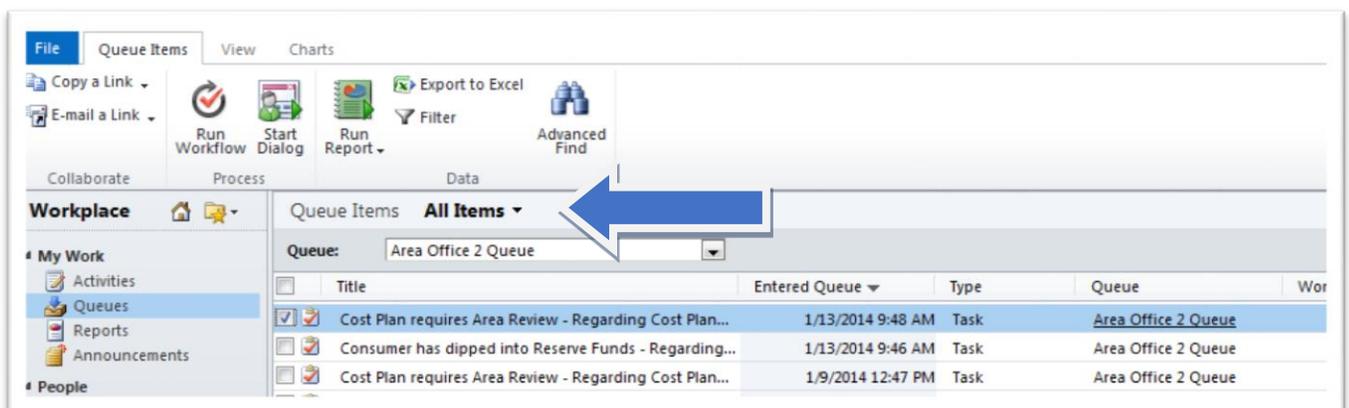


Figure 6.2

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

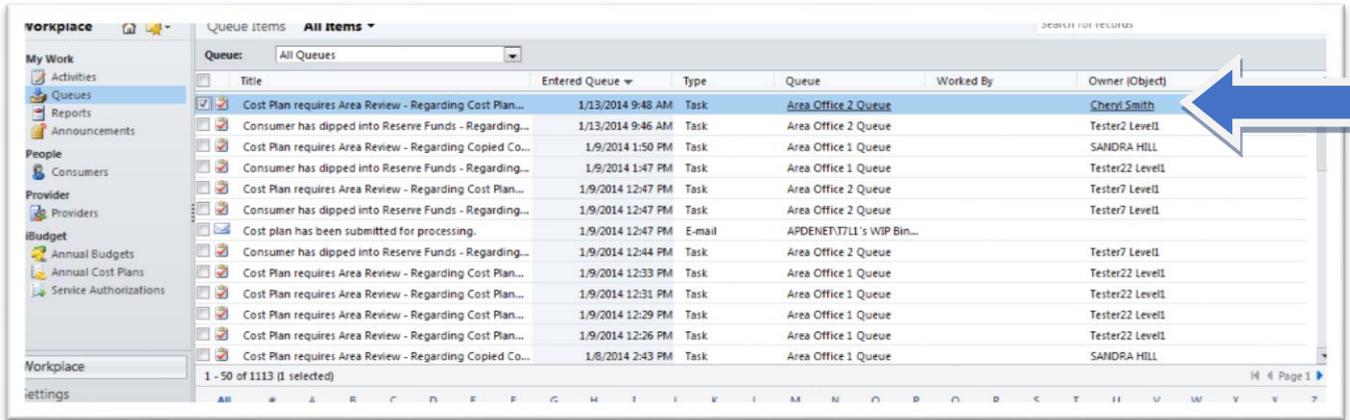


Figure 6.3

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*.

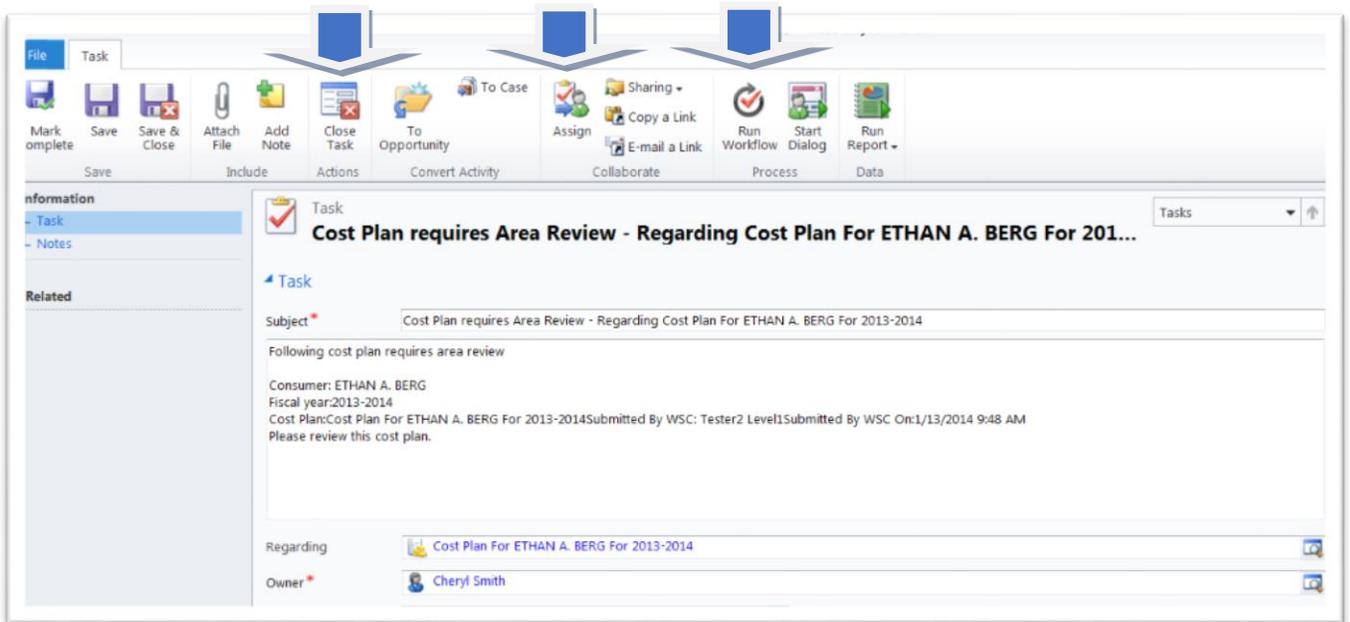


Figure 6.4

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

**Look Up Record**  
 Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for:   Show Only My Records

View:

Search:

	Process Name	Created On	Modified On	Status	Owner
<input checked="" type="checkbox"/>	Close Task	3/2014 7:49 PM	3/10/2014 5:32.	Activated	Satya Pu

1 - 1 of 1 (1 selected) Page 1

Figure 6.5

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

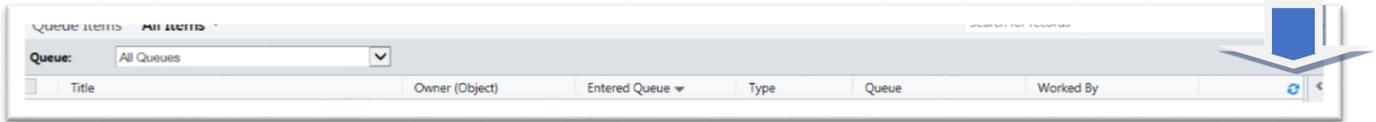


Figure 6.6

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*.

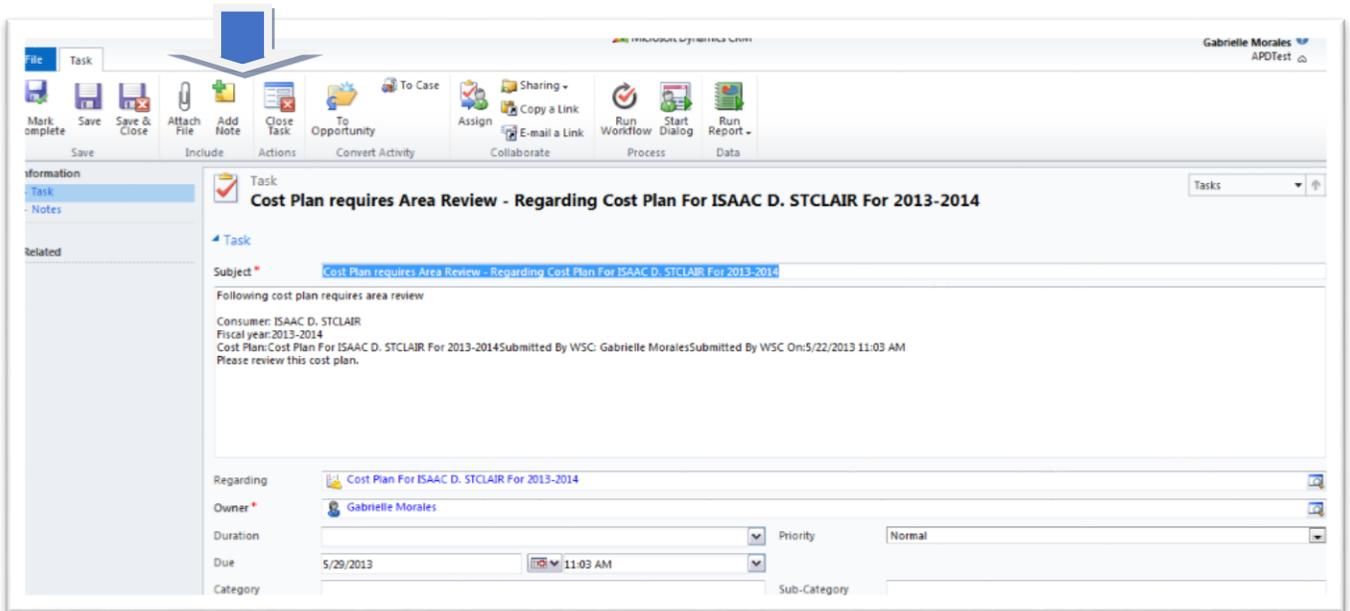


Figure 6.7

# 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).

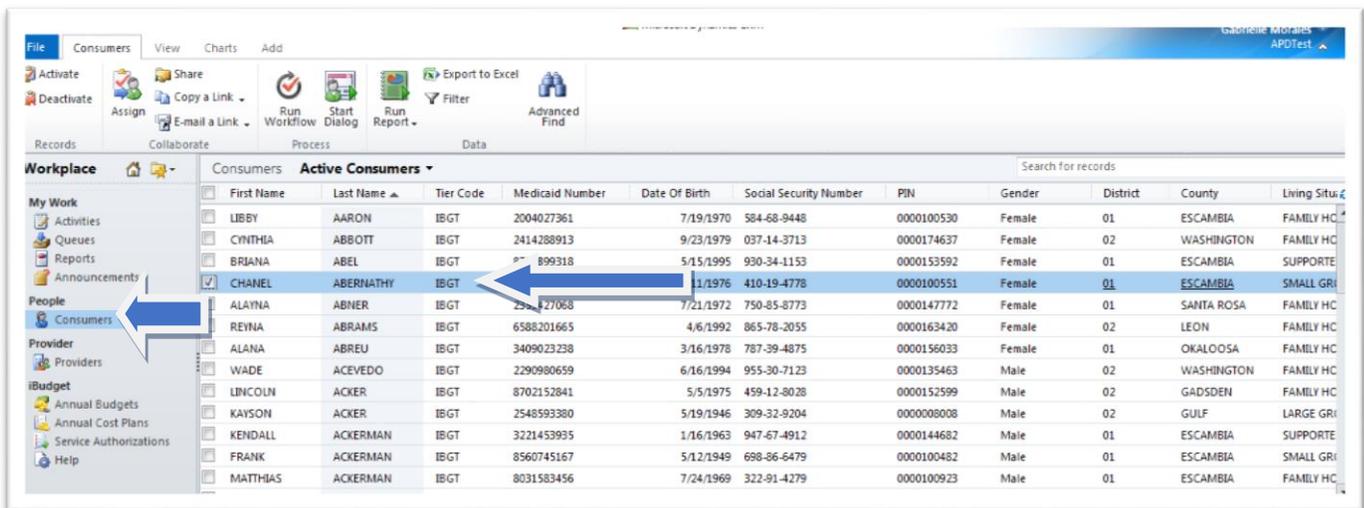


Figure 7.1

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

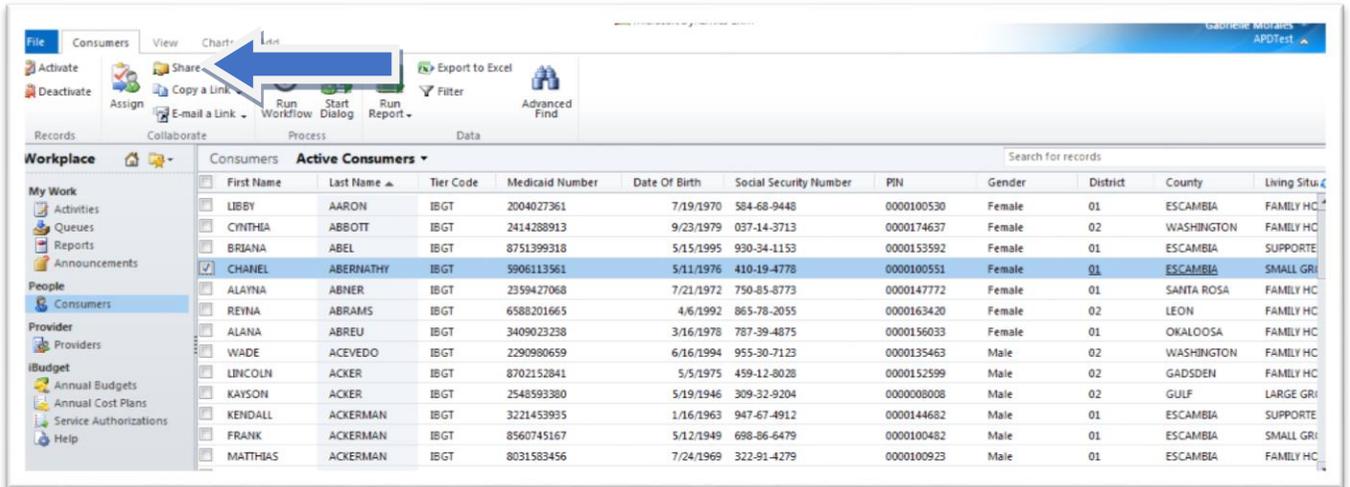


Figure 7.2

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).

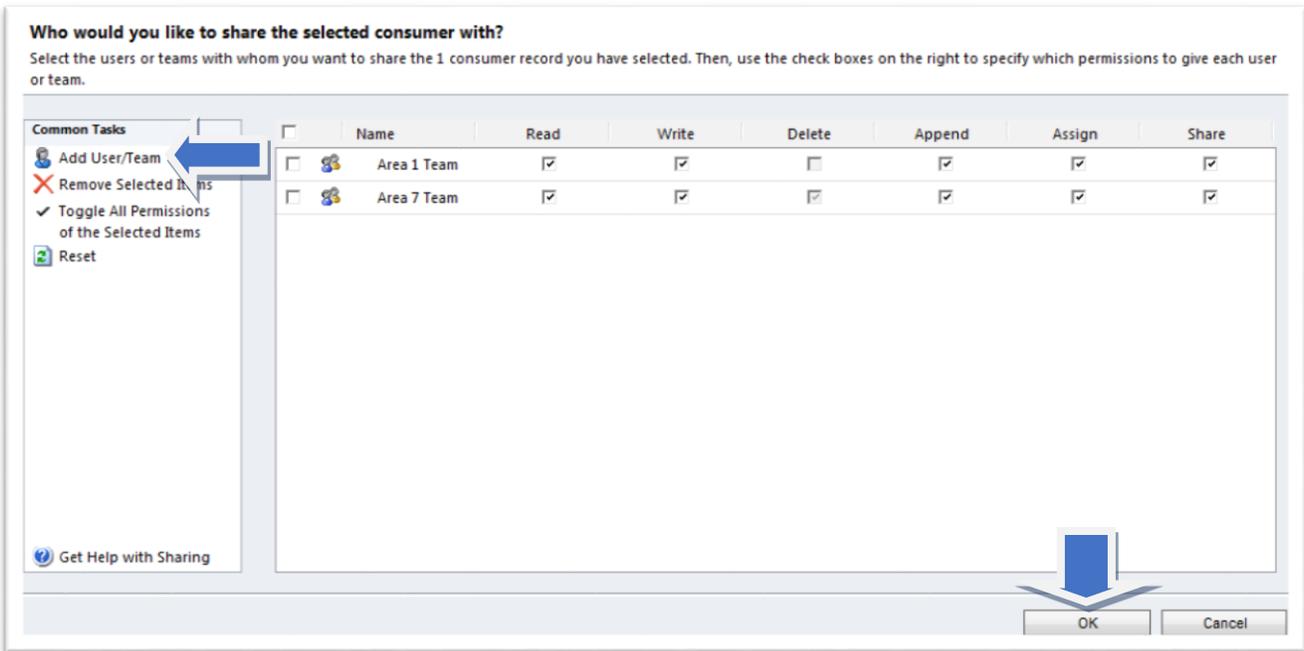


Figure 7.3

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.

**Look for:** Team

**View:** Teams Lookup View

**Search:** Search for records

<input type="checkbox"/>	Team Name
<input type="checkbox"/>	Area 1 Team
<input checked="" type="checkbox"/>	Area 10 Team
<input type="checkbox"/>	Area 11 Team
<input type="checkbox"/>	Area 12 Team
<input type="checkbox"/>	Area 13 Team
<input type="checkbox"/>	Area 14 Team

1 - 50 of 304 (1 selected) Page 1

**Selected records:**

Add

Remove

Properties New

OK Cancel

Figure 7.4

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

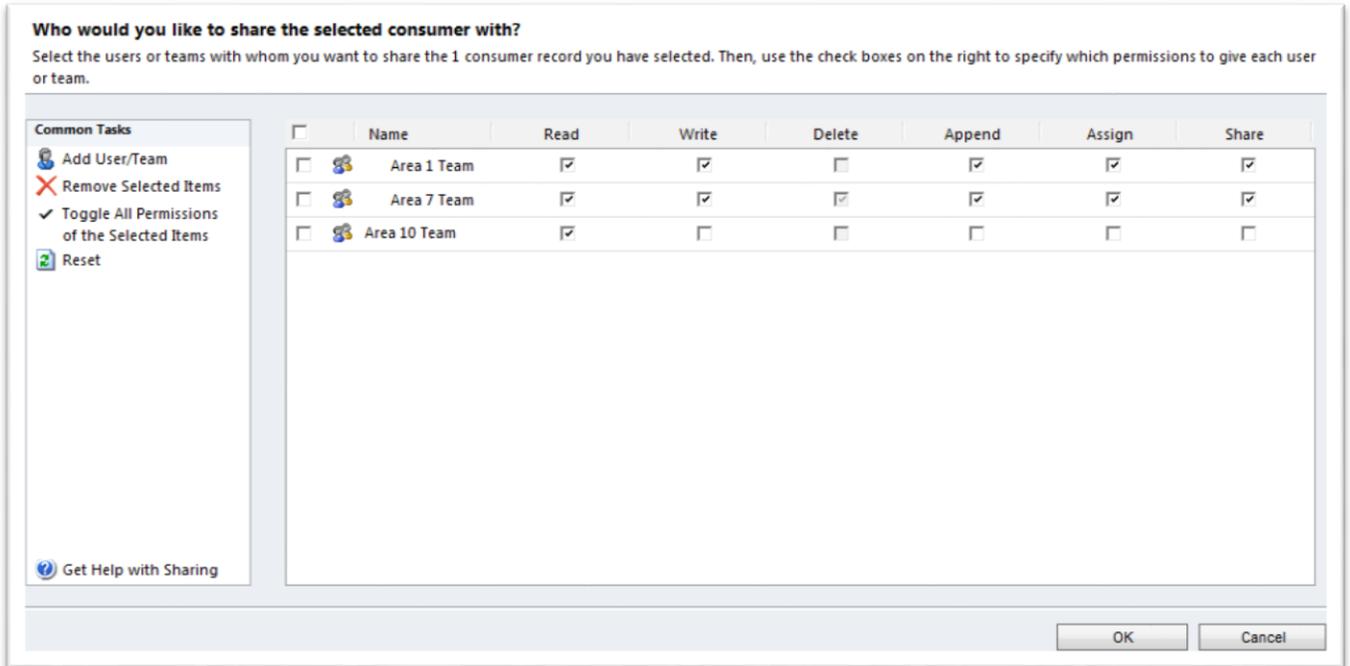


Figure 7.5

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*.

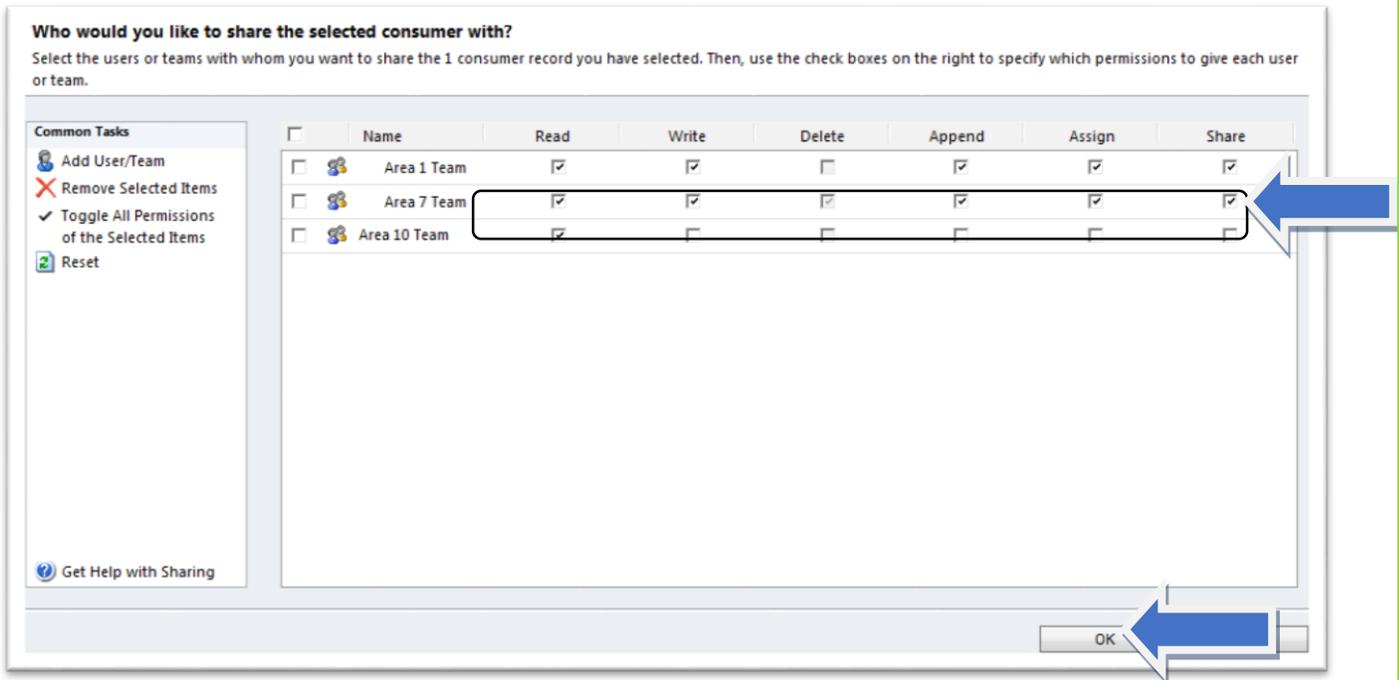


Figure 7.6

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).

First Name	Last Name	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situation
LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
BRIANA	ABEL	IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	FAMILY HC
CHANEL	ABERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	FAMILY HC
ALAYNA	ABNER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
REYNA	ABRAMS	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
WADE	ACEVEDO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000080808	Male	02	GULF	LARGE GR
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
MATTHIAS	ACKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC

Figure 7.7

2. Click Share (see Figure 7.8).

First Name	Last Name	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situation
LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HC
CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
BRIANA	ABEL	IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
CHANEL	ABERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GR
ALAYNA	ABNER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
REYNA	ABRAMS	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
WADE	ACEVEDO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
LINCOLN	ACKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
KAYSON	ACKER	IBGT	2548593380	5/19/1946	309-32-9204	0000080808	Male	02	GULF	LARGE GR
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
MATTHIAS	ACKERMAN	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).

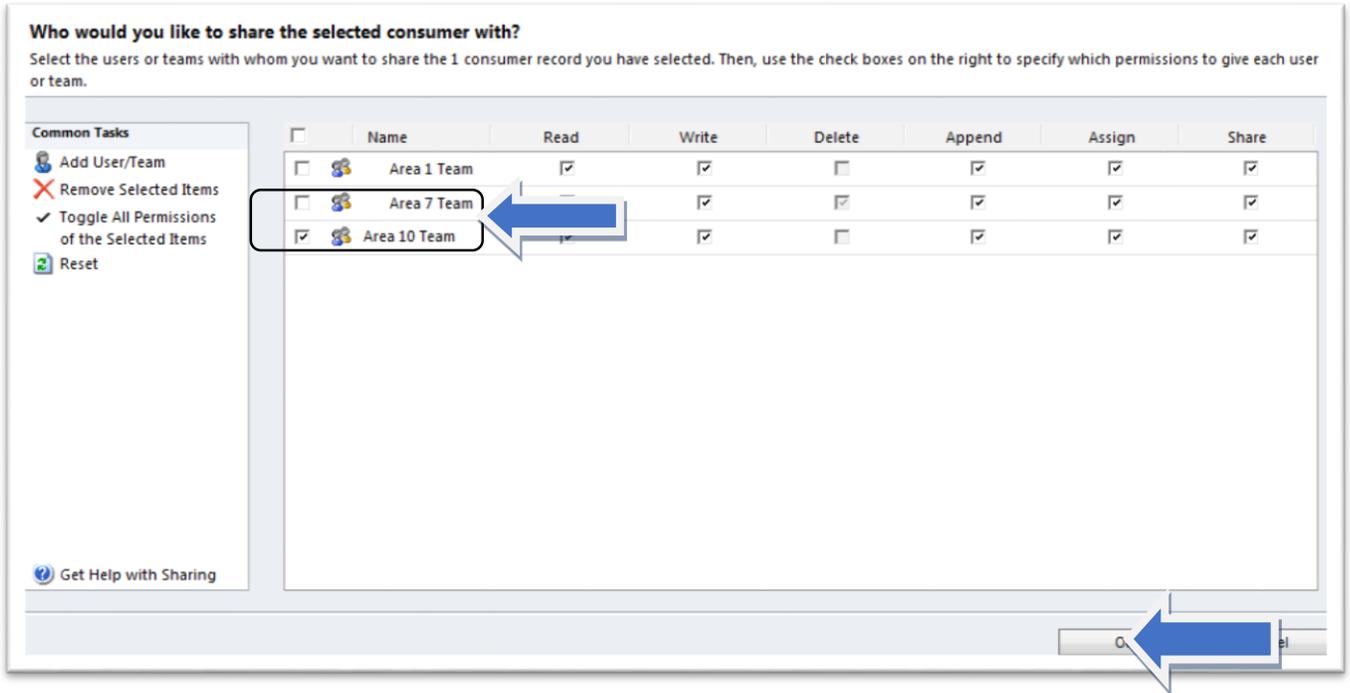


Figure 7.9

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

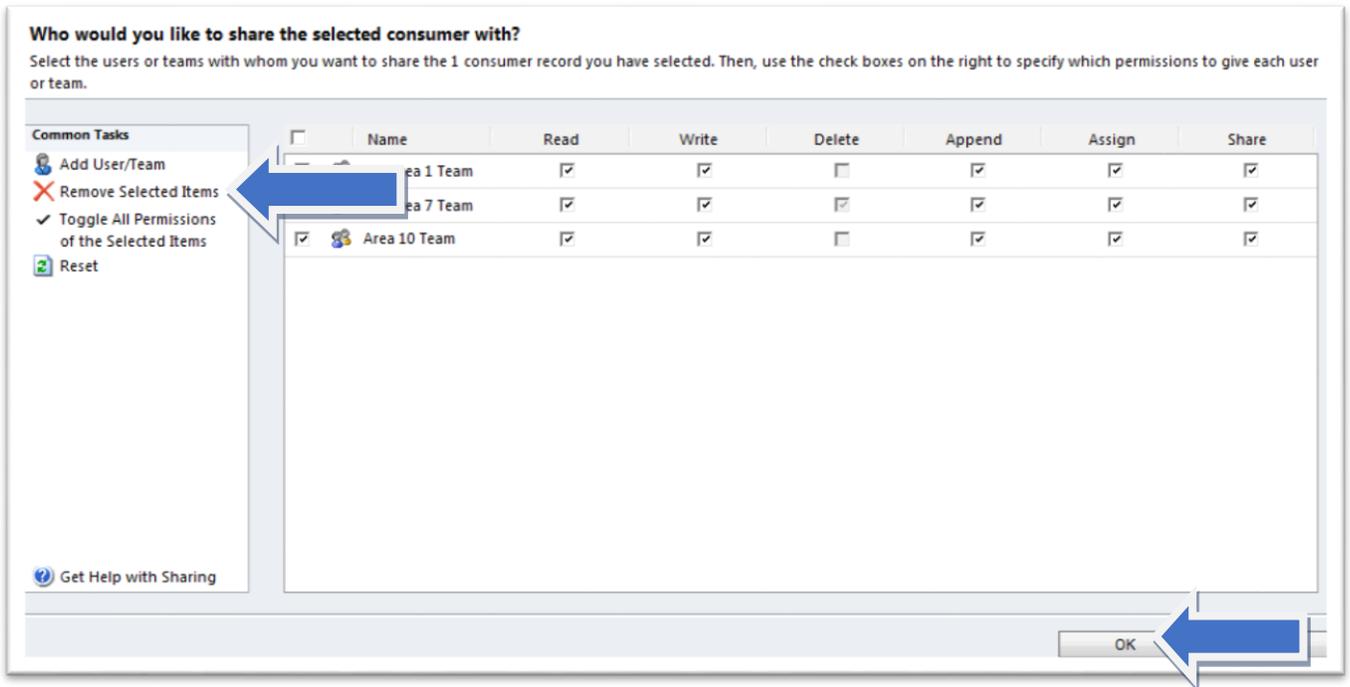


Figure 7.12

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

