Area Office Quick Reference Guide

User Instructions Condensed

How to Enter Pre-Approved Services

1. Log onto iBudget.
2. Click on *Consumers* under *Workplace/People.*
3. Double click on the appropriate consumer in the list.
4. Click *Approved Services.*
5. Click *New Approved Service.*
6. Enter the required information.
7. Click *Save and Close.*

How to Review/Approve/Deny/Resend Cost Plans

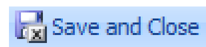
1. Log onto iBudget.
2. Click *Consumers* under *Workplace/People.*
3. Double click on a consumer in the list.
4. Click *Annual Cost Plans* in the *Details* menu.
5. Double click the cost pl*an* to review.
6. Check the *Notes* tab for any notes.
7. Review the components of the cost plan as well as the comments under the *Processing* section *(e.g. Monthly Cost Plan, Service Plan* and budgeted amounts, service plan *Notes,* etc.)
   a. If everything in the cost plan is approved, click the *Submit* icon.
   b. If there are criteria that prevent the approval of the cost plan that **cannot** be fixed, click the *Deny* icon.
   c. If there are criteria that prevent the approval of the cost plan which **can** be fixed, click the *Send Back to Waiver Support Coordinator* icon.
   d. If there are criteria that require review by Central Office, click the *Central Office Review* icon.
8. Click *OK.*

Activities Submitted to the Area Office

1. Log onto iBudget.
2. Click *Queues* under the *My Work* section on the left side. 

3. Double click the folder associated with your A*rea Office.* 

4. Double click the task to be able to read the notes.
5. When the task has been completed, click the *Actions* icon at the top of the page. 

6. Click the appropriate action for that task:
   a. If you are assigning the task to someone else, click *Assign.*
   b. If the task has been completed, click *Close Task.*
      i. Change status to *Complete.*
      ii. Click *OK* and *Close Task.*
   c. If a note or a file needs to be attached, click the attachment icon. 
7. When the task is completed, click *Save and Close.* 

How to Add a Service to a Provider

1. Log onto iBudget.
2. Click on *Providers* under *Provider.*
3. Double click on the appropriate provider in the list.
4. Click *Provider Services.*
5. Click *New Service Provider.*
6. Enter required information (for the *End Date,* enter 12/30/9999).
7. Click *Save and Close.*

Help Desk

To speak with an APD information technology (IT) staff member regarding the iBudget Florida application, please contact our Help Desk. Call (850) 488-4357 (option 3), between 8 a.m. and 6 p.m. (Eastern time), Monday through Friday.