Waiver Support Coordinator Quick Reference Guide

User Instructions Condensed

How to Create Cost Plans

1. Log onto iBudget
2. Click *Consumers* under *Workplace/People* Consumers
3. Double click on the consumer in the list
4. Click *Annual Cost Plan* in the *Details* menu Annual Cost Plans
5. Click *New Annual Cost Plan* New Annual Cost Plan
6. Click the *Search* icon in the *Fiscal Year* field to select a fiscal year for the cost plan
7. Select a fiscal year and click *OK*
8. Enter the date in the *Effective Date* field of the cost plan
9. Click *Save*
10. Click *Monthly Cost Plans* in the *Details* menu Monthly Cost Plans
11. Review Monthly Budgets
12. Click *Service Plans* in the *Details* menu Service Plans
13. Click *New Service Plan* New Service Plan
14. Enter appropriate service plan information
15. Click *Save and Close*
16. Repeat Steps 13-15 as needed for each service
17. Once finished with the service plans, click *Information* under *Details* menu Information
18. Review cost plan with the consumer and click *Consumer Accepts Cost Plan* under the *Processing Section*, and enter an effective date in the *Effective Date* field
19. Click *Submit* Submit
20. Click *OK*

How to Review Cost Plans

1. Log onto iBudget
2. Click *Consumers* under *Workplace/People* Consumers
3. Double click on the consumer in the list
4. Click *Annual Cost Plan* in the *Details* menu Annual Cost Plans
5. Double click the cost plan in the list to view amounts
6. Check the *Notes* tab for any notes Notes
7. Review the following components of the cost plan:
    a. Monthly Cost Plans
    b. Service Plans
    c. Notes for every Service Plan
8. Click *Submit* to submit the cost plan if needed Submit

How to Approve Cost Plans

1. Log onto iBudget
2. Click *Consumers* under *Workplace/People*
3. Double click on the consumer in the list
4. Click *Annual Cost Plan* in the *Details* menu
5. Double click the cost plan 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*
    a. Monthly Cost Plans
    b. Service Plans
    c. Notes for every Service Plan

    If everything in the cost plan is approved click the *Process* icon
8. Click *OK*

How to Copy/Change a Cost Plan

1. Log onto iBudget
2. Click *Consumers* under *People*
3. Double click the consumer in the list
4. Click *Annual Cost Plan* in the *Details* menu
5. Double click on the cost plan to be copied
6. Click the *Copy* button at the top of the page
7. Click *OK*
8. The system will return to the *Annual Cost Plan* screen that will now show the copied cost plan
9. Double click on the *Copied Cost Plan*
10. Click *Service Plans* in the *Details* menu
11. Click the service plan that needs modification
12. If the services need to be increased or decreased then make the appropriate modifications on the existing service plan
13. Click *Save and Close*
14. Repeat Steps 12-17 as needed for each service
15. Once finished with the service plans click *Information* under *Details* menu
16. Review cost plan with the consumer and click *Consumer Accepts Cost Plan* under the *Processing Section* and enter an effective date
17. Click *Submit*
18. Click *OK*

How to View a Service Authorization

1. Log onto iBudget
2. Click *Service Authorizations* under *iBudget* 

3. Double click the service authorization you wish to view
4. View the service authorization

How to View Paid Claims

1. Log onto iBudget
2. Click *Claims* under *iBudget* 

3. Double click the claim you wish to view
4. View the claim

How to Attach Files to Consumers or Cost Plans

1. Log onto iBudget
2. Click on *Consumers* under *People* 

3. Double click the consumer in the list
4. Click the *Attach* icon at the top of the screen 
5. Click *Browse* to locate file to be attached
6. Once located click *Open*
7. Click *Attach*
8. Click *Close*
9. The file is now located under the *Notes* section of the consumer

How to Remove Attached Files

1. Log onto iBudget
2. Click the *Consumers* option under *People in the Workplace* menu
3. Locate the file you wish to remove
4. Double click the file
5. Click *Remove*
6. Click *OK* in response to the message, “Are you sure you want to remove this attachment?”
7. Click *OK* in response to the message, “The attachment has been removed.”
8. Click *Save and Close*

How to Add Notes to the File

1. Log onto iBudget
2. Click on *Consumers* under *People* Consumers
3. Double click the consumer in the list
4. Click on the *Notes* tab Notes
5. Enter notes
6. Click *Save*

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.