



# iBudget

# Florida



agency for persons with disabilities  
*State of Florida*

# WSC Training Outline

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1. Introduction
2. Training Objectives
3. Fundamentals
4. iBudget Goals
5. Implementation Constraints
6. Application Roles
7. Program Overview
8. Service Desk



# 1. Introduction

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- **Fundamental Changes**
- **Service Changes**
- **Waiver Updates**
  - **Implementation Schedule**
  - **APD iBudget Rules**
  - **AHCA iBudget Handbook Rule**
- **Components of iBudget Florida**



# 2. Training Objectives

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- Acquire Knowledge of iBudget Florida Program
- Comprehend Users' Responsibilities
- Learn the Basic WSC Tasks
- Understand the Relationship between iBudget Florida and the other APD Applications
- Identify Workflow Improvements



# 3. Fundamentals

- Definitions
  - Application – an electronic system designed for data collection and/or disbursement (workflow)
  - Program – an organizational process to include policies and procedures
  - iBudget Florida – New Waiver Program
  - iBudget Application – iBudget Florida's electronic system



# 3. Fundamentals

- Definitions
  - Portal – the access point for external users of an application
  - APD Connects – the portal for other APD applications
  - CCR (client central record) – the repository for the customer's complete record.



# 3. Fundamentals

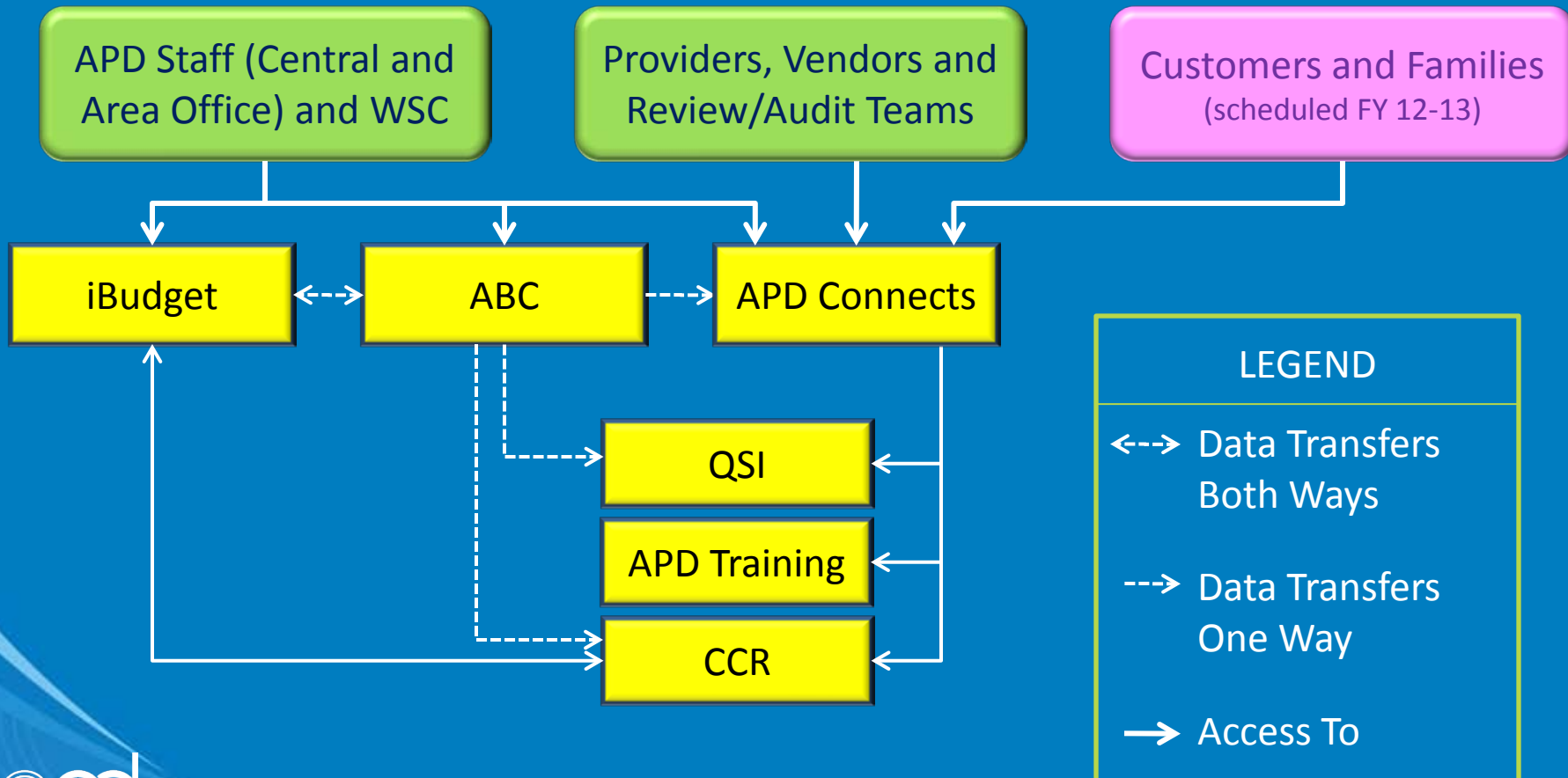
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- Definitions
  - CRM (Customer Relationship Management) – the software on which the iBudget application is built - structured and formalized to support workflows



# 3. Fundamentals





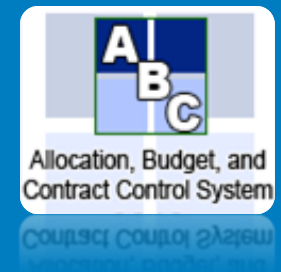
# 3. Fundamentals

- **iBudget Florida**
  - APD's New Budgeting Tool for Waiver Cost Plans
  - Budget Allocation Formula
  - Current Processes Still Apply
  - ABC Screens vs. iBudget Screen



# 3. Fundamentals

- ABC
  - Not Going Away
  - The “System of Record” for Most of APD’s Applications
- CCR
  - Repository for the client complete record
  - Updated Daily from ABC
  - Access to and from iBudget



# 4. iBudget Goals

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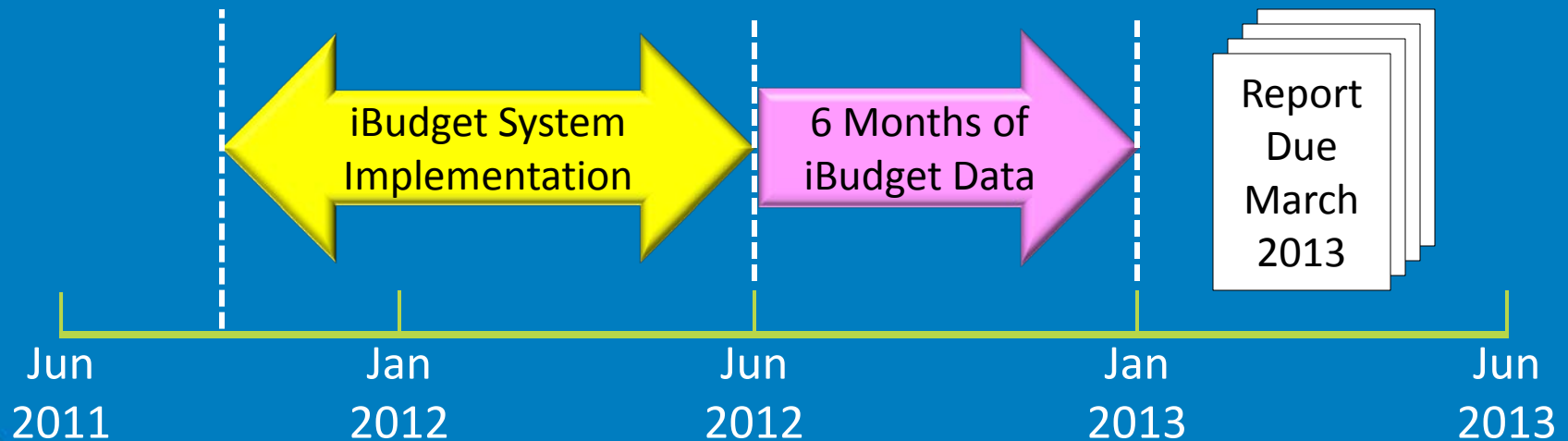
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- Increase Flexibility and Choice
- Sustainability of the Program
- Refocus on Community Resources
- Streamline Review Process
- Spotlight Health & Safety Issues



# 5. Implementation Constraints

- Timeline Based on the Law and Application Design



# Questions

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# 6. Application Roles (YOUUser)

## Application Training Components

- Submission of a NARF
- Link to the Training/Testing Site
- User Name and Password
- Responsibilities in the System(s)
- Training Guides
- Service Desk



# 6. Application Roles (YOUUser)

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## Responsibilities in ABC

- Closing-out Cost Plans
- Update and Maintain All Customer Information



# 6. Application Roles (YOUUser)

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## In iBudget Application

- Create Cost Plan
- Build Service Plans
- Submit Plan for Review





# 6. Application Roles (YOUUser)

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## Benefits of iBudget

- Ease of Navigation
- Pre-populated Providers and Rates
- Calculations are Automatic
- Built-in Prompts
- Direct Submission to Area Office



# 6. Application Roles (YOUUser)

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## Benefits of iBudget

- Service Authorizations Notice Emailed to Providers
- Budget Management Tools
- Service Utilization Tracking
- Instant Caseload Status Reporting



# 7. Program Overview

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- **Budget Allocation Formula Implementation**
- **Inputs for the Formula**
  - Demographics
  - Program Component
  - QSI Data



# 7. Program Overview

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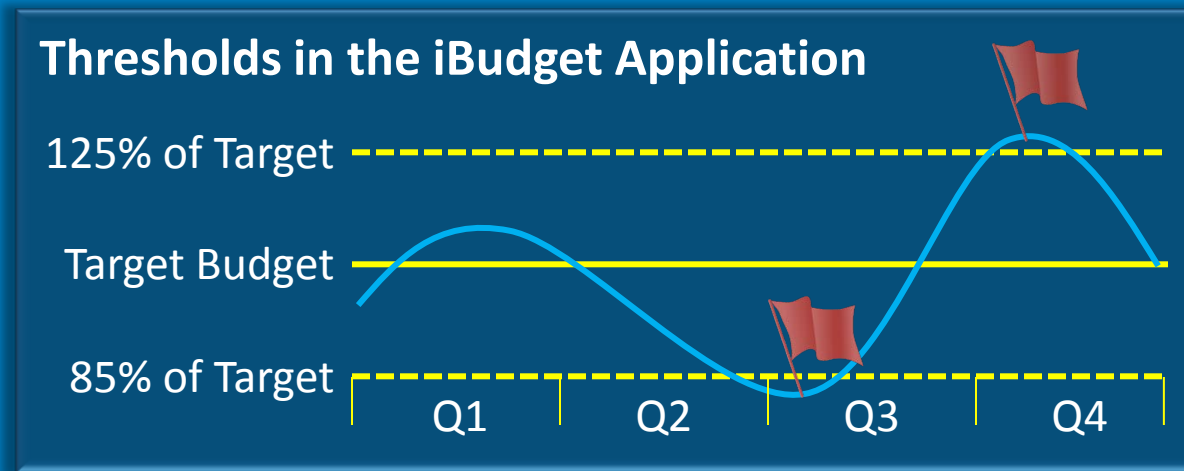
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- **Services (handout)**
  - New Ones
  - Consolidated Ones
- **iBudget Draft Handbook is on [iBudgetFlorida.org](http://iBudgetFlorida.org)**



# 7. Program Overview

- Application Controls
  - Over Budget Alerts
  - Thresholds within the application



Flags = Area Office Review



# 8. Service Desk

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Please Submit iBudget Florida Questions Online at:

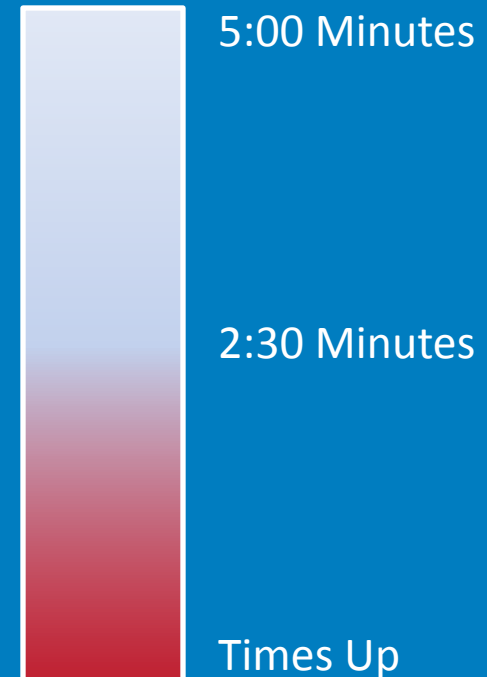
- <http://www.iBudgetFlorida.org>

For iBudget Florida Technical Questions (such as password resets and login issues) call (850) 488-4357 (option 3)



# Break time – Coming up...

- Walk-through iBudget Florida Application
- Discuss the Day-to-Day Operations
- Questions and Answers



# What Now?

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- Complete the iBudget Waiver Eligibility Worksheet
- Complete the Supplemental Waiver Application Form
- Read and Review the Handouts
- Remember - the only significant change is the application

