

Waiver Support Coordinator User Guide

Instructions for Specific Functions iBudget Florida Application

July 1, 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 by going to <u>https://apdflorida.zendesk.com/home</u> and submitting a help desk ticket. You can also call (850) 488-4357 between 8 a.m. and 6 p.m. (Eastern time), Monday through Friday.

Getting Started

Log into the iBudget application using your user name and password (Figure 1.1). Remember to use APD\ before your user name.

User name Password Domain: APD Remember my credentials
OK Cancel
OK Cancel

Figure 1.1

General Information

The iBudget application will use the *Activities* options under *My Work* to direct tasks and processes associated with iBudget. *WorkPlace* consists of four sections: *My Work, People, Provider*, and *iBudget*. Generally, the following options are available:

Workplace
My Work
Activities
Reports
Announcements
People
Consumer
Provider
Providers
iBudget
Annual Budgets
Annual Cost Plans
Service Authorizations
Help

Each list has filter options above it to allow the user to limit the data returned in the list.

Activities My Activities -	Search for records	ρ
Due: All		

For the *View* feature click the drop-down list to filter the list based on available criteria. This is most often used to see inactive records which are not included in the initial view of any list or to filter to a specific content type that you want to see.

Activ	/ities	M	Activities 🔻				Search for records		
Due:	A	2	All Activities	•					
	Activ	2	Task	•	System Views	Due Date 🔺	Start Date	Created By	Date Created 🕴
🔽 🏈	Task	ø	Fax	•	All Tasks	5/29/2013 11:03 AM	5/29/2013 11:03 AM	Satya Puvvada	5/22/2013 11:03
🔲 🎽	Task	٨	Phone Call		My Tasks	9/6/2013 11:17 AM	9/6/2013 11:17 AM	Satya Puvvada	8/30/2013 11:18
🔲 楶	Task		E-mail	•	Create Personal View	9/9/2013 11:09 AM	9/9/2013 11:09 AM	Satya Puvvada	8/30/2013 11:09
2	Task		Letter	• Ē	ng Cost Plan 🛃 Cost Plan F Normal	1/14/2014 8:30 AM	1/14/2014 8:30 AM	Satya Puvvada	1/7/2014 8:31 AM
2	Task	-	Appointment		ng Cost Plan 뉞 Cost Plan F Normal	1/14/2014 8:33 AM	1/14/2014 8:33 AM	Satya Puvvada	1/7/2014 8:33 AM
	Task		Service Activity	•	ng Cost Plan 📔 Cost Plan F Normal	1/14/2014 8:35 AM	1/14/2014 8:35 AM	Satya Puvvada	1/7/2014 8:36 AM
		2	Campaign Response	•					
		2	Campaign Activity	•					
		0	Recurring Appointment	•					

Most column headers may be used to sort the data in the list. To do so, click on the column header name.

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

When the column header is used to sort, an arrow will appear to the right of the column header name, such as after "Last Name" (above).

However, if the column header contains parenthesis "()" such as Service Code (Procedure Code) it may not be used to sort.

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.

When the column header is used to sort, some list pages will contain an alphabetic string of letters at the bottom of the list.

AII # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

You may click on a letter to limit the sorted list to only those records having data in the sorting column that begin with the letter selected.

If a list extends to more than one page, a paging option will be provided in the lower right corner of the page.

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).

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.

Many pages have links to related information. If the value in a data box is underlined (as shown in the example below), the value is a link to the related information.

Service Code *	4270	Q

WSC User Guide, rev. 7, 7/12/2014

Access the related information by clicking on any part of the underlined information.

If a data field has a search box at the far right of the field, the Search icon may be used to open a Look Up Records window to search for and select an appropriate value for the field (Figure 1.2).

Look Up Record Enter your search criteria and click Search to find matching rec of data by using the View options. Then, select the record you	ords. Filter your res want and click OK.	ults and view different columns
Look for: Service Code View: Service Code Lookup View Search:	Show Only My	y Records
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 Skills Development Level 1 (Community Inclusion)	4000	Life Skills Development
1 - 50 of 115 (0 selected)		M 🖣 Page 1 🕨
Properties <u>N</u> ew		
	<u>0</u> K	Cancel Remove Value

Figure 1.2

You may select a record from *the Look Up* list by clicking the record, and then click the *OK* button. Or you can double click the record in the list.

Many pages have one or more of the following links in the *Details* menu on the left side of the page.

Inform - Con - Note	ation sumer es	
Relate	d	
⊿ Com	mon	
	Activities	
ò	Closed Activities	
.	Approved Services	
- 🧟	Annual Budgets	
	Annual Cost Plans	
- <u>I</u>	Service Authorizations	
25	Claims	

Information – provides detailed information about the object you are viewing (Consumer, Annual Budget, Annual Cost Plan)

Activities - are tasks related specifically to that object you are viewing

Closed Activities - are tasks that were completed in Activities for the object you are viewing

An asterisk to the right of a page prompt indicates required data.

A new browser window opens 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.



Objects are things like 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 an object, be sure to either click Save and Close

page or click the kinetic icon in the upper right corner of the object page to close the object. This will reduce the number of open pages.

Activities

1. You will see the outstanding Activities associated with your user ID (Figure 1.3).



2. A task must be "worked" to remove it from your *Activities* list. To work a specific activity, double click it (Figure 1.4). Review the task and take the appropriate action.

Workplace 🚮 🙀 -	Activ	ities My Activi	ties 🔻		Search for r
▲ My Work	Due:	All	~		
Activities		Activity Type	Subject	Regarding	Priority
Reports		E-mail		DIAMOND A. PAPE	Normal
Announcements		E-mail	Test Site Work	🕵 DIAMOND A. PAPE	Normal
4 People		Task	Cost Plan requires Area Review - Regarding Cost Plan For	Cost Plan For DAVE A. D For 2012-2013	<
Consumers	🗆 🌒	Task	Consumer has dipped into Reserve Funds - Regarding Co	Cost Plan For DAVE A. D For 2012-2013	Normal
Providers		E-mail	Cost plan has been submitted for processing.	Cost Plan For TEST FIRST1 D. TEST LAST1 For 2012-2013	Normal
₄ iBudget		E-mail	Cost plan has been submitted for processing.	🛃 Cost Plan For NIKOLAI L. TROTTER For 2012-2013	Normal
Annual Budgets					
🛃 Annual Cost Plans					
Service Authorizations					
👌 Help					

Figure 1.4

Once the individual task has been completed, click the *Mark Complete* or the *Close Task* icon at the top of the page (Figure 1.5). **Note:** Selecting the *Mark Complete* icon will close the task automatically.

File	Task										Tester 1 Leve APDT	el 1 🖤 Test 💩	
Mark Complete	Save	Save & Close	Attach File	Add Note	Close Task Actions	Opportunity Convert Activity	Assign Copy Collaborate	ng v a Link iil a Link e Pr	Start Dialog	Run Report			
Informati – Task – Notes	ion			7	Task Cost P	lan requires Area	Review - Reg	arding Cos	t Plan Fo	D	Activities	- ↑	÷
Related				Subject Follow Consu Fiscal Cost P Please	k t * imer: DAVE year:2012-2 Van:Cost Pl an:Cost Pl review this	Cost Plan requires Area an requires area review A. D 2013 an For DAVE A. D For 2012-2 s cost plan	Review - Regarding 013Submitted By W	SC: DEANNA MCL	VE A. D For 2 EANSubmitt	2012-2013 ed By WS	3 C On:8/27/2012 :	10:36 AM	~
				Regard	ling	逞 Cost Plan For DAV	E A. D For 2012-201	3				Q	
				Owner* 🥚 Tester 1 Level 1							Q		
				Duratio Due	on	9/3/2012	✓ 10:36 AM	Priority	Norm	nal		~	
				Catego	лу			Sub-Category					>

Figure 1.5

If you select the *Close Task* icon a pop-up box will appear (Figure 1.6).

Cost Plan Close Task	Webpage Dialog	Review	- Redard		Plan
🖉 http://crm	nuat.apd. fl.local /APDTr	raining/_gri	d/cmds/dlg	_deactivate.asp	x?c
Close Task			$\langle \neg \rangle$		ROW
You have sele	cted 1 Task to close.				
Select the sta	tus of the closing Task.				
Status:	Completed				▼ rales
				<u>L</u>	
					_
			ок	Cancel	
htt 😜 Interne	t Protected Mode: On	1			nal
<u> </u>	9/6/2013	11:17 AM	×		

Figure 1.6

3. Click OK (Figure 1.7).

🟉 Close Task Webpage Dialog	×	
🕖 http://crmuat.apd. fl.local /APDTrai	ning/_grid/cmds/dlg_deactivate.aspx?c	L
Close Task		RO
You have selected 1 Task to close.		L
Select the status of the closing Task.		ral
Status: Completed		
		L
		L
		ŀ
		ŀ
	ок	
htt 🌍 Internet Protected Mode: On		nal
9/6/2013	:17 AM	

Figure 1.7

Accessing Consumer Information

1. Use the *Consumers* option under *People* in the *Workplace* menu on the left side of the page to access consumer information. Clicking this link will provide the list of consumers that you are authorized to see (Figure 1.8).

Workplace 🚮 🏹 -	Consumers Ac	tive Consumers	-					Search for r	records		
4 My 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
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	CH/ EL	ABERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	01	ESCAMBIA	SMALL GRO
4 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
4 Provider		ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Reviders	WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
4 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
	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
		АСЦИА	IRGT	38,27805614	1/25/1966	222 04 0283	0000001575	Male	02	IACKSON	SMALL GR
Workplace	1 - 50 of 3060 /0 sele	ucted)									H d Page 1
Settings	All #	А В С	D E	F G H	I J K	L M N	O P Q	R S	T U	v w x	Y Z



2. The *View* feature above the *Consumers* list may be used to indicate whether to view active or inactive consumers (Figure 1.9).

Workplace 🛛 🖓 🙀 -	Consumers Ac	tive Consumers	- (Search	or records		
4 My Work	First Name	Last Name 🔺	Select av	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
🎍 Queues	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
😽 Consumers	REYNA	ABRAMS	IBGT	6588201665	2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
4 Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Reviders	WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
4 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
×	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
		λέτινα	IRGT	3827805614	1/75/1966	223 04 9283	0000001575	Male	02	IACKSON	SMALL CD
Workplace	1 - 50 of 3060 (0 sele	cted)									M 🖣 Page 1 🕨
Settings	All #	А В С	D E	F G H	I Ј К	L M N	O P Q	R S	τU	v w x	Y Z

Workplace 🛛 🖓 🏹 -	Consumers	Active Consumers	•										Sea	arch for	records			
4 My Work	🔲 🛛 First Name	System Views				umber	Date Of Birt	h	Social Security	/ Number	PIN		Gender	r	District	Cour	nty	Living Situ: 👸
Activities	LIBBY	Active Consumers					7/19/	1970	584-68-9448		0000	100530	Female		01	ESCA	MBIA	FAMILY HC
🍶 Queues	CYNTHIA	Inactive Consumers					9/23/	1979	037-14-3713		0000	174637	Female		02	WAS	HINGTON	FAMILY HC
Reports	BRIANA	My Views					5/11/	1976	930-34-1153		0000	153592	Female		01	ESC/	MBIA	SUPPORTE
Announcements	CHANEL	Bday Under 21					5/11/	1976	410-19-4778		0000	100551	Female		01	ESC/	MBIA	SMALL GRO
4 People	ALAYNA	iBudget DOR updet	. 21				7/21/	1972	750-85-8773		0000	147772	Female		01	SAN	A ROSA	FAMILY HC
S Consumers	REYNA	NG Depier Coll	121				2/6/	1966	865-78-2055		0000	163420	Female		02	LEOP	1	FAMILY HC
4 Provider	ALANA	NE Region Call					3/16/	1978	787-39-4875		0000	156033	Female		01	OKA	LOOSA	FAMILY HC
2 Providers	WADE	Create Personal View	w				7/3/	1992	955-30-7123		0000	135463	Male		02	WAS	HINGTON	FAMILY HC
4 iBudget	LINCOLN	ACKER	IBG	Г	87021528	11	5/5/	1975	459-12-8028		0000	152599	Male		02	GAD	SDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	IBGI	r	25485933	30	5/19/	1946	309-32-9204		0000	800800	Male		02	GULI		LARGE GR
Service Authorizations	KENDALL	ACKERMAN	IBGI	г	32214539	35	1/16/	1963	947-67-4912		0000	144682	Male		01	ESC/	MBIA	SUPPORTE
	FRANK	ACKERMAN	IBGI	г	85607451	57	5/12/	1949	698-86-6479		0000	100482	Male		01	ESC/	MBIA	SMALL GR
	MATTHIAS	ACKERMAN	IBGI	r	80315834	56	7/24/	1969	322-91-4279		0000	100923	Male		01	ESC/	MBIA	FAMILY HC
		ΑζΗΝΑ	IRGI	r	38,778056	u	4/25	1966	225 04 9285		0000	001575	Male		02	INCK	SON	SMALL CR
Workplace	1 - 50 of 3060 (0 selected)						_										H 4 Page 1
Settings	All #	А В С	D	E	F (; н	I J	к	L M	N	0	P (Q R	S	T U	v	w x	Y Z

Figure 1.9

3. To select a consumer, double click the consumer in the list (Figure 1.9). This will display the consumer's *Information* page (Figure 1.10).

Information Consumer Notes	Consumer MARTH	A BROWNE				Consumers	•
Related	Consumer						
4 Common	Demographic Data						
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		CDC ID			
Claims	Phone Number			Email			
	Address Line 1	17 ADDRESS70		Address Line 2			
	City	GULF BREEZE		State	👰 Florida		Q

Figure 1.10

Create Annual Cost Plans

1. Click *Consumers* under *People* in the *Workplace* menu on the left side of the page (Figure 2.1).



2. Double click on a consumer in the list (Figure 2.2).

Workplace 🛛 🖓 🙀 -	Consumers Act	tive Consumers	•					Search for	records		
4 My 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
🎍 Queues	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 GRO
4 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
4 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
4 iBudget	LINCOLN	ACKER	IBGT	8702152841		3028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYSON	ACKER	IBGT	2548593380		32-9204	0000008008	Male	02	GULF	LARGE GR
Service Authorizations	KENDALL	ACKERMAN	IBGT	3221453935		1 912	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
		ΑζΗΝΙΑ	IRGT	3827805614	4/75/1966	225 04 0285	000001575	Male	02	IACKSON	SMALL CR
Workplace	1 - 50 of 3060 /0 selec	ted)									A Page 1
Settings	All # A	B C	D E	F G H	I J K	L M N	O P Q	R S	T U	v w x	Y Z

Figure 2.2

3. This action will pull up the consumer's *Information* page (Figure 2.3).

Information Consumer Notes	Consumer MARTH					Consumers 🔹 🛧
Related 4 Common	 Consumer Demographic Data 	\				
Activities	First Name *	MARTHA		Last Name *	BROWNE	
Closed Activities	Middle Initial			SFX		
ight Approved Services	Gender	Female	v	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	Q



Remember that approved services and a budget are needed before building a cost plan.

Pre-Approved Services

1. To view pre-approved services, click *Approved Services* under *Details* (Figure 2.4).

Information Consumer Notes	Consumer MARTHA	A BROWNE				Consumers 👻 🔨
Related	 Consumer Demographic Data 					
Activities	First Name *	MARTHA		Last Name *	BROWNE	
Closed Activities	Middle Initial			SFX		
Approved Services		Female	v	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



2. The list of *Approved Services* will be displayed (Figure 2.5).

Li	ist Tools				Micros	soft Dynamics	CRM							Gabrie	lle Mora	les 🕜	
File Consumer Add Appro	oved Services														APDT	est 🛆	
Add New Approved Service Records	A: d Service	ssign Approved Services Collaborate	hare opy a Link -mail a Link	Filter	Save	e Filters e Filters as Ne ent View	w View	Set As Der View	fault Char Pane	t Ru World	n Star low Dialo	t Run og Repo	n Expo rt - Dar	ort Approv Services	/ed		
Information Consumer Notes	Con: MA	sumer ARTHA BROW	'NE											Consume	rs	- 1	•
	🗏 🧏 🦢	oved Services A	pproved	Servic	e Associ	ated View	•					Search fo	r record	s			ρ
Related	Approve	ed Service Name 🔺				Service Co	de	Begin Dat	e	End Date		PA Numb	ber	PA St	atus	P	A L 😥
4 Common	MARTH	A BROWNE Adult De	ental			4001			4/1/2013	12	/30/9999			4			
Activities	MARTH	A BROWNE Life Skill	s Developme	nt - Leve	I 3 (ADT)	4082			4/1/2013	12	/30/9999						,
Closed Activities	MARTH	A BROWNE Persona	I Supports			4140			7/1/2013	12	/30/9999		$\boldsymbol{<}$			-	
Approved Services	MARTH	A BROWNE Persona	l Supports (c	lay)		4141			4/1/2013	12	/30/9999						•
Annual Budgets	MARTH	A BROWNE Support	Coordinatio	n		4270			4/1/2013	12	/30/9999						
Service Authorizations																	
	•																•
	1 - 5 of 5 (0	selected)													М	Page	1 🕨
	All #	A B C	D E	F	G H	I J	К	L M	N O	Р	Q R	S 1	r u	V	w x	Y	Ζ

Figure 2.5

3. To view whether this consumer has an annual budget click *Annual Budget* (Figure 2.6).

Add New Annual Budget	udget	Assign Annua Budgets	al 🔂 E-1	are opy a Link mail a Link	Filter	s 🖓 s	ave Filters ave Filters as	New View	Set As Vie	Default ew	Chart Pane -	C Run Workflow	Start Dialog	Run Report	Expor Bu	t Annual dgets					
Information Consumer Notes	Į	Consum MAR	ner THA B	BROWN	IE	Cı	urrent View			View		Pro	Cess		Data	[Consun	ners	•	1	ŀ
Related 4 Common		Annual I Fiscal Year 2013-2014	Budget •	s Annu Begin Date	al Budg	get As End D	sociated N ate 6/30/2014	/iew ▼ Allocated	d Amount \$12	000.00	Created	i By le Morales	Created	S d On 2012 11:5	earch fo Mo	r records odified By	; /	Moc 10	dified On /24/2012	2:09.	0 0 0
 Activities Closed Activities Approved Services Annual Budgets Annual Cost Plans Service Authorizations Claims 					,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		0,00,001						10/24/					10)			
	•																				•
	1	- 1 of 1 (0 sele	cted)																M 4 Pa	ige 1	Þ

Figure 2.6

Annual Cost Plan

1. Once approved services and a budget have been entered, you can build the cost plan. Click *Annual Cost Plans* in the *Details* menu on the left side of the page (Figure 2.7).

	List Tools				🏄 Microsoft Dyn	amics CRM					
File Consumer Add Ann	ual Cost Plans										
Activate Add New Annual Cost Plan X Delete Ann	ual Cost Plan	Assign Annual Cost Plans	Share Copy a Link E-mail a Link	Filter	Save Filters	Set As Default View	Chart Pane -	Run Workflow	Start Dialog	Run Ex Report +	port Annual C Plans
Records		Collabo	nate		Current view	view		Proce	55		Data
Information – Consumer – Notes	Consur MAR	mer THA BROWNI	E								
Pelated	🗄 🔯 Annual	Cost Plans Ann	ual Cost Plan A	ssociat	ed View 🔻						Search fo
	Fiscal Year	 Effective Data 	ate Waiver Co	Cost	Plan Statu Processing Stat	us To	tal Alloc	ated Amo	Total Bu	udgeted Amo	Total Rem
4 Common											
Activities											
Closed Activities											
Approved Services											
🥰 Annual Budgets											
🛓 Annual Cost Plans											
🛼 Service Authorizations											
🔁 Claims	٦						No Anr	iual Cost Pla	n records	are available	in this view.

Figure 2.7

2. Click Add New Annual Cost Plan (Figure 2.8).

	List Tools				🚧 Microsoft Dyn	amics CRM					
File Consumer Add	Annual Cost Plans										
Add New Annual Cost	e Annual Cost Plan	Assign Annual Cost	Share Copy a Link E-mail a Link	Filter Save Filte	ers ers as New View	Set As Default View	Chart Pane 🗸	© Run Workflow	Start Dialog	Run Report +	Export Annual C Plans
Records		Collab	orate	Current V	iew	View		Proce	\$\$\$		Data
Information Consumer Notes	Consu MAR	mer XTHA BROWN	E								
Peleted	🖳 🛃 Annua	l Cost Plans Ann	ual Cost Plan As	sociated View 🔻							Search fo
Related	Fiscal Yea	r 👻 Effective D	ate Waiver Co	Cost Plan Statu	Processing Stat	us To	tal Alloc	ated Amo	Total B	udgeted Ar	mo Total Rem
▲ Common											
Activities											
Closed Activities											
Approved services											
Annual Budgets											
Service Authorizations											
Claims							No Anr	iual Cost Pla	n records	are availat	ble in this view.

Figure 2.8

3. Click the Look-Up icon to the right of the Fiscal Year field to select a fiscal year for the cost plan (Figure 2.9).

File Annual Cost Plan Ac	d				🔎 Microsoft Dynar	nics CRM				Gabrielle Morales 𝒞 APDTest 🏡
Save & New Save & Save & New Save & Close Save	Assign Copy a Link Collaborate	Run Start Workflow Dialog	Run Report - Data WSC	it Area Review	Send Back To WSC Centra Review	I Send Back To Area Central Actions	Save And Copy Process			
nformation - Annual Cost Plan Related - Common	Annual Cost Pl. New Annual Cost Plan Annual Cost Plan	lan								Annual Cost Plans 💌 🛧
 Activities Closed Activities Monthly Cost Plans Service Plans 	Consumer *	MARTHA BROWNE				Fisca	I Year *			ব
	85% Target Amount			Buc	dgeted Target S ount			Remaining Target Amount	S	

Figure 2.9

4. Select the fiscal year and click *OK* (Figure 2.10).

Look Up Record Enter your search criteria and click Search to find matching records. Filter your results and view different coll of data by using the View options. Then, select the record you want and click OK. Look for: Fiscal Year View: Fiscal Year Lookup View Search: Search for records Fiscal Year ▲ Begin Date End Date 7/1/2010 001-2011 7/1/2011 010-2011 7/1/2011 011-2012 7/1/2011 011-2013 7/1/2012 013-2014 7/1/2013												
Look for: Fiscal Year Show Only My Records View: Fiscal Year Lookup View Search: Search for records Fiscal Year ▲ Begin Date End Date 2010-2011 7/1/2010 6/30/2011 2011-2012 7/1/2011 6/30/2012 2012-2013 7/1/2012 6/30/2013 2013-2014 7/1/2013 6/30/2014	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.											
Fiscal Year Begin Date End Date 2010-2011 7/1/2010 6/30/2011 2011-2012 7/1/2011 6/30/2012 2012-2013 7/1/2012 6/30/2013 2013-2014 7/1/2013 6/30/2014												
2010-2011 7/1/2010 6/30/2011 2011-2012 7/1/2011 6/30/2012 2012-2013 7/1/2012 6/30/2013 2013-2014 7/1/2013 6/30/2014	æ											
2011-2012 7/1/2011 6/30/2012 2012-2013 7/1/2012 6/30/2013 2013-2014 7/1/2013 6/30/2014	_											
2012-2013 7/1/2012 6/30/2013 2013-2014 7/1/2013 6/30/2014	_											
2013-2014 7/1/2013 6/30/2014	_											
	_											
2014-2015 7/1/2014 6/30/2015												
1 - 5 of 5 (1 selected) M 4 Page :	►											
Properties New												
OK Remove Va	le											
Figure 2.10												

ъ

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5. In the *Effective Date* field, enter the effective date of the cost plan (Figure 2.11).

					卢 Microsoft D	ynamics CRM				
File Annual Cost Plan Ad	d									
Save & Save & New Save Save & Close	Assign Sharing - Copy a Link E-mail a Link	Run Workflow	Run Report +	Submit Area Review	Send Back To Co	entral Send B eview Ar	ack To Save Proc	And Copy		
Save	Collaborate	Process	Data	WSC Actions	Area Actions	s Central	Actions Com	mon Actions		
Information - Annual Cost Plan	Annual Cost P	lan								
Related	Annual Cost Plan									
▲ Common	Annual Cost Plan									
Activities Closed Activities	Consumer*	MARTHA BROWNE				Q	Fiscal Year*	<u>.</u>	2014-2015	
🧕 Monthly Cost Plans	Annual Budget									
😸 Service Plans	Submitted Date						Waiver Cod			
	Amounts									
	85% Target Amount S			Bu An	udgeted Target nount	S			Remaining Target Amount	S
	10% Flexible S Amount			Bu	udgeted Flexible nount	S			Remaining Flexible Amount	S
	5% Reserve Amount §			Bu	udgeted Reserve nount	S			Remaining Reserve Amount	S
	Totals									
	Total Allocated S Amount Processing			To Ar	tal Budgeted nount	\$			Total Remaining Balance Amount	S
	Effective Date * 7	/1/2014						¢	No 🔿 Yes	

Figure 2.11

6. Click the *Save* icon \square at the top of the page (Figure 2.12).

					🟄 Microsoft	Dynamics (CRM				
File Annual Cost Plan	Add										
Save Save Close	Assign Sharing -	k Workflow	Run Report +	Submit Area Review	Send Back To WSC	Central Review	Send Back To Area	Save And Process	Сору		
Save	Collaborate	Process	Data	WSC Actions	Area Actio	ns C	entral Actions	Common	Actions		
Information Annual Cost Plan Peloted	Annual Cost	Plan									
4 C	Annual Cost Plar	1									
Activities	Annual Cost Plan										
Closed Activities	Consumer*	8 MARTHA BROWNE					🗔 Fiscal	Year *	20	14-2015	
🧕 Monthly Cost Plans	Annual Budget										
🛞 Service Plans	Submitted Date						HH Waive	or Code			
	Amounto							.i couc			
	Amounts										
	85% Target Amount	S		Bu	idgeted Target nount	S				Remaining Target Amount	S
	10% Flexible Amount	S		Bu An	idgeted Flexible nount	S				Remaining Flexible Amount	S
	5% Reserve Amount	S		Bu	idgeted Reserve nount	S				Remaining Reserve Amount	S
	Totals										
	Total Allocated Amount Processing	S		To An	tal Budgeted nount	S				Total Remaining Balance Amount	S
	Effective Date *	7/1/2014					Const Cost	umer Accept Plan? *	s 💽 N	io 🔿 Yes	

Figure 2.12

7. The cost plan's budget amounts will be calculated and displayed on the page in the Amounts section (Figure 2.13). Eighty-five percent of the annual budget is calculated and placed in the Target Amout field. Ten percent of the budget is shown in the Flexible Amount field. Five percent of the budget is shown in the Reserve Amount field. This will total 100% of the budget (85% + 10% + 5% = 100%). The Total Allocated Amount is shown at the bottom and contains the total dollar amount that is available for the WSC to budget.

	List Tools		Microsoft Dynamics CRM				Cabaialla Maaa			
File Annual Cost Plan Add	d Service Plans						APD1	Test 🔊		
Add New Service Plan	Plan Assign Service	Share Copy a Link F	Filter Save Filters	iew Set As Defau	It Chart Pane V	Run Vorkflow	Run Report + Ex	cport Service Plans		
Records	Colla	borate	Current View	View	v	Process	Da	ita		
Annual Cost Plan Notes	Annual Cos Cost Pla	n for MARTHA	A BROWNE For 2014	-2015						Annual Cost Plans
Peteted	Annual Cost Pla	in								
A Common	Annual Cost Plan									
Activities	Consumer*	S MARTHA BROW	/NE			Fiscal Year *	2	2014-2015		
Closed Activities	Annual Budget	🥰 Annual Budget	for MARTHA BROWNE for FY 20	14-2015						
Monthly Cost Plans Service Plans	Submitted Date					Waiver Code	IBGT			
W Serrice Hans	Amounts									
(85% Target Amount	\$20,188.33		Budgeted Target Amount	\$0.00			Remaining Target Amount	\$20,188.33	
	10% Flexible Amount	\$2,375.10		Budgeted Flexible Amount	\$0.00			Remaining Flexibl Amount	e \$2,375.10	
	5% Reserve Amount	\$1,187.55		Budgeted Reserve Amount	\$0.00			Remaining Reserv Amount	e \$1,187.55	
	Totals									
				atal Rudgeted	60.00			Total Remaining	\$23,750.98	
	Total Allocated Amount	\$23,750.98		Amount	50.00			Balance Amount		

Figure 2.13

Monthly Cost Plans

1. Click *Monthly Cost Plans* in the *Details* menu on the left side of the page (Figure 2.14).



2. When the annual cost plan is created, the system creates 12 monthly cost plans (Figure 2.15). The monthly cost plan budget is calculated by determining the number of days in the date range assigned to the annual budget and dividing 85% of the annual budget by this number to get a daily budget. Each month is assigned a calculated budget based on multiplying the daily budget by the number of days in the month. This is one of iBudget's budgeting tools. The WSC can budget under these suggested dollar amounts.

Information Annual Cost Plan Notes		Annual Cost	Plan for MARTHA BROWNE Fo	r 2014-2015				
	i[🛓 Monthly Cos	t Plans Monthly Cost Plan Asso	ciated View 🔻				
Related		Month	Monthly Allocated Amount	Monthly Budgeted Amount	Monthly	Balance Amount	C	Owner
Common		July	\$2,017.21	\$0.00		\$0.00	U	SYSTEM
Activities		August	\$2,017.21	\$0.00		\$0.00	U.,	SYSTEM
Monthly Cost Plans		September	\$1,952.14	\$0.00		\$0.00	U.,	SYSTEM
Service Plans		October	\$2,017.21	\$0.00		\$0.00	U.,	SYSTEM
20		November	\$1,952.14	\$0.00		\$0.00	U.,	SYSTEM
		December	\$2,017.21	\$0.00				M
		January	\$2,017.21	\$0.00		\sim		TEM
		February	\$1,821.99	\$0.00		\$0.00	U.,	SYSTEM
		March	\$2,017.21	\$0.00		\$0.00	U.,	SYSTEM
		April	\$1,952.14	\$0.00		\$0.00	U.,	SYSTEM
		May	\$2,017.21	\$0.00		\$0.00	U.,	SYSTEM
		June	\$1,952.10	\$0.00		\$0.00	U	SYSTEM

Figure 2.15

Service Plans

1. Create a service plan for each service. Click *Service Plans* in the *Details* menu on the left side of the page (Figure 2.16).



2. Click Add New Service Plan (Figure 2.17).

	List Tools				🏄 Microsoft Dyna	amics CR	М			
File Annual Cost Plan Add	Service Plans									
Add New Service P Records	sign Service Plans	Share Copy a Link E-mail a Link Ilaborate	Filter	Save Filters Save Filters as New View Current View	Set As Default View	Chart Pane +	Run Workflow Dialo Process	g Run Report -	Export Service Plans Data	
Information Annual Cost Plan Notes	Annual Co Cost Pl	ost Plan an for MART	HA BROW	WNE For 2014-20	15					
Related 4 Common Activities Closed Activities Monthly Cost Plans Service Plans	Service Pla	ans Service Pla	n Associat	ed View 🔻 Provider	Procedure Cod	. Servi	ce Ratio Tot	al Number O	. Total Amount	Search for rec SP Begin Date

Figure 2.17

- 3. To make sure that the page loaded correctly, look in the bottom left corner to see that it says *Done*. Also check the *Begin Date* field to be sure the date has been populated.
 - a. The date that will be populated is the date that you make the changes in the iBudget system. For example, if a WSC builds a new service plan on October 17, 2013, the date is automatically populated as 10/17/2013.
- 4. Click the *Look-Up* icon beside the *Service Code* field (Figure 2.18).

File Service Plan Add		<u></u>	Microsoft Dynamic	S CRM			Gabrielle Mo AP	orales
Save Save & New Save Save & Close	Assign Sharing - E-mail a Link	Run Workflow	Run Report +					
Save	Collaborate	Process	Data					
Information - Service Plan Notes	Service Plan New						Service Plans	▼ ∱
Related	Service Plan Summary							
✓ Common	Annual Cost Plan	🛓 Cost Plan for MARTH	HA BROWNE For 20	14-2015				Q
	Provider *			Q	Service Level *			
	Procedure Code *			Q	Service Ratio *			Q
	Unit Type			Q	Total Number Of Units			
	Total Amount \$							
	SP Begin Date				SP End Date			
	Quarter 1 Details							
	Cancel Quarter		Canceled Date			Q1 Amount	S	
	Q1 Status			-	Q1 PA Status			Ŧ
	July							
	Units		Begin Date	7/1	/2014			
	Rate	Q	Service Rate	S		Amount	S	
	Status	Active						
Done					Internet Protect	ed Mode: On		a 100%
		F	igure 2.18					

5. This brings up a *Look Up Record* box. Select a service code for the service plan (Figure 2.19). Click *OK*.

ok for: Ser View: Ser Gearch: Sea	vice Code 🚽 Г vice Code Lookup View 🚽	Show Only My Records
Se	rvic Description	Service Family 🥴
4001	Adult Dental	Wellness Management
4082	Life Skills Development - Level 3 (ADT) - Facility Ba	ased (Life Skills Development
4140	Personal Supports	Personal Supports
4141	Personal Supports (day)	Personal Supports
4270	Support Coordination	Support Coordination
1 - 5 of 5 (1	selected)	M ◀ Page 1 ►
Properties	New	
		OK Remove Value

Figure 2.19

6. Click the *Look-Up* icon beside the *Provider* field (Figure 2.20).

File Service Plan Add APDIEST & Service Plan Service Plan Service Plan Service Plan Service Plan Service Plan Service Plan Service Plan Service Plan Service Plan Service Plan Service Plan Annual Cost Plan Service Plan Service Plan Service Plan Annual Cost Plan Service Plan Service Plan Service Plan Service Code* Service Plan Service Plan Service Plan Victorized Service Plan Service Plan Service Plan Service Plan Service Plan Service			4	Microsoft Dynamics	CRM			Gabrielle M	lorales 🕜
Save Save & Collaborate Save Collaborate Process Data Information - Service Plan Notes Service Plan New Service Plan Summary Collaborate Annual Cost Plan Collaborate Service Plan Summary Collaborate Annual Cost Plan Annual Cost Plan Annual Cost Plan Collaborate Annual Cost Plan Collaborate Annual Cost Plan Collaborate Annual Cost Plan Collaborate Process Data Service Plan Service Plan Service Plan Service Code Service Code Process Data Service Plan Service Plan </th <th>File Service Plan Add</th> <th>🕋 💭 Sharing –</th> <th></th> <th>1000</th> <th></th> <th></th> <th></th> <th>A</th> <th>PDIest 🔊</th>	File Service Plan Add	🕋 💭 Sharing –		1000				A	PDIest 🔊
Save Asign	The state of the s	Copy a Link	S B						
Save Collaborate Process Data Information Service Plan Notes Service Plan New Service Plans Related Service Plan Summary Common Annual Cost Plan Cost Plan for MARTHA BROWNE For 2014-2015 Closed Activities Provider* Provider* Procedure Code* Procedure Code* Ounit Type Total Amount SP Begin Date Quarter 1 Details Quarter 1 Details Qui Status July Units Begin Date Q1 Status July Units Begin Date Service Rate Service Rate	Close	E-mail a Link	Workflow Dialog	Report +					
Information Service Plan Service Plan Service Plans Image: Conservence Plans Related Service Plan Summary Annual Cost Plan Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan for MARTHA BROWNE For 2014-2015 Closed Activities Service Code * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan for MARTHA BROWNE For 2014-2015 Closed Activities Service Code * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan for MARTHA BROWNE For 2014-2015 Int Type Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan for Martha Browne For 2014-2015 Int Type Image: Cost Plan for Martha Browne For 2014-2015 Image: Cost Plan for Martha Browne For 2014-2015 Int Type Image: Cost Plan for Martha Browne For 2014 For 2014 Image: Cost Plan for Martha Browne For 2014-2015 Int Type Image: Cost Plan	Save	Collaborate	Process	Data					
Protect Plan Image: Control of Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan Summary Annual Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE For 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE for 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE for 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE for 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE for 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE for 2014-2015 Image: Cost Plan Summary Image: Cost Plan for MARTHA BROWNE for 2014-2015 Image: Cost Plan for MartHa BROWNE for 2014 in the for 2014 in th	Information	Service Plan						Service Plans	一 个
Related Service Plan Summary Common Activities Closed Activities Provider* Provider* Procedure Code* Image: Service Plan Information Service Service Plan Inform	– Service Plan	🖾 New							
Related Service Plan Summary A Common Annual Cost Plan Cost Plan for MARTHA BROWNE For 2014-2015 Provider* Provider* Procedure Code* Service Ratio* Unit Type Total Number Of Unit Type Total Number Of Unit Sp Begin Date SP End Date Quarter 1 Details Q1 PA Status Q1 Status Q1 PA Status July Units Begin Date Service Rate Service Rate Annount Status Active									
Common Annual Cost Plan Cost Plan for MARTHA BROWNE For 2014-2015 Service Code * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for MARTHA BROWNE For 2014-2015 Provider * Image: Cost Plan for Martha Browne For 2014-2015 Unit Type Image: Cost Plan for Martha Browne For 2014-2015 Image: Cost Plan for Martha Browne For 2014-2015 Image: Cost Plan for Martha Browne For 2014-2015 Image: Cost Plan for Martha Browne For 2014 Image: Cost Plan for Martha Browne For 2014 Image: Cost Plan for Martha Browne For 2014 Image: Cost Plan for Martha Browne For 2014 Image: Cost Plan for Martha Browne For 2014<	Related	Service Plan Summary							
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Closed Activities Provider* Procedure Code* Seive Ratio* Unit Type Unit Type Total Amount SP Begin Date Quarter 1 Details Quarter 1 Details Q1 Status July Units Begin Date Q1 Status July Units Begin Date Service Rate Satus Active	Activities	Service Code *							
Procedure Code* Unit Type Total Amount S SP Begin Date Quarter 1 Details Quarter 1 Details Quarter 1 Details Q1 Status Q1 Status July Units Begin Date Y Q1 PA Status July Units Begin Date Service Rate Satus Amount Status Attive	Closed Activities	Provider *					_		
Procedure Code* Unit Type Total Amount SP Begin Date Quarter 1 Details Cancel Quarter Cancel Quarter Q1 Status July Units Begin Date Q1 Status July Units Begin Date Service Rate Samuel Service Rate Status Amount Status Attive									
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Total Amount S SP Begin Date SP End Date Quarter 1 Details Quarter 1 Details Cancel Quarter Canceled Date Q1 Status Q1 PA Status July V Units Begin Date Rate Service Rate Status Amount Status Active		Unit Type			Q	Total Number O Units	f		
SP Begin Date Image: SP End Date Quarter 1 Details Cancel Quarter Canceled Date Q1 Status July Units Begin Date Xate Service Rate Status Active		Total Amount S							
Quarter 1 Details Cancel Quarter Canceled Date Q1 Status Q1 Status July Units Begin Date 7/1/2014 End Date Service Rate Status Active		SP Begin Date				SP End Date			
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July Units Begin Date 7/1/2014 End Date Image: Comparison of the com		Q1 Status			-	Q1 PA Status			-
Units Begin Date 7/1/2014 End Date Image: Comparison of the compa		July							
Rate Service Rate Amount Status Active		Units		Begin Date	7/1	/2014	End Date		
Status Active		Rate	9	Service Rate	S		Amount	\$	
		Status	Active						
	Dana					Internet Dr	atastad Mada Or		● 100%

Figure 2.20

7. Under *Provider Name*, select a provider for the service plan (Figure 2.21). Click *OK*.

Look	U	p Record							
Enter	you	ur search criteria and click Search to find matching	record	s. Filte	r your results and view	different colu	imns		
of dat	ta b	y using the View options. Then, select the record y	ou wa	nt and	I CIICK OK.				
Look f	or:	Provider 👻	Show Only My Records						
Vie		Provider Lookup View							
VIE	: .								
Searc	ch:	Search for records ${\cal O}$							
		Provider Name 🔺		Pro	ovi Provi		Э		
E	EME	RALD COAST SUPPORT COORDINATORS, INC	67	362	Agency				
I	EXC	EPTIONAL PARTNERS, INC.	67	108	Agency				
E 6	EXC	EPTIONAL PARTNERS, INC.	67	108	Agency				
F	FLU	HARTY SUPPORT COORDINATOR CHARLENE F. FLU	. 67	548	Solo				
F	FLU	HARTY SUPPORT COORDINATOR CHARLENE F. FLU	. 67	548	Solo				
	ноі	RGAN SUPPORT COORDINATOR	67	554	Solo				
	ноі	RGAN SUPPORT COORDINATOR	67	554	Solo				
	IND	EPENDENT CHOICE MANAGEMENT	67	102	Solo				
E 6	PAL	MER AND BRANUM ASSOC., INC.	67	483	Agency				
E 6	PAL	MER AND BRANUM ASSOC., INC.	67	483	Agency				
I	TRA	CY CHISOLM	67	322	Solo				
I	TRA	CY CHISOLM	67	322	Solo				
I	TUR	NER, WILLIAM M	67	599	Agency		-		
1 - 2	2 of	f 22 (1 selected)				I¶ ◀ Page 1	Þ		
Pr	оре	rties <u>N</u> ew							
			<u>0</u> ł	(Remove Valu	le		

Figure 2.21

8. Click the *Look-Up* icon beside the *Service Level* field (Figure 2.22).

File Service Plan Add		<u>/4</u>	Microsoft Dynamics C	RM			Gabrielle Mo APE	rales 𝕜 DTest ℴ
Save & New Save & Save & New Close	Sharing ↓ Assign ☐ E-mail a Li	nk Run Start Workflow Dialog	Run Report +					
ave	Collaborate	Process	Data					
– Service Plan – Notes	Service Plar New	1					Service Plans	▼ ↑
Related	Service Plan Summa	iry						
Common	Annual Cost Plan	遏 Cost Plan for MARTH	A BROWNE For 2014	4-2015				Q
Activities Closed Activities	Service Code *			Q				
	Provider *			Q	Service Level *			9
	Procedure Code *			Q	Service Ratio *			Q
	Unit Type			Q	Total Number Of Units			
	Total Amount	S						
	SP Begin Date			•	SP End Date			
	Quarter 1 Details							
	Cancel Quarter		Canceled Date			Q1 Amount	\$	
	Q1 Status			-	Q1 PA Status			-
	July							
	Units		Begin Date	7/1/	/2014	End Date		•
	Rate	Q	Service Rate	S		Amount	S	
	Status	Active						
one					😝 Internet Prote	cted Mode: On	- <u>-</u>	🔍 100%

Figure 2.22

9. Select the Service Level (Figure 2.23). Click OK.

Leek II	Pererd			
LOOK U	D Record	to find matching r	acords. Filter vour results an	d view different columns
of data b	y using the View options. Then,	select the record yo	ou want and click OK.	a view difference conditions
Look for:	Service Level	-	Show Only My Record	is
View:	Service Level Lookup View	-		
Search:	Search for records	Q		
			1	
	Service Level			0
Nor	ie 🖉			
	N			
1 - 1 of	1 (1 selected)			😽 🖣 Page 1 🕨
Prope	rties <u>N</u> ew			
				Demons Males
				Remove Value

Figure 2.23

10. Click the *Look-Up* icon beside the *Procedure Code* field (Figure 2.24).

File	Service Plan	bbA			4	Microsoft Dynami	cs CRM				Gabrielle N A	lorales ở PDTest ⊘
Save	Save & Close	& New	Assign	Run k Workflov	Start Dialog	Run Report -						
	Save		Collaborate	Proc	ess	Data						
Informa - Servio Note	a tion ce Plan s		Service Plan New								Service Plans	- +
Related	d		Service Plan Summar	у								
▲ Comn	non Activities Closed Activities		Annual Cost Plan Service Code *	逞 Cost Plan	for MARTI	HA BROWNE For 2	2014-2015					9
10			Provider *				Q	Servi e Leve	el *			Q
			Procedure Code *				Q	/_		7		Q
			Unit Type				Q	Tots Numb Units	er Of			
			Total Amount	S								
			SP Begin Date					SP End Dat	e			
			Quarter 1 Details									
			Cancel Quarter			Canceled Date				Q1 Amount	S	
			Q1 Status				Ŧ	Q1 PA State	JS			-
			July									
			Units			Begin Date	7/1	/2014	•	End Date		
			Rate		Q	Service Rate	S			Amount	\$	
			Status	Active								
Dama									t Danta -	ad Madai Oa		● 100%

Figure 2.24

11. Select the *Procedure Code* (Figure 2.25). Click *OK*.

Enter you of data b Look for: View:	r search criteria and click y using the View options Procedure Code Procedure Code Lookup	Search to find matchi Then, select the reco View	ng records rd you war	. Filter your resu It and click OK. Show Only My	ults and vi Records	ew different col	umns
Search:	Procedure Code 🔺	Service Code		Service Level	Ur	nit Type	Ø
G90	1200	4270	<u>N0</u>	me	Month		
1 - 1 of 3	l (1 selected)					I¶ ◀ Page:	1 🕨
Prope	nties New						
			<u>0</u> K			Remove Va	lue

Figure 2.25

12. Click the *Look-Up* icon beside the *Service Ratio* field (Figure 2.26).

File Service Plan Add		<u></u>	Microsoft Dynamics	CRM			Gabrielle Mora APDT	les ? est ⇔
Save & New Save & Save & New Close	Assign	Run Workflow Dialog	Run Report -					
Jave	Collaborate	Process	Data					
– Service Plan – Notes	Service Plan New						Service Plans	▼
Related	Service Plan Summary							
Common	Annual Cost Plan	🛃 Cost Plan for MARTH	IA BROWNE For 201	4-2015				Q
	Provider *			Q	Service Level *			
	Procedure Code *			Q	Service Ratio *			
	Unit Type			Q	Total Number Of Units			
	Total Amount							
	SP Begin Date				SP End Date			
	Quarter 1 Details							
	Cancel Quarter		Canceled Date			Q1 Amount	\$	
	Q1 Status			-	Q1 PA Status			-
	July							
	Units		Begin Date	7/1	/2014	End Date		•
	Rate	Q	Service Rate	S		Amount	\$	
	Status	Active						

Figure 2.26

13.	Select	the Se	ervice	Ratio	(Figure	2.27).	Click OK.
-----	--------	--------	--------	-------	---------	--------	-----------

Look U	p Record				
Enter you	ur search criteria and click Sear	ch to find matching r	ecords. Filter your re	sults and view different	columns
of data b	y using the View options. The	n, select the record yo	ou want and click Ol	κ.	
look for:	Service Ratio		Show Only M	ly Perords	
LOOK IOI.			Show Only N	iy kecolus	
View:	Service Ratio Lookup View	*			
Search:		Q			
	Service Ratio 🔺				e
V Nor	ne 🖌 📃				
	N				
1 - 1 of	1 (1 selected)			M 4 Pa	ne 1 🕨
1 1 01	,-				
Prope	rties <u>N</u> ew				
			<u>o</u> k	Remove	Value
		F !	27		

Figure 2.27

14. In the *Units* fields enter the appropriate units for each month in the service plan (Figure 2.28).

File Service Plan Add	Microsoft Dynamics CRM	Gabrielle Morales 🕜 APDTest 🚕
Save & New Save & Save & New Save & Close	Image: Sharing + Image: Sharing + Image: Copy a Link Image: Start Image: Bemail a Link Norkflow Dialog Collaborate Process Data	
Information Service Plan Notes	Service Plan New Outster 1 Details	Service Plans 🔻 🚹
Related 4 Common Activities	Cancel Quarter Canceled Date Q1 Amount Q1 Status Q1 PA Status	5
Lð Closed Activities	July Units 1.00 7/1/2014 End Date Rate Image: Service Rate Service Rate Amount	7/31/2014 📧 🗙
	August Units 1.00 Begin Date 8/1/2014 End Date Rate Image: Service Rate Service Rate Amount	8/31/2014
	September Units 1.00 Begin Date 9/1/2014 End Date Rate Image: Service Rate Service Rate Service Rate	9/30/2014 🖽 🗸
	PA Rejected Reason	

Figure 2.28

15. Click the *Save and Close* icon at the top of the page. The service amounts will be calculated, and a monthly service plan will be created (Figure 2.29).

		🏄 Microsoft Dynamics CRM			Gabrielle Morales
File Service Plan Add					APDIESE
Save & Close	Assign	k Run Start Report			
Save	Collaborate	Process Data			
Information - Service Plan Notes	Service Plan Service F	Plan For MARTHA BROWNE For 4	270		Service Plans 👻 🛧
Related	Service Plan				
▲ Common					
Activities	Service Plan Summa	ry			
Closed Activities	Annual Cost Plan	Cost Plan for MARTHA BROWNE For 2014-2019	i		Q
	Service Code *	4270]		
	Provider *	EXCEPTIONAL PARTNERS, INC.	Service Level *	🍺 None	Q
	Procedure Code *	🔞 G9012UC	Service Ratio *	😫 None	Q
	Unit Type	🔩 Month	Total Number Of Units	11.00	
	Total Amount	\$1,382.81]		
	SP Begin Date	7/1/2014	SP End Date	6/30/2015	
	Quarter 1 Details				
	Cancel Quarter	Canceled Date		Q1 Amount	\$377.13

Figure 2.29

16. Repeat Steps 4 through 14 until all of the appropriate services have service plans.

Spanning the Quarter

When building a service plan, a WSC may span quarters to give flexibility to the individual and the provider. This can be done by entering units in the first month of the quarter, skipping the middle month of the quarter, and entering units in the last month of the quarter. As long as there are units with a begin date of the first month of the quarter **and** an end date the last month of the quarter, the provider is able to bill for that amount at any time throughout the quarter, and the individual is not confined to only one month of services. This process is frequently used for dental plans so that the individual may visit the dentist any time within the quarter.

Follow the instructions for building a service plan. However, the units entered should be similar to those in Figure 2.30.

File Service Plan Add	Microsoft Dynamics CRM	Gabrielle Morales ^ۯ APDTest ⇔
Save & New Save & Save & New Save & Deactivate Save X Delete Save	Image: Sharing - Image: Sharing - Imag	
Information - Service Plan - Notes	Service Plan Service Plan For MARTHA BROWNE For 4270	Service Plans 🔻 🛧
Related	Cancel Quarter Canceled Date Q1 Amount	\$377.13
Activities	Q1 Status New v Q1 PA Status Pending Transmit	v
Closed Activities	Units 1.00 Begin Date 7/1/2014 End Date	7/31/2014
	Rate G9012UC - A 🕂 🗔 Service Rate S125.71 Amount	\$125.71
	August	
	Units Begin Date 8/1/2014 End Date	8/31/2014
	Rate G9012UC - A 🗧 🗖 Service Rate S125.71 Amount	\$125.71
	September	
	Units 1.00 Begin Date 9/1/2014 End Date	9/30/2014
	Rate G9012UC - A 🗧 🖸 Service Rate S125.71 Amount	\$125.71
	PA Rejected Reason	

Figure 2.30
Submitting a Cost Plan

At any time the WSC can look in the Annual Cost Plan tabs to see all cost plans for the individual. When the cost plan is being built, the *Cost Plan Status* shows as *Draft* and *Processing Status* displays *None*. Once all the services have been added, the cost plan must be submitted for review.

1. Double click on the *Draft* cost plan that needs to be submitted from the *Annual Cost Plans* list (Figure 2.31).

	List Tools		🟄 Microsoft Dyr	namics CRM			Gabriel	le Morales
File Consumer Add	Annual Cost Plans							APDTest &
Add New Annual Cost Plan	ite Innual Cost Plan	Assign Annual Cost Plans E-mail a Link	Filter Save Filters as New View	Set As Default View Chart	Run Workflow Start Dialog	Run Report - Export Annual Cost Plans		
Records		Collaborate	Current View	View	Process	Data		
Information - Consumer Notes	Consur MAR	ner THA BROWNE					Consume	ers 🔻 🕇 🔱
	📖 🛃 Annual	Cost Plans Annual Cost Plan	Associated View 🔻			Search for record	s	Q
Related	Fiscal Year	➡ Effective Date Waiver C	o Cost Plan Statu Processing Sta	Total Alloca	ated Amo Total B	udgeted Amo Total Remaining E	al Created By	Created On 👻 🤕
Activities	2014-2015	7/1/2014 IBGT	Draft None		\$23,750.98	\$1,382.81 \$22,36	8.17 Gabrielle Moral	4/22/2014 12:19
Closed Activities								
Approved Services								
🥰 Annual Budgets								
🛃 Annual Cost Plans								
ڸ Service Authorizations								
🔁 Claims								

Figure 2.31

2. Click *Submit* at the top of the page (Figure 2.32). A confirmation box will appear asking, "Are you sure you want to submit this cost plan?" Click the *OK* button.

		<u>/4</u>	Microsoft Dynam	ics CRM			Gabrielle	Morales 🕜
File Annual Cost Plan Add	d							APDTest 🔊
Save & Save & New	Image: Sharing → Image: Sharing →	Run Workflow	Run Report +	nit Area Review	Send Back To WSC	Send Back To Area	Save And Process	y
Save	Collaborate	Process	Data WS	C Actions	Area Actions	Central Actions	Common Action	ns
Information Annual Cost Plan Notes Related	Annual Cost Plan Cost Plan f	^{an} For MARTHA B	ROWNE Fo	r 2014-	2015		Annual Cos	t Plans 🔻 🛧
▲ Common	Consumer*	lessage from webpag	e		X	2014-2015		
 Activities Closed Activities Monthly Cost Plans Service Plans 	Annual Budget Submitted Date Amounts	Are you sur	re you want to si	ıbmit this c	ost plan?	G		Q
	85% Target Amount		OF			Remaining Target Amount	\$18,805.5	2
	10% Flexible Amount		Amount			Remaining Flexible Amount	\$2,375.10	
	5% Reserve Amount \$1	,187.55	Budgeted Re Amount	erve \$0.0	0	Remaining Reserve Amount	\$1,187.55	
	Total Allocated S2 Amount	3,750.98	Total Budgete Amount	d \$1,3	82.81	Fotal Remaining Balance Amount	\$22,368.1	7

Figure 2.32

3. This will change the *Cost Plan Status* to *Pending Review* and the *Processing Status* from *None* to *Pending WSC Review* (Figure 2.33). Double click on the *Pending WSC Review* cost plan.

Information Consumer Notes	Consumer MARTHA	BROWNE						Consume	rs 🔻 🕈 🔱
	🖳 😼 Annual Cost	Plans Annual Cost Plan Ass	ociated View 🔻				Search for records		Q
Related	📃 🛛 Fiscal Year 🔫	Effective Date Waiver Co	Cost Plan Statu	Processing Status	Total All cated Amo	Total Budgeted Amo	Total Remaining Bal	Created By	Created On 👻 👸
Activities	2014-2015	7/1/2014 IBGT	Pending Review	Pending WSC Review		\$1,382.81	\$22,368.17	Gabrielle Moral	4/22/2014 12:19
Closed Activities		L L							
😸 Approved Services									
🥰 Annual Budgets									
🛃 Annual Cost Plans									
Service Authorizations									
🔁 Claims									

Figure 2.33

- 4. Enter your notes in the *WSC Processing Comments* field (Figure 2.34). Please remember that this is the space for you to communicate with the area office. Please do not select *Approve* or *12-13 Cost Plan*.
- 5. Click Yes if the consumer accepts the cost plan. If the consumer does not accept the cost plan, click No.





6. Click the *Process* icon at the top of the page to submit the cost plan for review (Figure 2.35). If *Yes* is clicked, then the cost plan will be processed normally.

File	Annual Cost Plan Ad	d	-		,			Gabrielle Mo AP[DTest 🔊
Save	Save & New Save & Deactivate Close X Delete	Sharing ↓ Assign E-mail a Link	Run Workflow	Run Report -	Submit Area Review	Send Back To WSC	Send Back To Area	Process	
	Save	Collaborate	Process	Data	WSC Actions	Area Actions	Central Actions	Common Actions	
Anno Anno Note	ation Jal Cost Plan S	Annual Cost Plan f	an or MARTHA B	ROWN	E For 2014-2	2015		Annual Cost Pl	ans 🔻 🛧 🔱
Relate	d	WSC Processing Comments *				Date			
4 Comr	non Activities Closed Activities								

Figure 2.35

- 7. If the consumer did not accept the cost plan and *No* is selected, a pop-up box will appear, asking for an explanation to be entered for non-acceptance of the cost plan. Enter an explanation in the field titled *Explanation for Consumer not accepting Cost Plan.*
- 8. This will send the cost plan automatically for area review for approval.

How to Manually Send Cost Plan for Area Review

Due to the need to streamline the approval process, flags have been placed in the system to automatically send the cost plan for area review. If the cost plan built by the WSC does not flag any of these, it will automatically go to *Current Approved* status. However, area office action may be needed in some instances. An example would be the need for a date correction. Please follow the instructions below to manually send the cost plan for area review.

1. Submit the cost plan so that the processing status is *Pending WSC Review*. Double click to open (Figure 2.36).

Information Consumer Notes	Consumer MARTHA	BROWNE							Consume	rs 👻 🛧 🔱
	🖳 🛃 Annual Cost	Plans Annual Co	st Plan Ass	ociated View 🔻				Search for records		Q
Kelated	📃 🛛 Fiscal Year 👻	Effective Date	Waiver Co	Cost Plan Statu	Processing Status	Total Allocated Amo	Total Budgeted Amo	Total Remaining Bal	Created By	Created On 👻 👸
Common Activities	2014-2015	7/1/2014	IBGT	Pending Review	Pending WSC Review	\$23,750.98	\$1,382.81	\$22,368.17	Gabrielle Moral	4/22/2014 12:19
Activities Approved Activities Approved Services Annual Budgets Annual Budgets Cannoic Authorizations Caims										

Figure 2.36

2. In the field *WSC Processing Comments* enter the details of why you are manually sending this to area office for review (Figure 2.37). You will then need to hit the *Save* button.



Figure 2.37

3. At the top of the screen click the *Area Review* button in lieu of the *Save and Process* button. This will manually send the cost plan to the area office for review (Figure 2.38).

			-	merosore	synamics crim			Gabrielle Morales 🖤
File	Annual Cost Plan Ad	d						APDTest 💩
Save	Save & New Close Save & Deactivate Close Save & Delete	Assign ↓ Sharing ↓ ↓ Copy a Link ↓ E-mail a Link	Run Workflow	Run Report -	Submit Area Review	Sind Back To Central WSC Review	Send Back To Area	Process Copy
	Save	Collaborate	Process	Data	WSC Actions	Area Actions	Central Actions	Common Actions
Annu Annu Note	ation ual Cost Plan :s	Annual Cost Plan f	^{an} for MARTHA B	ROWN	E For 2014-2	2015		Annual Cost Plans 🔻 🛉 🖣
						Date		
Relate	d	WSC Processing Cr Comments *	hanged provider for p	ersonal sup	ports. Please corre	ct the begin date from 5	/15 to 5/7.	
⊿ Comi 2 Co	non Activities Closed Activities							

Figure 2.38

How to Add Notes

On every service plan, notes must be added. These notes appear on the service authorizations for providers; they are your way of making sure that the provider adheres to the service plan exactly. They may also be used to communicate some flexibility. Notes cannot be changed or removed once added. Please make sure that you put relevant notes for the providers who receive these service authorizations quarterly.

1. To add a note, click the *Notes* tab and then select the *Click here to enter a new note* link (Figure 3.1).

				🚧 Microsoft Dynamics CR	RM		
File Service Plan Add							
Save & New Save & Save & New Save & Deactivate Save & Delete Save	Sharing ↓ Assign i Copy a Link i Copy a Link Collaborate	Run Workflow Process	Run Report - Data				
Information Service Plan Notes	Service Plan Copied Service	rvice Plan For	MARTH	A BROWNE For 4001			
Related	Service Plan						
▲ Common	Service Plan Summary						
Closed Activities	Annual Cost Plan	🛓 Copied Cost Plan F	or MARTHA	BROWNE For 2013-2014			
	Service Code *	a 4001			Q		
	Provider *	BOSSO, KATHY DMI)			Service Level *	🍺 None
	Procedure Code *	D0160UC				Service Ratio *	📴 None
	Unit Type 💐	🛢 None			Q	Total Number Of Units	4.00

Figure 3.1

2. Enter the appropriate service level comments for the provider (Figure 3.2).

File Service Plan	Add		4	Microsoft Dynami	IS CRM		Gabrielle Morales APDTest	
Save Save & Del	ve & New lete	Image: Sharing → Image: Sharing →	Run Workflow Process	Run Report - Data				
Information Service Plan Notes		Service Plan Copied Ser	vice Plan For	MARTHA BI	ROWNE For 4270)	Service Plans	-
Keiated Common Z Activities Closed Activities	5	 Notes 12 Months Support Cool email@email.com (123) 456-7891 Attach File 	ordination			>	Done	

Figure 3.2

3. Press the Save, Save & Close, or Done to save the note. You can also simply click out of the box.

Annual Cost Plan Copy

To modify a current approved cost plan it is necessary to copy it and then make changes to it. When the copy feature is used, all the existing service plans are copied to the new cost plan. iBudget uses copied service plan information for comparison with current approved service plan information to determine how to modify service authorizations.

- 1. Select a consumer in the *Consumer* list.
- 2. Click *Annual Cost Plans* under the *Details* menu. Double click the cost plan that will be copied (Figure 4.1). Only *Current Approved* cost plans may be copied.

Information - Consumer - Notes	Consumer MARTHA	BROWNE				
Databa d	🖳 🛃 Annual Cost I	Plans Annual Co	ost Plan Asso	ociated View 🔻		
Related	📃 🛛 Fiscal Year 👻	Effective Date	Waiver Co	Cost Plan Status	Processing Status	Total Allocated Amo
Common Activities Closed Activities Approved Services Annual Budgets Annual Cost Plans Service Authorizations Claims	2014-2015	7/1/2014	IBGT	Current Approved	Approved <	3,750.98

Figure 4.1

3. Click the *Copy* button at the top of the *Annual Cost Plan* page (Figure 4.2).

File Annual Cost Plan Add	i	-	,			Gabrielle Morales – APDTest 🚕
Save & New Save Save & New Close X Deactivate X Delete	Image: Sharing → Image: Sharing →	k Run Start Workflow Dialog	Run Report -	rea view Send Back To Ce WSC	Send Back To Area	Process Copy
Save	Collaborate	Process	Data WSC Actio	ns Area Actions	Central Actions	Common Actions
Annual Cost Plan Notes	Annual Cost Cost Plan	Plan for MARTHA B	ROWNE For 20	14-2015		Annual Cost Plans 🔻 🛧
Related	Annual Cost Pla	n				
Common Activities	Consumer *	S MARTHA BROWNE		🔍 Fiscal Year *	2014-2015	
Closed Activities	Annual Budget	🥰 Annual Budget for	MARTHA BROWNE for F	(2014-2015		
Long Monthly Cost Plans	Submitted Date	4/22/2014		Vaiver Code	IBGT	
Service Plans	Amounts					
	85% Target Amount	\$20,188.33	Budgeted Target Amount	\$1,382.81	Remaining Target Amount	\$18,805.52
	10% Flexible Amount	\$2,375.10	Budgeted Flexible Amount	\$0.00	Remaining Flexible Amount	\$2,375.10
	EV/ Decence Amount	\$1 187 55	Budgeted Reserve	\$0.00	Remaining Reserve	\$1.187.55

Figure 4.2

4. The system will automatically populate a message stating, "Are you sure you want to copy this cost plan to a new draft plan?" Click the *OK* button (Figure 4.3).



Figure 4.3

- 5. The system will return to the *Annual Cost Plans* list page showing the new copied cost plan (Figure 4.4).
- 6. Double click the copied *Draft* cost plan in the list to make changes (Figure 4.4).

Information Consumer Notes	Consumer MARTHA	BROWNE				
	🛄 🕹 Annual Cost F	Plans Annual Co	st Plan Asso	ciated View 🔻		
Related	📃 🛛 Fiscal Year 👻	Effective Date	Waiver Co	Cost Plan Status	Processing Statu	Total Allocated Amo
4 Common	2014-2015	7/1/2014	IBGT	Draft	None	\$23,750.98
Closed Activities	2014-2015	7/1/2014	IBGT	Current Approved	Approved	\$23,750.98
Approved Services						
nnual Budgets						
🛃 Annual Cost Plans						
📙 Service Authorizations						
🔁 Claims						

Figure 4.4

Changes to Service Plans

To make changes to service plans (i.e. provider changes, ratio changes, etc.) you must copy the cost plan. When making changes DO NOT cancel the service plan unless you are certain that the provider has not provided services and they have not billed. Remember communication with the provider is essential. Please follow the instructions below to make changes.

Changing Number of Units

If a change to the number of units is the only change needed in the service plan, copy the cost plan as described above, locate the service plan, and increase or decrease the units as needed. **DO NOT CANCEL THE SERVICE PLANS**.

Changing Service Ratios

.

- 1. Click Service Plans under the Details menu on the left (Figure 5.1).
- 2. On the list, double click a service plan with a service ratio.



Figure 5.1

3. To change ratios you will need to end date the current ratio plan by removing units from an unused month of service. Highlight and delete the number in the *Units* field (Figure 5.2).

Information									
Service Plan	Service Pla	an						Service Plans	-
Notes	Service	Plan For MARTHA BROWNE Fo	r 4140						
		150.00	Regin Data			Faid Date			
Related	Units	130.00	begin Date	8/1/2014		End Date	8/31/2014		•••
Common	Rate	S5130UC - Agency - NonGeo - 1:1	Service Rate	\$3.46		Amount	\$519.00		
Activities	September								
Closed Activities	Units	150.00	Begin Date	9/1/2014	•	End Date	9/30/2014		
	Rate	S5130UC - Agency - NonGeo - 1:1	Service Rate	\$3.46		Amount	\$519.00		
	PA Rejected Reason								
	FA Rejetted Reason								
	Quarter 2 Details								
	Quarter 2 Details Cancel Quarter		Canceled Date			Q2 Amount	\$1,557.00		
	Quarter 2 Details Cancel Quarter		Canceled Date			Q2 Amount	\$1,557.00		
	Quarter 2 Details Cancel Quarter Q2 Status	New	Canceled Date	v Q2 PA Status	Pending Tr	Q2 Amount	\$1,557.00		
	Quarter 2 Details Cancel Quarter Q2 Status October	New	Canceled Date	y Q2 PA Status	Pending Tr	Q2 Amount ansmit	\$1,557.00		Ţ
	Quarter 2 Details Cancel Quarter Q2 Status October Units	New	Canceled Date Begin Date	Q2 PA Status 10/1/2014	Pending Tr	Q2 Amount ransmit End Date	\$1,557.00		
	Quarter 2 Details Cancel Quarter Q2 Status October Units Rate	New 150.00 \$\$5130UC - Agency - NonGeo - 1:1	Canceled Date Begin Date Service Rate	Q2 PA Status 10/1/2014 \$3.46	Pending Tr	Q2 Amount ransmit End Date Amount	\$1,557.00 10/31/2014 \$519.00		
	Quarter 2 Details Cancel Quarter Q2 Status October Units Rate November	New 150.00 > \$5130UC - Agency - NonGeo - 1:1	Canceled Date Begin Date Service Rate	Q2 PA Status 10/1/2014 53.46	Pending Tr	Q2 Amount ansmit End Date Amount	\$1,557.00 10/31/2014 \$519.00		• •
	Quarter 2 Details Cancel Quarter Q2 Status October Units Rate November Units	New 150.00 55130UC - Agency - NonGeo - 1:1	Canceled Date Begin Date Service Rate	Q2 PA Status 10/1/2014 53.46 1/2014	Pending Tr	Q2 Amount ansmit End Date Amount End Date	\$1,557.00 10/31/2014 5519.00 11/30/2014		

- 4. Click the *Save* icon at the top of the page (Figure 5.2).
- 5. Verify that the dates and amounts for the selection deleted have also been removed (Figure 5.3).
- 6. Click Save and Close.

Save Save & D te Save Save	Sharing - Copy a Line E-mail a Li Collaborate	k nk Workflow Process	Run Report - Data						
Information Service Plan Notes	Service Plan Service F	lan For MARTH	A BROWNE For	4140					Service Plans 👻 🕇
Related	August Units	150.00		Begin Date	8/1/2014		End Date	8/31/2014	
Activities	Rate September	55130UC - Agency -	NonGeo - 1:1	Service Rate	\$3.46		Amount	\$519.00	
	Units	150.00		Begin Date	9/1/2014		End Date	9/30/2014	
	Rate	55130UC - Agency -	NonGeo - 1:1	Service Rate	\$3.46		Amount	\$519.00	
	PA Rejected Reason								
	Quarter 2 Details								
	Cancel Quarter			Canceled Date			Q2 Amount	\$1,557.00	
	Q2 Status October	New				Pending T	ransmit		¥
	Units			Beg	14		End Date	10/31/2014	
	Rate	55130UC - Agency -	NonGeo - 1:1	Service Rate	\$3.46		Amount	\$519.00	
	November								
	Units			Begin Date	11/1/2014	•	End Date	11/30/2014	

Figure 5.3

7. Click Add New Service Plan (Figure 5.4).

Add New Service	Assign Service Plans	are ppy a Link mail a Link	Save Filters	Set As Default View Pane	Run Workflow	Run Report + Plans
Records	Collaborate		Current View	View	Process	Data
Information - Annual Cost Plan - Notes	Annual Cost Plan Copied Cost	Plan for MA	RTHA BROWNE For	2014-2015		
Related	Service Plans Se	ervice Plan Asso	clated view *			
	Service Plan Name	Service Code 🔺	Description (Service Code)	Provider	Procedure Cod	Service Ratio Total N
Activities	Service Plan For MA	4082	Life Skills Development	ABILITIES CENTER OF	S5102UC	1:3
Closed Activities	Service Plan For MA	4140	Personal Supports	A & E CAREGIVERS L	S5130UC 1	1:1
Monthly Cost Plans	Copied Service Plan	4270	Support Coordination	EXCEPTIONAL PARTN	G9012UC	None
🛞 Service Plans						

Figure 5.4

8. Click the *Look-Up* icon next to the *Service Code* field (Figure 5.5).

File Service Plan Add	and an even a linear even	Gabrielle Morales APDTest
Save & Close	Assign B-amila Link Workflow Dialog Report.	
Save	Collaborate Process Data	
Information Service Plan Notes Related Common	Service Plan Service Plan Service Plan	Service Plans 👻 🛧
Activities	Service Plan Summary	
Closed Activities	Annual Cost Plan 📓 Copied Cost Plan for MARTHA BROWNE For 2014-2015	Q
	Service Code *	
	Provider*	Q
	Procedure Code *	Q
	Unit Type Total Number Of	

Figure 5.5

9. Select the same service code that you edited previously (Figure 5.6).

Look Up	Recor	d							
Enter you	ir search	criteria and click Sear	ch to find matc	hing re	cords. Filte	r your re	sults and view	different col	umns
of data b	y using t	the View options. The	n, select the rec	ord you	u want and	click OK			
Look for:	Service	Code		-	Show	Only M	v Records		
10		5 . I. I					,		
view:	Service	Code Lookup view		_					
Search:	Search	for records		Q					
	Servic	. Description		\neg		S	ervice Family		e
4001	L Ad	lult Dental)	Wellne	ss Managemei	nt	
4082	2 Lif	e Skills Development	- Level 3 (ADT) -	Facility	Based (Life Ski	ills Developme	nt	
☑ 4140) Pe	rsonal Supports				erson	al Supports		
4141	L Pe	rsonal Supports (day)				Person	al Supports		
4270) Su	pport Coordination				Suppo	rt Coordinatio	n	
					,				
4									•
1 - 5 of	5 (1 selec	ted)						M 🖣 Page 🛙	1 🕨
Prope	rties	New							
					OK		Cancel	Demove Ve	luo
					<u>o</u> k		Callcel	Remove Va	nue
			Fig	ure 5.	6				

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- 10. Select the same *Provider* (Figure 5.7).
- 11. Select the same *Procedure Code*.
- 12. When you get to the *Service Ratio* field, select a different ratio.

Save & New Save & Close Save Save	Assign Copy a Link Collaborate	Run Workflow Dialog Process	Run Report + Data							
Information Service Plan Notes Related	Service Plan New								Service Plans	- A
Common Activities Closed Activities	Service Plan Summary Annual Cost Plan	逞 Copied Cost Plan f	or MARTHA BR	OWNE For 20	014-2015					g
	Service Code *	à 4140				Q				
	Provider*					Q	Service Level*			
	Procedure Code*					Q	Service Ratio *			Q
	Unit Type					Q	Total Number Of Units			

Figure 5.7

13. Scroll down to the *Monthly Details* section and enter the units of service in the same fields where you deleted units in the previous service plan (Figure 5.8).

					Dynamics Crivi				Gabrielle Morale	25 0
File Service Plan Add									APDTe	st⊳
Save & New Save & Save & Close	Assign Assign E-mail a Lin	k Run Start	Run Report -							
Save	Collaborate	Process	Data							
Information Service Plan Notes	Service Plan	1							Service Plans	-
	Units			Begin Date		•	End Date			•
Related	Rate		Q	Service Rate	S		Amount	S		
▲ Common	September									
Activities	Units			Begin Date		••	End Date			
	Rate			Service Rate	s		Amount	s		
			- Lag							
	PA Rejected Reason									
	Quarter 2 Details									
	Cancel Quarter			Canceled Date		•	Q2 Amount	S		
	O2 Status				- O2 PA Status					
	October				V Q2 PA Status					¥.
	Units	250.00		Begin Date	10/1/2014		End Date	10/21/2014		
	Data			Convice Date	c		Amount	6		
	Nate		ц	Service Rate	a		Amount	2		
	November									
	Units	250.00		Begin Date	11/1/2014	• •	End Date	11/30/2014		•

Figure 5.8

- 14. Click the Save icon.
- 15. Verify the rates and also the dates populated for the months with units of service.
- 16. Click Save and Close.

Changing Providers

- 1. Click on Service Plans under the Details menu on the left (Figure 5.9).
- 2. On the list, double click a service plan with the old provider.

Add New Service Plan Records	Plan	Assign Service Plans Collaborate	ire oy a Link aail a Link	Filter	Save Filters	Set As Default View View	Chart Pane 🗸	Run Workflow Dialo	g Run Report -	Export Service Plans Data	
Information Annual Cost Plan Notes		Annual Cost Plan Copied Cost Plan for MARTHA BROWNE For 2014-2015									Search for reco
Related Common		Service Plan Name	Service Co	de 🔺	Description (Service Code)			Provider		Procedure Cod	Service Ratio
Activities		Service Plan For MA Service Plan For MA	4082 4140		Life Skills Development - Leve Personal Supports	I 3 (ADT) - Facility	Based (H	A due CAR	REGIVERS L	S5102UC S5130UC	1:3
Monthly Cost Plans		Copied Service Plan	4270		Support Coordination			EXCEPTIO	NAL PARTN	G9012UC	None

Figure 5.9

3. To change providers you will need to end date the current provider's plan by removing units from an unused month of service. Highlight and delete the number in the *Units* field (Figure 5.10).

File Service Plan Add									APDTe	est ⇔
Save & New Save & Ave Close & Delete Save	Assign Collaborate	k Run Start Workflow Dialog Process Data								
Information Service Plan Notes	Service Plan Service F	lan For MARTHA BROWNE F	or 4	082					Service Plans	- 1
	Rate	S5102UC - Agency - NonGeo - 1:3	Q	Service Rate	\$8.16		Amount	\$612.00		
Related	September									
Common Activities	Units	75.00		Begin Date	9/1/2014	•	End Date	9/30/2014		•
Closed Activities	Rate	S5102UC - Agency - NonGeo - 1:3	Q	Service Rate	\$8.16		Amount	\$612.00		
	PA Rejected Reason									
	Quarter 2 Details									
	Cancel Quarter			Canceled Date		•	Q2 Amount	\$1,836.00		
	Q2 Status October	New			v Q2 PA Status Pen	ding Tr	ransmit			Ŧ
	Units	75.00			x/2014	•	End Date	10/31/2014		•
	Rate	55102UC - Agency - NonGeo - 1:3	Q		16		Amount	\$612.00		
	November									
	Units	75.00		Begin Date	11/1/2014	•	End Date	11/30/2014		•
	Rate	S5102UC - Agency - NonGeo - 1:3	Q	Service Rate	\$8.16		Amount	\$612.00		

- Figure 5.10
- 4. Click the *Save* icon at the top of the page.

- 5. Verify that the dates and amounts for the selection deleted have also been removed (Figure 5.11).
- 6. Click Save and Close.

File Service Plan Add				•					APDT	iest ⇔
Save & Save	Collaborate	nk Run Start Workflow Dialog Process Data								
Information Service Plan Notes	Service Pla Service	n Plan For MARTHA BROWNE F	or 4082						Service Plans	- ↑ ↓
Related	Unit Type	Jan Hour		[]	Total Number Of Units	825.00				
 ▲ Common ☑ Activities ☑ Closed Activities 	Total Amount SP Begin Date Quarter 1 Details	\$6,732.00 7/1/2014		*	SP End Date	6/30/2015				
	Cancel Quarter		Canceled Date				Q1 Amount	\$1,224.00		
	Q1 Status July	New		Ţ	Q1 PA Status	Pending Tra	insmit			¥
	Units	75.00	Begin Date	7/1/2014			End Date	7/31/2014		•
	Rate	S5102UC - Agency - NonGeo - 1:3	Service Rate	\$8.16			Amount	\$612.00		
	August Units	75.00	Begin Date	8/1/2014			End Date	8/31/2014		
	Rate	S5102UC - Agency - NonGeo - 1:3	Service Rate	\$8.16			Amount	\$612.00		
	September				-					
	Units		Begin Date				End Date			
	Rate		Service Rate	5			Amount	S		

Figure 5.11

7. Click Add New Service Plan (Figure 5.12).

	LIST TOOLS		_	nerosore bynamics entri				G	abrielle Morales	
File Annual Cost Plan Add	Service Plans								APDTest	
Add New Service	Assign Service	Share Copy a Link E-mail a Link	Filter	📓 Save Filters	Set As Default View	Chart Pane +	© Run Workflow	Start Dialog	Run Report - P	
Records	Col	laborate	rate Current View View						Data	
Information Annual Cost Plan Notes	Annual Co Copied	ost Plan Cost Plan for Ins Service Plan	r MAF	RTHA BROWNE For 2	2014-2015		Searc	And h for reco	nual Cost Plans	
Kelateu	Service Plan N	lame Service Co	ode 🔺	Description (Service Code)	Provider		Procedure C	od S	Service Ratio	
Common Activities	Service Plan F	or MA 4082		Life Skills Development	ABILITIES CENTER	OF	S5102UC	1	.:3	
Closed Activities	Service Plan Ferrice	or MA 4140		Personal Supports	A & E CAREGIVER	S L	. S5130UC		1:1	
Monthly Cost Plans	Copied Service	e Plan 4270		Support Coordination	EXCEPTIONAL PAR	RTN	G9012UC	N	None	
🛞 Service Plans										

Figure 5.12

8. Click the *Look-Up* icon next to the *Service Code* field (Figure 5.13).

File Service Plan Add		Gabrielle Morales Solution APDTest
Save & New Save & Save & New Close	Assign Copy a Link Assign E-mail a Link Collaborate	
Information - Service Plan	Service Plan	Service Plans 👻 🛧
Related	Service Plan	
▲ Common		
Activities	Service Plan Summary	
Closed Activities	Annual Cost Plan 🛛 🗽 Copied Cost Plan for MARTHA BROWNE For 2014-2015	Q
	Service Code*	
	Provider* Service Level*	D
	Procedure Code *	
	Unit Type Total Number Of	

Figure 5.13

9. Select the same service code that you edited previously (Figure 5.14).

Look Up Re Enter your se of data by us	ecord arch criteria and click Search to find matchin ing the View options. Then, select the recor	ing records. Filter your results and view different columr ord you want and click OK.
Look for: Ser	vice Code	Show Only My Records
Search: Sea	arch for records	Service Family
4001	Adult Dental	Wellness Management
4082	Life Skills Development - Level 3 (ADT) - Fa	acility Based (Life Skills Development
✓ 4140	Personal Supports	Personal Supports
4141	Personal Supports (day)	Personal Supports
4270	Support Coordination	Support Coordination
 1 - 5 of 5 (1 Properties 	selected)	I I I I I I I I I I I I I I I I I I I
		OK Cancel Remove Value

Figure 5.14

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8.3

- 10. Select a different *Provider* (Figure 5.15).
- 11. Select the same *Procedure Code*.
- 12. Select the same *Ratio* if applicable.

Save & New Save & Save & New Close	Assign Assign E-mail a Link	Run Workflow	Run Report +							
Save	Collaborate	Process	Data							
Information - Service Plan Notes	Service Plan New								Service Plans	*
Related	Service Plan									
▲ Common										
Activities	Service Plan Summary									
Closed Activities	Annual Cost Plan	逞 Copied Cost Plan f	or MARTHA B	ROWNE For 201	14-2015					q
	Service Code*	à 4140				Q				
	Provider *					Q	Service Level *			Q
	Procedure Code*					Q	Service Ratio *			Q
	Unit Type					ą	Total Number Of Units			

Figure 5.15

- 13. Scroll down to the *Monthly Details* section and enter the units of service in the same fields where you deleted units in the previous service plan (Figure 5.16).
- 14. Click the Save icon.
- 15. Verify the rates and the dates populated for the months with units of service.
- 16. Click Save and Close.

Service Plan/Service Authorization Cancellations

- 1. Log into iBudget.
- 2. Go to the *Consumers* tab and search for the individual for whom you need to amend the manual rate service plan.
- 3. Double click on the consumer.
- 4. This opens the consumer's information page.
- 5. Click on Annual Cost plans under the Details menu to the left of the screen (Figure 5.16).

Information Consumer Notes	Consumer MARTHA	BROWNE				
Delated	🖳 😼 Annual Cost F	Plans Annual Co	st Plan Asso	ociated View 🔻		
Kelated	📃 🛛 Fiscal Year 👻	Effective Date	Waiver Co	Cost Plan Status	Processing Status	Total Allocated Amo
A common	2014-2015	7/1/2014	IBGT	Draft	None	\$23,750.98
Closed Activities	2014-2015	7/1/2014	IBGT	Current Approved	Approved	\$23,750.98
Approved Services						
annual Budgets						
🛃 Annual Cost Plans						
Service Authorizations						
🔁 Claims						

Figure 5.16

- 6. If you have not already created a draft, double click the *Current Approved* cost plan and copy into a *Draft* plan (Figure 5.16).
- 7. Double click the *Draft* plan to open the plan.
- 8. Select Service Plans under the Details menu (Figure 5.17).

Information Annual Cost Plan Notes	Annual Cost Copied C	t Plan Cost Plan for MAR	THA BROWNE	For 2014-2015		Annual Cost Plans	•	¥
Related	 Annual Cost Pla Annual Cost Plan 	in						^
Common Activities	Consumer*	S MARTHA BROWNE		Fiscal Year*	2014-2015		Q	
Closed Activities	Annual Budget	annual Budget for M	ARTHA BROWNE for FY	2014-2015			Q	
Monthly Cost Plans	Amounts			Waiver Code	IBGT			
	85% Target Amount	\$20,188.33	Budgeted Target Amount	\$9,671.81	Remaining Target Amount	\$10,516.52		
	10% Flexible Amount	\$2,375.10	Budgeted Flexible Amount	\$0.00	Remaining Flexible Amount	\$2,375.10		

Figure 5.17

- 9. Double click the service plan that you want to cancel.
- 10. Verify that there are no paid claims by reviewing the paid claims tab or by contacting the provider to make sure there are no billed claims for the months you are trying to cancel.

11. After verifying that there are no paid or billed claims, select the checkbox for the quarter you would like to cancel (Figure 5.18).

Save & New Save Save & New Save & Close Save & Delete Save	Assign Copy a Link I Collaborate	k Run Start Workfrom Dialog Report - Process Data							
Information - Service Plan Notes	Service Plar Copied S	Service Plan For MARTHA BROWN	E For 4270					Service Plans	•
Related	Ouarter 3 Details								
▲ Common	Cancel Quarter		Canceled Date			Q3 Amount	\$377.13		
Closed Activities	Q3 Status	New		Q3 PA Status	Pending Tra	ansmit			\checkmark
	January								
	Units	1.00	Begin Date	1/1/2015	•	End Date	1/31/2015		
	Rate	👔 G9012UC - Agency - NonGeo - None 🛛 🖸	Service Rate	\$125.71		Amount	\$125.71		
	February								
	Units	1.00	Begin Date	2/1/2015	•	End Date	2/28/2015		
	Rate	G9012UC - Agency - NonGeo - None	Service Rate	\$125.71		Amount	\$125.71		
	March								
	Units	1.00	Begin Date	3/1/2015	•	End Date	3/31/2015		•
	Rate	G9012UC - Agency - NonGeo - None	Service Rate	\$125.71		Amount	\$125.71		

Figure 5.18

- 12. A pop-up box will appear asking to confirm. Select *OK*. Note: Once you select *OK* you cannot uncheck the box. Please be sure that you are cancelling the correct quarter.
- 13. The Q# status and PA status for the quarter wil change to Cancel and Pending Transmit (Figure 5.19).

Quarter 3 Details							
Cancel Quarter	\checkmark	Canceled Date			Q3 Amount	\$377.13	
Q3 Status	Cancel		Q3 PA Status	Pending Tra	insmit		\checkmark
January							
Units	1.00	Begin Date	1/1/2015		End Date	1/31/2015	
Rate	G9012UC - Agency - NonGeo - None	Service Rate	\$125.71		Amount	\$125.71	
February							
Units	1.00	Begin Date	2/1/2015		End Date	2/28/2015	
Rate	G9012UC - Agency - NonGeo - None	Service Rate	\$125.71		Amount	\$125.71	
March							
Units	1.00	Begin Date	3/1/2015		End Date	3/31/2015	
Rate	G9012UC - Agency - NonGeo - None	Service Rate	\$125.71		Amount	\$125.71	
PA Rejected Reason							



- 14. With the new cancel feature, the funds that were cancelled will not be released until the cancellation comes back as approved from FMMIS. If it comes back as rejected from FMMIS, the cancel will not process and will be changed to *Edit Approved*.
- 15. For the cancellation to be processed, you must make sure that the cost plan is moved to *Current Approved* status.

Amending Manual Rate Service Plans

- 1. Log into iBudget.
- 2. Go to the *Consumers* tab and search for the individual for whom you need to amend the manual rate service plan.

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- 3. Double click on the consumer.
- 4. This opens the consumer's information page.
- 5. Click on Annual Cost plans under the Details menu to the left of the screen (Figure 5.20).

Information Consumer Notes	Consumer MARTHA	BROWNE				
Delated	🛄 🕹 Annual Cost 🛛	Plans Annual Co	st Plan Asso	ociated View 🔻		
Kelateu	📃 🛛 Fiscal Year 👻	Effective Date	Waiver Co	Cost Plan Status	Processing Status	Total Allocated Amo
A common	2014-2015	7/1/2014	IBGT	Draft	None	\$23,750.98
Activities	2014-2015	7/1/2014	IBGT	Current Approved	Approved	\$23,750.98
Approved Services						
Annual Budgets						
Annual Cost Plans						
Service Authorizations						
🄁 Claims						



- 6. If you have not already created a draft, double click the *Current Approved* cost plan and copy into a *Draft* plan (Figure 5.20).
- 7. Double click the *Draft* plan (Figure 5.20) to open the plan (Figure 5.21).

Information Annual Cost Plan Notes	Annual Cost Copied C	t Plan Cost Plan for MAR	THA BROWNE	For 2014-2015		Annual Cost Plans	• 1
Related	 Annual Cost Pla Annual Cost Plan 	an					^
Common Activities Closed Activities	Consumer*			Fiscal Year*	2014-2015		Q
Monthly Cost Plans	Submitted Date	Annual Budget for MA		Waiver Code	IBGT		
	Amounts						
	85% Target Amount	\$20,188.33	Budgeted Target Amount	\$9,671.81	Remaining Target Amount	\$10,516.52	
	10% Flexible Amount	\$2,375.10	Budgeted Flexible Amount	\$0.00	Remaining Flexible Amount	\$2,375.10	

Figure 5.21

8. Select Service Plans under the Details menu (Figure 5.22).



9. Double click the manual rate service plan (Figure 5.23).

					.,					Gabrielle Moral	les 🖤
File Service Plan Add										APDTe	est 🛆
Save & New	💫 🔊 Sharing 🗸	🧼 🎫									
Save Save & As	ssign	Run Start	Run								
Close X Delete	E-mail a Link	Workflow Dialog	Report +								
Save	Collaborate	Process	Data								
Information	Service Plan									Service Plans	- + A
- Notes	Service P	lan For MARTH	A BROWNE For 40	001							
	Service Plan Summar	у									
Related	Annual Cost Plan	Copied Cost Plan	for MARTHA BROWNE For 20	14-2015							Q
▲ Common	Service Code *	à 4001									
Activities			10				्रांची अन्यत				_
Lo Closed Activities	Provider "	BOSSO, KATHT DI			LQ.	Service Level	j None				LQ.
	Procedure Code *	🚳 D0160UC			Q	Service Ratio*	🗄 None				Q
	Unit Type	1 None			Q	Total Number Of	2.00				
	Total Assessed	6200.00				Units					
		\$200.00			(7777)	50.5 J.D.J					(777)
	SP Begin Date	7/1/2014				SP End Date	9/30/2014				
_	Quarter 1 Details										
	Cancel Quarter			Canceled Date				Q1 Amount	\$300.00		
	Q1 Status	New			~	Q1 PA Status	Pending Tra	ansmit			\checkmark
	July										
	Units	1.00		Begin Date	7/1/2014			End Date	7/31/2014		
	Rate			Service Rate	\$150.00			Amount	\$150.00		
	August		cref.								

Figure 5.23

10. To remove units from a month of service, highlight and delete the number in the *Units* field (Figure 5.24).

File Service Plan Add									Gabrielle Moral APDT	l es ™ est ⇔
Save Save & New Close Delete Save	Assign Copy a Link	Run Start Workflow Dialog Process	Run Report - Data							
Information - Service Plan - Notes	Service Plan	lan For MARTH	HA BROWNE For 40	001					Service Plans	→ ↑
Related	Quarter 1 Details	1 (da) da U da 1				010012021				
▲ Common	Cancel Quarter			Canceled Date			Q1 Amount	\$300.00		
Activities	Q1 Status	New			Q1 PA Status	Pending Tr	ansmit			\checkmark
Lo Closed Activities	July				_					
	Units			< =	11/2014	•	End Date	7/31/2014		
	Rate		Q	Service Rate	\$150.00		Amount	\$150.00		
	August									
	Units			Begin Date		•	End Date			•
	Rate		Q	Service Rate	\$		Amount	\$		
	September									
	Units	1.00		Begin Date	9/1/2014		End Date	9/30/2014		•
	Rate		Q	Service Rate	\$150.00		Amount	\$150.00		

Figure 5.24

11. Click the *Save* icon at the top of the page; this will remove the units and the rate (Figure 5.25).

File Caprice Blan Add				-	- ,				Gabrielle Moral APDTe	est 🔿
Save Save Save	Assign Copy a Link	k Workflow Dialog Process	Run Report - Data							
Information - Service Plan Notes	Service Plar Service F	Plan For MARTH	HA BROWNE For 40	001					Service Plans	• •
Related 4 Common	Quarter 1 Details			Canceled Date			Q1 Amount	\$300.00		
Activities Closed Activities	Q1 Status July	New			Q1 PA Status	Pending Trans	mit			~
	Units			Begin Date	-	■ • E	End Date			•
	Rate		Q	Service Rate	\$	A	Amount	\$		
	Units			Begin Date		10 V E	End Date			
	Rate		Q	Service Rate	\$	Α	Amount	\$		
	Units	1.00		Begin Date	9/1/2014	⊡⊡ ∨ E	End Date	9/30/2014		
	Rate		4	Service Rate	\$150.00	A	Amount	\$150.00		

Figure 5.25

12. Add the units back into the *Units* fields under the months where they were removed (Figure 5.26).

									Gabrielle Morales 🖤
File Service Plan Add									APDTest 🚕
Save & New	Assign	k Workflow Dialog	Run Report -						
Information	Conaborate	FIDCESS	Data						
- Service Plan	Service Plan			01					Service Plans 🔹 🛧
L Notes	Service P	Tan For MARTE	A BROWINE FOR 40	01					
	Quarter 1 Details								
Related	Cancel Quarter			Canceled Date			✓ Q1 Amount	\$150.00	
4 Common	Q1 Status	New			V Q1 P/	A Status Pending	Transmit		\checkmark
Acuvities	July								
Lo closed rearries	Units	1.00		\sim	1/2014		End Date	7/31/2014	
	Pate			Service Pate	<	(Amount	\$	
	August		- Laft	Service Rate	4		Anount	*	
	August						_		
	Units			Begin Date			End Date		
	Rate		Q	Service Rate	\$		Amount	\$	
	September								
	Units	1.00		Begin Date	9/1/2014		 End Date 	9/30/2014	
	Rate		Q	Service Rate	\$150.00		Amount	\$150.00	

Figure 5.26

- 13. Click the *Save* button (Figure 5.26).
- 14. A pop up message will appear with the instruction, "Please set the rate manually for this service." Click *OK* (Figure 5.27).

d Cost Plan for MARTHA BRO	Message from webpage	×	
D, KATHY DMD	Please set the rate manu	ally for this service.	Done None
		ОК	1.00
		SP End Date	9/30/2014

Figure 5.27

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15. The service rate field will now be open for you to change the rate (Figure 5.28).

File Service Plan Add					,					Gabrielle Mora APDT	lies 🔍
Save & Close X Delete	Assign	k Workflow	Run Report -								
Save	Collaborate	Process	Data								
Information	Service Plan	ı								Service Plans	▼ ↑ ↓
- Service Pidri	Service F	Plan For MART	HA BROWNE For 40	01							
	Total Amount	\$130.00									
Related	SP Begin Date	9/1/2014				SP End Date	9/30/2014				
4 Common	Quarter 1 Details										
Activities	Cancel Quarter			Canceled Date				Q1 Amount	\$150.00		
Closed Activities	Q1 Status	New			\checkmark	Q1 PA Status	Pending Tra	ansmit			\checkmark
	July										
	Units	1.00		Regin Date	7/1/0014			End Pate	7/21/2014		
	omis	1.00		begin Date	7/1/2014			end	7/51/2014		
	Rate		<u>a</u>	Service Rate *	\$200.00				5		
	August										
	Units			Begin Date			•	End Date			•
	Rate		Q	Service Rate	\$			Amount	\$		
	September										
	Units	1.00		Begin Date	9/1/2014			End Date	9/30/2014		
	Rate		Q	Service Rate	\$150.00			Amount	\$150.00		

Figure 5.28

16. In the appropriate fields, enter the correct number of units and the correct service rate (Figure 5.28).17. Click *Save and Close* (Figure 5.28).

Submitting Changes Made to a Cost Plan

Please follow the instructions below to submit the changes that were made to the cost plan.

1. When you are finished with the service plans, click *Information* under the *Details* menu (Figure 5.29).

					A WICIOSOILE	Synamics Crivi				
File Annual Cost Plan Add										
Save & New Save & Close Cose	Assign	Run Workflow	Run Report -	Submit Area Review	Send Back To WSC	al Send Back To	Process Copy			
Save	Collaborate	Process	Data	WSC Actions	Area Actions	Central Actions	Common Actions			
Information Annual Cost Plan Notes	Annual Cos Copied C	t Plan Cost Plan for M/	ARTHA	BROWNE F	or 2014-2015					
Related	Annual Cost P	lan								
Common Activities	Consumer*	S MARTHA BROWN	IE			Q	Fiscal Year*	2014-	2015	
Closed Activities	Annual Budget	annual Budget fo	r MARTHA	BROWNE for FY 2	014-2015					
뇒 Monthly Cost Plans 쮡 Service Plans	Submitted Date						Waiver Code	IBGT		
	Amounts									
	85% Target Amount	\$20,188.33			Budgeted Target Amount	\$9,821.81			Remaining Target Amount	\$10,366.52
	10% Flexible Amount	\$2,375.10			Budgeted Flexible Amount	\$0.00			Remaining Flexible Amount	\$2,375.10
	5% Reserve Amount	\$1,187.55			Budgeted Reserve Amount	\$0.00			Remaining Reserve Amount	\$1,187.55
	Totals									
	Total Allocated Amount	\$23,750.98			Total Budgeted Amount	\$9,821.81			Total Remaining Balance Amount	\$13,929.17
	Processing						4			
	Effective Date *	7/1/2014					Co : Plan? *	s 💿 No	⊖ Yes	
				Figu	re 5.29					
MSC Lloor Guido	rov 7 7/12	/2014		Dag	o 60				o	2
voc oser Guide,	164. 1, 1/12/	2014		rdg	00				õ.	5

- 2. Review the cost plan with the consumer. Under the *Processing* section click *Yes* next to *Consumer Accepts Cost Plan?* Enter a date in the *Effective Date* field (Figure 5.30).
- 3. Click *Submit*. This will change it to *Pending WSC Review*. Double click to enter in WSC processing comments and submit again.

Paid Claims

It is important to verify and check paid claims prior to changing service plans. Without checking paid claims, your service authorizations may return with a rejected status rather than an approved status.

- 1. Log onto the iBudget Florida application.
- 2. Click Consumers under the Workplace/People menu (Figure 6.1).



3. Locate the consumer you wish to view. Highlight the consumer's name and double click (Figure 6.2).



Figure 6.2

4. This will open the *Consumer Information* page (Figure 6.3).

				Microsoft bynamics chim	
File Consumer Add					
Save & Close	Assign	Run Workflow Dialog	Report -		
Save	Collaborate	Process	Data		
Consumer Notes	Consumer MARTHA Consumer	BROWNE			
▲ Common	Demographic Data				
Activities	First Name *	/IARTHA			Last Name *
Closed Activities	Middle Initial				SFX
🁍 Approved Services	Gender F	emale		v	PIN *
🥰 Annual Budgets 🛃 🛃	Date Of Birth *	/14/1960			Medicaid Number
Service Authorizations	Social Security 4 Number	95-91-5954			CDC ID
East Claims	Phone Number				Email

Figure 6.3

5. Under the *Details* menu on the left side of the page, click on *Claims* (Figure 6.4).

				Zeg Microsoft Dynamics Chivi	
File Consumer Add					
Save & Close	Sharing → Assign Copy a Link ⊮ E-mail a Link	Run Workflow	Run Report +		
Save	Collaborate	Process	Data		
Information - Consumer Notes	Consumer MARTHA	BROWNE			
Related	Consumer Demographic Data				
Activities	First Name *	MARTHA			Last Name *
Closed Activities	Middle Initial				SFX
Approved Services	Gender	emale		v	PIN *
🥰 Annual Budgets 🔝	Date Of Birth *	/14/1960			Medicaid Number
Service Authorizations	Social Security 4 Number	95-91-5954			CDC ID
					Email
		Figu	re 6.4		

6. This pulls up the consumer's paid claims (Figure 6.5).

		List	Tools						🕌 Mic	rosoft Dynamics CRM							Gabrielle N	lorales 🕜
File Consume	er Add	Cla	aims														A	PDTest 🔈
Copy a Link	Filter	Save F Save F	ilters ilters as New View	Set As Default View	Chart Pane +	Run Workflow	Start	Run Report	Export Claims									
Collaborate	C	urren	t View	View		Process	;	Da	ata									
Information Consumer Notes			Consumer MARTH	A BROWNE													Consumers	- ↑
			🖾 🔀 Claims 🛛 Cl	aim Associate	d Viev	v -									Search for r	ecords		
Related		- 1	Consumer	Pro	ovider					Service Code	Service D	ate	Units		Paid Amount	PA Number	ICN	Line
▲ Common			MARTHA BRO	VNE BC	SSO, K	ATHY DMD				4001		7/1/2013		1.00	\$90.00	12548721	123457852	3
Activities	vities		MARTHA BRO	VNE AB	ILITIES (ENTER OF NO	RTHWE		JA, INC	4082		7/1/2013		54.00	\$239.76	12548721	123457853	4
Approved Se	vices		MARTHA BRO	VNE A 8	k E CAR	EGIVERS LLC				4140		7/1/2013		108.00	\$307.80	12548721	123457854	5
Annual Bud	laets		MARTHA BRO	VNE AD	EPT CO		VICES, II	۱C		4270		7/1/2013		1.00	\$113.14	12548721	123457855	6
🛃 Annual Cost	st Plans		MARTHA BROV	VNE BC	SSO, KA	ATHY DMD				4001		7/1/2013		1.00	\$90.00	12548721	123457124	6
📙 Service Auth	horizations		MARTHA BROWNE ABILITIES CENTER OF NORTHWEST FLORIDA, IN							4082		7/1/2013		54.00	\$239.76	12548721	123457125	1
🔀 Claims			MARTHA BROV	VNE A 8	& E CAR	EGIVERS LLC				4140		7/1/2013		108.00	\$307.80	12548721	123457126	2
		1	MARTHA BRO	VNE AD	EPT CO	MMUNITY SER	VICES, II	۱C		4270		7/1/2013		1.00	\$113.14	12548721	123457127	3

Figure 6.5

How to Export Paid Claims

For an Individual Consumer

1. Double click on the consumer for whom you would like to run the Paid Claims Report (Figure 6.6).

File	Consur	mers	View	Cha	arts	Add						sonoyna	nica crim					Gabrie
🧭 Activate	ate	Assign	💭 Sha 🗈 Cop	re y a Lii ail a L	nk 🗸 ink 🗸	V Run Workflow	Start Dialog	Run Report -	Export t 🖓 Filter	o Excel Advance Find	d							
Records			Collabor	ate		Proce	ess		Data	а								
Workpla	ice		iy -	С	onsum	ners Se	arch Re	sults 🔻					4				*browne	
4 My Work					Full N	lame 🔺		Tier Co	de	Medicaid Numb.	. Social Security	Numb		d	er	District	County	Waiver Support Cod
Activi	rities				MARTI	HA BROWN	IE	IBGT		6848531645	495-91-5954			Femal	e	<u>01</u>	SANTA ROSA	Gabrielle Morales
🛛 🎍 Quei	ues																	
🔮 Repo	orts																	
Anno 🚰	ounce	ments																
4 People																		
🐰 Cons	sumers	s																

Figure 6.6

2. The information page will open. Click *Reports* on the top of the page. Select *WSC Paid Claims Report* (Figure 6.7).

File Consumer Add					
Save Save & Close	Image: Sharing → Assign Image: Sharing → Image: Sharing →	Run Workflow	RuRepo		
Save	Collaborate	Process	Run	on Current Record	
Information	Consumer			WSC Paid Claims Report	
- Consumer	🛛 🖳 MARTHA	BROWNE	Run	on All Records	
				Service Authorization Report	
Delated	Consumer				
Kelaleu	Demographic Data				
Activities	First Name *	MARTHA			Last N
Closed Activities	Middle Initial				SFX
Approved Services	Gender	Female		, ,	PIN *
Annual Budgets Annual Cost Plans	Date Of Birth *	/14/1960			Medic
Service Authorizations	Social Security Number	495-91-5954			CDC II
Claims	Phone Number				Email

Figure 6.7

3. The new window will open. Click *Select a format.* From the list, select *Acrobat (PDF) file*, then click *Export* (Figure 6.8).

File								
Edit Filter								
	1 🕨 🕅 💠 100% 👻	·	Find Next					
	Paid Claims by	y Consum	ner, Provid	E XML file with report data CSV (comma delimited)	, Month \	(ear		
		for W	SC Tirupa	Acrobat (PDF) file MHTML (web archive) Acr	obat (PDF) file			
Consumer	Provider	Provider ID	Procedure Code	Excel TIFF File	Month Year	Total Claims	Total Units	Total Paid Amount
MARTHA BROWNE	BOSSO, KATHY DMD	684739196	D0160UC	Word	Jul-2013	2	2	\$180.000
MARTHA BROWNE	ADEPT COMMUNITY SERVICES, INC	676029596	G9012UC	Support Coordination	Jul-2013	2	2	\$226.280
MARTHA BROWNE	ABILITIES CENTER OF NORTHWEST FLORIDA, INC	671032896	S5102UC	Life Skills Development - Level 3 (ADT) - Facility Based (Hour)	Jul-2013	2	108	\$479.520
MARTHA BROWNE	A & E CAREGIVERS LLC	678509396	S5130UC	Personal Supports	Jul-2013	2	216	\$615.600
04/21/2014						8	328	\$1,501.400

Figure 6.8

How to Attach and Remove Files to Consumers' Records or Cost Plans

The following section discusses how to attach files to consumers' records or cost plans and how to remove files that have been attached.

How to Attach Files to Consumers' Records or Cost Plans

- 1. Log onto the iBudget Florida application.
- 2. Click the Consumers option under People in the Workplace menu (Figure 7.1).



3. Double click on the consumer in the list (Figure 7.2).

							microsoft bym	annes entre				Gabrie
File Consu	umers	View	Charts	Add								
Activate		詞 Sha	re		📻 🐼 E	xport to Excel 🛛 🚕						
Deactivate			yaLink 🗸	V 🔙		ilter ilter						
	Assign	E m	ail a Link 🚽	Run Start Workflow Dialog	Run Report +	Advanced Find						
Records		Collabor	ate	Process		Data						
Workplace		- 	Consu	mers Search Re	esults 🔻				4		*browne	
4 My Work			V Full	Name 🔺	Tier Code	Medicaid Numb	Social Security Number	PIN	order	District	County	Waiver Support Coo
Activities			MAF	RTHA BROWNE	IBGT	6848531645	495-91-5954	0001016644			SANTA ROSA	Gabrielle Morales
🃥 Queues												
Reports												
Announc	ements											
▲ People												
🛛 🔱 Consume	ers											

Figure 7.2

4. Click the *Add* at the top of the screen (Figure 7.3).

File Consumer Add		
Include	Consumer	
– Consumer – Notes	MARTHA BR	OWNE
Related	Consumer Demographic Data	
Activities	First Name * MART	HA
Closed Activities	Middle Initial	
Approved Services	Gender Fema	le
🥰 Annual Budgets	Date Of Birth * 1/14/1	960
Service Authorizations	Social Security 495-9 Number	1-5954
🔀 Claims	Phone Number	

Figure 7.3

- 5. Click *Attach File* to locate the file needing to be attached (Figure 7.4).
- 6. Once located, highlight the file and click *Open*.
- 7. Click Attach.
- 8. Click *Close*.
- 9. The file is now located under the *Notes* section of the consumer.

Manage Attachment	
Click Browse to select and attach a file, click an existing file to view it, or click Remove remove a file.	to
Pile Attachment	
File Name: Browse	ch
Clos	se

Figure 7.4

How to Share and Un-Share Records with a Team

For a WSC to work with consumers in more than one area, the consumer records must be shared with the area office teams for the additional areas. Also, for the backup WSC to provide service, the WSC must share consumers. **Remember not to share user names or passwords**. This section discusses sharing consumer records.

Example: WSC T9L1 is assigned to Area 1 but has consumers in Area 2. Therefore, T9L1 must share the consumer records in Area 2 with the Area 2 team for them to be able to view their record.

Sharing Records with a Team

- 1. Log onto the iBudget Florida application.
- 2. Click the *Consumers* option under *People* in the *Workplace* menu (Figure 8.1).
- 3. Click the consumer record to be shared.

File Consumers	View	Charts	Add					🚧 Microsoft Dynamic	s CRM				Gabrielle	Morales ? APDTest 🔉
Activate Assign	🧊 Shari 📄 Copy 🕞 E-ma	e raLink 🖵 il aLink 🖵	Run Workflow	Start Dialog	Run Report +	Export to Export	Advanced							
Workplace	Collabora	Consur	Proces	ive Cer		Data					Search f	or records		
	- 	First	Name	Last Na	me .	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ: 2
My Work			,	AARON		IBGT	2004027361	7/19/1970	584.68.9448	0000100530	Female	01	ESCAMBIA	EAMILY HO
Activities			нīδ	ABBOT	т	IBGT	2004027501	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HO
Reports		BRIA	NΔ	AREI		IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	
Announcements		С СНАМ	JEI	ABERN	ΔΤΗΥ	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Eemale	01	ESCAMBIA	
People				ABNER		IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	AMILY HC
💈 Consumers <		•	7	ABRAN	15	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	EAMILY HO
Provider			Δ	ABRELL		IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	EAMILY HC
🙀 Providers		WAD	F	ACEVE	DO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
iBudget			- DLN	ACKER		IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
🧟 Annual Budgets		KAYS	ON	ACKER		IBGT	2548593380	5/19/1946	309-32-9204	000008008	Male	02	GULF	LARGE GR
Annual Cost Plans		KEND	ALL	ACKER	MAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
Service Authorizati A Help	ions	ERAN	IK	ACKER	MAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
Light rich		MATT	HIAS	ACKER	MAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
			PO	ACUNA		IBGT	3827805614	1/25/1966	223 04 9283	000001575	Male	02	IACKEON	SMALL CR

Figure 8.1

4. At the top of the page click *Share* (Figure 8.2).

File Consumers View Charts						Microsoft Dynamics CRM						Gabrielle	Gabrielle Morales ? APDTest			
Activate	Assign	Sha Co E-n	are py a l nail a	Link -	Workflow	Start Dialog	Run Report -	Export to E	Advanced Find							
Workplace				Consur	mers Ac	tive Co	nsumers	-					Search for	records		
				First	Name	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 HO
Aueues Reports				CYNTHIA BRIANA		ABBO	π	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HO
						ABEL		IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
Announcements		V	CHAN	NEL	ABERI	VATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	<u>01</u>	ESCAMBIA	SMALL GRO	
▲ People			ALAYNA		ABNE	R	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC	
8 Consumers				REYN	IA	ABRA	MS	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider Providers				ALAN	A	ABREU	J	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
				WAD	E	ACEVE	DO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
4 iBudget				OLN	ACKEP	ł	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC	
Annual Budgets				KAYS	ON	ACKEP	ł	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
				KEND	DALL	ACKEP	RMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
Help			FRAN	IK	ACKEP	RMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR	
			MATT	THIAS	ACKEF	RMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC	
					PO.	ACHIN	٨	IRGT	3827805614	1/25/1966	273 04 9283	0000001575	Male	02	IACKSON	SMALL GR

Figure 8.2

Page 68

5. On the sharing page, click Add User/Team (Figure 8.3).



Figure 8.3

6. At the top of the page click the down arrow beside the *Look for:* field (Figure 8.4). Select *Team*.

Look Up Record Select the type of	ds record you want to find	and enter your sea	arch criteria. Filter yo	our results and viev	v different	
columns of data b	y using the View option	s. Repeat this proc	ess for different typ	es of records.		
Look for: User				.		
View: User Loo	okup View	•				
Search: Tester		Q				
Full Name			Main Phone	Business Unit	ð	
Satya Puvvad	a		8509213091	APDTest		
Tirupal Kurap	ati		850-488-4357	APDTest		
Sharath Tigu	lla		850-921-4101	APDTest		
Email Sender	DO NOT REPLY			APDTest		
Meghan Mur	ray			APDTest		
Miranda Johr	nson		850-414-9132	Central Office		
Mike Sodder	٢			APDTest	•	
1 - 50 of 89 (0 set	ected)			H	Page 1	
Falacted seconds:	ceedy			Tuger		
Selected records:						
Add]					
Remove]					
Properties	New					
				<u>о</u> к	<u>C</u> ancel	

Figure 8.4

7. In the field to the right of the *Look for:* drop-down list, enter all or part of the name of the team with whom you wish to share; then click the *Search* icon (magnifying glass). The list will appear in the *Available records* box on the left (Figure 8.5).

Look U	p Records			
Select the	e type of record you want to find and enter your	search criteria. F	ilter your results and	d view different
columns	of data by using the View options. Repeat this p	rocess for differ	ent types of records.	
Look for:	Team	-		
		_		
View:	Teams Lookup View			
Search:	Area 10 🖇		~	
Tear	n Name			e
Area	a 10 Team			
1 - 1 of	1 (0 selected)			I¶ ◀ Page 1 ▶
Selected	records:			
A	dd			
Rem	love.			
Prope	rties <u>N</u> ew			
			<u>о</u> к	<u>C</u> ancel

Figure 8.5

- 8. Double click the team with whom you want to share your consumer (Figure 8.6). This will move the team to the *Selected records:* column on the right.
- 9. Click OK.

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 thi	is process for differe	nt types of records.					
Look for:	Team	-						
View:	Teams Lookup View	-						
Search:	Area 10	Q						
-								
V lear	n Name		8	1				
	 •0 							
•								
1 - 1 of 3	1 (1 selected)		H 🖣 Page 1 🕨					
Calastada				1				
Selected	ecords:							
A	bb							
Rem	ove							
Drana	diag Nov							
Prope	illes illew							
				_				
			<u>O</u> K					
				-				

Figure 8.6

Page 72
10. This will return you to the sharing page (Figure 8.7).

ommon Tasks	Г		Name	Read	Write	Delete	Append	Assian	Share
🖁 Add User/Team			Area 1 Team	V					
Remove Selected Items		8	Area 7 Team	~	7		~		2
 Toggle All Permissions of the Selected Items 		8	Area 10 Team	~		Π			

Figure 8.7

11. Click all of the boxes that are circled (Figure 8.8). Click OK.

C Add Hear Team		Name	Read	Write	Delete	Append	Assign	Share
add Oser/Team		🖇 🛛 Area 1 Team	~	~		7	~	~
Remove Selected Items		🖇 🛛 Area 7 Team	~	~	×	~	~	
 Toggle All Permissions of the Selected Items Reset 	□ 8	🖇 Area 10 Team						

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

Un-Sharing Records with a Team

This section discusses un-sharing consumer records and necessary steps to remove shared permissions.

Example: WSC T9L1 is assigned to Area 1 but has consumers in Area 2. The consumer has been shared with Area 2. The consumer then moves to Area 1. Therefore, T9L1 must un-share the consumer record with Area 2.

1. Click the consumer record to be unshared (Figure 8.9).

						Microsoft Dynamics	s CRM				Gabrielle	Morales ?
File Consumers View Activate Deactivate Records Colla	w Charts Share Copy a Link + E-mail a Link +	Add	g Report	Export to Ex Filter	cel Advanced Find							APDIest 🛪
Vorkplace 🛛 🚮 📴 -	- Consu	mers Active (Consumers	•					Search fo	or records		
Medi	First	Name Las	Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ: 🗧
Activities			ON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HO
dueues	CYN	THIA ABE	оп	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	AMILY HO
Reports	BRI4	ANA ABE	L	IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	
Announcements	🔽 СНА	NEL AB	RNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	<u>01</u>	ESCAMBIA	
People	ALA	YNA ABI	IER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	AMILY HC
S Consumers	E REY	NA ABF	AMS	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
Provider	ALAI	NA ABF	EU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
2 Providers	WAI	DE ACE	VEDO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
iBudget		OLN AC	ER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual Budgets	KAYS	SON AC	ER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Service Authorizations	KEN	DALL ACI	ERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
A Help	FRA	NK ACI	ERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
	MAT	THIAS ACK	ERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
			INIA	IRCT	3827805614	1/75/1066	225 04 0285	000001575	Mala	02		SMALL GR

Figure 8.9

2. At the top of the page click *Share* (Figure 8.10).

File Cons	umers	View	Charts	lad	-			Microsoft Dynamics	CRM				Gabrielle	Morales ? APDTest 🛦
🔊 Activate 🖓 Deactivate	kssign	🧊 Shar 🝙 Copy 🙀 E-ma	re y a Link ↓ ail a Link ↓	Run St Workflow Dia	art Report	Export to E ▼ Filter	xcel Advanced Find							
Records		Collabora	ite	Process		Data								
Workplace		₽	Consur	mers Active	Consumer	s -					Search	for records		
4 My Work			First	Name L	ist Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Number	PIN	Gender	District	County	Living Situ: 🥑
Activities			LIBB	Y A	ARON	IBGT	2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HO
dueues				THIA A	BBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
Reports			BRIA	NA A	BEL	IBGT	8751399318	5/15/1995	930-34-1153	0000153592	Female	01	ESCAMBIA	SUPPORTE
Annound	cements		СНА	NEL A	BERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	0000100551	Female	<u>01</u>	ESCAMBIA	SMALL GRO
4 People				'NA A	BNER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consume	ers		REYN	IA A	BRAMS	IBGT	6588201665	4/6/1992	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
▲ Provider				A A	BREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
Providers	5		WAD	DE A	CEVEDO	IBGT	2290980659	6/16/1994	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
₄ iBudget				OLN A	CKER	IBGT	8702152841	5/5/1975	459-12-8028	0000152599	Male	02	GADSDEN	FAMILY HC
Annual E	Budgets		KAYS	ON A	CKER	IBGT	2548593380	5/19/1946	309-32-9204	0000008008	Male	02	GULF	LARGE GR
Service A	uthorizati	ions		DALL A	CKERMAN	IBGT	3221453935	1/16/1963	947-67-4912	0000144682	Male	01	ESCAMBIA	SUPPORTE
A Help	Generizaei		FRAM	NK A	CKERMAN	IBGT	8560745167	5/12/1949	698-86-6479	0000100482	Male	01	ESCAMBIA	SMALL GR
			MAT	THIAS A	CKERMAN	IBGT	8031583456	7/24/1969	322-91-4279	0000100923	Male	01	ESCAMBIA	FAMILY HC
						IRGT	3827805614	1/25/1066	222 04 9283	0000001575	Male	02	IACKSON	SMALL GR

Figure 8.10

3. On the sharing page, click the check box to the left of the user or team with whom you want to unshare (Figure 8.11). Click *Remove Selected Items*.

non Tasks	Name	Read	Write	Delete	Append	Assign	Share
dd User/Team	Area 1 Team	~		Γ	7	~	~
emove Selected Items	Area 7 Team	~	v	×*	~	~	~
f the Selected Items	🚯 Area 10 Team	~	~	Γ	~	~	~
et Helo with Sharing							

Figure 8.11

The share permissions have now been removed; the record is un-shared.

Service Authorizations (System)

The iBudget application creates service authorizations automatically when a cost plan is approved. However, the service authorization is not active until a PA number has been issued from FMMIS. Nightly, iBudget sends the pending service authorizations to ABC. Then ABC exports pending service authorizations to FMMIS. ABC imports service authorization PA numbers from FMMIS and sends them to iBudget.

How to View a Service Authorization

- 1. Log onto the iBudget Florida application.
- 2. Click Service Authorizations under Workplace/iBudget (Figure 9.1).



3. Double click the service authorization you wish to view (Figure 9.2).

			7				soft Dynamics CRM	
File	Service Author	izations	View Charts	Add				
New	Ø Activate Ø Deactivate ➤ Delete ↓	kssign	🧊 Share 🗎 Copy a Link ↓ 🕞 E-mail a Link ↓	Run Workflow	Run Report ↓ Export to Excel	Advanced Find		
	Records		Collaborate	Process	Data			
Work	oplace 🚮	- 🙀	Service Author	izations Active	Service Authorizations	•		
4 My M	lork		Consumer		Provider	PA Nu	mber Status Reason	PA Status
	Activities		KODY W. HER	ZOG	ARC GATEWAY, INC		New	Pending Transmi
- 🍝	Queues		BRIANA ABEL		BOSSO, KATHY DMD		New	Pending Transmi
<u> </u>	Reports		CHANEL L. AB	ERNATHY	A & E CAREGIVERS LLC		New	Pending Transmi
	Announcements		AARON C. UP	<u>SHAW</u>	BUCHANAN, TIMOTHY	6424	dit	Approved
▲ Peop	le		AARON C. UP	SHAW	BUCHANAN, TIMOTHY	6424	New	Approved
	Consumers		AARON C. UP	SHAW	BUCHANAN, TIMOTHY	6424	New	Approved
4 Provi	der		AARON C. UP	SHAW	BUCHANAN, TIMOTHY	6424	New	Approved
<u>8</u>	Providers		AARON C. UP	SHAW	BARLOW, SANDRA M.	6424	New	Approved
^₄ iBudg	jet		AARON C. UP	SHAW	BARLOW, SANDRA M.	6424	New	Approved
e e e e e e e e e e e e e e e e e e e	Annual Budgets		AARON C. UP	SHAW	BARLOW, SANDRA M.	6424	New	Approved
	Service Authorizat	ions	AARON C. UP	SHAW	BARLOW, SANDRA M.	6424	New	Approved
	Help		AURORA AGU	IIRRE	CALHOUN, JANA, DMD, PA	(DENTIST)	New	Pending Transmi

Figure 9.2

4. View the service authorization (Figure 9.3).

			arries entiti		Gabrielle Morales 😈
File Service Authorization	Add				APDTest 🔊
Save & New Save & New Save & Deactivate Close & Delete	Sharing ↓ Assign 문-mail a Li	k nk Workfow Dialog Report			
Save	Collaborate	Process Data			
Information Service Authorization Notes	Service Aut Informa	norization tion			Service Authorizations 👻 🏠 📢
	Service Authori	zation			
Related	Service Authorizatio	n Summary			
Activities	Consumer*	S AARON C. UPSHAW	Q		
Closed Activities	Provider*	BUCHANAN, TIMOTHY	Q	Provider Id	674824496
	Fiscal Year*	E 2014-2015	Q	Quarter *	July-September
	Begin Date *	7/1/2014		End Date *	9/30/2014
	Service Code	à 4061	Q	Service Description	Environmental Accessibility Adaptations Assessment
	Procedure Code *	🖀 55165UCSC	Q	Unit Type	None
	Service Level	None	Q	Service Plan	🛞 Copied Service Plan For AARON C. UPSHAW For 4061
	Service Ratio	🔯 None	Q	Amount	\$9.00
	FMMIS Rate	\$1.50		Units	6.00
	Approved Date	4/10/2014			

Figure 9.3

NOTE: Do not print this screen for providers. Use the service authorization report to ensure you capture all pertinent information.

FMMIS Service Authorization Error Rejections

If a consumer's service authorization comes back as rejected, double click the *Service Authorization* and scroll down to view the rejection reason. Below is a list of the rejection errors, descriptions, and resolutions.

FMMI	S Service Authorization Rejections	/Errors
Error	Description	Resolution
06 - Recipient not eligible	Consumer lost Medicaid eligibility	Check consumer's eligibility and
	before service authorization (SA)	address the issues for eligibility to
	sent to FMMIS	be restored
10 - Duplicate PA	There is another SA in FMMIS that	Check FMMIS to see which PA
	overlaps with the newly created SA	needs to be addressed
75 - Sum of claims greater	SA allocation is lower than what	Check PA claims in FMMIS to see if
	the provider has billed on the PA in	the provider has over billed or
	FMMIS	increase the allocation on SA to at
		least the amount of the paid claims
79 - No description given	SA has been cancelled in ABC, but	Check FMMIS to find the PA and
	not in FMMIS due to the fact that	re-create the SA in ABC. Email APD
	the provider has billed against the	Help Desk with a request to have
	PA	the PA number re-assigned.
		Address the issue of whether or
		not the provider was authorized to
		bill
L3 - Line item not found	SA balance in FMMIS is zero	If funds were added to the SA, the
		provider needs to void the last paid
		claim. Then the SA needs to be re-
		sent to FMMIS to update the PA
		balance
L4 - Invalid authorized amount	Allocation on the SA is zero	Enter the correct allocation and re-
		send to FMMIS for PA number
L5 - Invalid unit rate	Unit rate on SA is zero	Enter the correct rate and re-send
		to FMMIS for PA number

How to Resend a Rejected Service Authorization

When FMMIS rejects a service authorization, and you know that the issue has been fixed, follow the instructions below to resend the service authorization to FMMIS so that a PA number can be assigned.

- 1. Log in to the iBudget system.
- 2. Find your consumer with the rejected service authorization in the *Consumers* tab under *People* in the *Workplace* menu (Figure 9.4). Double click on the consumer.

Workplace 🚮 🙀 -	Consumers Search Res	ults 🔻		
4 My Work	📃 🛛 Full Name 🔺	Tier Code	Medicaid Numb	Social Security Number
Activities	SEAN C. MEREDITH	IBGT	285454223	081-48-6091
🍶 Queues	SEAN L. COOK	IBGT	0918156139	358-03-1523
Reports Announcements				
▲ People				
😸 Consumers	<u> </u>			
4 Provider				



3. The consumer's information page will be displayed (Figure 9.5).

Information - Consumer Notes	Consumer SEAN C.	MEREDITH	
Related	ICO First Name		
▲ Common	ICO Address Line 1		
Activities	ICO City		
Closed Activities	ICO Zip		
Approved Services	ICO day time phone		
Annual Cost Plans	Other Demographic	Data	
📕 Service Authorizations	Tier Code	IBGT	
🔁 Claims	Begin Date	7/1/2012	

Figure 9.5

4. Select Service Authorizations (Figure 9.6).

Information Consumer Notes	8	Consumer SEAN C. MEREDITH					
Deleted	ĿĘ	Service Authorizations Servic	e Authorization Associated Vi	iew 🔻			
Kelated		Provider	Consumer	PA Number	Status Reason	PA Status 👻	Fiscal Yea
Common		GADSDEN ARC, INC.	SEAN C. MEREDITH	123456789	New	Rejected	2013-201
Activities		GADSDEN ARC, INC.	SEAN C. MEREDITH	123456789	New	Rejected	2013-201
Approved Services		ABOVE & BEYOND HABILITATION SER	SEAN C. MEREDITH	123456789	New	Rejected	2013-201
Annual Budgets		ABOVE & BEYOND HABILITATION SER	SEAN C. MEREDITH	123456789	New	Rejected	2013-201
Annual Cost Plans		ANDREWS, ALFREDA	SEAN C. MEREDITH		New	Pending Transmit	2013-201
Service Authorizations	~-	IFREDA	SEAN C. MEREDITH		New	Pending Transmit	2013-201
Claims		ANDREWS, ALFREDA	SEAN C. MEREDITH		New	Pending Transmit	2013-201
					Maria	Den die e Terrereit	2012 201



5. Sort the list by *PA Status*. This will group all of the rejected service authorizations together. Double click to open the rejected service authorization (Figure 9.7).

Information Consumer Notes	Consume SEAN	er C. MEREDITH					
	🖳 🛃 Service A	uthorizations Servi	e Authorization Ass	ociated View 🔻			
Related	Provider		Consumer	PA Number	Status Reason	PA Status 👻 <	1
4 Common	GADSDEN AF	RC, INC.	SEAN C. MEREDITH	123456789	New	Rejected	2013-201
Closed Activities	GADSDEN AF	RC, INC.	SEAN C. MEREDITH	123456789	New	Rejected	2013-201
Approved Services	ABOVE & BE	YOND HABILITATION SER	SEAN C. MEREDITH	123456789	New	Rejected	2013-201
Annual Budgets	ABOVE & BE	YOND HABILITATION SER	SEAN C. MEREDITH	123456789	New	Rejected	2013-201
🛃 Annual Cost Plans	ANDREWS, A	ALFREDA	SEAN C. MEREDITH		New	Pending Transmit	2013-201
Service Authorizations	ANDREWS, A	ALFREDA	SEAN C. MEREDITH		New	Pending Transmit	2013-201
🔁 Claims	ANDREWS, A	ALFREDA	SEAN C. MEREDITH		New	Pending Transmit	2013-201
						Description Transmit	2012.201

Figure 9.7

6. The rejected service authorization is now open (Figure 9.8).

Save & New Save & New Save & Save & Save & Xew	Resend Assi	Sharing ↓ Image: Copy a Link Image: E-mail a Link	Workflow Di	Start Rep	un port -				
Save		Collaborate	Process	Di	ata				
Information Service Authorization Notes Related	Service Service	Authorization Ce Authorization norization cation Summary	on For SE#	AN C. N	IERED	ITH for Life	e Skills Devel	lopment - Lev	el 3 (ADT) - Facility Based (Hour)
Common Activities	Consumer*	🔱 SEAN C. ME	REDITH				Q		
Closed Activities	Provider *	GADSDEN A	RC, INC.					Provider Id	024301996
	Fiscal Year *	2013-2014					Q	Quarter *	July-September
	Begin Date *	7/1/2013					•	End Date *	7/31/2013
	Service Code	4082					D	Service Description	Life Skills Development - Level 3 (ADT) - Facility Based (Hou
	Procedure Code	* 👔 \$5102UC					Q	Unit Type	Nur Hour
	Service Level	🍺 Facility Base	d				D	Service Plan	Copied Service Plan For SEAN C. MEREDITH For 4082
	Service Ratio	1:5					Q	Amount	\$710.00

Figure 9.8

7. Click *Resend* on the top menu bar (Figure 9.9).

Save & New Save	Resend Assingn	Copy a Link	Run Workflow Process	Start F Dialog Rep	Nun port ↓			
Information Service Authorization Notes Related 4 Common	Service Auth Service Authoriz Service Authorizatio	norization Authorization n Summary	on For SE	AN C. N	IERE	DITH for Life Skills Deve	lopment - Lev	el 3 (ADT) - Facility Based (Hour)
Activities Closed Activities	Consumer* Provider* Fiscal Year*	GADSDEN A	REDITH RC, INC.			م م	Provider Id Quarter *	024301996 July-September
	Begin Date * Service Code Procedure Code *	7/1/2013 4082 55102UC				 ۲ ۲	End Date * Service Description Unit Type	7/31/2013 Life Skills Development - Level 3 (ADT) - Facility Based (Hou
	Service Level Service Ratio	Facility Base	d			۵ ۵	Service Plan Amount	Copied Service Plan For SEAN C. MEREDITH For 4082

Figure 9.9

8. The pop-up message will appear: *Please make sure you have corrected the rejected reason below if any. Are you sure you want to resend this rejected authorization to FMMIS?* Click *OK* (Figure 9.10).

иснм (Unit Type	
	Message from webpage	CSM
	Please make sure you have corrected the rejected reason below if any. Are you sure you want to resend this rejected authorization to FMMIS?	\$ [:
	ОК	09

Figure 9.10

9. This will change the PA status to *Pending Transmit* (Figure 9.11).



10. FMMIS should assign a PA number overnight, with the exception of Friday evening. Service authorizations that are resent on Friday evening will have a PA number assigned the following Monday.

Service Authorizations in "Transmitted" Status

If a service authorization is stuck in transmitted status, please contact the Help Desk. At times the communication between FMMIS, ABC, and iBudget will get stuck and IT will need to intervene so that a PA number is assigned.

https://apdflorida.zendesk.com/home

Adding Notes Directly to a Service Authorization

Please use this feature when you simply want to amend or add notes to a service plan. By following the instructions below you can add a note to that service authorization for that quarter. You will not have to copy the cost plan and resubmit. **Please note** that if you follow the instructions below, you will need to add the notes to every quarter for that service.

1. Log into iBudget Florida Application (Figure 9.12).

User name Password Domain: APD Remember my credentials
OK Cancel

Figure 9.12

2. Click Consumers under the Workplace/People menu (Figure 9.13).

Workplace 🛛 😭 🙀 -	Consumers Act	ive Consumers	•					Search fo	or records		
4 My 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
🍶 Queues	CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HO
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
4 People		ABNER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers		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
4 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
~	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
		АСНМА	IRGT	3827805614	1/75/1966	225 04 0283	000001575	Male	02	IACKSON	SMALL CR
Workplace	1 - 50 of 3060 /0 selec	ted)								I	Page 1
Settings	All # A	вс	D E	F G H	I J K	L M N	O P Q	R S	T U	v w x	Y Z

Figure 9.13

3. Search for the consumer. Double click on the consumer (Figure 9.14).

Workplace 🕼 🙀 -	Consumers Ac	tive Consumers	•					Search	for records		
4 My Work	First Name	Last Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Numbe	er PIN	Gender	District	County	Living Situ: ಿ
Activities	LIBBY	AARON		2004027361	7/19/1970	584-68-9448	0000100530	Female	01	ESCAMBIA	FAMILY HO
🂑 Queues	CYNTHIA	АВВОТТ		\$913	9/23/1979	037-14-3713	0000174637	Female	02	WASHINGTON	FAMILY HC
Reports	BRIANA	ABEL	L I	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
4 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
4 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
~	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
			IRGT	3827805614	4/25/1966	225 04 0285	0000001575	Male	07	IACKSON	SMALL GRA
Workplace	1 - 50 of 3060 (0 selec	ted)									M A Page 1
Settings	All #	в с	D E	F G H	I J K	L M N	O P Q	R S	τυ	v w x	Y Z



4. This opens the *Consumer Information* page (Figure 9.15).

Save & Close	Assign Copy a Link Collaborate	Run Start Workflow Dialog Process Data	•					
Information Consumer Notes	Consumer CYNTHIA	ABBOTT					Consumers -	•
Related	Consumer Demographic Data							
Activities	First Name *	CYNTHIA			Last Name *	ABBOTT		
Closed Activities	Middle Initial			_	SFX			_
Approved Services	Gender	Female		-	PIN *	0000174637		_
🥰 Annual Budgets	Date Of Birth *	9/23/1979			Medicaid Number	2414288913		_
🛃 Annual Cost Plans	Cosial Convilu	007.44.0740			CDC ID			_
Service Authorizations	Number	057-14-3713			CDCID	1		
过 Claims	Phone Number	8503334444			Email			
	Address Line 1	802 ADDRESS2806		_	Address Line 2			
	City	CHIPLEY			State	🦉 Florida		Q
	Zip	13726						
	Area	02			County			
	Logal Cuardian Infor	mation		cast		4		
	Legal Guardian Info	inauon						
	Guardian/Legal Rep *			Ŧ	Guardian Relationship			
	ICO First Name				ICO Last Name			

Figure 9.15

5. On the left side under the *Details* menu click *Service Authorizations* (Figure 9.16).

Save & Close	Assign Copy a Link Collaborate	Run Start Run Workflow Dialog Report				
Information Consumer Notes	Consumer CYNTHIA	ABBOTT				Consumers 🔻 🕈 🕨
Related 4 Common	Consumer Demographic Data Eirst Name*	CYNTHIA		last Name *	ABBOTT	
Activities	Middle Initial	CIVITIE		SEV	Abbott	
Approved Services	Cander			DIN *	0000171077	
Annual Budgets	Gender	renale	· · · · · · · · · · · · · · · · · · ·	PIN	0000174637	
🛃 Annual Cost Plans	Of Birth *	9/23/1979		Medicaid Number	2414288913	
Service Authorizations		24-3713		CDC ID		
🔁 Claims	he Number	000000000000000000000000000000000000000		Fmail		
	Address Line 4			Address Line 2		
	Address Line 1	802 ADDRESS2806		Address Line 2		
	City	CHIPLEY		State	M Florida	ାସ
	Zip	13726				
	Area	02	9	County	MASHINGTON	q
	Legal Guardian Inform	mation				
	Guardian/Legal Rep [*		T	Guardian Relationship		
	ICO First Name			ICO Last Name		

Figure 9.16

6. From the list double click on the service authorization that needs an updated note (Figure 9.17).

Add New Service Authorization	Authorization	Assign Service Authorizations	k Filter	Save Filters	w Set As Defat View	ult Chart Pane +	Run Workflow	Run Export Se Report + Authoriza	rvice tions
Records	e Cons	Collaborate		Current View	Vie	W	Process	Data	
Consumer Notes	Le CAN	NTHIA ABBOTT							
Related	🖳 🛃 Servio	e Authorizations Service	Authoriza	tion Associated View	•				1
1.6	Provide	r C	onsumer	P/	ANumber	Status Rea	son PA Status	Fiscal Year	Quai
Activities	🔲 CALHOU	JN, JANA, DMD, PA (DENTIST)	YNTHIA ABB	οπ		New	Pending Tra	insmit 12 2013	Octo
Closed Activities	CHRISTO	OPHER M. DONATO D.M.D.,	YNTHIA ABB	оп 32	2168798327	New	Approved	<	April
Approved Services	🔲 CALHOU	JN, JANA, DMD, PA (DENTIST)	YNTHIA ABB	ОП 34	42353643	New	Approved	13-2014	July-
Annual Budgets	🔲 CALHOU	JN, JANA, DMD, PA (DENTIST)	YNTHIA ABB	οπ		Deleted	Approved	2013-2014	April
Annual Cost Plans	🔲 A CARPI	ENTERS CONSTRUCTION CO	YNTHIA ABB	οπ 12	2569087	Canceled	Approved	2012-2013	April
Service Authorizations	GOLDEN	NANGELS PROFESSIONAL S	YNTHIA ABB	оп 32	2197891	Canceled	Approved	2012-2013	July-
🔁 Claims	GOLDEN	NANGELS PROFESSIONAL S	YNTHIA ABB	ОП 21	164987516	Canceled	Approved	2012-2013	Octo
	GOLDEN	NANGELS PROFESSIONAL S	YNTHIA ABB	ОП 32	2165987321687	Canceled	Approved	2012-2013	Janu

Figure 9.17

7. This will open the *Service Authorization Information* page (Figure 9.18).

Save & New Save Save & New Close X Delete Save	Assign Copy a Lin Frmail a Li Collaborate	ik nk Workflow Dialog Process	Run Report - Data					
Information - Service Authorization L Notes	Service Aut	horization Authorization For	CYNTHIA ABBOT	T for Adult Dental				Service Authorizations 👻
Related 4 Common	Service Authori Service Authorizatio	zation n Summary						
Activities	Consumer*	S CYNTHIA ABBOTT		0	J.			
Closed Activities	Provider*	CHRISTOPHER M. DO	NATO D.M.D., P.A.	C.	D Pro	ovider Id	690443296	
	Fiscal Year *	2012-2013		0	J Qu	uarter *	April-June	
	Begin Date *	4/1/2013			✓ End	id Date *	6/30/2013	
	Service Code	4001		C	Ser	rvice Description	Adult Dental	
	Procedure Code*	🚳 D0160UC		0	J Uni	nit Type	None	
	Service Level	🝺 None		[Ser	rvice Plan	Copied Service Plan For CYNTHIA ABBOTT For 4001	
	Service Ratio	🔢 None		C	Am	nount	\$4,930.00	
	FMMIS Rate	\$493.00			Uni	nits	10.00	
	Approved Date	9/17/2012			~			
	Details				_			

Figure 9.18

8. Click the *Notes* tab (Figure 9.19).

Save & New Save & Close & Delete Save	Assign Copy a Lin Collaborate	ik nk Workflow Dialog Renn Process Data							
Information - Service Authorization Notes	Service Authorization Service Authorization Service Authorization								
Related	Service Authorizatio	n Summary							
Common Activities	Consumer*								
Closed Activities	Provider *	CHRISTOPHER M. DONATO D.M.D., P.A.		Provider Id	690443296				
	Fiscal Vear*	2012-2013		Quarter*	Anril luna				
	riscal real	10 2012-2015		Quarter	(April-June				
	Begin Date "	4/1/2013		End Date *	6/30/2013				
	Service Code	la 4001	Q	Service Description	Adult Dental				
	Procedure Code*	📸 D0160UC	Q	Unit Type	Sone				
	Service Level	None	Q	Service Plan	B Copied Service Plan For CYNTHIA ABBOTT For 4001				
	Service Ratio	📰 None	Q	Amount	\$4,930.00				
	FMMIS Rate	\$493.00	_	Units	10.00				
	Approved Date	9/17/2012							
	Details								

Figure 9.19

Page 85

9. Click on *Enter a note* to enter a new note (Figure 9.20).

Save & New Save & Save & New Close X Delete	Assign Sharing -	Run Workflow	Run Report -	
Save	Collaborate	Process	Data	
Information - Service Authorization - Notes Related	Service Authori Service Authori Error Keason	zation Horization Fo	r CYNTHI	A ABBOTT for Adult Dental
▲ Common Activities Closed Activities	Enter a note			

Figure 9.20

10. Enter the note and then either click outside the box or click *Done* (Figure 9.21).

Save & New Save & Save & New Close & Deactivate X Delete	Image: Sharing - Image: Sharing - Imag
Save	Collaborate Process Data
Information – Service Authorization – Notes	Service Authorization Service Authorization For CYNTHIA ABBOTT for Adult Dental Error Keason
Related 4 Common	▲ Notes
Activities Closed Activities	Enter a note
	Title: Note created on 4/18/2014 4:19 PM by Gabrielle Morales TEST TEST TEST
	Gabrielle Morales 4/18/2014 4:19 PM

Figure 9.21

11. The new note has been added to the service authorization and should appear on the service authorization using the Service Authorization Report (Figure 9.22).

Save & New Save & Save & New Save & Close ★ Delete	Image: Sharing - Image: Sharing - Image: Sharing -											
Save	Collaborate Process Data											
Information Service Authorization Notes	Service Authorization Service Authorization For CYNTHIA ABBOTT for Adult Dental											
Related Common	Notes											
Activities Closed Activities	Enter a note											
Title: Note created on 4/18/2014 4:19 PM by Gabrielle Morales												
	Gabrielle Morales 4/18/2014 4:19 PM											

Figure 9.22

12. Click *Run Report*. Select *Service Authorization Report*. This will run the authorization report for the one updated authorization with the new note (Figure 9.23).

Save & New	Assign E-mail a Link	Run Report -							
Save	Collaborate Process	Run on Current Record							
Information Service Authorization Notes	Service Authorization Service Authorization For	Service Authorization Report							
Related	A Notos								
▲ Common	- NOLES								
 Activities Closed Activities 	Enter a note Title: Note created on 4/18/2014 4:19 PM by Gabrielle Morales TEST TEST								
	Gabrielle Morales 4/18/2014 4:19 PM								

Figure 9.23

NOTE: This process will only add a note to the service authorization for that quarter. If you want the same note to appear on each quarter, add it manually for each by following the instructions or by copying the entire cost plan, adding your notes to the service plans, and then resubmitting.

Reports

Service Authorization Reports

To access and print service authorizations, please follow the steps in this section.

- 1. Log onto the iBudget Florida application.
- 2. Under Workplace/My Work, select Reports (Figure 10.1).



Figure 10.1

3. Double click Service Authorization Report (Figure 10.2).

File Reports View	Charts								
Edit Delete -	Edit Default	Assign Share	Run Workflow						
Records	Actions	Collaborate	Process						
Workplace 🛛 🚮 🙀	- Repo	rts Available Reports	•						
▲ My Work		Name 🔺 Annual Budgets - Consumer Vie	W						
Activities									
M Queues									
		Paid Claims							
Announcements		Progress Report - Area View							
▲ People		Progress Report - Consumer Vie	ew						
🔕 Consumers		Provider By Zip							
▲ Provider		SA Aging Report							
🙀 Providers		Service Authorization Report							
⊿ iBudget									
🥰 Annual Budgets									
🛃 Annual Cost Plans									
Service Authorizations									
👌 Help									

Figure 10.2

- 4. After you select the authorization report, you will be directed to the new report.
- 5. Once in the new report, you will need to make sure that you select something in the boxes marked with a red asterisk which include: SA Status, FY, PA Status, and Quarter.
- 6. Different ways to run the report:
 - a. <u>Report for the Entire Caseload (Figure 10.3)</u>
 - i. Under SA Status select New.
 - ii. Under FY select "2013-2014" (or the corresponding fiscal year).
 - iii. Under PA Status select Approved.
 - iv. Under Quarter select "April-June" (or the corresponding quarter).
 - v. Click View Report.

SA Status FY	New 2013-2014	•				PA Status Quarter	Approved April-June	•		View Report
Consumer	All		•			Exclude Consumer	None		•	
Area	All	•				PA Assign Date On or After			🔟 🗹 NULL	
Provider	All				•					
					Figure 10.3	}				
	WSC User	r Guide, rev	v. 7, 7/1	2 /2 014	Page 90				8.3	

b. <u>Report for Entire Caseload Excluding One Individual (Figure 10.4)</u>

- i. Under SA Status select New.
- ii. Under FY select "2013-2014" (or the corresponding fiscal year).
- iii. Under PA Status select Approved.
- iv. Under Quarter select "April-June" (or the corresponding quarter).
- v. Under *Exclude Consumer* select the consumer that you would like pull authorizations for.
 - 1. *Note: consumers are listed in alphabetical order by their first name.
- vi. Click View Report.

SA Status	New	•		PA Status	Approved 👻		View Report
FY	2013-2014	•		Quarter	April-June 🔹		
Consumer	All		•	Exclude Consumer	AIDA BENJAMIN	•	
Area	All	•		PA Assign Date On or After		III III NULL	
Provider	All		•				

Figure 10.4

- c. <u>Report for One Consumer (Figure 10.5)</u>
 - i. Under SA Status select New.
 - ii. Under FY select "2013-2014" (or the corresponding fiscal year).
 - iii. Under Consumer select the consumer that you would like pull authorizations for.
 - 1. *Note: consumers are listed in alphabetical order by their first name.
 - iv. Under PA Status select Approved.
 - v. Under Quarter select "April-June" (or the corresponding quarter).
 - vi. Click View Report.

SA Status	New •	PA Status	Approved -		View Report
FY	2013-2014 •	Quarter	April-June 👻		
Consumer	AARON B. BLEDSOE	Exclude Consumer	None	•	
Area	All	PA Assign Date On or After		🔲 🗹 NULL	
Provider	All				

Figure 10.5

- d. <u>Report for One Provider for Entire Caseload (Figure 10.6)</u>
 - i. Under SA Status select New.
 - ii. Under FY select "2014-2015" (or the corresponding fiscal year).
 - iii. Under *Provider* select the provider that you would like pull authorizations for.
 - 1. *Note: Providers are listed in alphabetical order.
 - iv. Under PA Status select Approved.
 - v. Under Quarter select "April-June" (or the corresponding quarter).
 - vi. Click View Report.

SA Status	New	•				PA Status	Approved	•		View Report
FY	2013-2014	•				Quarter	April-June	•		
Consumer	All		•			Exclude Consumer	None		•	
Area	All	•				PA Assign Date On or After			🔟 🗹 NULL	
Provider	1ST CHOICE BEH	AVIOR SOLUTION	NS, INC 690715696		•					
					Figure 10.	6				
	7. Onc	e you hit	<i>View Report,</i> t	he report will l	begin to gen	erate (Figure 10	.7).			
14 4	of 0 🕨 🕅	100%	▼ Find	Next Select a format	🔻 Export 🛛 💆	4				*
					0					

Report is being generated

Figure 10.7

- e. *Note: If you get a date in the upper right hand corner and a page 1 of 1 at the top but nothing else, something was not filtered correctly.
- 8. Under Select a Format, select PDF and click Export (Figure 10.8)

			1 -	
🗐 🖣 1 of 2 🕨 🎽 100% 👻	Find Next	Select a format 🔹 👻	Export	1 🗇
		Select a format		
Service Authorization For AARON AN Coordination	DREWS for Sup	XML file with report data CSV (comma delimited) TIFF file		
Authorization Details	PIN 0000	Acrobat (PDF) file Web archive Excel	Export Formate	5

Figure 10.8

9. Send securely to providers.

IMPORTANT NOTES REGARDING THE NEW AUTHORIZATION REPORT

- This is not live data and will always match FMMIS. Data is current as of 4 a.m. each day with the exception of the weekends.
 - If you make a change in iBudget, the authorization will not be available until the next day.
- You will need to run separate batches for "New" authorizations and "Edit" authorizations at this time.
 - IT will be making the change so that you can combine the two, but not until after it is in production.

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- "New" authorizations are those that have never been amended or changed. "Edit" authorizations are those that have been amended or changed.
- Please remember that if you make a change to a service plan that is built for the entire year, all of the future quarters will be categorized as "Edit."
- The old report in the iBudget system is only available to use for up to 30 service authorizations at a time if needed. You will no longer be able to use that report for more than 30 service authorizations.

Printing, Saving, and Delivering Service Authorizations

Look at the report that has been generated. Double check to make sure all information shown is correct. The report can generate an Adobe PDF document which can be printed or saved using the *Print* or *Save* options on your computer. Print the documents and deliver to the provider, or save the documents to email to the provider.

NOTE: Waiver support coordinators are subject to federal HIPAA laws; all email transmissions of service authorizations must be secure.

Printing the Cost Plan Signature Page

The Cost Plan Signature Page is the document that will need to be signed and kept in the client central record for Delmarva purposes. To print the Cost Plan Signature Page, follow the instructions below.

- 1. Select Consumers under Workplace/People.
- 2. Double click your consumer (Figure 10.9).



Figure 10.9

3. This opens the consumer *Information* screen (Figure 10.10).

Save & Close	Assign Copy a Link	Workflow Dialog Report-				
Information Consumer Notes	Consumer CYNTHIA	ABBOTT				Consumers 👻 🚹
Related	Consumer Demographic Data					
Activities	First Name *	CYNTHIA		Last Name *	ABBOTT	
Closed Activities	Middle Initial			SFX		
Approved Services	Gender	Female	•	PIN *	0000174637	
Annual Budgets	Date Of Birth *	9/23/1979		Medicaid Number	2414288913	
Service Authorizations	Social Security Number	037-14-3713		CDC ID		
🛃 Claims	Phone Number	8503334444		Email		
	Address Line 1	802 ADDRESS2806		Address Line 2		
	City	CHIPLEY		State	📴 Florida	a
	Zip	13726				
	Area	02	Q	County	WASHINGTON	ā
	Legal Guardian Infor	mation				

Figure 10.10

Select Annual Cost Plans under the Details menu (Figure 10.11). Highlight the Current Approved cost plan (Figure 10.11).

Add New Annual Cost Plan	Cost Plan	Assign	Image: Share Image: Share Image: Share				Set As Defau View	Workflow	Start w Dialog			Annual Cost Plans			
Information Consumer Notes Consumer CYNTHIA ABBOTT							Current V	IEW	Viev	V	Proce	255		Data	
Public d	i[😼 Annual Cost Plans 🛛 Annual Cost Plan Associated View 🔻											Search for re		
Related		Fiscal Year	•	Effective Date	Waiver Co.	Cost	Plan Statu	Processing Stat	tus	Total Alloc	ated Amo	Total Bu	udgeted Am	10 1	Total Remaini
Common		2013-2014			IBGT	Draf	t	None			\$35,000.00		\$14,52	5.52	\$2
Activities	V	2013-2014		1/7/2013	IBGT	Curr	ent Approv	Approved			\$35,000.00		\$5,773	3.92	\$2
Approved Services		2013-2014		7/1/2013	IBGT	Hist	orical	Approved			\$35,000.00		\$6,435	5.72	\$2
Annual Budgets		2012 2014		7/1/2013	IBGT	Pen	ding Review	Pending WSC R	Review		\$48,000.00		\$47,996	5.00	
Annual Cost Plans	-			4/1/2013	IBGT	Curr	ent Approv	Approved			\$16,500.00		\$6,195	5.01	\$1
📙 Service Authorizations		2012-2013		10/1/2012	IBGT	Hist	orical	Approved			\$16,500.00		\$8,630	0.38	S
😼 Claims		2012-2013		4/1/2013	IBGT	Hist	orical	Approved			\$16,000.00		\$8,586	5.83	\$
		2012 2012		7.8.004.0	IDCT			American			£35,000,00		60.50		e-

Figure 10.11

4. Select the *Run Report* (Figure 10.12).

Add New Annual Cost Plan	A Cost Plan	ssign Annu Plans	anual Cost ans the second se				Set As Defau View	ult Chart Pane -	O Run Workflow	Start Dialog	Run Report -	Expl	Annual Cost Plans		
Records			Collaborate			Current V	iew	Vie	w	Proc	ess		Data	3	
Information – Consumer – Notes	8	Consume CYNTH	er HIA ABE	вотт											
	I	Annual Cost Plans Annual Cost Plan Associated View -													Search for re
Related		Fiscal Year 👻	r Effe	ctive Date	Waiver Co	Cost	Plan Statu	Processing Stat	us	Total Alloc	ated Amo	Total B	udgeted A	mo	Total Remainii
Common Activities		2013-2014			IBGT	Draf	t	None			\$35,000.00		\$14,52	5.52	\$2
Closed Activities	V	2013-2014		1/7/2013	IBGT	Curr	ent Approv	Approved			\$35,000.00		\$5,77	3.92	\$2
Approved Services		2013-2014		7/1/2013	IBGT	Hist	orical	Approved			\$35,000.00		\$6,43	5.72	\$2
Annual Budgets		2013-2014		7/1/2013	IBGT	Pend	ding Review	Pending WSC R	Review		\$48,000.00		\$47,99	6.00	
Annual Cost Plans		2012-2013		4/1/2013	IBGT	Curr	ent Approv	Approved			\$16,500.00		\$6,19	5.01	\$1
Service Authorizations		2012-2013		10/1/2012	IBGT	Hist	orical	Approved			\$16,500.00		\$8,63	80.38	s
🔁 Claims		2012-2013		4/1/2013	IBGT	Hist	orical	Approved			\$16,000.00		\$8,58	6.83	s
		2012 2012		7.0.0010	IDCT	C		American			£26 000 00		tor	0.02	0

Figure 10.12

5. Select the report you would like to print (Figure 10.13). The Annual Cost Plan Report – Print View Details will give you the details of the cost plan. This includes units, rates, beginning and end dates, and budget allocated for each service. The Annual Cost Plan Report – Print View Summary provides a general overview of the service plans. For Delmarva purposes the summary report is sufficient. However, some families will want the detailed report.

						G	abrielle	e Morales 🕜 APDTest 🚕
n flow	Start Dialog	Run Report •	Export	Annual Cost Plans			1	
Proce	SS	Run on S	Selected	d Records				
		Ann Ann	iual Co iual Co	st Plan Report st Plan Report	- Print Vie - Print Vie	ew Details ew Summary	suc	~
				Search for re	cords			
ıo	Total Bu	idgeted A	mo	Total Remainii	ng Bal	Created By		Created On 👻
0.00		\$14,52	25.52	\$2	0,474.48	SYSTEM		3/12/2013 10:28
0.00		\$5,77	3.92	\$2	9,226.08	<u>SYSTEM</u>		1/7/2013 1:18 P
0.00		\$6,43	35.72	\$2	8,564.28	Tester19 Leve	el2	12/5/2012 7:54
				Figure	e 10.13			

6. A pop-up box will appear. Make sure to select *The selected records* (Figure 10.14).

Report: Annual Cost Plar	n Report - Print	View Details	
Use these records:			
C All applicable record	ls		
The selected records		ζ.	
 All records on all pa 	ges in the curr	ent view	

Figure 10.14

7. Click Run Report (Figure 10.15).

elect Records									
elect which records you want to use in this report.									
Report: Annual Cost Plan Report	- Print View Details								
Use these records:									
All applicable records									
The selected records									
C All records on all pages in the contract of the contract	ne current view								
	Run Report								

Figure 10.15

8. The report will be generated (Figure 10.16).

Edit Filter											
🛛 🖣 1 of 1	> ⊳∎ ф	100% 👻	Find	Next 🔍 - 💿 🧯							
Copied Cost Pl	an For CYN	THIA ABBOTT	For 2013	-2014							
Consumer CYNTHIA ABBOTT Fiscal Year 2013-2014											
Amounte											
Allounts											
85% Target Amt	\$29,750.00	Budgeted Target	\$5,773.92	Balance Target	\$23,976.08						
10% Flexible Amt	\$3,500.00	Budgeted Flexible	\$0.00	Balance Flexible	\$3,500.00						
5% Reserve Amt	\$1,750.00	Budgeted Reserve	\$0.00	Balance Reserve	\$1,750.00						
Total Allocated Amt	\$35,000.00	Total Budgeted	\$5,773.92	Total Balance	\$29,226.08						
Processing											
Effective Date	01/07/2013	Consumer accepts	cost plan?	Yes							
Cost Plan Status	Current Approved	Processing Status		Approved							
Signatures											
WSC		Consume	er/ Legal Guar	dian							
		Figure 10).16								

9. To print, export to PDF by clicking on *Select a format* and from the drop-down list choose *Acrobat* (*PDF*) *File*. Click *Export* and the document will appear in a PDF file format. You will now be able to print the document (Figure 10.17).

Edit Filter										
4 4 1 of 1 ↓	> > 14 <	100% 👻	Find	Next 🔍 -	_					
Copied Cost Plan For CYNTHIA ABBOTT For 2013-2014										
Consumer CYNTHIA ABBOTT Fiscal Year 2013-2014										
Amounts										
85% Target Amt	\$29,750.00	Budgeted Target	\$5,773.92	Balance Target	\$23,976.08					
10% Flexible Amt	\$3,500.00	Budgeted Flexible	\$0.00	Balance Flexible	\$3,500.00					
5% Reserve Amt	\$1,750.00	Budgeted Reserve	\$0.00	Balance Reserve	\$1,750.00					
Total Allocated Amt	\$35,000.00	Total Budgeted	\$5,773.92	Total Balance	\$29,226.08					
Processing										
Effective Date	01/07/2013	Consumer accepts	cost plan?	Yes						
Cost Plan Status	Current Approved	Processing Status		Approved						
Signatures										
wsc		Consum	er/ Legal Guar	dian						

Figure 10.17

10. Please do not use the print icon located on the screen (Figure 10.18).



NOTE: You can also run this report by double clicking the *Current Approved Cost Plan* and selecting *Reports*.

Steps for Deactivating Waiver Consumers

The WSC will notify the regional office of the intent to deactivate the consumer, giving the reason and the anticipated date of waiver closure.

Regional office will determine if deactivation is appropriate. When notified by regional office that the person may be deactivated, and the effective date of waiver closure, the WSC will proceed with the following steps:

WSC Steps

1. Log into iBudget Florida Application using your User Name and Password (Figure 11.1).

User name Password Domain: APD Remember my credentials
OK Cancel

Figure 11.1

2. Locate the consumer in the iBudget system; double click to open the information page (Figure 11.2).

Workplace 🛛 🖓 🙀 -	Consumers A	tive Consumers	•					Search f	or records		
4 My 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
🎍 Queues	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 GRO
4 People		ABNER	IBGT	2359427068	7/21/1972	750-85-8773	0000147772	Female	01	SANTA ROSA	FAMILY HC
S Consumers		ABRAMS	IBGT	6588201665	2/6/1966	865-78-2055	0000163420	Female	02	LEON	FAMILY HC
4 Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	0000156033	Female	01	OKALOOSA	FAMILY HC
R Providers	WADE	ACEVEDO	IBGT	2290980659	7/3/1992	955-30-7123	0000135463	Male	02	WASHINGTON	FAMILY HC
4 iBudget		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
	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
		АСШМА	IRGT	3827805614	1/25/1966	222 04 0283	0000001575	Male	07	IACKSON	SMALL CD
workplace	1 - 50 of 3060 (0 sele	cted)									M 🖣 Page 1 🕨
Settings	All #	А В С	D E	F G H	І Ј К	L M N	O P Q	R S	τυ	v w x	γz

Figure 11.2

3. Go to Annual Cost Plans (Figure 11.3).

Information Consumer Notes		Consumer MARTHA	BROWNE							
Delated	i[Annual Cost Plans Annual Cost Plan Associated View -								
Related		Fiscal Year 👻	Effective Date	Waiver Co	Cost Plan Status	Processing Status	Total Allocated Amo			
Common Activition		2014-2015	7/1/2014	IBGT	Draft	None	\$23,750.98			
Activities		2014-2015	7/1/2014	IBGT	Current Approved	Approved	\$23,750.98			
Approved Services										
annual Budgets										
🛃 Annual Cost Plans		~								
🔒 Service Authorizations										
🔁 Claims										



4. Select the current approved cost plan and copy into *Draft* (Figure 11.4). Or, double click the *Pending WSC Review*.

Information Annual Cost Plan Notes	Annual Cos Copied C	Annual Cost Plan Annual Cost Plan for MARTHA BROWNE For 2014-2015									
Related 4 Common	Annual Cost Pla Annual Cost Plan	in						^			
Activities	Consumer *	8 MARTHA BROWNE		Fiscal Year *	2014-2015		Q				
Closed Activities	Annual Budget	Annual Budget 🥰 Annual Budget for MARTHA BROWNE for FY 2014-2015									
🛃 Monthly Cost Plans 🛞 Service Plans	Submitted Date			₩ waiver Code	IBGT						
	Amounts										
	85% Target Amount	\$20,188.33	Budgeted Target Amount	\$9,671.81	Remaining Target Amount	\$10,516.52					
	10% Flexible Amount	\$2,375.10	Budgeted Flexible Amount	\$0.00	Remaining Flexible Amount	\$2,375.10					

Figure 11.4

5. Open up the *Draft* cost plan and end date all service plans with the date of waiver closure. Do this by end dating the current month and removing all units thereafter. **DO NOT CANCEL** (Figure 11.5).

File Service Plan Add									Gabrielle Mor APD	ales ♥ Test ⊘
Save & Close & Delete	Assign Copy a Link	k Workflow	Run Report -							
Save	Collaborate	Process	Data							
- Service Plan	Service Plan			* 4001					Service Plans	
L Notes	Service I		A BROWNE FO	r 4001						
	Ouarter 1 Details									
Related 4 Common	Cancel Quarter			Canceled Date			Q1 Amount	\$300.00		
Activities	Q1 Status	New			V Q1 PA Status	Pending Tra	ansmit			>
Closed Activities	July									
	Units			Begin Date	7/1/2014		End Date	7/31/2014		•
	Rate			Q Service Rate	\$150.00		Amount	\$150.00		
	August									
	Units			Begin Date		•••	End Date			•
	Rate			Service Rate	s		Amount	s		
	September				2					
	Unite	1.00					End Data	0.00.0014		
	onits	1.00			(1/2014		chu Date	9/50/2014		
	Rate			Q Servie Rate	\$150.00		Amount	\$150.00		

Figure 11.5

- 6. Once the end date has been applied to each service plan and the unused units of service removed, submit the cost plan for restoration of *Current Approved* status.
- 7. Inform the regional office that you have completed end dating the service plans.

Regional Office Steps

1. The following business day the service authorizations should all say *Edit Approved*. (Support coordination, for some reason, may say "Edit Rejected" and this is okay). Check this by finding the consumer and selecting *Service Authorizations* under the *Details* menu (Figure 11.6).

				Microsoft Dynamics CRIVI				
File Consumer Add								
Save & Close	Assign Sharing - Image: Copy a Link Image: E-mail a Link	Run Workflow	Run Report -					
Save	Collaborate	Process	Data					
Information Consumer Notes	Consumer MARTHA	BROWNE						
	Area	01		LQI				
Related	Legal Guardian Information							
Activities	Guardian/Legal Rep *			\checkmark				
Closed Activities	ICO First Name							
Approved Services	ICO Address Line 1							
🥰 Annual Budgets 🛃 Annual Cost Plans	ICO City							
Service Authorizations								
🔁 Claims	ICO day time phone							

Figure 11.6

2. If case closure is the reason for cessation of waiver services, this will automatically close the individual's waiver status.

However, if the case is to remain active, but the person no longer meets waiver service criteria (i.e., moves to a nursing home, is incarcerated, etc.), notify State Office and request that waiver services be closed. Provide the effective date.

3. When the case or the tier has been closed in ABC, the consumer must then be deactivated in iBudget. Open the *Consumers* tab; highlight the individual (Figure 11.7).

									All Microsoft Dynami	CS CRM
File Consu	mers	View	Charts	Add						
🔊 Activate 🙀 Deactivate	kssign	🧊 Shar 📄 Copy 🏹 E-ma	re yaLink ↓ ailaLink ↓	Run Workflow	Start Dialog	Run Report -	Export to Ex ▼ Filter	Advanced Find		
Records		Collabora	ate	Proce	ss		Data			
Workplace		🙀 •	Consu	mers Ac	ive Co	nsumer	; •			
4 My Work			First	Name	Last N	ame 🔺	Tier Code	Medicaid Num	ber Date Of Birth	Social Security Nu
Activities				Υ	AARO	N	IBGT	2004027361	7/19/1970	584-68-9448
🎍 Queues					АВВОТТ		IBGT	2414288913	9/23/1979	037-14-3713
Reports			BR.	ANA	ABEL		IBGT	8751399318	5/15/1999	5 930-34-1153
🚽 Announce	ements		🔲 СНА	NEL	ABER	NATHY	IBGT	5906113561	5/11/1976	6 410-19-4778
▲ People			ALA	YNA	ABNE	र	IBGT	2359427068	7/21/1972	2 750-85-8773
S Consumer	IS C		REY	NA	ABRAI	MS	IBGT	6588201665	4/6/1992	865-78-2055
4 Provider			. ALA	NA	ABREU	J	IBGT	3409023238	3/16/1978	8 787-39-4875
Providers			wa	DE	ACEVE	DO	IBGT	2290980659	6/16/1994	955-30-7123

Figure 11.7

4. Click select *Deactivate* (Figure 11.8).

				4	Microsoft Dynamics	CRM	
File Consumers View	Charts Add						
🖉 Activate 🛛 👔 Shar	e 🔗		😰 Export to Ex	cel 🕋			
Deactivate	yaLink 🗸 🛛 🕙		Filter	uru -			
isign E-ma	ail a Link 🗸 🛛 😽 Workf	n Start Run Iow Dialog Report ,		Advanced Find			
Records Collabora	ate F	rocess	Data				
Workplace 🚮 🙀 - Consumers Active Consumers -							
4 My Work	First Name	Last Name 🔺	Tier Code	Medicaid Number	Date Of Birth	Social Security Nu	
Activities	LIBBY	AARON	IBGT	2004027361	7/19/1970	584-68-9448	
🎍 Queues	CYNTHIA	ABBOTT	IBGT	2414288913	9/23/1979	037-14-3713	
Reports	BRIANA	ABEL	IBGT	8751399318	5/15/1995	930-34-1153	
Announcements	CHANEL	ABERNATHY	IBGT	5906113561	5/11/1976	410-19-4778	
4 People	ALAYNA	ABNER	IBGT	2359427068	7/21/1972	750-85-8773	
S Consumers	REYNA	ABRAMS	IBGT	6588201665	4/6/1992	865-78-2055	
4 Provider	ALANA	ABREU	IBGT	3409023238	3/16/1978	787-39-4875	
Providers	WADE	ACEVEDO	IBGT	2290980659	6/16/1994	955-30-7123	

Figure 11.8

Page 105

5. Select the status and click OK (Figure 11.9).

Confirm (Consumer Deactivation	
You have se	elected 1 Consumer to deactivate.	
This action	will change the status of the selected Consumer to Inactive. To continue, click OK.	
Status:	Case closed, services no longer needed (41)	
	Case closed, services no longer needed (41)	
	Case closed, loss of contact with client (43)	
	Case closed, client deceased (45)	
	Case closed, services no longer appropriate (46)	
	Case closed, part h trasnfer to cms (45)	
	CDC consumer	
	Moved out of area	_
ttp://apdte	estern Left Waiver Services	



Interesting Tools in iBudget

Export to Excel

The *Export to Excel* feature is a tool in iBudget that can be used by support coordinators if they would like an Excel table that can be used for their own records.

One example would be having a list of their individuals' PIN numbers. Please follow the instructions below to export to Excel.

1. When you see the *Export to Excel* button, you can export the entire list in view. Click the *Export to Excel* button (Figure 12.1).



2. Select *Static worksheet with records from all pages in the current view*. This will pull all the records from all pages (Figure 12.2).

Export Data to Excel	
Select the type of worksheet to export.	
Use this type of worksheet:	
O Static worksheet with records from this page	
• Static worksheet with records from all pages in the curren	nt view
C Dynamic PivotTable	Select Columns
O Dynamic worksheet	Edit Columns
Make this data available for re-importing by including rec	uired column headings
F	xport Cancel
Figure 12.2	

3. Click *Export* (Figure 12.3).

Export Data to Excel	
Select the type of worksheet to export.	
Use this type of worksheet:	
O Static worksheet with records from this page	
Static worksheet with records from all pages in	n the current view
O Dynamic PivotTable	Select Columns
C Dynamic worksheet	Edit Columns
Make this data available for re-importing by in	cluding required column headings
	Export
Figure 12	2.3
4. A file download box will pop up. If you would like to open the file before saving, select *Open*. If you would like to save to your computer, click *Save* (Figure 12.4).



Figure 12.4

5. An Excel file will open and a pop-up box will appear. Simply select *Yes* (Figure 12.5). An Excel file will now be displayed and you can manipulate it to your choosing.

Microsof	t Office Excel
<u> </u>	The file you are trying to open, 'Active%20Service%20Authorizations[1].xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?
	Yes
	Figure 12.5

Advanced Find

Advanced Find is a tool used by support coordinators and area offices. This feature allows you to create reports that are specific to your needs. This tool can be manipulated in many ways. Below are some things that you will want to remember.

1. Select the Advanced Find icon located on the top tool bar below the APD logo (Figure 12.6).

	Zie in	neroson Dynamics exter
File Activities View	Charts	
Cancel	ti Share	
Mark Complete	Add Assign Run Start Run Report -	Advanced Find
Actions	Include Collaborate Process Data	
Workplace 👘 🚮 🙀 🗸	Activities My Activities -	
▲ My Work	Due: All	
Activities	Activity Type Subject	Regarding Priority
A Queues	🗐 🖉 Task Cost Plan requires Area Review - Regarding Cost Plan	遏 Cost Plan F Normal
Announcements	🔲 😨 Task Cost Plan requires Area Review - Regarding Cost Plan	遏 Cost Plan F Normal
4 People	🔲 🖉 Task Consumer has dipped into Reserve Funds - Regarding	🛃 Cost Plan F Normal
Consumers	🗐 😨 Task Cost Plan requires Area Review - Regarding Cost Plan	🛃 Cost Plan F Normal
4 Provider	🔲 👻 Task Cost Plan requires Area Review - Regarding Cost Plan	逞 Cost Plan F Normal
Reviders	🔲 🕏 Task Cost Plan requires Area Review - Regarding Cost Plan	🛃 Cost Plan F Normal
₄ iBudget		
🥰 Annual Budgets		
🛃 Annual Cost Plans		
🗦 Service Authorizations		
👌 Help		

Figure 12.6

2. A pop-up box will appear. It is important to remember to start with broad filter criteria and then filter for more specific information. First, you will want to select the drop-down arrow to see the available options (Figure 12.7).

		🏄 Microsoft Dynam	ics CRM	
File Advanced Find				
Query Saved Results	New Save Save As	Clear (E Group AND Clear Details	Download Fetch XML	
51101	TCT .	Queiy	bebug	
Look for: Consumers			ew]	
Select				

Figure 12.7

3. Hover over *Select* and click the drop-down arrow to filter more (Figure 12.8).

		_		Microsoft Dynam	ics CRM	
File	Advanced Find					
Query	Saved Results	New Save	Save As 2 Edit Columns Clear Edit Properties	(블 Group AND (블 Group OR 🔁 Details	Download Fetch	
	Show	View		Query	Debug	
Look fo	or: Consumers		. U:	se Saved View: [n	ew]	
	Select					
		V				

Figure 12.8

4. After selecting a filter category, add more specific criteria such as consumers who are not 21 (Figure 12.9).

	_					Microsoft Dynam	ics CRM	
File	Advanced Fin	d						
Query	Saved Views Show	New	Save	Gave As Gave As Gave As Edit Columns Gave Boot For the set of the set o	2 Clear	(문 Group AND (문 Group OR 로 Details	Download Fetch XML Debug	
						,		
Look	for: Consumers				Us Us	e Saved View: [n	ew]	
•	Date Of Birth		<u>On</u>		Choose	e Date	X	
	Select							

Figure 12.9

5. After setting all of your filter criteria, select *Edit Columns* to manipulate only the columns you would like (Figure 12.10).

				🏄 Microsoft Dynam	ics CRM
File	Advanced Find				
Query	Saved Views Results	New Save	 Gave As ☑ Edit Columns ☑ Edit Properties 	(ﷺ Group AND Clear Clear ♪ Details	Download Fetch
	Show		View	Query	Debug
Look fo	or: Consumers	0	After	Use Saved View: [n	ew]
•	Date Of Birth	On of	r Atter	<u>4/18/1993</u>	
	Select				

Figure 12.10

6. A pop-up box will appear (Figure 12.11). Below is a description of all the items from which you can select.

III Name 🔺	Address Line 1	Address Line 2	City	County	District	Common Tasks			
						60			
						Configure Sorting			
	View results are displayed here.								
						a Change Properties			
						Ъ Remove			
					•				
Note: When the	re are too many columns to	fit on a page, the v	iew will be sho	tened and scrollbars	will be				
added	,				.				

Figure 12.11

Green Arrows: Click on a column header (which will highlight it in green.) Use the right or left arrows to move the order of the columns.

Configure Sorting: You can choose a column by which you would like to sort the data. You can choose Ascending or Descending order.

Add Columns: You can add columns for information that is not previously shown.

Remove: By clicking on a column header, which will highlight it in green, you can remove the columns that do not pertain to your report.

2. Click *OK* (Figure 12.12).

ll Name 🔺	Address Line 1	Address Line 2	City	County	District	Common Tasks
						30
						Configure Sorting
	Viev	v results are displaye	d here.			Add Columns
						Change Properties
						🜏 Remove
					F	
Note: When the	re are too many columns to	fit on a page, the vi	iew will be sho	tened and scrollbars	will be	
					T	

Figure 12.12

3. Select *Results* to run your report (Figure 12.13).

				🏄 Microsoft Dynami	ics CRM
File	Advanced Find				
Query	Saved Results	New Sa	Bave As Edit Columns		Download Fetch
	Show		View	Query	Debug
Look fo	or: Consumers			Use Saved View: [n	ew]
• !	Date Of Birth	O	n or After 📃	4/18/1993	
	Select				

Figure 12.13

4. Your report will be generated. Please click *Export* (Figure 12.14).

			List Tools		🟄 Microsoft Dynam	ics CRM		
File	Advan	ced Find	Consumers					
Retiv	vate ctivate	Assign Consumers	Share Copy a Link	Run Start Workflow Dialog	Run Export Report - Consumers			
Recor	rds	Co	ollaborate	Process	Data			
F	ull Name	ē 🔺	Address Lin	e 1 Address Line	e 2 City	County	District	First
V A	ADEN B	MCBEE	104 ADDRE	SS2	QUINCY	GADSDEN	<u>02</u>	AAD
A	ADEN M	I. WORDEN	252 ADDRE	\$\$515	MARIANNA	JACKSON	02	AAD
A	ALIYAH	CATALANO	978 ADDRE	SS1	JAY	SANTA ROSA	01	AALI
A	ARAV G	UFFEY	165 ADDRE	SS1	PENSACOLA	ESCAMBIA	01	AAR
A	ARAV H	OLBROOK	15 ADDRES	\$1678	MARIANNA	JACKSON	02	AAR
A	ARON C	. UPSHAW	716 ADDRE	SS472	PANAMA CITY	BAY	02	AAR
A	ARON C	OLVIN	775 ADDRE	\$\$72	TALLAHASSEE	LEON	02	AAR

Figure 12.14

5. If you would like to save your report for future use, select *Advanced Find* (Figure 12.15).

File	Advar	nced Find	ist Tools		🏄 Microsoft Dynamie	cs CRM		
Re	ctivate eactivate cords	Assign Consumers	Share Copy a Link E-mail a Link porate	Run Workflow Dialog Process	Run Export Report - Consumers Data			
	Full Nam	e 🔺	Address Lin	e 1 Address Line	2 City	County	District	First
	AADEN B	. MCBEE	104 ADDRE	SS2	QUINCY	GADSDEN	<u>02</u>	AADI
	AADEN N	1. WORDEN	252 ADDRE	\$\$515	MARIANNA	JACKSON	02	AADI
	AALIYAH	CATALANO	978 ADDRE	SS1	JAY	SANTA ROSA	01	AALI
	AARAV G	UFFEY	165 ADDRE	SS1	PENSACOLA	ESCAMBIA	01	AARA
	AARAV H	OLBROOK	15 ADDRES	\$1678	MARIANNA	JACKSON	02	AAR
	AARON C	. UPSHAW	716 ADDRE	SS472	PANAMA CITY	BAY	02	AAR
	AARON C	OLVIN	775 ADDRE	SS72	TALLAHASSEE	LEON	02	AAR

Figure 12.15

6. Select *Save As* (Figure 12.16).

					4	Microsoft Dynami	ics CRM
File	Advanced Find			4			
		32		📙 Save As		[{≣ Group AND	100
				📝 Edit Columns		[{≣ Group OR	
Query	Saved Results Views	New Sa	Save	🤯 Edit Properties	Clear	🔁 Details	Download Fetch XML
	Show		١	/iew		Query	Debug
Look fo	or: Consumers				Us	e Saved View: [n	ew]
▼]	Date Of Birth		On or	After 💌	4/18/19	<u>93</u>	
	Select						

Figure 12.16

7. A pop-up box will appear. Type the name of your report and a description if you like. Then select *OK* (Figure 12.17). Your report will now be saved for future use.

Provide Information for This View
Provide a name and description for this saved view. The name will be visible in the View list.
Name *
Consumers Under 21)
Description
OK ncel
Figure 12.17

8. You can view these by selecting the *Saved Views* (Figure 12.18).

					4	🕯 Microsoft Dynam	nics CRM
File	Advanced Find						
Query	Saved Views Results	New	Save	Gave As Gave As Gave As Edit Columns Gave As Edit Properties	2 Clear	(ﷺ Group AND (ﷺ Group OR	Download Fetch
	Show		v	ïew		Query	Debug
Look fo	or: Consumers				• Us	e Saved View: [r	new]
• 1	Date Of Birth		On or A	After 💌	4/18/19	<u>93</u>	
	<u>Select</u>						

Figure 12.18

9. Figure 12.19 displays the *Saved Views screen*.

		List Tools		Microso Microso	oft Dynamics CRM
		LIST TOOLS			on Dynamics Crivi
File	Advanced Find Saved Views				
8		2 Activate	20	Share	
		💐 Deactivate		Copy a Link	
Type +	View	X Delete Saved Vi	ew Views	E-mail a Link	Workflow Dialog
	View	Records	Co	ollaborate	Process
🖪 Co	nsumers Save	d Views: Active	Saved Views	•	
Na	ame 🔺			Owner	Last Modified
Bd	lay Under 21			Gabrielle Moral	8/6/2013 3:17 PM
Co	onsumers Under	21		Gabrielle Moral	4/18/2014 3:40.
iBudget DOB under 21				Gabrielle Moral	11/8/2012 3:42.
	n Call			Gabrielle Moral	5/9/2013 11:23.

Figure 12.19

NOTE: You can also share your advanced find reports with other WSCs by checking the box next to the report and selecting *Share* to share them exactly as you would share your consumers.

User Guides in iBudget System

The WSC User Guide, Quick Reference Guide, Troubleshooting Guide, WSC iBudget Password Guide, and Service Authorization Report Guide are now located in the iBudget system. Please follow the instructions below to access them while you are in your VPN.

1. Under the *Workplace* menu select *Help* (Figure 12.20).



2. To open, double click on *Double click here for User Guides and additional information* (Figure 12.21).



3. Select the document you wish to view (Figure 12.22).

Information – WSC User Guide – Quick Reference Gui	Double click here for User Guides and additional information
 Troubleshooting Gu WSC iBudget Passw Notes 	► WSC User Guide
	Quick Reference Guide
Related Common	Troubleshooting Guide
Activities Closed Activities	WSC iBudget Passwords
	▶ Notes



WSC Passwords

The Information Technology (IT) unit has implemented a solution that will enable users to reset their iBudget passwords and unlock their accounts without contacting the APD Help Desk.

Enroll

1. To go to the APD password management portal, connect to the APD network via VPN. Click this link: <u>http://apdap5v.apd.fl.local:8888. You may also copy and paste it into the address bar of your web</u> browser.

NOTE: A VPN connection must be established before the link will work.

2. Enter your user name and password in the fields marked *User Name* and *Password*. Use the same credentials you use to log in to iBudget. Select *APD* from the dropdown menu and then click the *Login* button (Figure 13.1).

User Name:		
Password:		
Log on to:	APD	• 🧲
	Login	-
	Reset Password	
8	Reset Password Reset your forgotten password	

Figure 13.1

3. Click on the *Click Here* button to proceed with registration (Figure 13.2).

Welcome	! This portal offers you the power of password self-service!
	 Password self-service: Reset password yourself when you forget it! Don't wait for the helpdesk! Self-service Account Unlock: Unlock the computer, when you are locked out of it. Self-service Directory Update: Update the changes in contact details yourself! And more Enroll now to enjoy these benefits! Click Here

Figure 13.2

4. Registration requires selecting two security questions and entering two corresponding answers. From each question field labeled *Que*, select a question from the drop down menu. Enter the answer in the *Answer* field and confirm (retype) your answer in the *Confirm Answer* field.

NOTE: Your answers are *case sensitive*. Once you have completed both security questions and answers, click the *Enroll* button (Figure 13.3).

	tion you provide here would	be used to authenticate	you when attempt to reset	password or unlock your account
Security	Que & Ans			
Lengt	h Specification	war(a) should be 7 shows	vo	d is 255 characters
- 104	minimum length of the ans	wer(s) should be 3 chara	cores and matomum allow	to is 200 characters
Regist	ter Your Security Que & Ans			
Que:	Please Select a Ques	tion	•	
	Arrant	Confirm Anzer	W	
				1
Quei	Please Select a Ques	tion		
	Argoni	Continen Angles	er	
	Hide Answer(s)			

Figure 13.3

5. If your registration was successful, you will see the message below (Figure 13.4). You may now close the web page.



Figure 13.4

Congratulations! Now that you have registered successfully, you will be able to reset your iBudget password or unlock your account without needing to contact the APD Help Desk.

Unlock

1. Go to <u>http://apdap5v.apd.fl.local:88888.</u> Click the *Unlock Account* link (Figure 13.5).

opd	
Update Your Profile Efficiently :	Sign in User Name: Password:
User Registration Establish your identity via registration Self Update Update your contact information	Log on to: APDENET Login
Change Password Change your password using current password	Reset Password Reset your forgotten password
	Unlock Account Unlock your locked out account

Figure 13.5

2. In the field labeled *Domain User Name* enter your iBudget user name. Select *APD* from the drop down menu and click the *Continue* button (Figure 13.6).

ManageEngine ADSelfService		
	Unlock Your Account Please provide your user name and domain name.	
	Domain User Name smithj (Example : Jsmith) Domain Name APDENET	
	Continue	

Figure 13.6

3. In the *Ans* field enter the answers to your security questions (*Que*) and click *Continue* (Figure 13.7).

ManageEngine - ADSelfService Plus		0 0 4
KanageEngine) ADSelfService		
C Time left	for this operation : 04:30	
Security Questions Please answer the following question(s) as per your ancolliment profile to unl	lock your account	
Answer the below question(s)		
Anar		
Ans:		
Continue		

Figure 13.7

4. Click the *Unlock Account* button (Figure 13.8).

A ManageEngine - ADSelfSe	rvice Plus	E S
ADSelfService P	\$	^
C	Time left for this operation : 04:32	
1	Unlock Account Unlock your locked out account	
U	nlock Account	
	Unlock Account	



5. If you receive the message below, your APD iBudget account is now unlocked. Close the window and log in to iBudget (Figure 13.9).

A ManageEngine - ADSelfService Plus		- 0	×
ADSelfService NK			*
	The account unlock has been done successfully.		

Figure 13.9

Reset

1. Go to <u>http://apdap5v.apd.fl.local:8888.</u> Click the *Reset Password* link (Figure 13.10).

opd	
Update Your Profile Efficiently :	Sign in User Name: Password:
User Registration Establish your identity via registration Self Update Update your contact information	Log on to: APDENET Login
Change Password Change your password using current password	Reset Password Reset your forgotten password
	Unlock Account Unlock your locked out account

Figure 13.10

2. In the *Domain User Name* field enter your iBudget user name. Select *APD* from the drop down menu and click the *Continue* button (Figure 13.11).

ManageEngine) ADSelfService		
	Reset Your Password Please provide your user name and domain name.	
	Domain User Name smithj (Example : Jsmith)	
	Domain Name APDENET	

Figure 13.11

3. In the *Ans* fields answer your security questions (*Que*) and click the *Continue* button (Figure 13.12).

A ManageEngine - ADSelfService Plus	(= (0) 4)
ManageEngine) ADSelfService ^{PMS}	
Time left for this operation 1 04:30	
Security Questions Please enswer the following guestion(s) as per your excellment profile to unlock your account	
Answer the below question(s) Oue: Who is your favorite superhero?	
Ansı Quei What is your favourite color 7	
Ans:	
Continue	
	171

Figure 13.12

4. Enter your new password in the *New Password* field. Enter your new password again in the *Confirm New Password* field; then click the *Reset Password* button (Figure 13.13).

NOTE: In order to meet password complexity requirements, your password must have any **three** of the following four characteristics:

uppercase letter
 lowercase letter
 number
 special character (ie: ?, ^, !, *, etc.)

A ManageEngine - AD	DSelfService Plus	- 0	×
ManageEngine ADSelfServic	ce ^{plus}		Î
	Time left for this operation : 04:11		
	Please enter a new password in the boxes below:		
	Domain Password Policy Requirements		
	The maximum password age is 90 The minimum password length is 8		
	 No. of Password Remembered is 5 The password complexity property is Enabled >>> See **NOTE Above 		
	Reset Password		
	New Password :		
	Reset Password		

Figure 13.13

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5. If you receive the message below, your iBudget password is reset (Figure 13.14). Close the window and log into iBudget using your new password.

ManageEngine - ADSelfService Plus	the second s	
ADSelfService		
	The password reset has been done successfully.	

Figure 13.14

New Consumable Medical Supply (CMS) Code Instructions

 Any specific items that have a Medicaid State Plan Procedure Code must be entered by the unit as shown on the CMS Codes Chart, and may not exceed the monthly or annual limits set by the Agency for Health Care Administration (AHCA). For items that do not have discrete procedure codes to denote size, the *Notes* section of the service plan must clearly specify what is needed.

Ex: Disposable underpads, Service Code '4435', Procedure Code 'A4554'. The Notes should specify the exact size needed, such as 17" x 24", 36" x 18", etc.

2. Service Code '4437' and Procedure Code 'A4335', Incontinence Supply, Miscellaneous Incontinence supplies which are not included on the rate chart but which are medically necessary for

persons 21 and older. An area review will be required each time this code is used, so documentation of medical necessity must be kept current and provide at the time the cost plan is entered.

Ex: Incontinent Sheath Holders A specialty Gravity Drainage Bag Plastic 5-in-1 Connector for drainable bag or extended catheter Belly Bag Urine Bag

3. Service Code '4446' and Procedure Code 'S5199', Personal Care item, NOS

Supplies provided by the waiver for non-CDC+ waiver participants, as specified in the Handbook.

An area review will be required each time this code is used, so documentation of medical necessity must be kept current and provide the time the cost plan is entered. These will be limited to 10 units per day with a total unit rate not to exceed \$246.75.

There is no requirement to order these items as discrete units. A tub, a box, etc., may be used so long as the amount does not exceed the individual's needs and may be specified in the notes.

Incontinence supplies which are not included on the rate chart but which are medically necessary or which exceed the Medicaid State Plan limits but which are determined to be medically necessary to ensure the person's health and safety: *An area review will be required each time this code is used, so documentation of medical necessity must be kept current and provide at the time the cost plan is entered.*

Ex 1: Specific disposable pull-up brand required due to allergy to the content of the generic brand provided at the MSP rate.

Ex 2: Using the same example, but the individual also uses a disposable guard when in the community, and a specific brand is also needed for the same reason and the same provider is used, the number needed per month is 20 @ \$0.46, for a cost of \$9.20,

Ex 3: An individual is tube fed and has increased urinary output. The absorbency of regular diapers would require very frequent changes. However, with the use of diaper liners, the moisture can be wicked away from the body for an extended period of time, thus requiring changes less frequently. The usage has been determined to be 180 diapers and 180 liners per month. However, this exceeds the MSP allowable of 200 units per month.

- a. The WSC would enter the diapers on one service plan, the remaining number of units under MSP for the lines on a second service plan.
- b. The additional units of liners, which must be approved by the regional office, will be entered on a third service plan, using the same provider, unit and cost as automatically entered for the MSP-allowable amount, and enter the appropriate notes.

4. Service Code '4030' and Procedure Code 'S5199', Consumable Medical Supplies

This service code and procedure code will be used for all consumable medical supplies for CDC+ participants (ICDC). The same service plan may be used to combine all CMS items for an individual.

Beginning with Fiscal Year 2013-2014, APD implemented new CMS codes for identifying specific items. Included with these codes were two miscellaneous codes to be used for special needs and extenuating circumstances. These miscellaneous codes might be used for the situations below.

- It is deemed medically necessary for an individual to receive more than 200 diapers or pull ups per month.
- An individual has a specific allergy or specific size that may be more expensive.
- The conversion issue, where the use of the new codes is costing individuals more money than before.
- Other items such as wipes, hearing aid supplies, bowel management supplies, etc. that are covered by the waiver but may not have a specific code.

Clarification has been provided by AHCA and all of these items should be built under the Service Code 4446 Personal Care Item NOS. The 4437 Code has a max rate of \$19.40 per month. Below you will find instructions for correcting the service plans based on specific scenarios. Please direct questions to your regional office or Gabrielle Morales at <u>gabrielle.morales@apdcares.org</u>.

To speak with an information technology (IT) staff member regarding the iBudget Florida application, please contact APD's Help Desk by going to <u>https://apdflorida.zendesk.com/home</u> and submitting a help desk ticket. You can also call (850) 488-4357 between 8 a.m. and 6 p.m. (Eastern time), Monday through Friday.