iBudget Florida

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 https://apdflorida.zendesk.com/home 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 and password input fields](image)

**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.

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

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 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.

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.
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 window](image)

**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.

- **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** at the top left of the page or click the 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).

![Figure 1.3](image)

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.

![Figure 1.4](image)
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.
If you select the Close Task icon a pop-up box will appear (Figure 1.6).

![Figure 1.6](image1)

3. Click OK (Figure 1.7).

![Figure 1.7](image2)
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).

2. The View feature above the Consumers list may be used to indicate whether to view active or inactive consumers (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).
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).
3. This action will pull up the consumer's *Information* page (Figure 2.3).

![Figure 2.3](image)

**Figure 2.3**

*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).

![Figure 2.4]

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

![Figure 2.5]
3. To view whether this consumer has an annual budget click Annual Budget (Figure 2.6).

![Annual Budget screenshot on WSC interface](image)
**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).

![Figure 2.7](image1)

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

![Figure 2.8](image2)
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).

![Figure 2.9]

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

![Figure 2.10]
5. In the *Effective Date* field, enter the effective date of the cost plan (Figure 2.11).

![Figure 2.11](image1)

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

![Figure 2.12](image2)
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 Amount* 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.

![Figure 2.13](image)

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Monthly Cost Plans

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

![Figure 2.14](image)

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.

![Figure 2.15](image)
**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).

   ![Figure 2.16](image)

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

   ![Figure 2.17](image)
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).
5. This brings up a *Look Up Record* box. Select a service code for the service plan (Figure 2.19). Click **OK**.
6. Click the Look-Up icon beside the Provider field (Figure 2.20).
7. Under Provider Name, select a provider for the service plan (Figure 2.21). Click OK.
8. Click the *Look-Up* icon beside the *Service Level* field (Figure 2.22).
9. Select the Service Level (Figure 2.23). Click OK.
10. Click the Look-Up icon beside the Procedure Code field (Figure 2.24).
11. Select the *Procedure Code* (Figure 2.25). Click OK.

![Figure 2.25](image)
12. Click the *Look-Up* icon beside the *Service Ratio* field (Figure 2.26).
13. Select the *Service Ratio* (Figure 2.27). Click *OK*.
14. In the *Units* fields enter the appropriate units for each month in the service plan (Figure 2.28).

![Service Plan Form](image)

*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).

![Figure 2.29](image)

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.
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).

![Figure 2.31](image-url)
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.

![Figure 2.32](image)

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.

![Figure 2.33](image)
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*.

![Figure 2.34](image)

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.

![Figure 2.35](image)

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).

![Figure 2.36](image)

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](image)
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).

![Figure 2.38](image-url)
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).

![Figure 3.1](image1)

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

![Figure 3.2](image2)

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.

![Figure 4.1](image)
3. Click the **Copy** button at the top of the *Annual Cost Plan* page (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).
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).

![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](image1)

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).

![Figure 5.2](image2)
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.

![Figure 5.3](image1.png)

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

![Figure 5.4](image2.png)
8. Click the Look-Up icon next to the Service Code field (Figure 5.5).

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

![Figure 5.7](image)

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).

![Figure 5.8](image)

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.

![Figure 5.9](image)

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).

![Figure 5.10](image)

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.

![Figure 5.11](image-url)

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

![Figure 5.12](image-url)
8. Click the **Look-Up** icon next to the **Service Code** field (Figure 5.13).

9. Select the same service code that you edited previously (Figure 5.14).
10. Select a different *Provider* (Figure 5.15).
11. Select the same *Procedure Code*.
12. Select the same *Ratio* if applicable.

![Figure 5.15](image)

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).

![Figure 5.16](image)

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).

![Figure 5.17](image)

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).

![Figure 5.18](image)

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 will change to Cancel and Pending Transmit (Figure 5.19).

![Figure 5.19](image)

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.
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).

<table>
<thead>
<tr>
<th>Information</th>
<th>(Consumer)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Closed Activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approved Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Budgets</td>
<td></td>
<td>Annual Budgets for MARTHA BROWNE for FY 2014-2015</td>
</tr>
<tr>
<td>Service Plans</td>
<td></td>
<td>Service Plans</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 5.20

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).

<table>
<thead>
<tr>
<th>Information</th>
<th>(Annual Cost Plan)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Closed Activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monthly Cost Plans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Plans</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 5.21

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

<table>
<thead>
<tr>
<th>Information</th>
<th>(Annual Cost Plan)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities</td>
<td></td>
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<tr>
<td>Closed Activities</td>
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<td>Monthly Cost Plans</td>
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<td>Service Plans</td>
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<td></td>
</tr>
</tbody>
</table>

Figure 5.22
9. Double click the manual rate service plan (Figure 5.23).

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

![Figure 5.25](image-url)
12. Add the units back into the *Units* fields under the months where they were removed (Figure 5.26).

![Figure 5.26](image)

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).

![Figure 5.27](image)
15. The service rate field will now be open for you to change the rate (Figure 5.28).

![Figure 5.28](image)

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).

![Figure 5.29](image)
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).

![Figure 6.1](image1)

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

![Figure 6.2](image2)
4. This will open the Consumer Information page (Figure 6.3).
5. Under the Details menu on the left side of the page, click on Claims (Figure 6.4).

6. This pulls up the consumer’s paid claims (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).

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

![Figure 6.8](image-url)
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).

Figure 7.1

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

Figure 7.2
4. Click the Add at the top of the screen (Figure 7.3).

![Figure 7.3](image)

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.

![Figure 7.4](image)
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.

4. At the top of the page click **Share** (Figure 8.2).
5. On the sharing page, click *Add User/Team* (Figure 8.3).
6. At the top of the page click the down arrow beside the *Look for:* field (Figure 8.4). Select *Team.*
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).

![Figure 8.5](image-url)
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.
10. This will return you to the sharing page (Figure 8.7).

![Figure 8.7](image)

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

![Figure 8.8](image)

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).

![Figure 8.9](image)

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

![Figure 8.10](image)
3. On the sharing page, click the check box to the left of the user or team with whom you want to un-share (Figure 8.11). Click *Remove Selected Items*.

![Figure 8.11](image)

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).
4. View the service authorization (Figure 9.3).

**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.

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

3. The consumer’s information page will be displayed (Figure 9.5).
4. Select Service Authorizations (Figure 9.6).

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).

6. The rejected service authorization is now open (Figure 9.8).
7. Click Resend on the top menu bar (Figure 9.9).

![Figure 9.9](image)

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).

![Figure 9.10](image)

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

![Figure 9.11](image)

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).

![Figure 9.12](image)

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

![Figure 9.13](image)
3. Search for the consumer. Double click on the consumer (Figure 9.14).

4. This opens the Consumer Information page (Figure 9.15).
5. On the left side under the Details menu click Service Authorizations (Figure 9.16).

6. From the list double click on the service authorization that needs an updated note (Figure 9.17).
7. This will open the **Service Authorization Information** page (Figure 9.18).

![Figure 9.18](image)

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

![Figure 9.19](image)
9. Click on \textit{Enter a note} to enter a new note (Figure 9.20).
10. Enter the note and then either click outside the box or click Done (Figure 9.21).

![Figure 9.21](image)

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).

![Figure 9.22](image)
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).

![Figure 9.23](image)

**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](image-url)
3. Double click Service Authorization Report (Figure 10.2).

![Figure 10.2](image)

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. Report for the Entire Caseload (Figure 10.3)
      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.

![Figure 10.3](image)
b. **Report for Entire Caseload Excluding One Individual (Figure 10.4)**
   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*.

![Figure 10.4](image)

---

c. **Report for One Consumer (Figure 10.5)**
   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*.

![Figure 10.5](image)

---

d. **Report for One Provider for Entire Caseload (Figure 10.6)**
   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*.
7. Once you hit View Report, the report will begin to generate (Figure 10.7).

![Figure 10.7](image)

- **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)

![Figure 10.8](image)

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.
“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).

3. This opens the consumer Information screen (Figure 10.10).
Select Annual Cost Plans under the Details menu (Figure 10.11). Highlight the Current Approved cost plan (Figure 10.11).

4. Select the Run Report (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.

![Figure 10.13]
6. A pop-up box will appear. Make sure to select *The selected records* (Figure 10.14).
7. Click Run Report (Figure 10.15).

![Select Records](image)

**Figure 10.15**
8. The report will be generated (Figure 10.16).

![Copied Cost Plan For CYNTHIA ABBOTT For 2013-2014](image)

**Copied Cost Plan For CYNTHIA ABBOTT For 2013-2014**

<table>
<thead>
<tr>
<th>Amounts</th>
<th>2013-2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>85% Target Amt</td>
<td>$29,750.00</td>
</tr>
<tr>
<td>10% Flexible Amt</td>
<td>$3,500.00</td>
</tr>
<tr>
<td>5% Reserve Amt</td>
<td>$1,750.00</td>
</tr>
<tr>
<td>Total Allocated Amt</td>
<td>$35,000.00</td>
</tr>
</tbody>
</table>

**Processing**

| Effective Date          | 01/07/2013 |
| Consumer accepts cost plan? | Yes       |
| Processing Status       | Approved   |

**Signatures**

<table>
<thead>
<tr>
<th>WSC</th>
<th>Consumer/ Legal Guardian</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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).

![Copied Cost Plan For CYNDTHIA ABBOTT For 2013-2014](image)

**Copied Cost Plan For CYNDTHIA ABBOTT For 2013-2014**

<table>
<thead>
<tr>
<th>Amounts</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>85% Target Amt</td>
<td>$29,750.00</td>
<td>Budgeted Target</td>
<td>$5,773.92</td>
</tr>
<tr>
<td>10% Flexible Amt</td>
<td>$3,500.00</td>
<td>Budgeted Flexible</td>
<td>$0.00</td>
</tr>
<tr>
<td>5% Reserve Amt</td>
<td>$1,750.00</td>
<td>Budgeted Reserve</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Allocated Amt</td>
<td>$35,000.00</td>
<td>Total Budgeted</td>
<td>$5,773.92</td>
</tr>
</tbody>
</table>

**Processing**

- Effective Date: 01/07/2013
- Cost Plan Status: Current Approved
- Consumer accepts cost plan?: Yes
- Processing Status: Approved

**Signatures**

- WSC
- Consumer/ Legal Guardian

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).

2. Locate the consumer in the iBudget system; double click to open the information page (Figure 11.2).
3. Go to Annual Cost Plans (Figure 11.3).

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

![Figure 11.5](image)

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).

![Figure 11.6](image)
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).

   ![Figure 11.7](image)

4. Click select Deactivate (Figure 11.8).

   ![Figure 11.8](image)
5. Select the status and click OK (Figure 11.9).

![Figure 11.9: Confirm Consumer Deactivation](image)
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).
3. Click Export (Figure 12.3).
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).

![File Download](image1)

**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.

![Microsoft Office Excel](image2)

**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).

![Figure 12.6](image)

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).

![Figure 12.7](image)
3. Hover over **Select** and click the drop-down arrow to filter more (Figure 12.8).

![Figure 12.8](image)

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

![Figure 12.9](image)
5. After setting all of your filter criteria, select *Edit Columns* to manipulate only the columns you would like (Figure 12.10).

![Diagram showing Microsoft Dynamics CRM interface with Advanced Find tab selected, highlighting options for filter criteria, including 'Look for: Consumers', 'Date Of Birth On or After 4/18/1993', and 'Edit Columns' feature.]

*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.

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

![Figure 12.13](image-url)

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

![Figure 12.14](image-url)
5. If you would like to save your report for future use, select _Advanced Find_ (Figure 12.15).

![Figure 12.15](image)

6. Select _Save As_ (Figure 12.16).

![Figure 12.16](image)
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.

![Figure 12.17](image)

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

![Figure 12.18](image)
9. Figure 12.19 displays the *Saved Views screen*.

![Image of Saved Views screen showing four saved views: Bday Under 21, Consumers Under 21, Budget DOB under 21, and In Call, with their respective owners and last modified dates.

**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).
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: http://apdap5v.apd.fl.local:8888. You may also copy and paste it into the address bar of your web 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).

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

![Figure 13.3](image)

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](image)

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 http://apdap5v.apd.fl.local:8888. Click the Unlock Account link (Figure 13.5).

![Figure 13.5](image)

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).

![Figure 13.6](image)
3. In the Ans field enter the answers to your security questions (Que) and click Continue (Figure 13.7).

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

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).
Reset

1. Go to http://apdap5v.apd.fl.local:8888. Click the Reset Password link (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).
3. In the Ans fields answer your security questions (Que) and click the Continue button (Figure 13.12).

![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:
- 1-uppercase letter
- 2-lowercase letter
- 3-number
- 4-special character (ie: ?, ^, !, *, etc.)

![Figure 13.13]
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.

![Password reset message]

Figure 13.14

New Consumable Medical Supply (CMS) Code Instructions

1. 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.


   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


   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.

   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 gabrielle.morales@apdcares.org.
To speak with an information technology (IT) staff member regarding the iBudget Florida application, please contact APD's Help Desk by going to https://apdflorida.zendesk.com/home 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.