

# Waiver Disenrollment Process for Waiver Support Coordinators Chapter 20



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Waiver Disenrollment is needed for multiple reasons. The consumer may have died, chooses to leave the waiver, is noncompliant, or is put permanently in a nonwaiver eligible setting.

The Waiver Support Coordinator initiates the Waiver Disenrollment, and then APD staff finishes the process. This presentation describes what the WSC needs to do to disenroll a consumer from the waiver.

# WSC Updates the Division Tab Due To Death

**This step is only needed if the consumer dies**

- Once a consumer dies the MCM will update the **Demographics Tab**
- This triggers a Tickler to the WSC or Waiting List Support Coordinator (WLSC):
  - *Due to a Death, update Division – Pending Disenrollment*

- Click on the Tickler
- Click to open the APD Division record and update “Disposition” = **Pending Disenrollment**
- When finished, click **File > Save Division**

File Word Merge

Division

Events

Track Disposition

Events	
Divison *	APD
Disposition *	Pending Disenrollment
Disposition Date	04/27/2018
Open Date	04/04/2018
Data Entry Date	03/21/2018
Primary Worker *	Reed, Monica
Secondary Worker	Tierney, Jacqueline
Application Received Date *	04/04/2018
Interested in ICF/IID	Yes
Age Category at Time of Application *	Under 6

- Continue to the Waiver Disenrollment Process
- If the consumer did not die, then the WSC will initiate the process with a Note



# WSC Initiates Waiver Disenrollment

1. The WSC will navigate to the consumer's record and click

**Notes > File > Add Note**

2. The WSC will create a Note asking for the consumer to be disenrolled
  - Note type = Waiver Disenrollment
  - Sub-type = Pending Waiver Disenrollment
  - The status is **Pending** because the WSC is expecting a reply
  - They will send it to the Waiver Workstream Lead

## Notes Details

Division \*

APD ▼

Note By \*

WLSuper, Robert ▼

Note Date \*

04/23/2018 

Program/Provider

▼

Note Type \*

Waiver Disenrollment ▼

Note Sub-Type

Pending Waiver Disenrollment ▼

Description

▼

Note

Consumer would like to disenroll. Please approve request for disenrollment.

Status \*

Pending ▼

Date Completed

▼

# The Note is Routed to the ROM for Approval

- The Waiver lead sends the Note to the Regional Operations Manager (ROM)
- The ROM reviews the Note and changes the Sub-type to **Waiver Disenrollment Approved** or **Waiver Disenrollment Denied**
  - They will send the Note back to the WSC and Waiver Lead
- The WSC will review the Note to see if the waiver disenrollment was approved or denied
  - The Waiver Lead will update the consumer's **Program Tab**

Waiver Lead sends *Notice of Termination of Waiver Services* to the consumer and documents it in a Note

**The note triggers 3 Ticklers for the WSC:**

- *Notify all Providers of Disenrollment*
- *End Date Planned Services and Complete Plans*
- *End Date All Authorizations*

# WSC Will Create an **ALERT** Note to Notify All Providers of Disenrollment

- Type = Waiver Disenrollment
- No subtype
- Body of the note = The consumer is disenrolling from the waiver
- Status = Alert
- Add the Waiver Lead as a recipient
  - This makes the alert note show up on their Dashboard

**Workflow Wizard**

- [35 Day Due Process Reminder](#)
- [Notify All Providers of Disenrollment](#)**
- [End Date Planned Services & Complete Plans](#)
- [Cancel All Authorizations](#)

**Notes Details**

Division \*

Note By \*

Note Date \*

Program/Provider  [Details](#)

Note Type \*

Note Sub-Type

Description

Note

Status \*

Date Completed

Hover over the arrow next to the Tickler to click **Complete**

# 5. End Date Planned Services & Complete Plans

- Click into the relevant Plan record and update all necessary fields
  - When finished, click **File > Save Plans**
- Hover over the arrow next to the Tickler to click **Complete**

**Workflow Wizard**

- [35 Day Due Process Reminder](#)
- [Notify All Providers of Disenrollment](#)
- [End Date Planned Services & Complete Plans](#)**
- [Cancel All Authorizations](#)

**Filters**

Division

3 Plans record(s) returned - now viewing 1 through 3

	Division	Program	Worker	Cost Plan Creation Date	Comments	Closed Date	Status
<input type="checkbox"/>	APD	CDC+	Tierney, Jacqueline	04/09/2018			Draft
<input type="checkbox"/>	APD		Tierney, Jacqueline	03/30/2018	Created from Assessment		Pending
<input type="checkbox"/>	APD	APD Waiver	Reed, Monica	03/27/2018			Approved

<< First < Previous Retrieve  Records at a time Next > Last >>

## 5. End Date Planned Services & Complete Plans

## 6. End Date All Authorizations

- Click the Tickler *“End Date All Authorizations”*
  - Click into each relevant Authorization record and update the **“End Date field”**
- When finished, hover over the arrow next to the Tickler to click **Complete**

# The rest of the Waiver Disenrollment Process is done by APD staff

*Let's review what the WSC did to disenroll a consumer:*

1. If the consumer dies, the WSC will update the Division Tab.
2. To initiate the disenrollment, the WSC sends the Waiver Lead a Note. The Waiver Lead reviews and sends the Note to the ROM. The ROM gives approval and sends the Note back to the WSC and Waiver Lead.
3. The Waiver Lead reviews the Note and updates the Program Tab.
4. The WSC gets Ticklers to create an Alert Note, end Planned Services and Authorizations, and complete the Cost Plan.

# Things to Remember:

- ✓ When sending a Note to someone or replying to a note, you must attach them as a recipient every time or they will not get it on their Dashboard
  - ✓ You must Append Text to Note when replying to a note or your text will not be sent
- ✓ Mark Ticklers/Workflow Wizards Complete once finished or they will add up



agency for persons with disabilities  
*State of Florida*