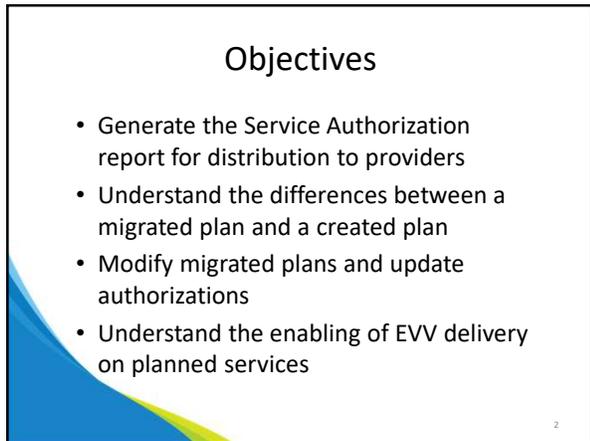
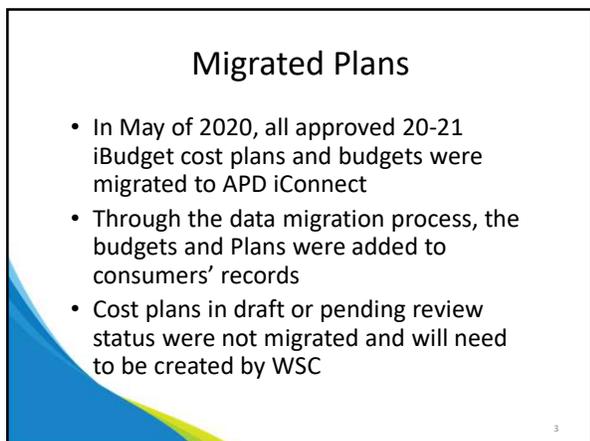


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2



3

Migrated Plans

- Migrated plans bypassed plan validation because they were approved in iBudget
- Since plan validation was bypassed, authorizations were generated by a script run in APD iConnect
- Thus, when a migrated plan is modified, there may be some different steps than when a plan has passed plan validation

4

SANs

- SANs are not being covered in this training
- APD will be sending WSCs information regarding how to handle SANs initiated in iBudget and when to begin requesting them in APD iConnect
- SAN eLearning video will be posted in the APD iConnect eLearning Library

5

Most Common Plan Modifications

- Provider Changes
 - When there are no claims on the authorization
 - When there are claims on the authorization
- Adding A Service
- Editing/Ending A Service
 - When there are no claims on the authorization
 - When there are claims on the authorization

6

Most Common Plan Modifications

- There are common steps in all types of plan modifications
- Some types may have an additional step or two
- WSCs should follow the 5/4/2020 Budget and Cost Plan Training Mini-Manual

7

Provider Claims and APD iConnect

- Like other APD iConnect functionalities, claim submission will occur on a rolling implementation schedule
 - Based on procedure codes
- Claims for Waiver Support Coordination are targeted to begin in APD iConnect after July 1, 2020
 - Official notification will be sent when WSC claims go live
 - Remember, WSC Provider Documentation is needed in APD iConnect prior to claim submission

8

Provider Claims and APD iConnect

- Claims for procedure codes related to Respite will go live in APD iConnect after respite provider implementation in the summer of 2020
- Claims for procedure codes related to Personal Supports will go live in APD iConnect after Personal Supports provider implementation in the fall of 2020

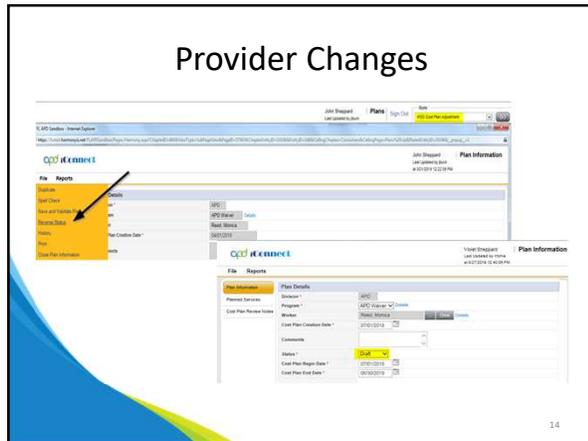
9

Provider Changes

- Provider changes include both **editing/ending a service** and **adding a service**
- Once claim data has been validated, the WSC is ready to modify the planned service
- The **WSC Cost Plan Adjustment** is a **new role** that has been added to assist with this process
 - Should be automatically available when WSCs log into APD iConnect by June 1, 2020

13

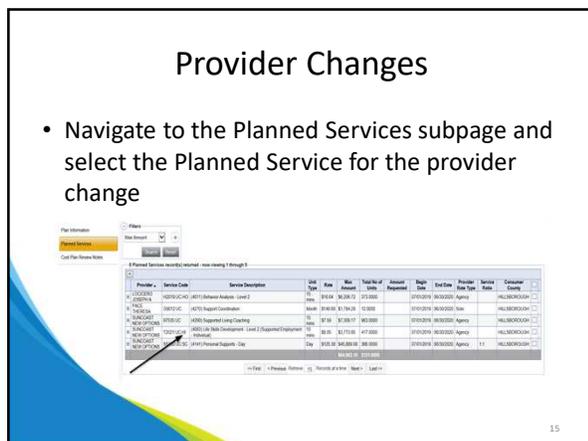
Provider Changes



14

Provider Changes

- Navigate to the Planned Services subpage and select the Planned Service for the provider change



15

Provider Changes

- In the Planned Service details screen, update the end date for this provider
 - The Total No of Units will recalculate based on the change in end date
 - If necessary, the WSC can manually adjust the Total No of Units after it recalculates

16

Provider Changes

Planned Services				
Division	APD			
Fiscal Year	2020			
Begin Date	07/01/2019			
End Date	06/30/2020			
Index/Sub-Object Code	Index Code	Index Description	Sub-Object	Sub-Object De
Service Rate	Sur-Cover	Sur-Cover Region	Waiver	Budget Waiver
Consumer County	HILLSBOROUGH			
Geographic Differential	Non-Geographic			
Provider Rate Type	Agency			
Service Code	17001 UCHI			
Service Description	08001 Life Skills Development - Level 2 (Supported Employment - Individual)			
Unit Type	19 Plans			
Units Per	104.00			
Units of Measure	Quarter			
Total No of Units	365			
Provider ID	13720			
Provider	BUNCOMBE NEW OPTIONS			
	\$9.00			
	\$3,303.25			

17

Provider Changes

- All planned services migrated with the status of Region Review Approved, since they were approved in iBudget
- As the WSC modifies a planned service, there is no need to change the status
- File > Save and Close

Planned Service Status	Region Review Approved
------------------------	------------------------

18

Provider Changes

- Add the new provider by adding a new planned service
 - On Planned Services, File>Add Planned Service
- Complete all fields on the new planned service screen for the new provider
- Be sure the start date is after the end date of the prior provider

19

Provider Changes

The screenshot shows a 'Planned Services' form with the following fields and values:

- Service Code: 1815
- Start Year: 2020
- Begin Date: 06/15/2020
- End Date: 06/30/2020
- Index/SubObject Code: [Dropdown]
- Service State: [Dropdown]
- Consumer County: [Dropdown]
- Geographic Description: [Dropdown]
- Provider Rate Type: [Dropdown]
- Service Code: [Dropdown]
- Service Description: [Dropdown]
- Unit Type: [Dropdown]
- Units Per: [Dropdown]
- Units of Measure: [Dropdown]
- Total No of Units: [Text]
- Provider ID: [Dropdown]
- Provider: [Dropdown]
- Account: [Dropdown]
- Tabular: [Dropdown]

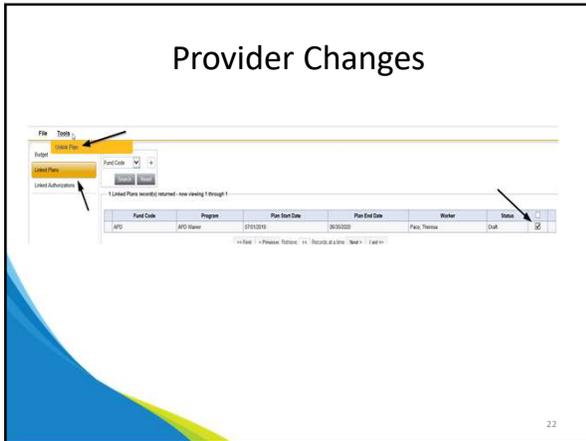
20

Provider Changes

- New Step – Must be completed to pass validation
 - Since the authorizations have PA numbers, in order to update the available budget, WSCs will need to unlink, then relink the plan to the budget
 - Navigate to the consumer’s budget tab and open the budget for the current fiscal year
 - Click on the Linked Plans subpage
 - Check the box of the plan, then Tools > Unlink Plan

21

Provider Changes



22

Provider Changes

- Still on the Linked Plans subpage, click File > Link to Plan



- Select the plan for the current fiscal year, then click on the carat at the end of the row, and Link

The screenshot shows the 'Linked Plans' table with a dropdown arrow on the 'Status' column. The table data is as follows:

Fiscal Code	Program	Plan Start Date	Plan End Date	Worker	Status
APD	APD Water	07/01/2019	06/30/2020	Paul Thomas	Out
APD	APD Water	07/01/2020	06/30/2021	Paul Thomas	Approved

23

Plan Validation

- The plan is now ready for validation
- Reminder – migrated plans previously bypassed validation.
 - Some plans will fail validation, even on a simple provider change because certain services require either State Office review or a two-tiered approval
 - Planned service status = Region or State Review AND Plan status = Approved

24

Plan Validation

- Simply follow the plan validation steps as outlined in the 5/4/2020 Budget and Cost Plan Training Mini-Manual
- Navigate back to Plan Information, and update the Plan Status to 'No Review Required'
- File > Save and Validate

25

25

Plan Validation

26

26

Plan Validation

- Click View Issues, and the Okay button to display the plan validation report

27

27

Plan Validation

- The plan validation report will detail the issues
- WSCs should remedy any issues they can
 - Correct living setting
 - Remove services that fail due to a consumer’s age
- When the only failure reasons are region or state review, the WSC will complete the steps to route appropriately

28

28

Plan Validation

- In this example one service requires two-tier approval and one service requires State Office review
- Remember, all migrated planned services have the status of “Region Review Approved”
- If the WSC gets a validation report indicating region review is needed, it means the plan needs to be in “Approved” status
 - **Only Region or State Office staff can place a plan in “Approved” status**

29

29

Plan Validation

Plan Validation Report

Consumer: Sylvia Galls Program: APD Waiver
 Case No: 10364 Plan Start Date: 7/1/19
 Division: APD Plan End Date: 6/30/20

Service	Proposed	Problem(s)
(4141) Personal Supports - Day	Units Per: 1.00 Units of Measure: Calendar Day Total Units: 386.0000 Total Cost: \$45,859.08	• This service requires State review due to the amount of the total service amount.
(4290) Supported Living Coaching	Units Per: 240.00 Units of Measure: Quarter Total Units: 963.0000 Total Cost: \$7,309.17	• This service always requires Regional review. <small>This one failed because Supported Living Coaching requires that planned service status = Region Review Approved, Region Review Pending, Approval of Region Review Denied AND the plan status = Approved.</small>

30

30

Plan Validation

NOTE: Since the last WSC classroom training for plans and planned services, APD iConnect has been configured with a regional pending plans queue

- Please review the manual for new steps

31

31

Plan Validation

- Route the plan to region or State Office as indicated by the Plan Validation report
 - Using the WSC Cost Plan Adjustment role and reverse the status on the plan (see slide 13)
 - If the plan needs to go to the region, update the worker on the plan to the region waiver liaison for the WSC
 - When routing a plan to State Office, there is no need to update the worker on the plan

32

32

Plan Validation

- Change the Plan status to “Pending” and select which review is needed by choosing either the appropriate region or State Office



33

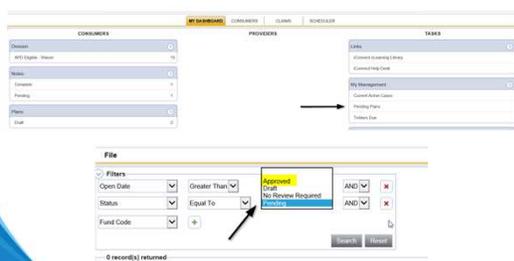
33

Plan Validation

- The region or State Office will review and if everything is approvable per the iBudget Rule and Handbook, they will update the worker back to the WSC and change the Plan status to “Approved” and validate the plan
- WSCs can monitor their Pending Plans queue on their My Dashboard
 - Adjust the filter to search for only Approved plans

34

Plan Validation



35

Plan Validation

12 Pending Plans record(s) returned - now viewing 1 through 12

Consumer	Fund Code	Program	Open Date	Close Date	Worker	Status	Region or State
Higgins, Matthew	APD	APD Worker	04/06/2020		Bob, Baska	Approved	Sanjour
Hugh, Brent	APD	APD Worker	04/22/2020		Janet, Gaskin	Approved	
Jarvis, William, III	APD	APD Worker	04/22/2020		Justin, Wilkins	Approved	
Leah, Lisa	APD	APD Worker	04/22/2020		John, Thomas	Approved	
Leah, Ally	APD	APD Worker	04/22/2020		Eric, Gaskin	Approved	
Palmer, James	APD	APD Worker	04/22/2020		Marion, Clayton	Approved	
Reese, Stan	APD	COO	04/22/2020		Stanley, Baska	Approved	
Reese, Thomas	APD	APD Worker	04/22/2020		Reggie, Gaskin	Approved	
Rosen, Alan	APD	APD Worker	04/22/2020		Harold, Potts	Approved	
Thomas, Nick	APD	APD Worker	04/22/2020		Mark, Williams	Approved	
Walt, Tom	APD	APD Worker	04/22/2020		Tom, Thomas	Approved	
Walt, Philip	APD	APD Worker	04/22/2020		Bob, Baska	Approved	

36

Plan Validation

- Once the plan is validated, the WSC can update the authorization
- Open the consumer's plan
- Navigate to the Planned Services subpage
- Check the box at the end of the row of the planned service(s) that have been modified
- File > Update Authorizations

37

Plan Validation



- Click "OK" on the message indicating the authorization was updated



38

Plan Validation

- Now click the checkbox for the new provider, then File > Create Authorizations



- Click "OK" on the message indicating the authorization was created



39

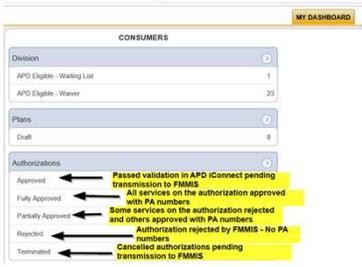
Authorizations

- The updated and created authorizations will transmit to FMMIS
- WSCs can monitor their My Dashboard for updated Authorizations
- The status of the authorization reflects where it is in the process of receiving a PA number from FMMIS

40

40

Authorizations



The screenshot shows a 'MY DASHBOARD' for 'CONSUMERS'. It includes a table with columns for 'Division', 'APD Eligible - Waiting List', 'APD Eligible - Waiver', 'Plans', and 'Authorizations'. The 'Authorizations' section is expanded to show a list of statuses with corresponding counts and descriptions:

Status	Description
Approved	Passed validation in APD iConnect pending transmission to FMMIS
Fully Approved	All services on the authorization approved with PA numbers
Partially Approved	Some services on the authorization rejected and others approved with PA numbers
Rejected	Authorization rejected by FMMIS - No PA numbers
Terminated	Cancelled authorizations pending transmission to FMMIS

41

41

Rejected Authorizations

- When one or all services on an authorization is rejected by FMMIS, the status of the authorization will either be Rejected (all services) or Partially Approved (at least one service is approved)
- WSCs can review authorizations to see the reason for the rejection

42

42

Rejected Authorizations

- From the Authorizations pane on My Dashboard, the WSC can open the rejected authorization
- Click on the Auth Service subpage, and then select the rejected service



43

Rejected Authorizations

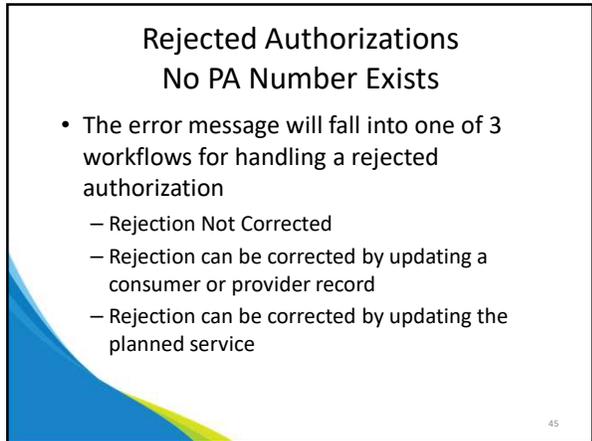
- In the AuthService screen, click on the Error Message subpage



44

Rejected Authorizations No PA Number Exists

- The error message will fall into one of 3 workflows for handling a rejected authorization
 - Rejection Not Corrected
 - Rejection can be corrected by updating a consumer or provider record
 - Rejection can be corrected by updating the planned service



45

Rejection Not Corrected

- The Rejection is not corrected when there is no PA number issued, and the authorization was sent to FMMIS in error
 - Example: consumer is deceased
- Using the WSC Cost Plan Adjustment role, the WSC will reverse the status of the plan
- Update the planned service
 - Total No of Units = 0
 - Do not change the Planned Service status
- Run Plan Validation
 - Send to region or state if needed

46

Rejection Not Corrected

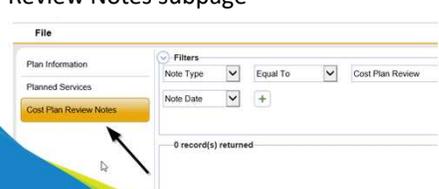
NOTE – Do NOT use Update Authorization on Planned Services file menu

- Rather, once validation has passed, WSC will send the plan to their regional waiver liaison via a Cost Plan Review Note, requesting the authorization be restored to match the planned service

47

Rejection Not Corrected

- Navigate to the consumer’s record and the Plans tab
- Open the plan, and navigate to the Cost Plan Review Notes subpage



48

Rejection Not Corrected

- Select File > Add Note
- Update the following fields
 - Program = Your WSC Agency/ Solo Provider
 - Cost Plan Review Note? = Yes
 - Note Type = Cost Plan Review
 - Note Subtype = Rejected Authorization
 - Description = Request to Manually Update Authorization
 - Note = Describe the request
 - Status = Pending
 - Recipient = Region Waiver Liaison

49

Rejection Not Corrected

50

Rejection Not Corrected

- Region Waiver Workstream Worker (waiver liaison) will navigate to the Authorizations tab of the consumer's record, opens the correct authorization and updates the following fields
 - Max Units = 0
 - Amount Approved updates to \$0.00 automatically

51

Cancelling Planned Services

Consumer County *	HILLSBOROUGH
Geographic Differential *	Non-Geographic
Provider Plan Type *	Supple
Service Code *	140513 UC PRO
Service Description	(4811) Behavior Analysis - Level 2
Unit Type	15 mins
Units Per *	15.00
Units of Measure *	Quarter
Total No of Units	0.0000
Provider ID *	18190
Provider	14042390 JOSEPH A
Rate *	\$116.68
Max Amount *	\$0.00
Amount Requested	3752447 30.31241M as designated by the month
Authorization Notes/Comments *	TERMINATED
Contract Number	
Non-Taxable	<input type="checkbox"/>
Planned Service Status	Terminated

64

Cancelling Planned Services

- Run plan validation and route to region/state office if indicated on the validation report
 - Follow the steps for the Pending Plans queue
 - Region will update the Planned Service Status to Region Review Approved and will change the Plan status to Approved
- The validated plan will be routed back to the WSC who will update the Authorization

65

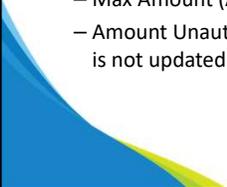
Cancelling Planned Services

- If FMMIS approves the cancellation
 - AuthService EDI Status and Auth Status are updated to Terminated
 - FMMIS changes Max Amount (Amount Approved) to \$0.00
 - Amount Unauthorized on the consumer's budget is updated

66

Cancelling Planned Services

- If FMMIS rejects the cancellation
 - AuthService EDI Status and Auth Status are updated to Rejected
 - Cancelled = No
 - Max Amount (Amount Approved) is not changed
 - Amount Unauthorized on the consumer’s budget is not updated



67

67

Rejected Cancellations

- FMMIS will reject cancellations for one of three reasons
 - Paid claims exist
 - Invalid Begin Date
 - Cancellation sent in error



68

68

Rejected Cancellations

- Paid claims exist
 - Was the service provided and are the claims valid?
 - Yes – authorization should not have been cancelled
 - The planned service should have been ended and units reduced to cover the services delivered/billed
 - No – provider submitted claim in error
 - WSC contacts provider to void the claim
 - WSC updates auth after claim is voided



69

69

Rejected Cancellations

- Invalid Begin Date
 - WSC updates the planned service begin date
 - No change to the Planned Service Status
 - Re-run plan validation
 - Because the begin date was changed, this plan will require region review
 - Use Pending Plans Queue to route to region/state if needed
 - WSC updates auth after plan passes validation



70

70

Rejected Cancellations

- Authorization Cancelled in Error
 - WSC updates the planned service back to original state
 - Total No of Units = original #
 - Max Amount will update automatically
 - Comments = Termination sent in error
 - Planned Service Status = Approved
 - Do not change if status = Region Review Approved



71

71

Rejected Cancellations

- Authorization Cancelled in Error
 - Re-run validation / use Pending Plans Queue if needed to route to region/state
 - Once plan passes validation and is approved, WSC will send request to region waiver liaison via Cost Plan Review note requesting they manually update the Auth Service (see slides)



72

72

Rejected Cancellations

- Select File > Add Note
- Update the following fields
 - Program = Your WSC Agency/ Solo Provider
 - Cost Plan Review Note? = Yes
 - Note Type = Cost Plan Review
 - Note Subtype = Rejected Authorization
 - Description = Request to Manually Update Authorization
 - Note = Describe the request
 - Status = Pending
 - Recipient = Region Waiver Liaison

73

73

Rejected Cancellations

74

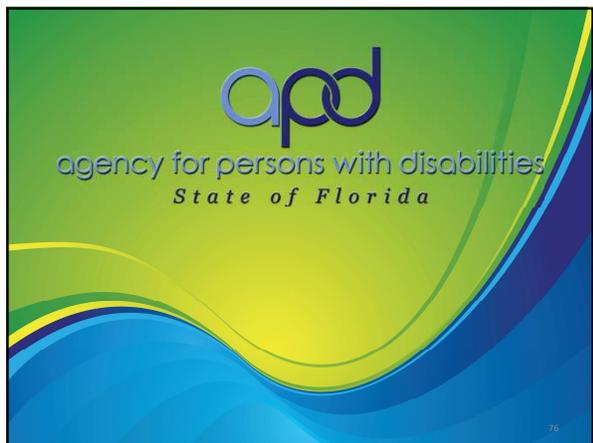
74

Rejected Cancellations

- Authorization Cancelled in Error
 - Region updates following fields on AuthService
 - Total No of Units = original approved # units
 - Should match updated planned service
 - Amount Approved – no changes
 - AuthServiceStatus = Restored
 - AuthServiceEDISStatus = updates to Approved when record is saved
 - WSC monitors My Dashboard for Approved authorizations

75

75



76
