State of Florida
Agency for Persons with Disabilities

Harmony for APD iConnect
Supported Living Training Manual Version 2.2
2/24/2022

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Introduction

Supported living is an opportunity for adults with developmental disabilities to choose where, how and with whom they live. People receive personalized supports needed to maintain their own private home. Through supported living, individuals, even people with severe disabilities can receive supports to live in their own homes. Candidates for Supported Living are adults 18 or older, who have been determined eligible for Developmental Disabilities services, wants to live in his/her own home, and needs ongoing supports & services to live there.

The Consumer has expressed an interest to move into their own home. There are 3 possible workflows:

1. If the Consumer is on the Waiting List, notify the Waiting List Workstream Lead and proceed with the Non-Waiver process. See Chapter 12 | IFS of the Case Management Training manual for more details.

2. If the Consumer is on the Waiver, they will inform the WSC who will complete several steps to assist the consumer in achieving their goal of living in their own home with the assistance of a Supported Living Coach. The WSC and Supported Living Coach complete the following sections:
    a. Person-Centered Support Plan Updates
    b. Request a New Algorithm
    c. Supported Living Coach Selection Process
    d. Update the Cost Plan
    e. Complete the Assignment of Duties and Responsibilities
    f. WSC Quarterly Meeting
    g. Supported Living Tasks

3. If the Consumer is on the Waiver and the consumer will NOT have a Supported Living Coach, the WSC completes the following sections:
    a. Supported Living Request Note
    b. Person-Centered Support Plan Updates
    c. Request a New Algorithm
    d. Update the Cost Plan
    e. Complete the Assignment of Duties and Responsibilities
    f. WSC Quarterly Meeting

g. Supported Living Tasks

Waiver Support Coordinator Tasks

The WSC will complete several steps to assist the consumer in achieving their goal of living in their own home.

1. If a Supported Living Coach is not needed, create the Supported Living Request Note to begin the process.

2. Update the Person-Centered Support Plan.

3. Request a new algorithm (EZ iBudget Calculator) based on a change in living setting.

4. Identify the services and supports that the consumer will need.
    - May include Personal Supports, but not required
    - May include Supported Living Coaching, but not required

5. Complete the Supported Living Coach selection process when applicable.

6. Update the cost plan by adding planned services for services identified as needed and obtain authorizations.

7. Follow the SAN process if necessary.

8. Review Initial Housing Surveys completed by the Supported Living Coach when applicable.

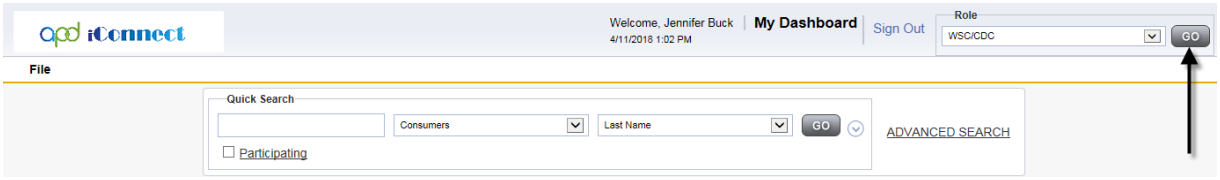
9. Complete the Assignment of Duties and Responsibilities word merge.

10. Complete the quarterly meeting.

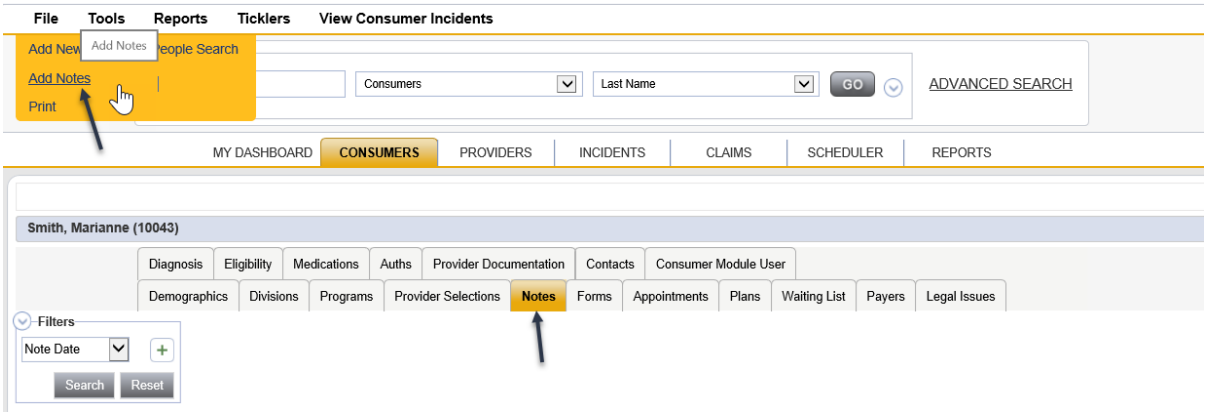
Supported Living Request Note

If a Supported Living Coach is not needed, the Supported Living Request Note is created to begin the process in APD iConnect.

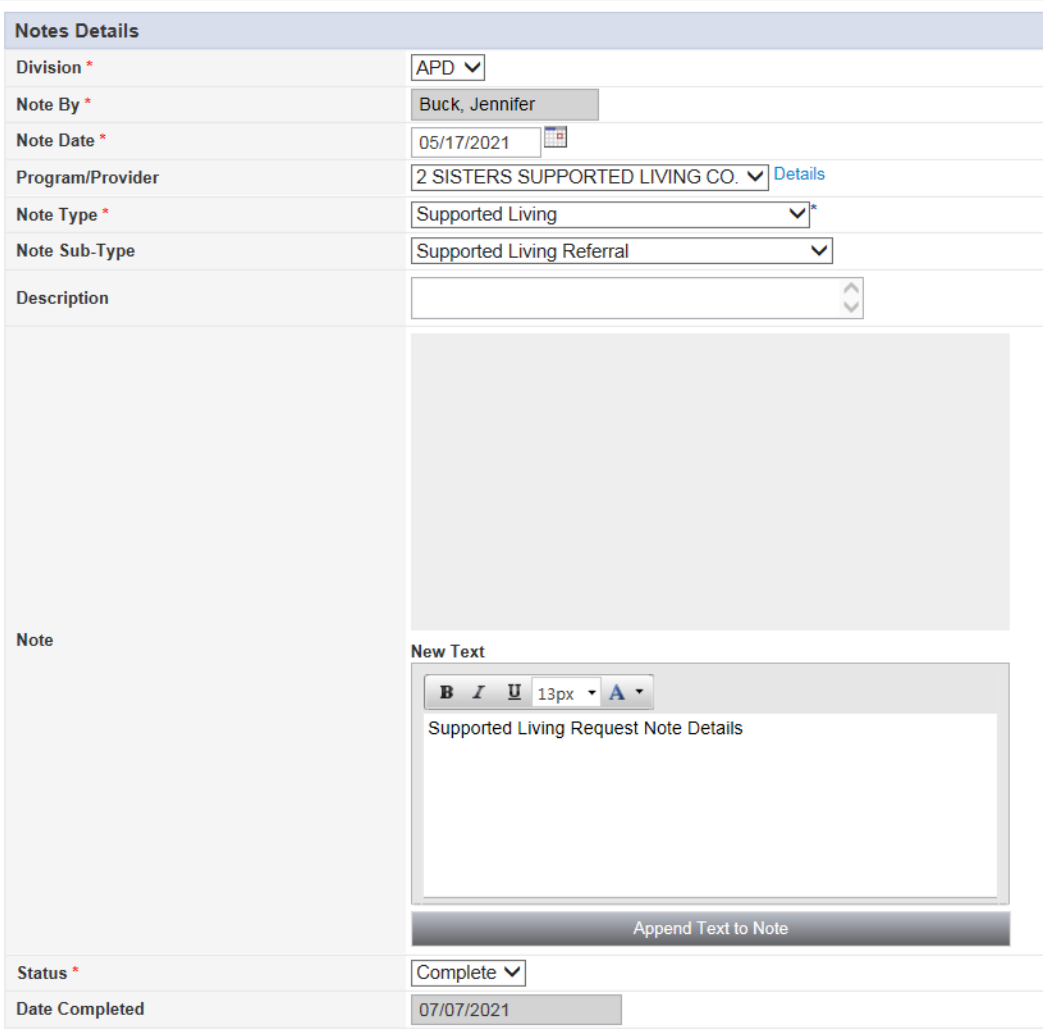
1. To begin, log into APD iConnect and set Role = WSC/CDC. Click **Go.**



2. To add a Note, navigate to the Consumer's record and click **Notes > File > Add Notes.**



3. In the new Note record, update the following fields:
    a. Division = defaults to APD
    b. Note By = defaults to self
    c. Note Date = defaults to today
    d. Program/Provider = select the WSC's agency
    e. Note Type = Supported Living
    f. Note Subtype = Supported Living Referral
    g. Description = optional
    h. Note = brief description of the request
    i. Status = Complete
    j. Recipient = None

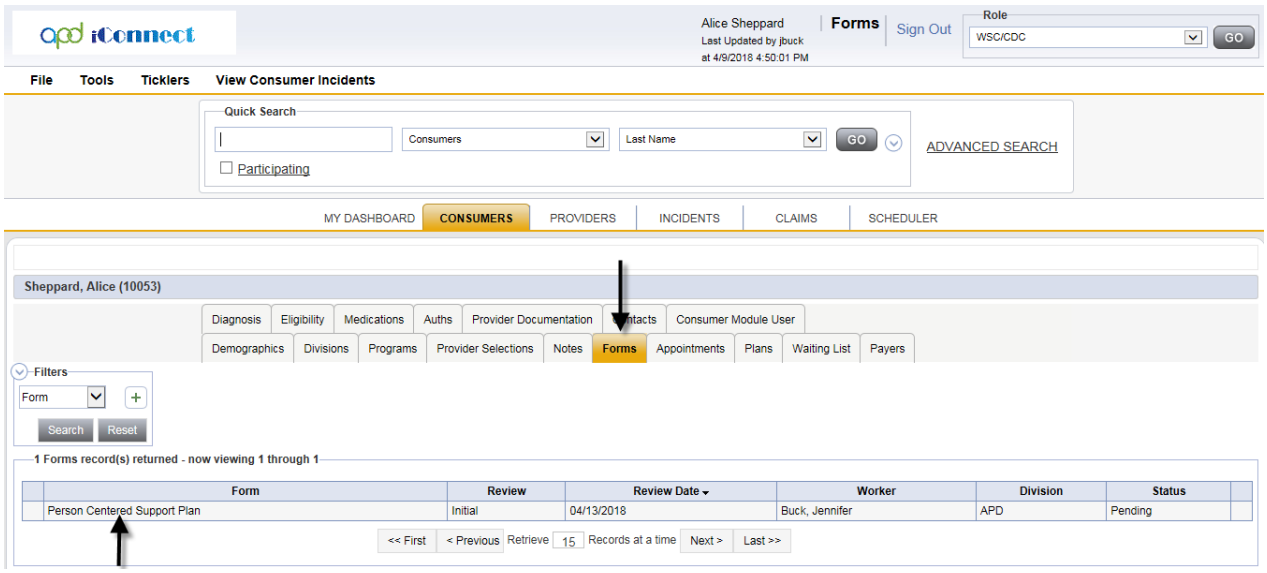


4. When complete, click **File** > **Save and Close Notes**.

5. This note will trigger several ticklers that will be completed later in the workflow. Proceed to Person-Centered Support Plan Updates.

Person-Centered Support Plan Updates

1. Navigate to the Consumer's record and click **Forms**. A list of all Consumer forms is displayed. Locate and click the existing **Person-Centered Support Plan** to open the form.



2. In the Person-Centered Support Plan (PCSP) form, update the following section as applicable:
   a. In the top section of the form, answer the question Supported Living Need = Yes
   b. Update the other appropriate areas of the PCSP
   c. Save with status = Open.

3. When finished, click **File > Save and Close Forms.**

4. Answering Supported Living Need = Yes on this form will trigger a tickler to request a new algorithm. Proceed to Request a New Algorithm.

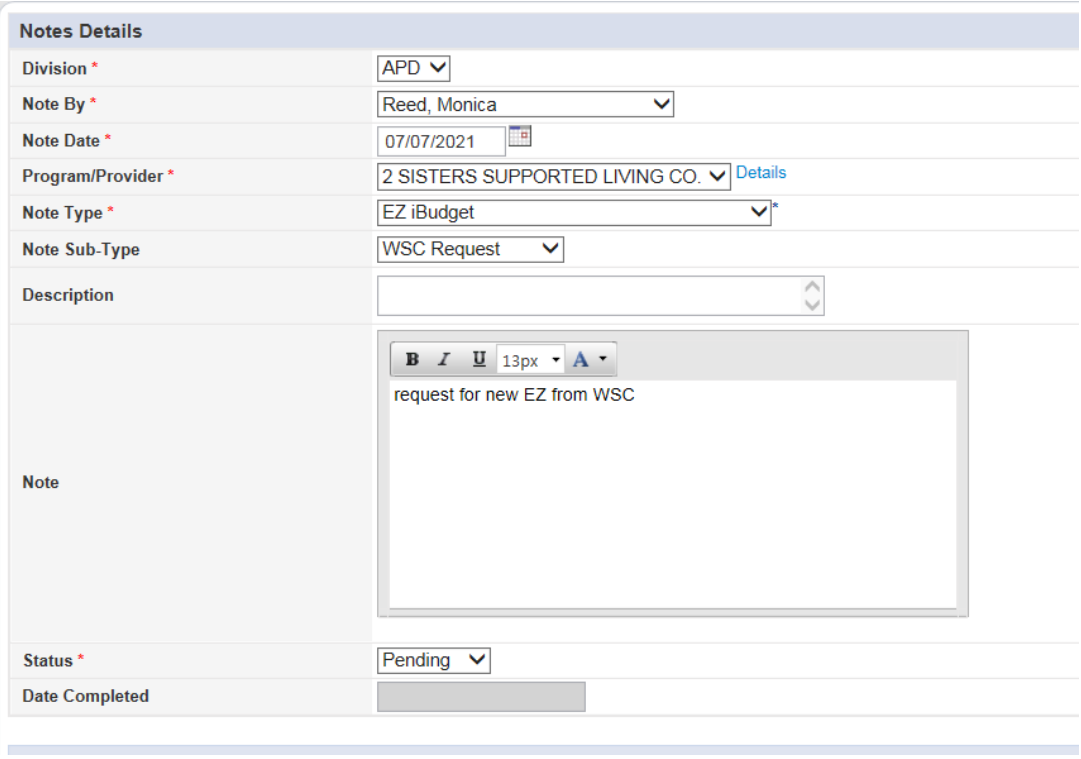
Request a New Algorithm

When the WSC updates the PCSP and changes the Supported Living Need question to Yes, a Workflow Wizard will trigger a tickler to Request a New Algorithm. The WSC will add a note, send it to the Waiver Liaison. The Waiver Liaison will create a new EZ iBudget Calculator form and attach it to a Note and send it to the Waiver Lead. The Waiver Lead will update the budget and reply to the same note originated by the WSC to inform him/her that the process is complete.

1. Navigate to the Consumer's record and select the **Notes** tab.

2. From the **File** menu, select **Add Note**.

3. The Note details page displays. Update the following fields:
    a. Division = defaults to APD
    b. Note By = defaults to self
    c. Note Date = defaults to today
    d. Program/Provider = select the WSC's agency
    e. Note Type = EZ iBudget
    f. Note Subtype = WSC Request
    g. Description = New EZ For Supported Living
    h. Note = brief description of the request
    i. Status = Pending
    j. Recipient = Waiver Liaison (Region Waiver Workstream Worker)

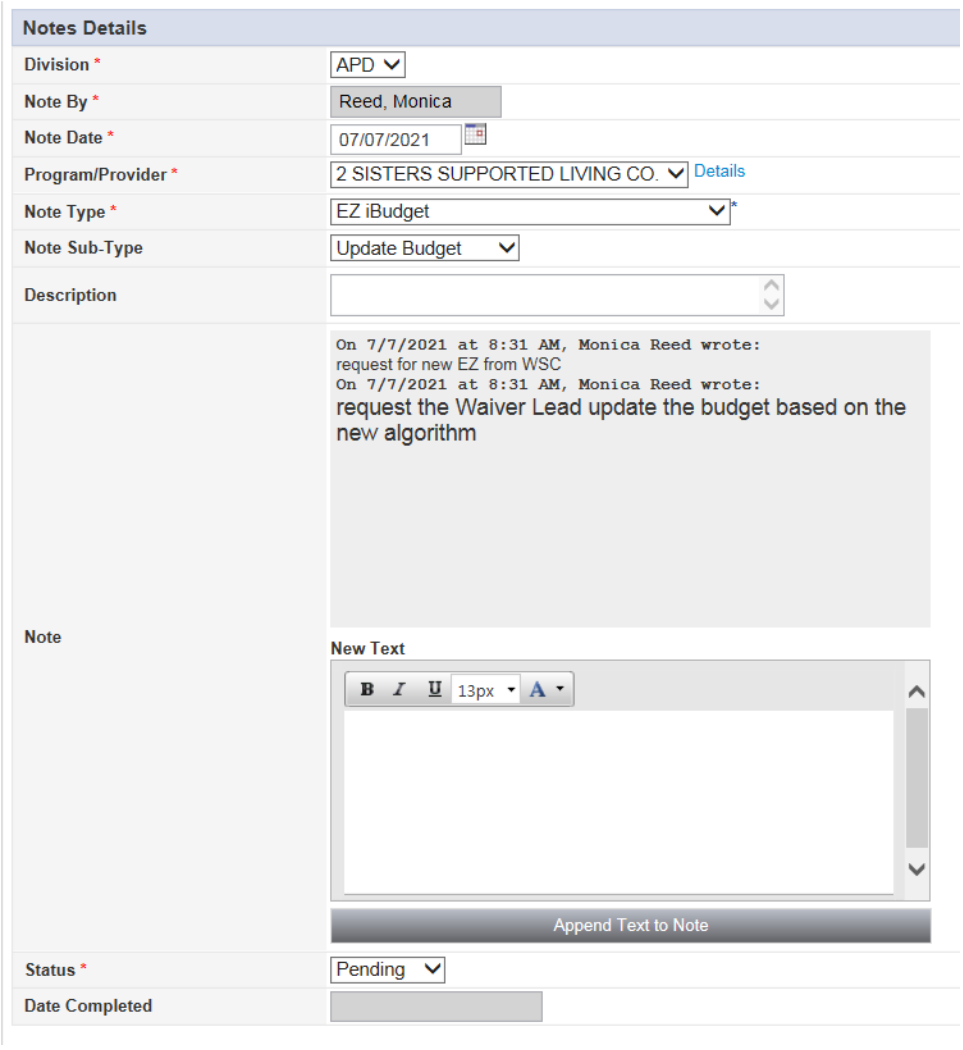


4. From the **File** menu, select **Save and Close Note**.

5. The Waiver Liaison will monitor **My Dashboard** for incoming notes.

6. The Waiver Liaison will review the EZ iBudget note and create a new **EZ iBudget Calculator Form**.

7. When complete, the Waiver Liaison will update the EZ iBudget note originated by the WSC by updating the following fields:
    a. Note SubType = Change to Update Budget
    b. Note = Append text to note to request the Waiver Lead update the budget based on the new algorithm
    c. Status = remains Pending
    d. Attachment = attach the printable EZ to the note
    e. Note Recipient = Waiver Workstream Lead

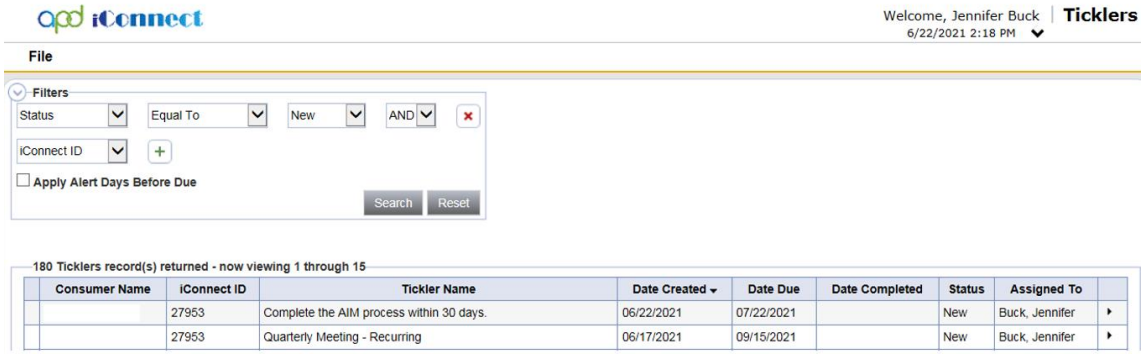


8. The Region Waiver Workstream Lead will monitor **My Dashboard** for incoming notes.

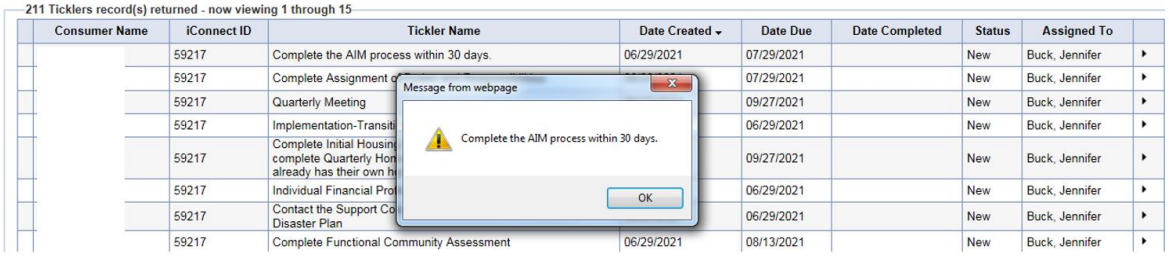
9. The Region Waiver Workstream Lead will review the EZ iBudget note and proceed with the AIM Process and send out the appropriate notices.

10. Two workflows begin when the EZ iBudget Note with Sub-Type = Update Budget is saved:
    a. A Workflow Wizard triggers a tickler for the WSC to complete the AIM process. Proceed to step 11.
    b. A Workflow Wizard triggers a tickler for the Waiver Workstream Lead to check the status of the AIM in 30 days, then proceed with updating the budget. Skip to step 14.

11. The WSC will monitor My Dashboard for incoming ticklers.

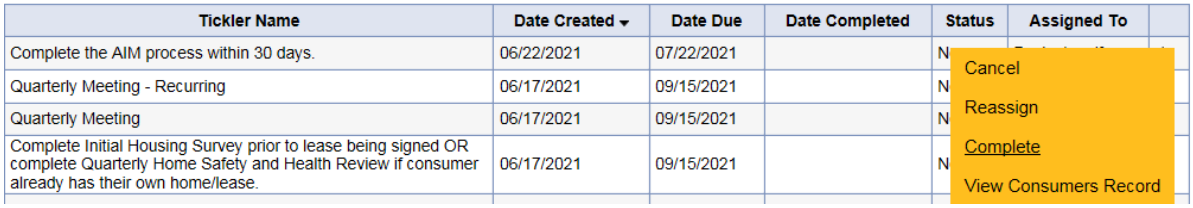


12. Select the “Complete the AIM process within 30 days tickler.” The following message displays: “Complete the AIM process within 30 days.”



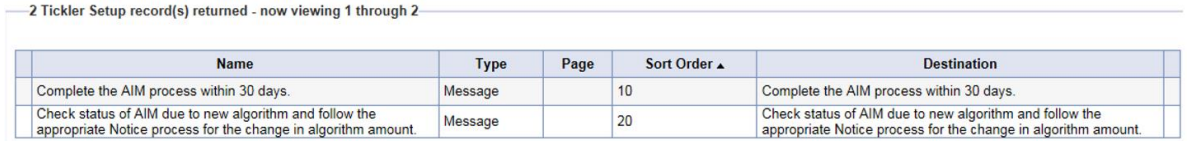
13. The WSC will complete the AIM process within 30 days. See the Case Management Training manual for more details on the AIM

process. When that is done, the tickler can be marked as complete from the tickler flyout menu. Skip to step 18.



Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Complete the AIM process within 30 days.	06/22/2021	07/22/2021		N	
Quarterly Meeting - Recurring	06/17/2021	09/15/2021		N	
Quarterly Meeting	06/17/2021	09/15/2021		N	
Complete Initial Housing Survey prior to lease being signed OR complete Quarterly Home Safety and Health Review if consumer already has their own home/lease.	06/17/2021	09/15/2021		N	

14. When the EZ iBudget note is saved with a Sub-Type equal to Update Budget, a Workflow Wizard triggers a tickler for the Region Waiver Workstream Lead (Secondary Worker) to "Check status of AIM due to a new algorithm and follow the appropriate Notice process for the change in algorithm amount."



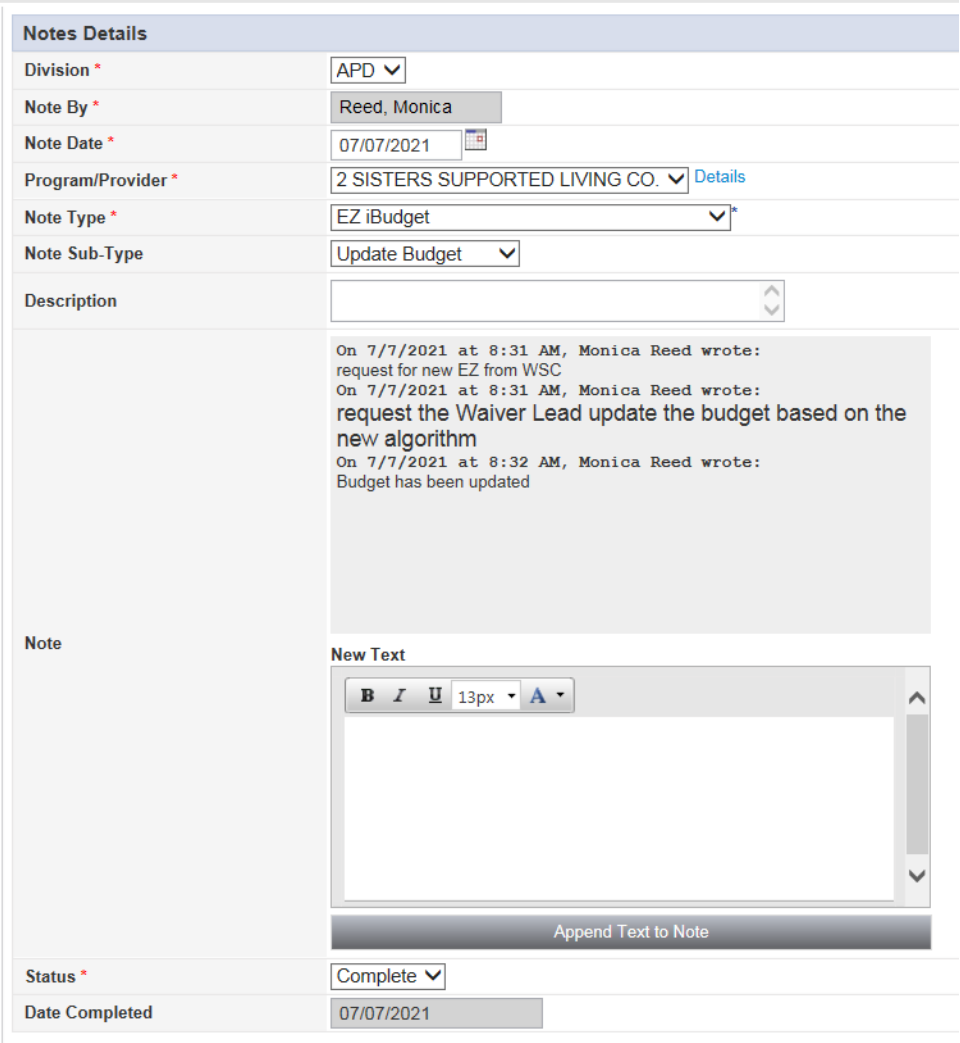
2 Tickler Setup record(s) returned - now viewing 1 through 2

Name	Type	Page	Sort Order	Destination
Complete the AIM process within 30 days.	Message		10	Complete the AIM process within 30 days.
Check status of AIM due to new algorithm and follow the appropriate Notice process for the change in algorithm amount.	Message		20	Check status of AIM due to new algorithm and follow the appropriate Notice process for the change in algorithm amount.

15. The Region Waiver Workstream Lead will monitor My Dashboard for incoming ticklers and confirm the WSC has completed the AIM. Then the Lead/Budget Entry Staff can proceed with updating the budget.

16. Use the Budget Entry Staff role to update budget (add transaction) if indicated by the new EZ. See the Case Management Training Manual for more details on adding budget transaction records in APD iConnect.

17. When complete, the Region Waiver Workstream lead will update the EZ iBudget note sent by the Waiver Liaison in Step 7, by updating the following fields:
    a. Note = Append text to note advising that budget has been updated
    b. Status = Complete
    c. Note Recipient = WSC



18. The WSC will monitor **My Dashboard** for incoming notes.

19. The WSC will review the note notifying him/her that the budget has been updated. Once the provider search and referral process is complete, the WSC proceeds with updating the cost plan.

Supported Living Coach Selection Process

While the WSC is waiting for the new algorithm, he/she initiates the Supported Living Coach referral process outside of APD iConnect. The WSC schedules interviews with SLC providers based on the consumer's choice. The WSC will document each interview as a note in APD iConnect. Once the interviews are completed and the

Consumer chooses as provider, the WSC will give the provider access to the Consumer's record by adding a Provider Selection record in APD iConnect.

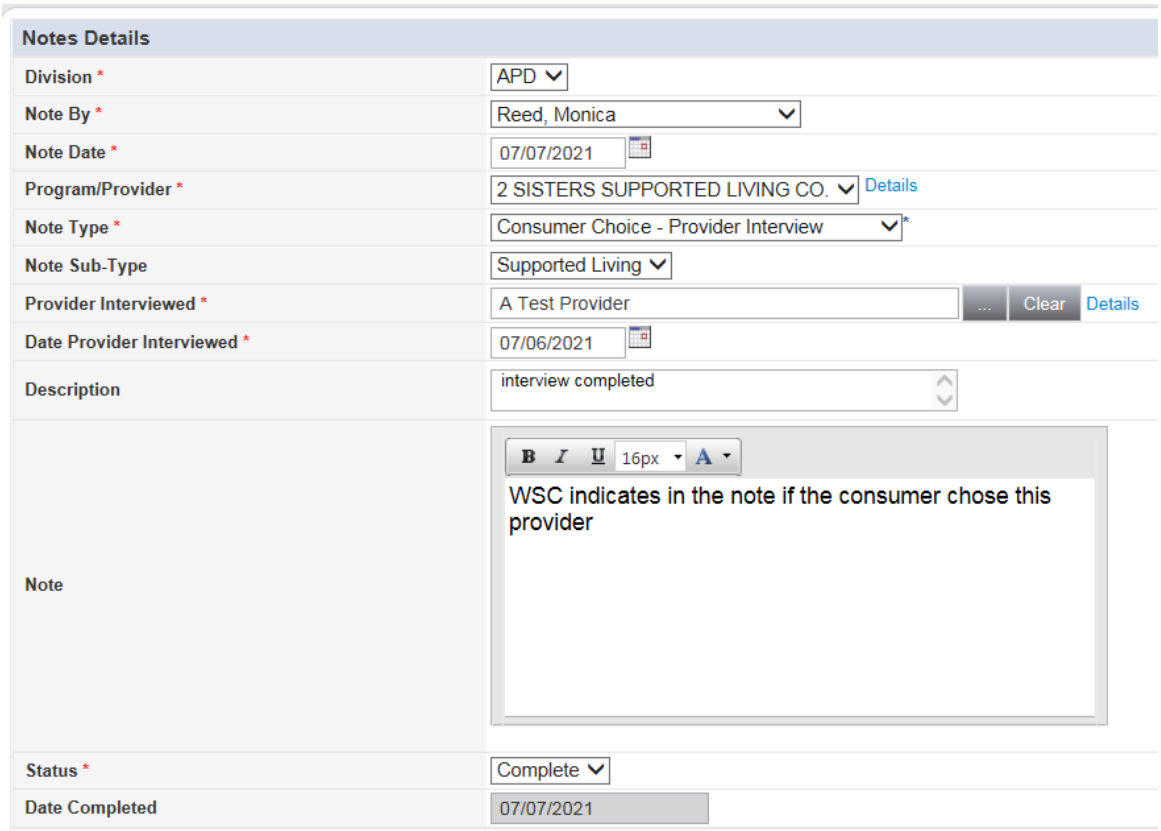
The WSC can skip this section for Consumers who will not have a Supported Living Coach. Proceed to the Update the Cost Plan section.

1. The WSC will create a note in APD iConnect after each provider interview. One note must be created for each interview.

2. Navigate to the Consumer's record and select the Notes tab.

3. From the **File** menu, select **Add Notes**.

4. The Note Details page displays. Update the following fields:
   a. Division = defaults to APD
   b. Note By = defaults to self
   c. Note Date = defaults to today
   d. Program/Provider = select the WSC's agency
   e. Description = optional
   f. Note Type = Consumer Choice – Provider Interview
   g. Sub-Type = Supported Living
   h. Provider Interviewed = Select Provider from dropdown
   i. Date Provider Interviewed = Select the date the interview occurred
   j. Note = WSC indicates in the note if the consumer chose this provider
   k. Status = Complete
   l. Recipient = None



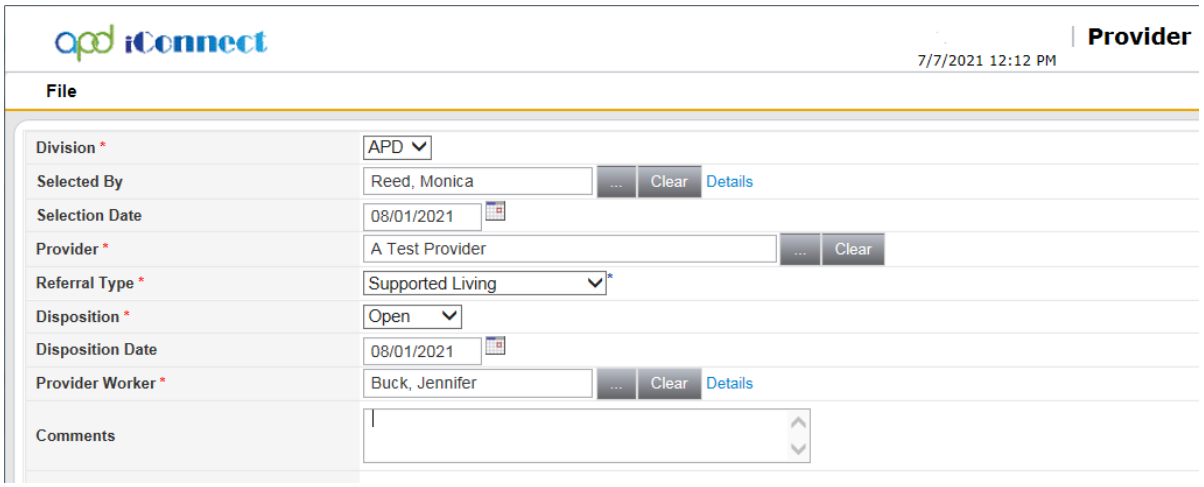
5. From the **File** menu, select **Save and Close Notes**.

6. The WSC will give the Supported Living Coach access to the Consumer's record in APD iConnect by adding a provider selection record.

7. Navigate to the **Provider Selections** tab of the Consumer record.

8. From the **File** menu, select **Add Provider**. The Provider Details page displays. Update the following fields:
   a. Provider = Supported Living Coach
   b. Disposition = Open
   c. Disposition Date = defaults today but is editable if needed.
   d. Referral Type = Supported Living
   e. Primary Worker = Supported Living Coach

Supported Living

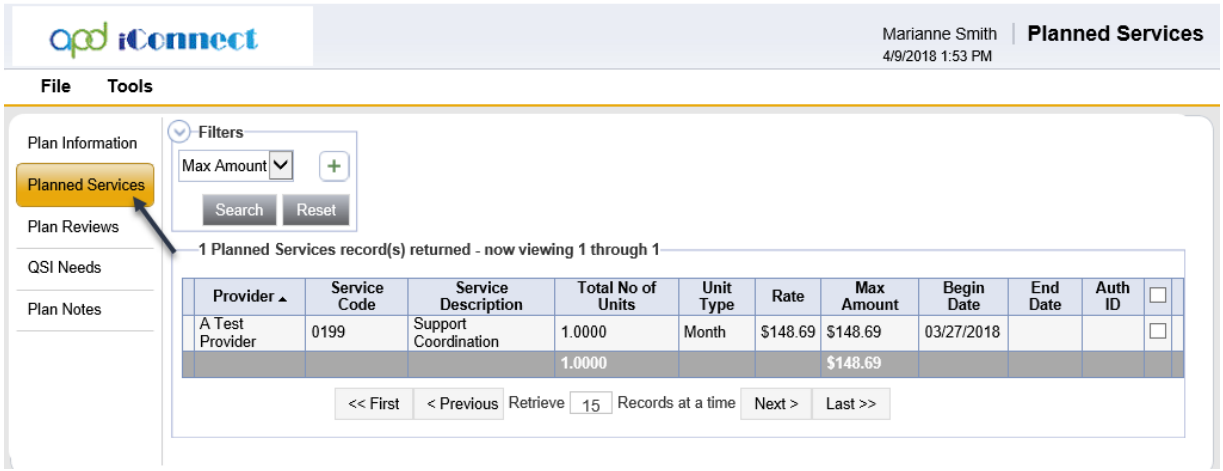


9. When finished, click **File** > **Save and Close Provider.**

Update the Cost Plan

Once the provider is known, the AIM process complete and the budget updated, the cost plan can be updated. The WSC will add the Supported Living Coaching and/or Personal Supports services to the Cost Plan when there is no Supported Living Coach.

1. In the Consumer's Plan List View grid, open the relevant Plan > click on **Planned Services** subpage



2. Click **File** > **Add Planned Service**.

3. A new Planned Service record opens. Follow the Cost Plan process to add the necessary planned services, validate, and create authorizations. If the budget is insufficient for the requested services, follow the SAN process.

Complete Assignment of Duties and Responsibilities

The WSC will complete the Assignment of Duties and Responsibilities word merge, where the primary and secondary responsible parties are selected. The WSC will complete this whether there is a Supported Living Coach or not. The word merge is printed, filled out by the WSC, and signed by all parties. The signed version will be scanned and attached to a Note in APD iConnect. Finally, a copy should be kept in the consumer's home for quick reference.

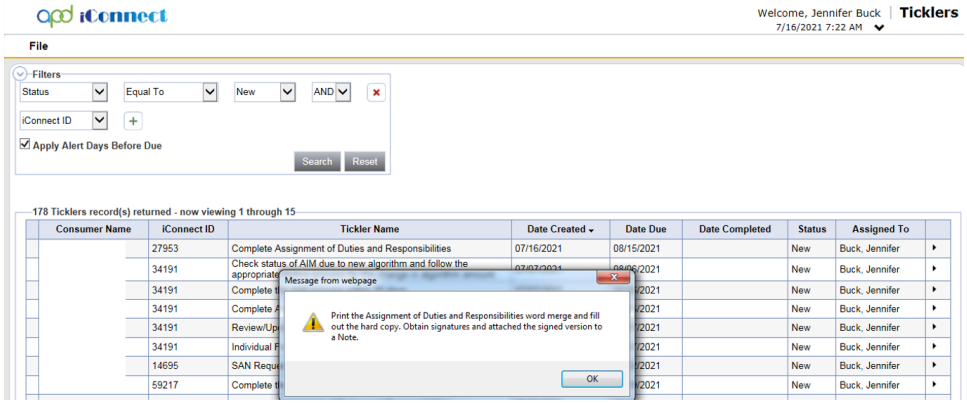
The WSC will be reminded to complete these tasks when the WSC creates the Supported Living Request note with status = Complete

OR

When the Provider Selection record is saved with Referral Type = Supported Living.

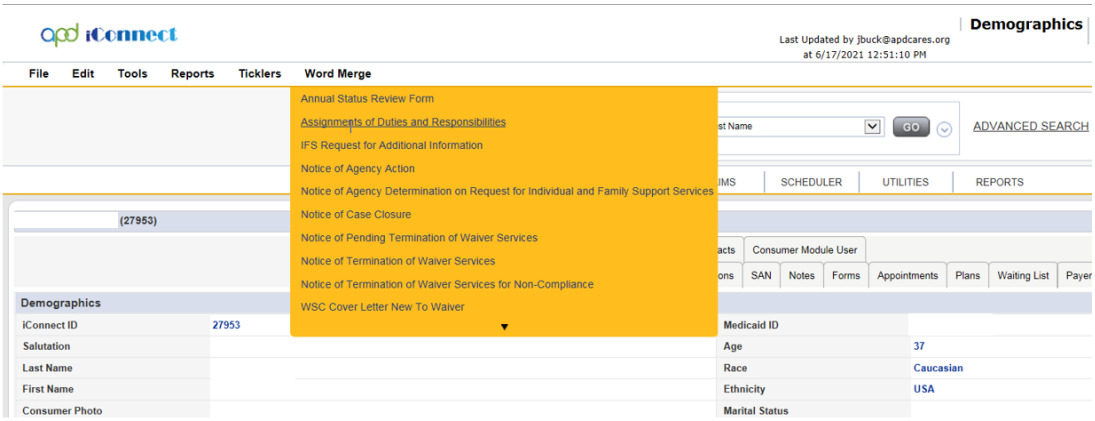
Both workflows trigger the same tickler to Complete Assignment of Duties and Responsibilities.

1. Select the **Complete Assignment of Duties and Responsibilities tickler** to open it. A message to print the Assignment of Duties and Responsibilities word merge, fill out the hard copy and obtain signatures is displayed.

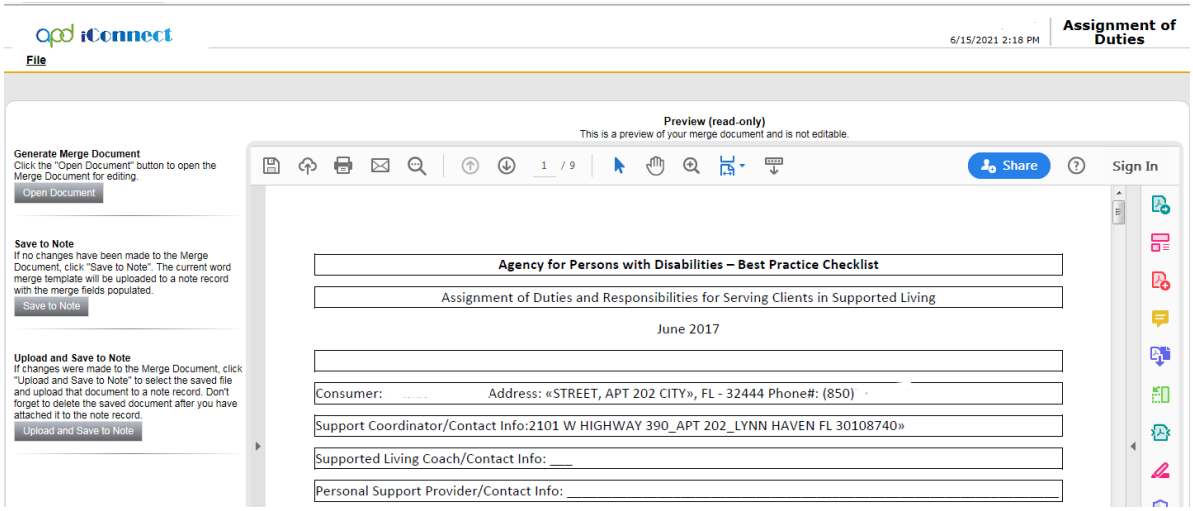


2. This tickler is displayed right away but the WSC has 30 days to complete it. The WSC will manually mark this tickler as complete once the form is done.

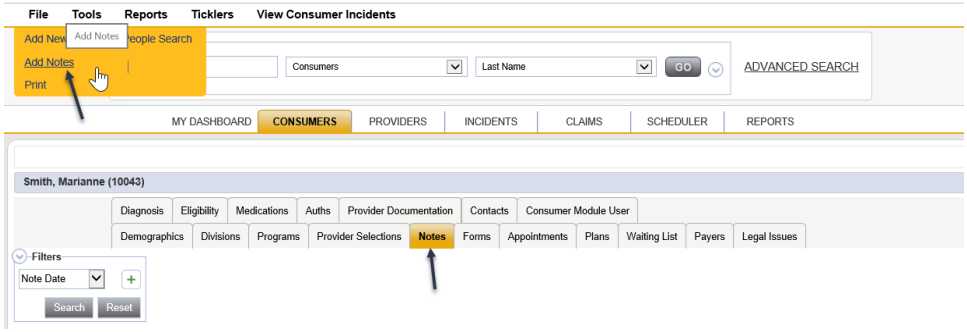
3. Navigate to the Demographics tab, from the **Word Merge** menu, select **Assignment of Duties and Responsibilities**.



4. The word merge displays in a new window. Print the form and fill it out.

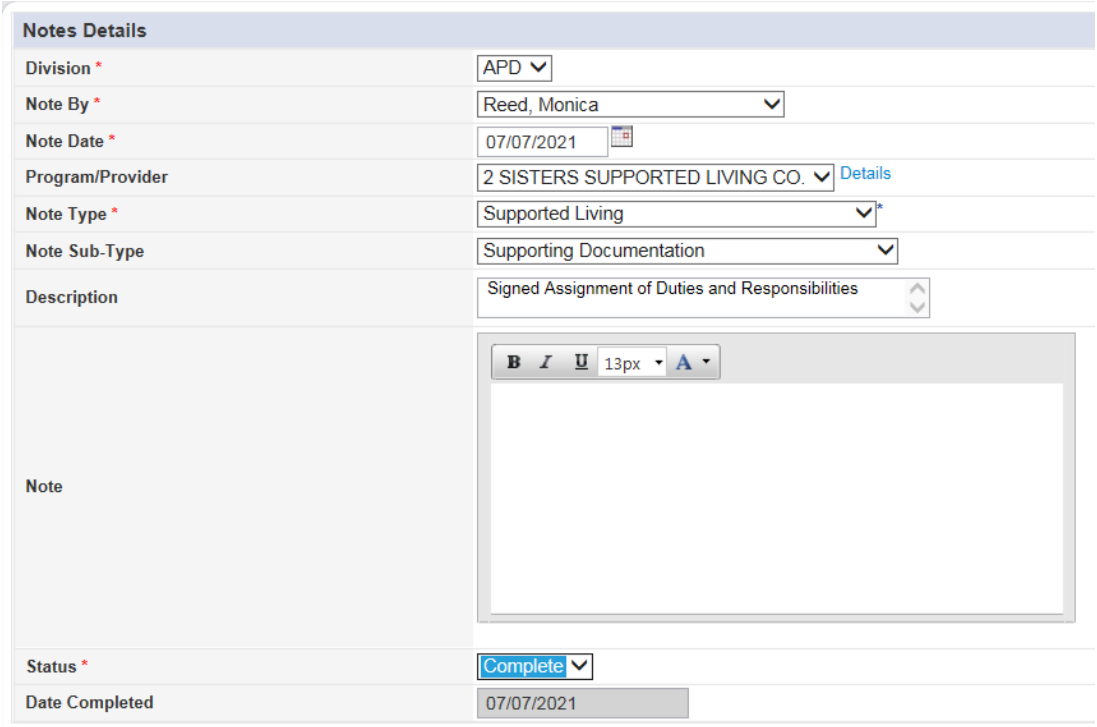


5. After the signatures have been obtained, scan a copy and attach it to a note. Navigate to the Consumer's record, click on the **Notes** tab > **File** > **Add Note**.



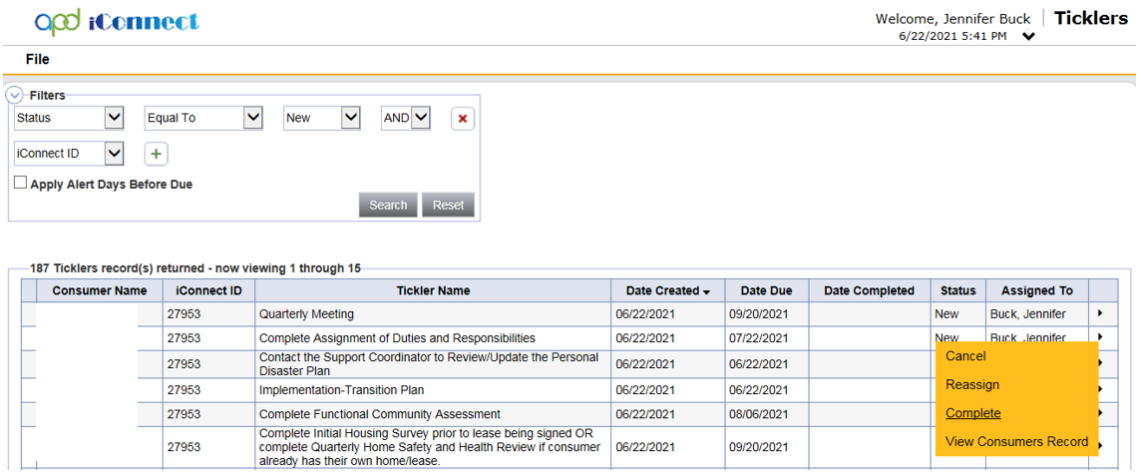
6. In the new Note record, update the following fields:
   a. Division = defaults to APD

b. Note By = defaults to self
c. Note Date = defaults to today
d. Program/Provider = select the WSC's agency
e. Note Type = Supported Living
f. Note Subtype = Supporting Documentation
g. Description = Signed Assignment of Duties and Responsibilities
h. Note = optional
i. Status = Complete
j. Recipient = None



7. When complete, click **File** > **Save and Close Notes**.

8. The Complete the Assignment of Duties and Responsibilities can be marked as complete. From the tickler **flyout menu**, select **Complete**.



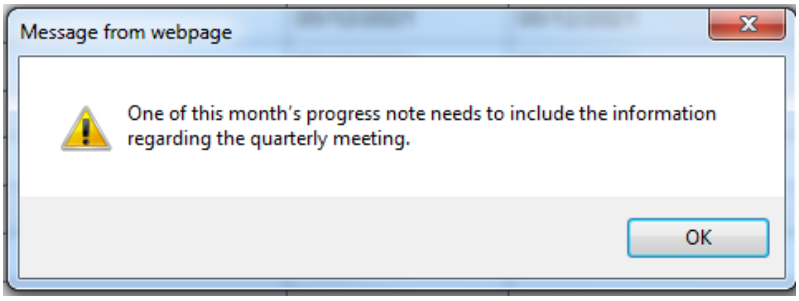
WSC Quarterly Meeting

1. When the Provider Selection record is saved with Referral Type = Supported Living or when the WSC creates the Supported Living Request note a Workflow Wizard triggers tickler assigned to the Waiver Support Coordinator:
    a. Quarterly Meeting – due in 90 days

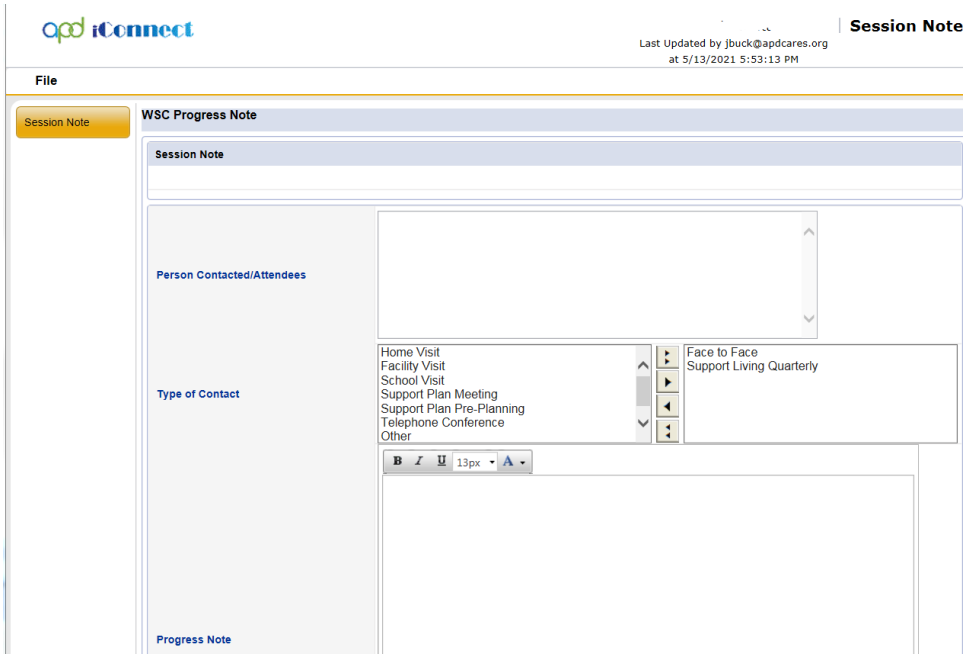
2. The WSC will monitor My Dashboard for assigned Ticklers.

3. From the Tickler queue, select the **Quarterly Meeting tickler** to open it. A message displays:

   One of this month's progress note needs to include the information regarding the quarterly meeting.



4. The WSC will add the Provider Documentation record and create the Session Note (WSC Progress Note.) In the Type of Contact section, the WSC will select Support Living Quarterly.



5. Once the WSC completes that progress note, he/she can mark this tickler as complete.

6. This tickler will trigger again for the WSC in 90 days from when the last WSC Progress Note with Type of Contact = Support Living Quarterly was saved.

Supported Living Tasks

1. When the WSC creates the Supported Living Request note with status = Complete, a Workflow Wizard triggers several ticklers for the WSC.

   OR

2. When the Provider Selection record is saved with Referral Type = Supported Living a Workflow Wizard triggers several ticklers for the Supported Living Coach.

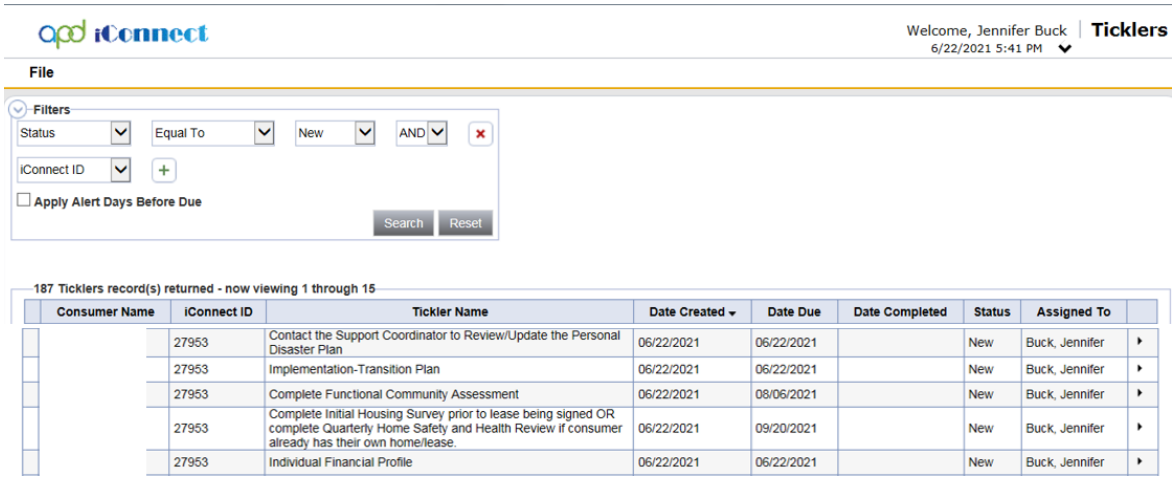
3. These Supported Living tasks begin once the authorization is obtained and include the following:
   a. Implementation-Transition Plan. Completed by the Supported Living Coach only.
   b. Individual Financial Profile
   c. Create or Review Personal Disaster Plan

d. Complete Functional Community Assessment. The Functional Community Assessment is due within 45 days only if the individual already lives in a supported living setting. If the individual is transitioning into a supported living setting the FCA is due prior to the move, which must occur within 90 days. The provider will keep the tickler on his/her dashboard until the form is completed, whether in 45 days or 90 days

e. Complete the Initial Housing Survey prior to lease being signed OR complete Quarterly Home, Safety and Health Review if consumer already has their own home/lease. Tickler would land on assessment list view and user picks which form to complete.

Remember!

*The "Quarterly Home, Safety and Health Review" form's name has been changed to "**APD Health and Safety Checklist**." When completing the tickler, please select APD Health and Safety Checklist from the Form List Dropdown menu.*



Implementation-Transition Plan

This tickler is completed by the Supported Living Coach only. The WSC should skip this section and proceed to the Individual Financial Profile.

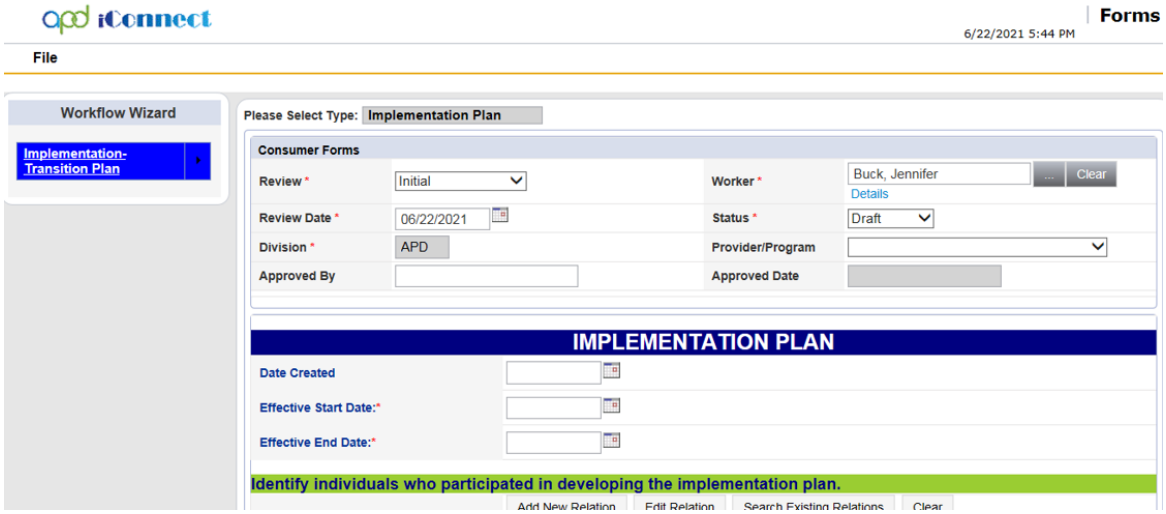
1. Select the **Implementation-Transition Plan tickler** to open it. The Implementation Plan screen design is displayed.

NOTE

A transition plan is an implementation plan when the individual is moving out of the family home or group home

2. In the header, update the following fields:
    a. Provider/Program = Supported Living Provider
    b. Status = Open. The stats will be kept as Open so updates can be made on the same version all year long. It will be changed to complete at the end of the year.

3. Answer the questions in the form.



4. Click **File** > **Save Form**.

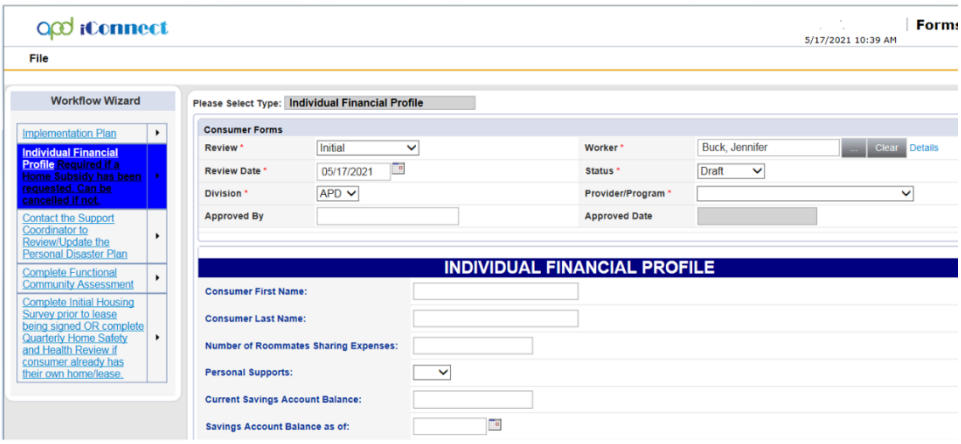
    NOTE: the tickler will be marked as complete after the first save of the form.

5. At the end of the year, the status of the form will be changed to Complete.

Individual Financial Profile

1. The Supported Living Coach or WSC will select the **Individual Financial Profile tickler** to open it. The Individual Financial Profile screen design is displayed.
    a. If a Home Subsidy has been requested, this form is required and must be signed by the consumer.
    b. If the consumer refuses to complete the IFP, and an In-Home Subsidy is not being requested, the Supported

Living Coach or WSC will fill out what they know on the IFP form and add a Note.



2. To fill out the Individual Financial Profile form, in the header, update the following fields:
    a. Provider/Program = Supported Living Provider
    b. Status = Complete, meaning it's ready to submit or and In-Home Subsidy is not being requested

3. Answer the questions in the form. When an In-Home Subsidy is not being requested, answer what you can, then mark the form as Complete.

4. Click **File** > **Save Form**. Save the form in Draft or Pending status until all applicable fields are completed.

NOTE

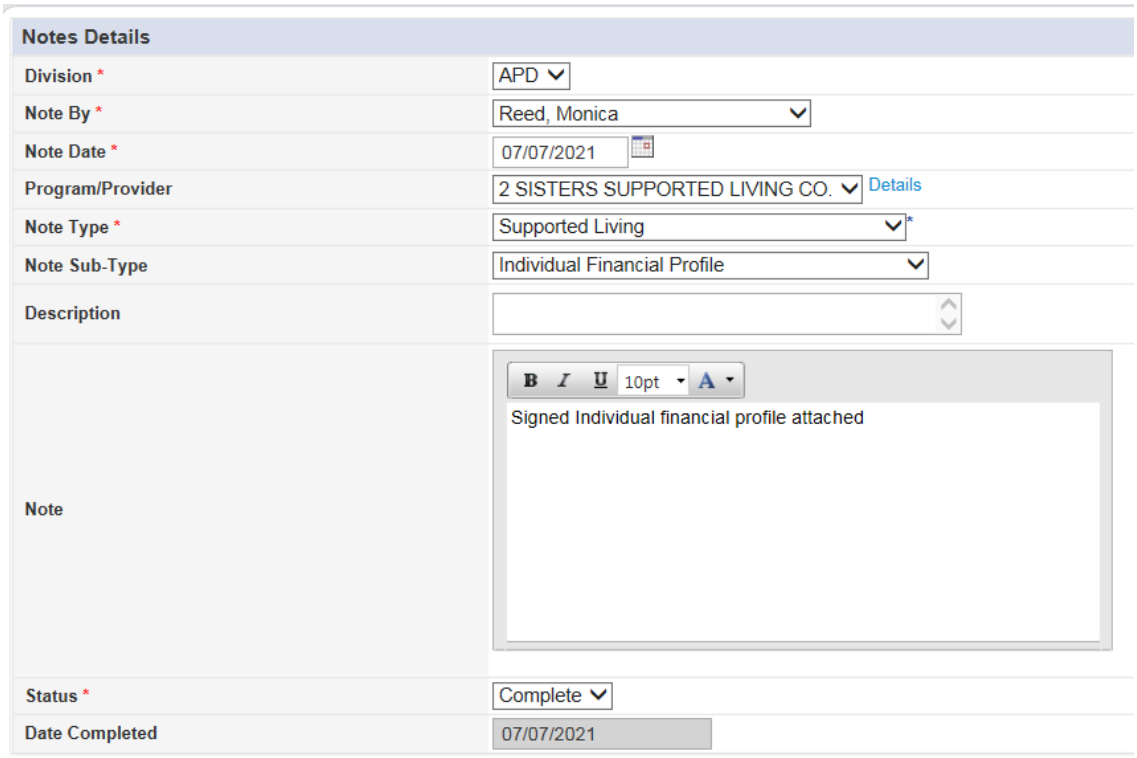
The tickler will be marked as complete after the first save of the form

5. Once the form is complete, change the **Status** = Complete. Click **File** > **Save and Close Forms**.

6. If an In-Home Subsidy was not requested, skip to Step 21.

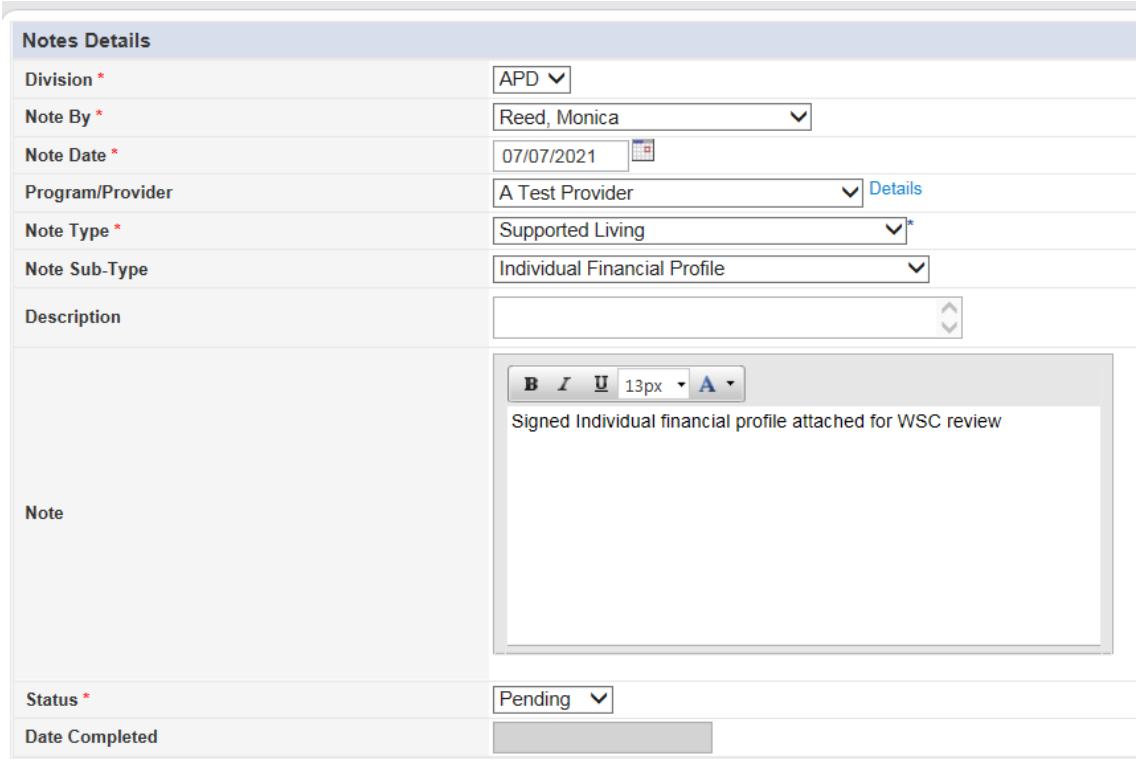
7. After filling out the Individual Financial Profile Form (IFP), print it and obtain the necessary signatures. Add it as an attachment to a Note in APD iConnect.

8. If the WSC completed the IFP, then navigate to the Consumer's record, click on the **Notes** tab > **File** > **Add Note**. In the new Note record, update the following fields:
   a. Division = defaults to APD
   b. Note By = defaults to self
   c. Note Date = defaults to today
   d. Program/Provider = select the WSC's agency
   e. Note Type = Supported Living
   f. Note Subtype = Individual Financial Profile
   g. Description = Signed IFP
   h. Note = optional
   i. Status = Complete
   j. Recipient = None
   k. Attachment = signed Individual Financial Profile



9. From the **File** menu, select **Save and Close Notes**. Skip to step 14.

10. If the SLC completed the IFP, then navigate to the Consumer's record, click on the **Notes** tab > **File** > **Add Note**. In the new Note record, update the following fields:
    a. Division = defaults to APD
    b. Note By = defaults to self
    c. Note Date = defaults to today
    d. Program/Provider = select the WSC's agency
    e. Note Type = Supported Living
    f. Note Subtype = Individual Financial Profile
    g. Description = Signed IFP
    h. Note = optional
    i. Status = Pending
    j. Recipient = Waiver Support Coordinator
    k. Attachment = signed Individual Financial Profile



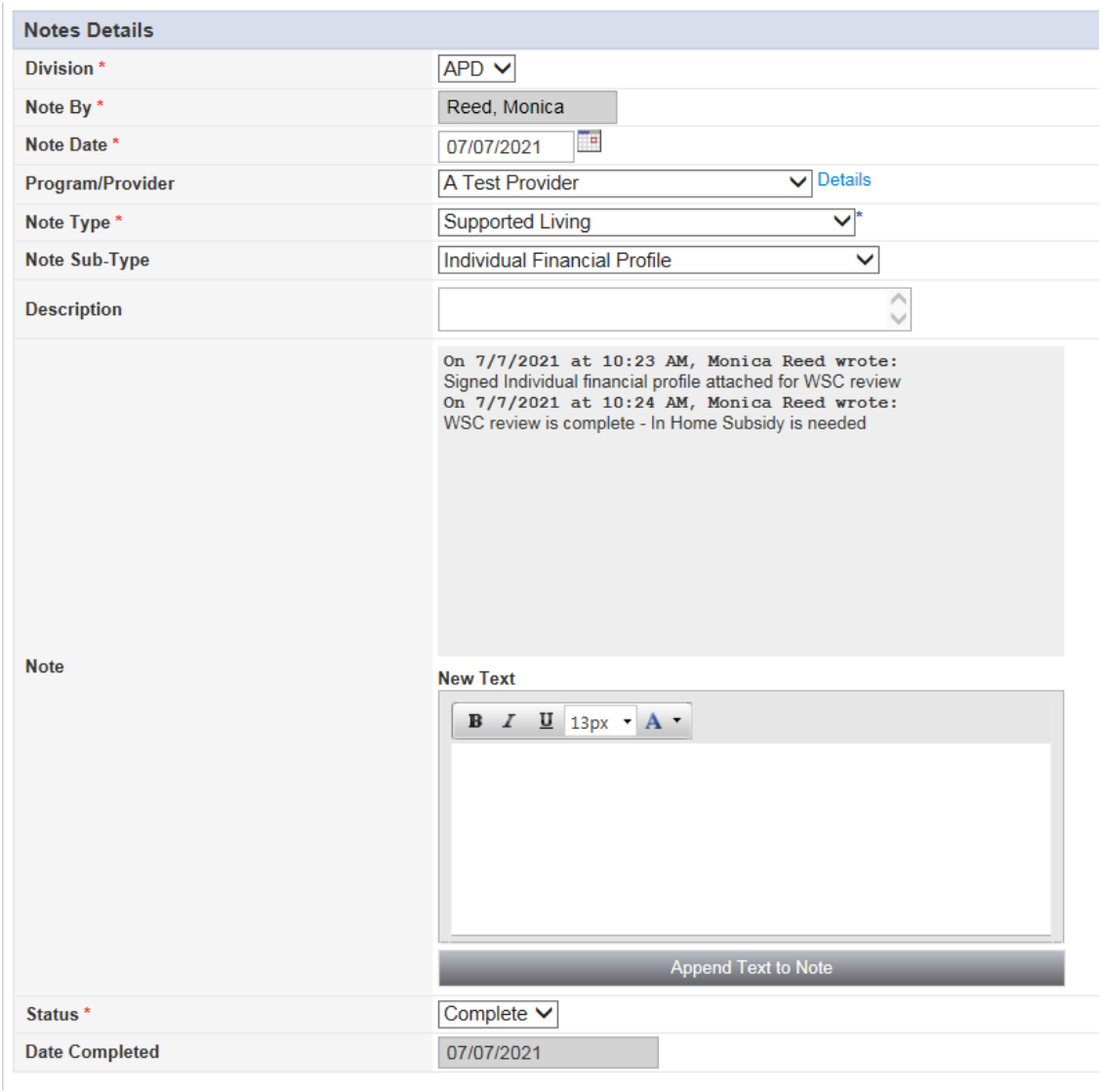
11. When finished, from the **File** menu, select **Save and Close Notes**

12. The WSC will monitor My Dashboard for incoming Notes. From the Pending Notes queue, select the note with Note Type =

Supported Living & Note Subtype = Individual Financial Profile. Update the following fields:

a. Note = Note if a home subsidy is needed

b. Status = Complete

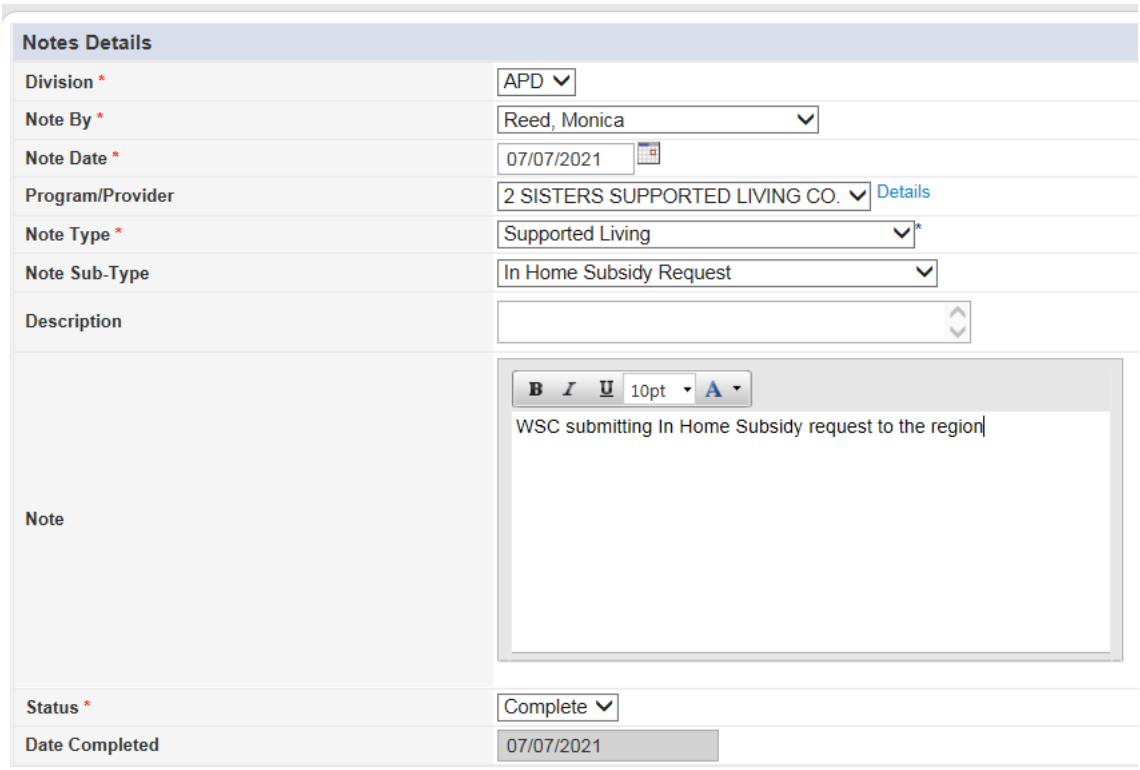


13. From the **File** menu, select **Save and Close Notes**.

14. If a Home Subsidy request is needed, the WSC will add a Note and forward it to the Region Worker.

15. The WSC will navigate to the Consumer's record, click on the **Notes** tab > **File** > **Add Note**. In the new Note record, update the following fields:

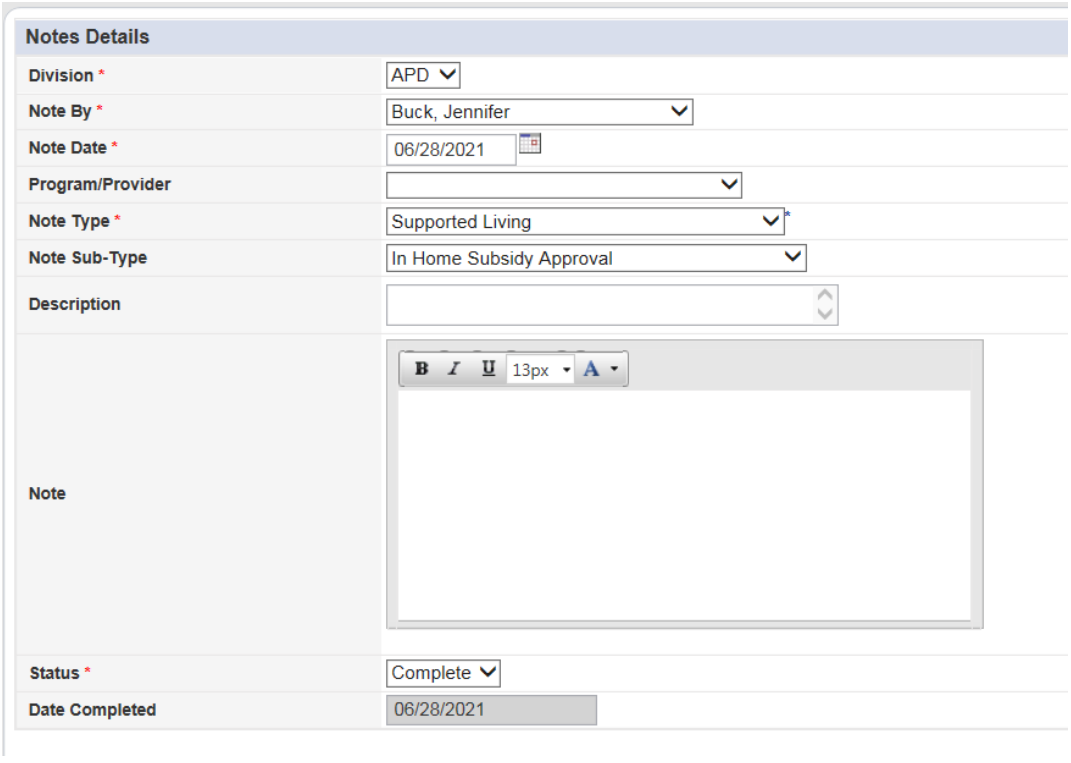
a. Division = defaults to APD
b. Note By = defaults to self
c. Note Date = defaults to today
d. Program/Provider = select the WSC's agency
e. Note Type = Supported Living
f. Note Subtype = In Home Subsidy Request
g. Description = Subsidy Request
h. Note = information provided by the SLC
i. Status = Complete
j. Recipient = Region Worker
k. Attachment = information/quotes provided by the SLC or WSC



16. From the **File** menu, select **Save and Close Notes**.

17. The Region Worker will monitor My Dashboard for incoming Notes. The content of the note is reviewed. The Region Worker will then proceed with the current subsidy request process outside of APD iConnect.

18. Once the process is complete, the Region Worker will create a second Supported Living > In Home Subsidy note. The note will include a copy of the paper form and a summary of the details. Navigate to the consumer's record and select the Notes tab. From the **File** menu, select **Add Note**. Update the following fields:
    a. Division = defaults to APD
    b. Note By = defaults to self
    c. Note Date = defaults to today
    d. Program/Provider = select the WSC's agency
    e. Note Type = Supported Living
    f. Note Subtype = In Home Subsidy Approval or In Home Subsidy Denial
    g. Description = Decision
    h. Note = summary of the approval or denial
    i. Status = Complete
    j. Recipient = Supported Living Provider or WSC
    k. Attachment = Subsidy request form

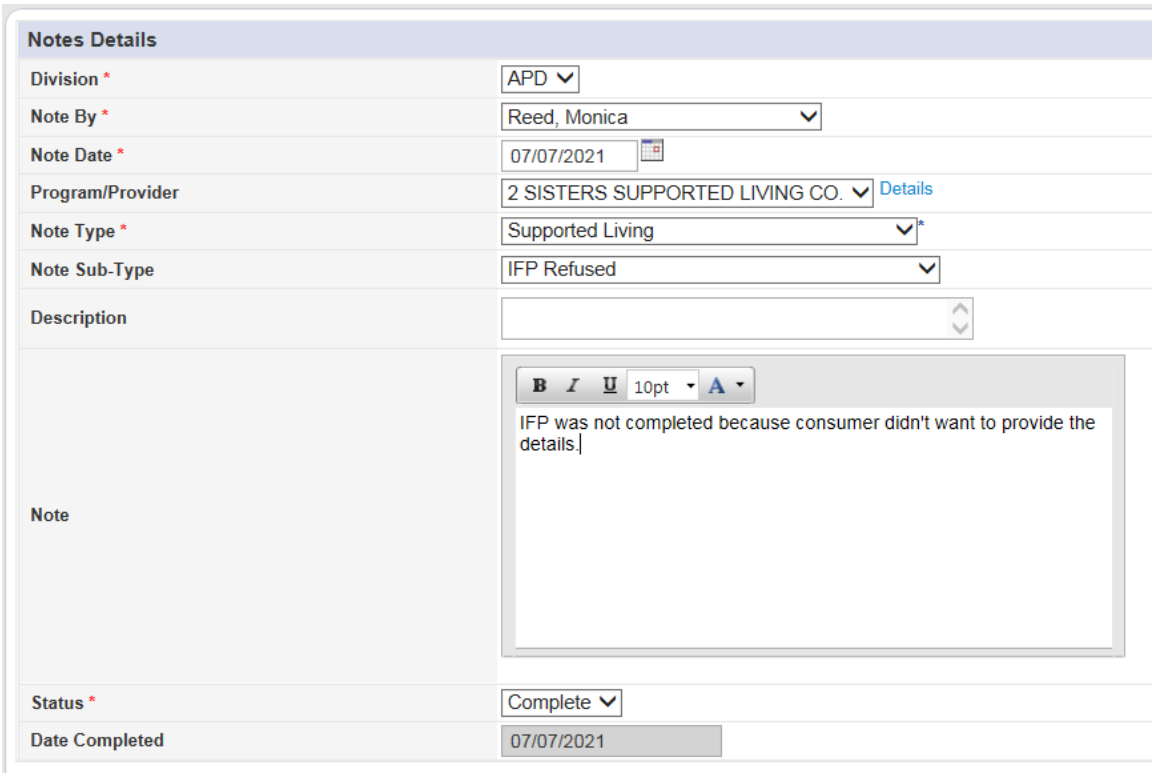


19. When finished, click **File** > **Save and Close Note.**

20. The WSC or Supported Living Coach (SLC) will monitor My Dashboard for incoming notes. The WSC or SLC will proceed accordingly based on the decision for the In-Home Subsidy request, then proceed to Personal Disaster Plan.

21. When an In-Home Subsidy is not requested, a Note must be added. Navigate to the consumer's record and select the Notes tab.

22. From the **File** menu, select **Add Note**. Update the following fields:
    a. Division = defaults to APD
    b. Note By = defaults to self
    c. Note Date = defaults to today
    d. Program/Provider = select the WSC's agency
    e. Note Type = Supported Living
    f. Note Subtype = IFP Refused
    g. Description = optional
    h. Note = details of why the IFP was not completed
    i. Status = Complete
    j. Recipient = Supported Living Provider or WSC



23. From the **File** menu, select **Save and Close Note**. Proceed to Personal Disaster Plan.

Personal Disaster Plan

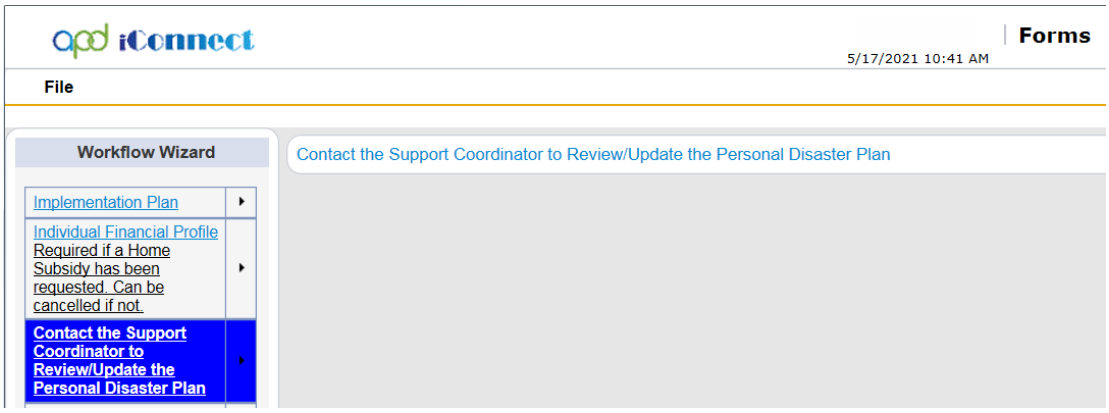
The Personal Disaster plan must be reviewed and possibly updated as part of the Supported Living Process.

The Supported Living Coach will receive a tickler to “Contact the Support coordinator to Review/Update the Personal Disaster Plan.”

When a Supported Living Coach is not selected, the WSC will receive the tickler to “Review/Update the Personal Disaster Plan.”

Both ticklers mean the same thing but are worded slightly different.

1. Select the **Contact the Support Coordinator to Review/Update the Personal Disaster Plan tickler** or the **Review/Update the Personal Disaster Plan tickler** to open it. A message tickler displays.



2. The Supported Living coach will communicate any changes to the Personal Disaster Plan to the WSC who will document via a Note in APD iConnect.

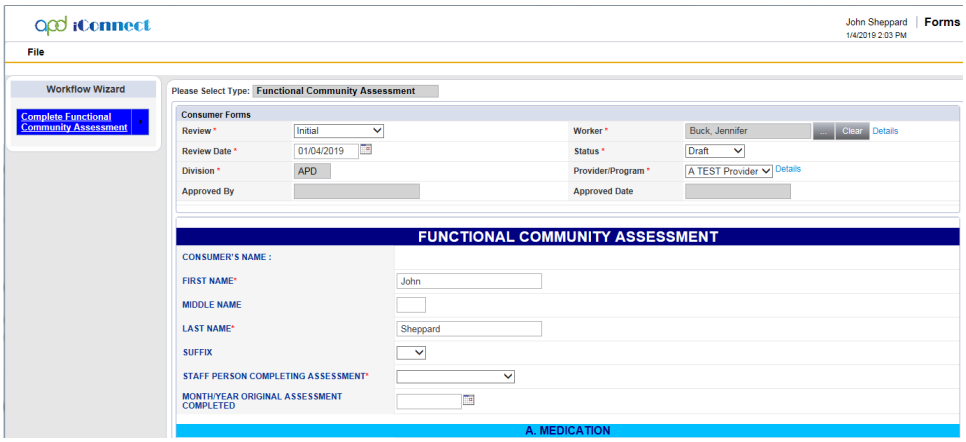
3. When complete, return to the Tickler queue. From the tickler flyout menu, select Complete. The tickler is marked as complete.

Functional Community Assessment

1. From the Tickler queue, select the **Complete Functional Community Assessment tickler** to open it. The Functional Community Assessment screen design is displayed.

2. In the header, update the following fields:
   a. Provider/Program = Supported Living Provider
   b. Status = Draft

3. Answer the questions in the form.



4. Click **File** > **Save Form**. Save the form in Draft or Pending status until all applicable fields are completed.

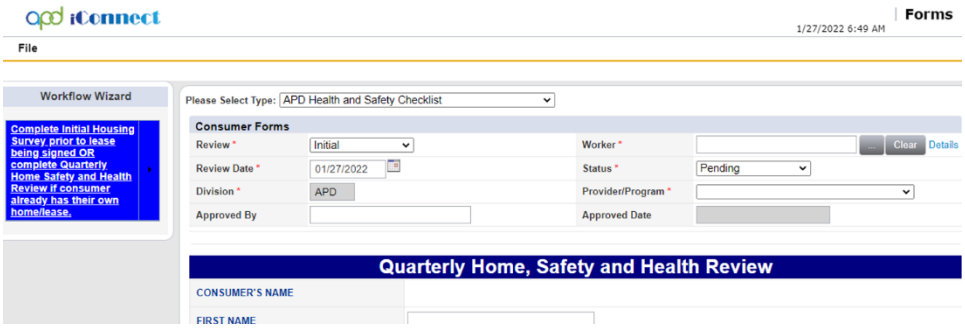
   NOTE: the tickler will be marked as complete after the first save of the form.

5. Once the form is complete, change the **Status** = Complete. Click **File** > **Save and Close Forms**.

Initial Housing Survey or Quarterly Home, Safety and Health Review (form referenced with this tickler has been renamed as APD Health and Safety Checklist form)

1. When the WSC creates the Supported Living Request note with status = Complete or when the Supported Living coach is added to the Provider Selection record, a tickler triggers to complete the Initial Housing Survey or Quarterly Home Safety and Health Review.

2. Select the tickler to open it. The Forms page displays.



3. In the header, update the following fields:
   a. Type = Select the Initial Housing Survey if the consumer doesn't have a lease. Select the APD Health and Safety Checklist if consumer already has their own home/lease.
   b. Provider/Program = Supported Living Provider
   c. Status = Draft

4. Answer the questions in the form.

5. Click **File** > **Save Form**. Save the form in Draft or Pending status until all applicable fields are completed.

   NOTE: the tickler will be marked as complete after the first save of the form.

6. Once the form is complete, change the **Status** = Complete. Click **File** > **Save Forms**.

7. If filling out the Housing Survey, print the Word Merge version of this form and obtain the Consumer's signature. Proceed to step 8.

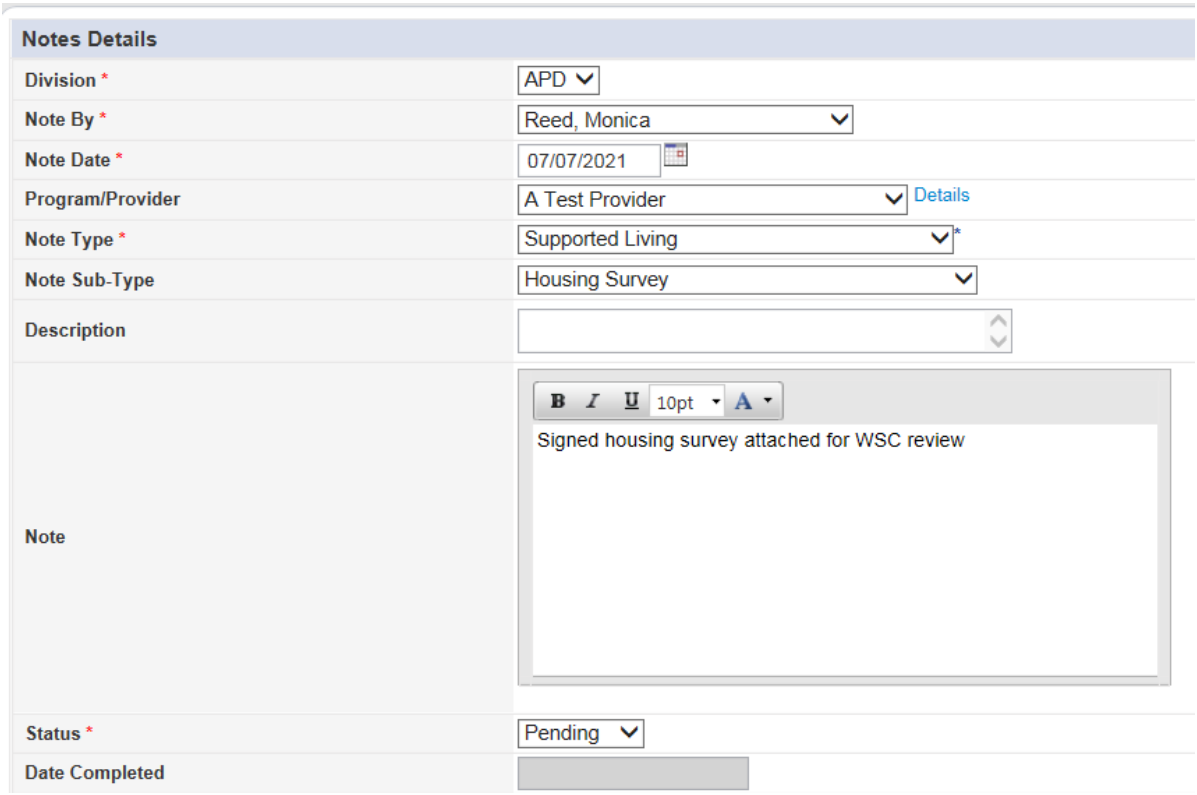
   If not, skip to the Quarterly Home Safety and Health review section.

8. Save a copy of the signed Housing Survey to a Note and follow one of the scenarios below:
   a. The SLC completes the Housing Survey and saves a copy of the signed survey to a note, then routes the note to the WSC for review. Skip to step 9.
   b. The WSC completes the Housing Survey and saves a copy of the signed survey to a note. There are no waiver requests due to the consumer's health or safety. The WSC does not route the Housing Survey note. Skip to step 17.
   c. The WSC completes the Housing Survey and saves a copy of the signed survey to a note. There are waiver requests due to the consumer's health or safety. The WSC routes the Housing Survey Note to the Supported Living Liaison for follow up. That same note may also be routed to the ROM if needed. Skip to step 19.
   d. The WSC reviews the Housing Survey completed by the SLC. There are waiver requests due to the consumer's health or safety. The WSC will route the Housing Survey note to the Supported Living Liaison for follow up. That same note may also be routed to the ROM if needed. Skip to step 30.

SLC completes Housing Survey and routes to WSC for review

9. If the SLC completes the Housing Survey, the SLC will add a Note. Navigate to the Consumer's record, click on the **Notes** tab > **File** > **Add Note**. In the new Note record, update the following fields:
   a. Division = defaults to APD
   b. Note By = defaults to self
   c. Note Date = defaults to today
   d. Program/Provider = select the SLC provider
   e. Note Type = Supported Living

f. Note Subtype = Housing Survey
g. Description = optional
h. Note = summary of the housing survey results
i. Status = Pending
j. Recipient = WSC
k. Attachment = signed Housing Survey



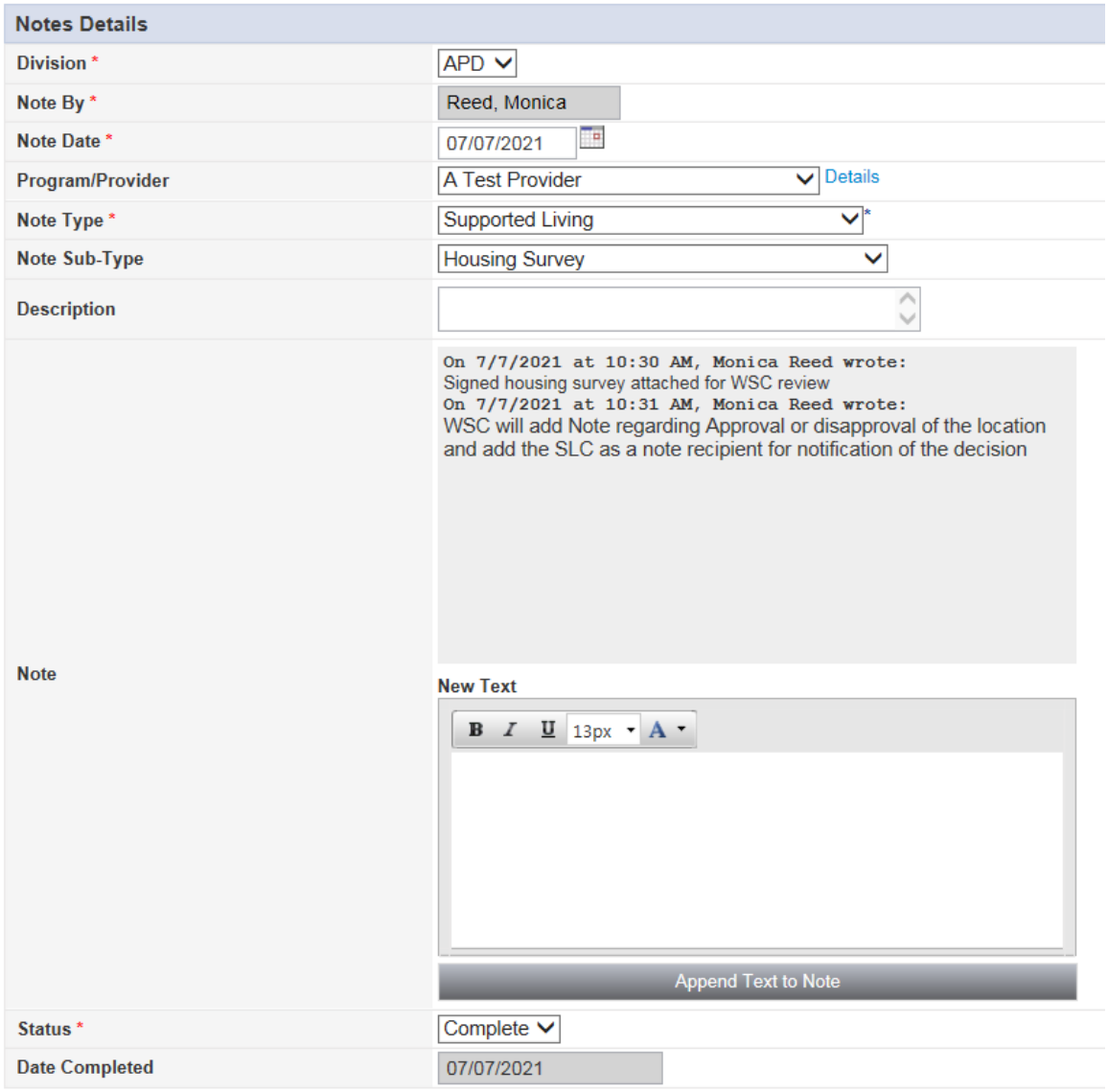
10. When finished, click **File** > **Save and Close Notes**

11. The Waiver Support Coordinator will monitor their My Dashboard for Notes related to the Housing Survey

12. To do so, navigate to My Dashboard, identify the Consumer panel and scroll down to the Notes section. Click on the **Pending** link to open

13. In the Pending Notes queue, open the **Note** record with Note Type = Supported Living and Note Subtype = Housing Survey

14. Review the attached Initial Housing Survey to approve or disapprove the location and update the Note accordingly. Update the following fields:
    a. Append Text: Add Note regarding Approval or disapproval of the location
    b. Status = Complete
    c. Note Recipient = Supported Living Coach

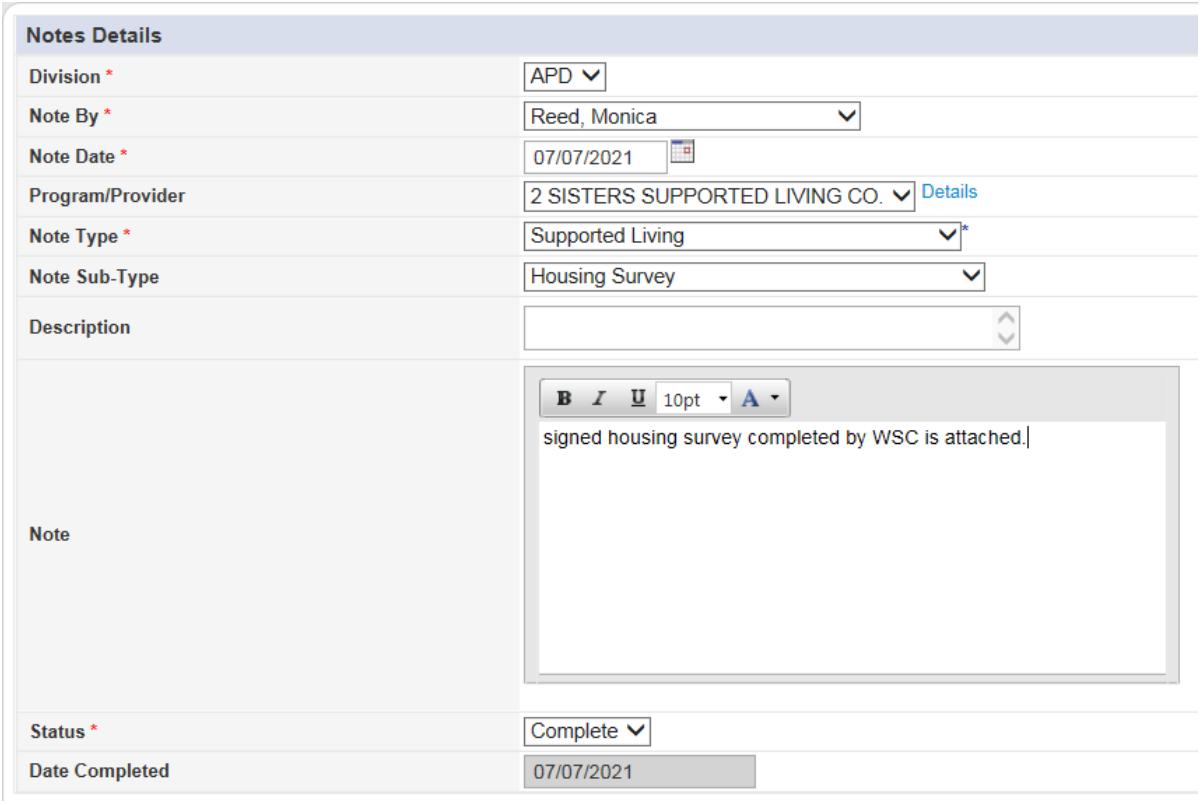


15. When finished, click **File** > **Save and Close Notes.**

16. The Supported Living Coach will monitor My Dashboard for incoming notes and note the location approval. Proceed to Quarterly Home Safety and Health Review.

WSC completes Housing Survey with no waiver requests

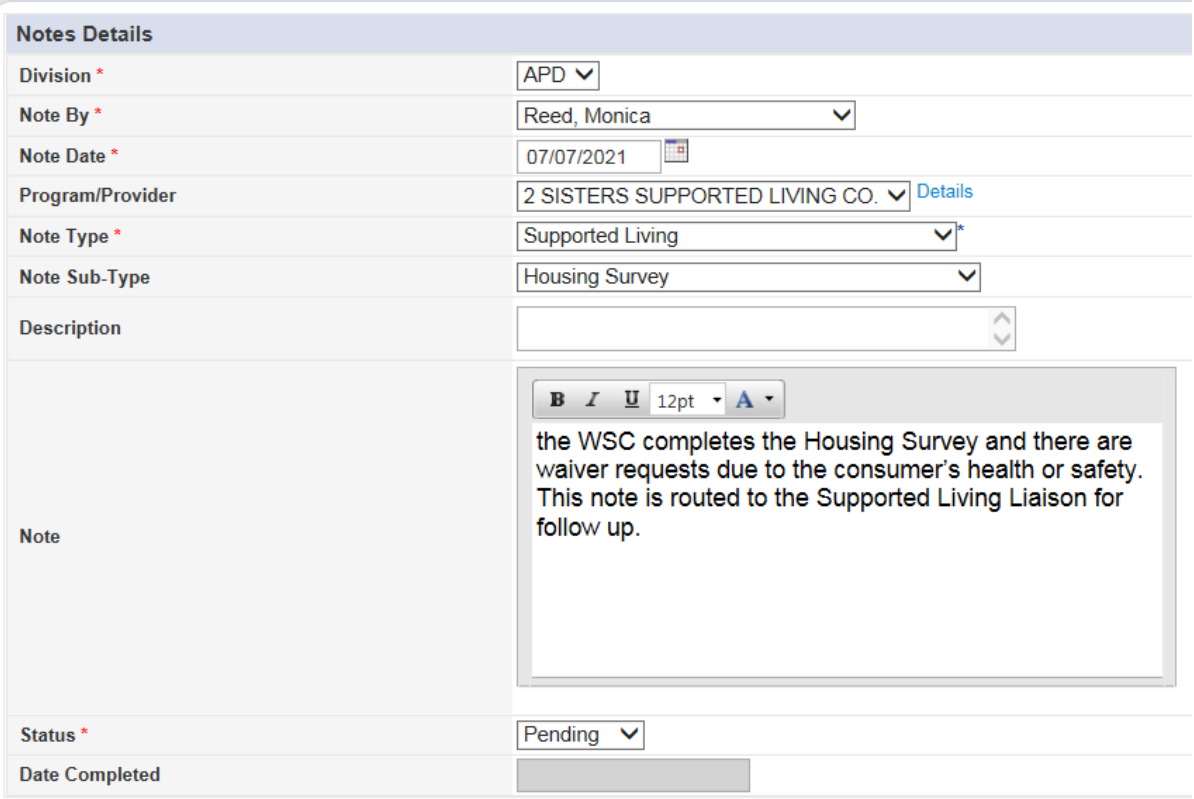
17. If the WSC completes the Housing Survey and there are no waiver requests due to the consumer's health or safety, the WSC will add a Note. Navigate to the Consumer's record, click on the **Notes** tab > **File** > **Add Note**. In the new Note record, update the following fields:
    a. Division = defaults to APD
    b. Note By = defaults to self
    c. Note Date = defaults to today
    d. Program/Provider = select the WSC agency
    e. Note Type = Supported Living
    f. Note Subtype = Housing Survey
    g. Description = optional
    h. Note = summary of the housing survey results
    i. Status = Complete
    j. Recipient = None
    k. Attachment = signed Housing Survey



18. From the **File** menu, select **Save and Close Notes.** Proceed to Quarterly Home Safety and Health Review.

WSC completes Housing Survey with waiver requests

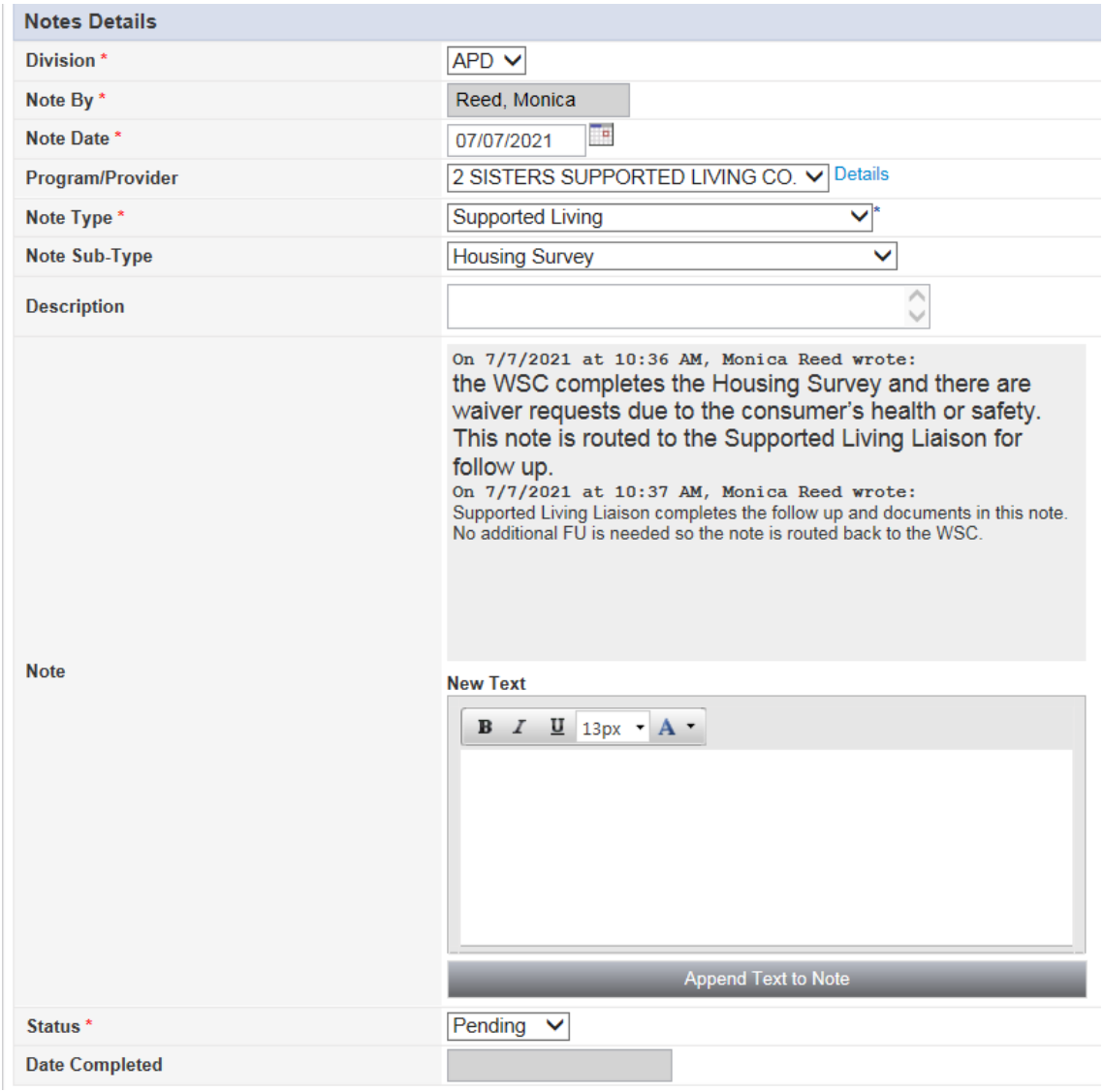
19. If the WSC completes the Housing Survey and there are waiver requests due to the consumer's health or safety, the WSC will add a note. Navigate to the Consumer's record, click on the **Notes** tab > **File** > **Add Note**. In the new Note record, update the following fields:
    a. Division = defaults to APD
    b. Note By = defaults to self
    c. Note Date = defaults to today
    d. Program/Provider = select the SLC provider
    e. Note Type = Supported Living
    f. Note Subtype = Housing Survey
    g. Description = Waiver Requests
    h. Note = details of the concerns
    i. Status = Pending
    j. Recipient = Supported Living Liaison
    k. Attachment = signed Housing Survey



20. From the **File** menu, select **Save and Close Notes.**

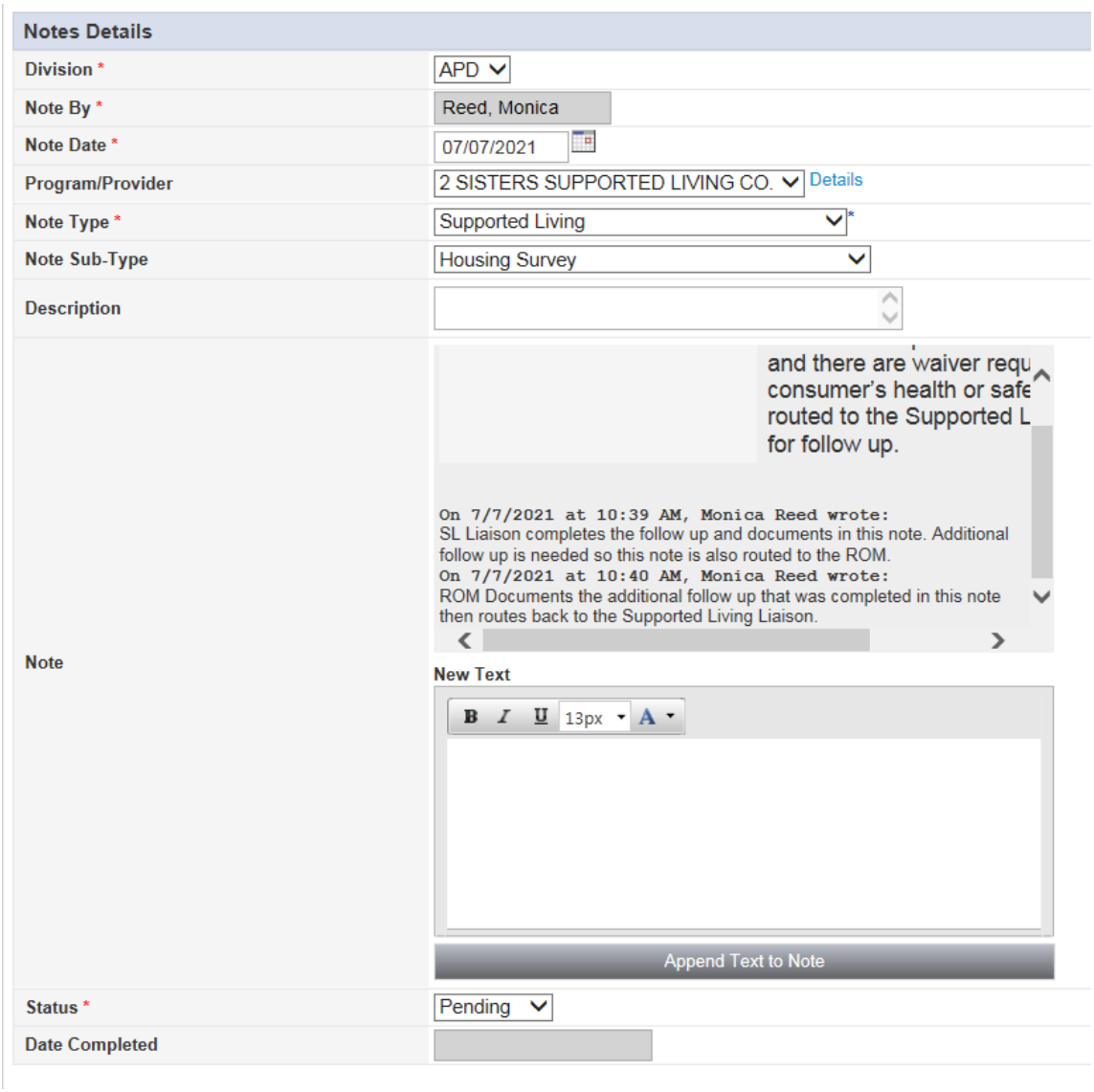
21. The Supported Living Liaison will monitor My Dashboard for incoming notes. The Supported Living Liaison will complete the follow up and document in the Housing Survey Note. The Supported Living Liaison may need to route the note to the ROM for additional follow up.

22. From the **My Dashboard** > **Notes** queue, the SL Liaison will select the Supported Living > Housing Survey Note. Review the note and complete the follow up. Update the following fields:
    a. Note = details of the follow up
    b. Status = Pending
    c. Note Recipient = WSC if follow up is complete. ROM if additional follow up is needed.



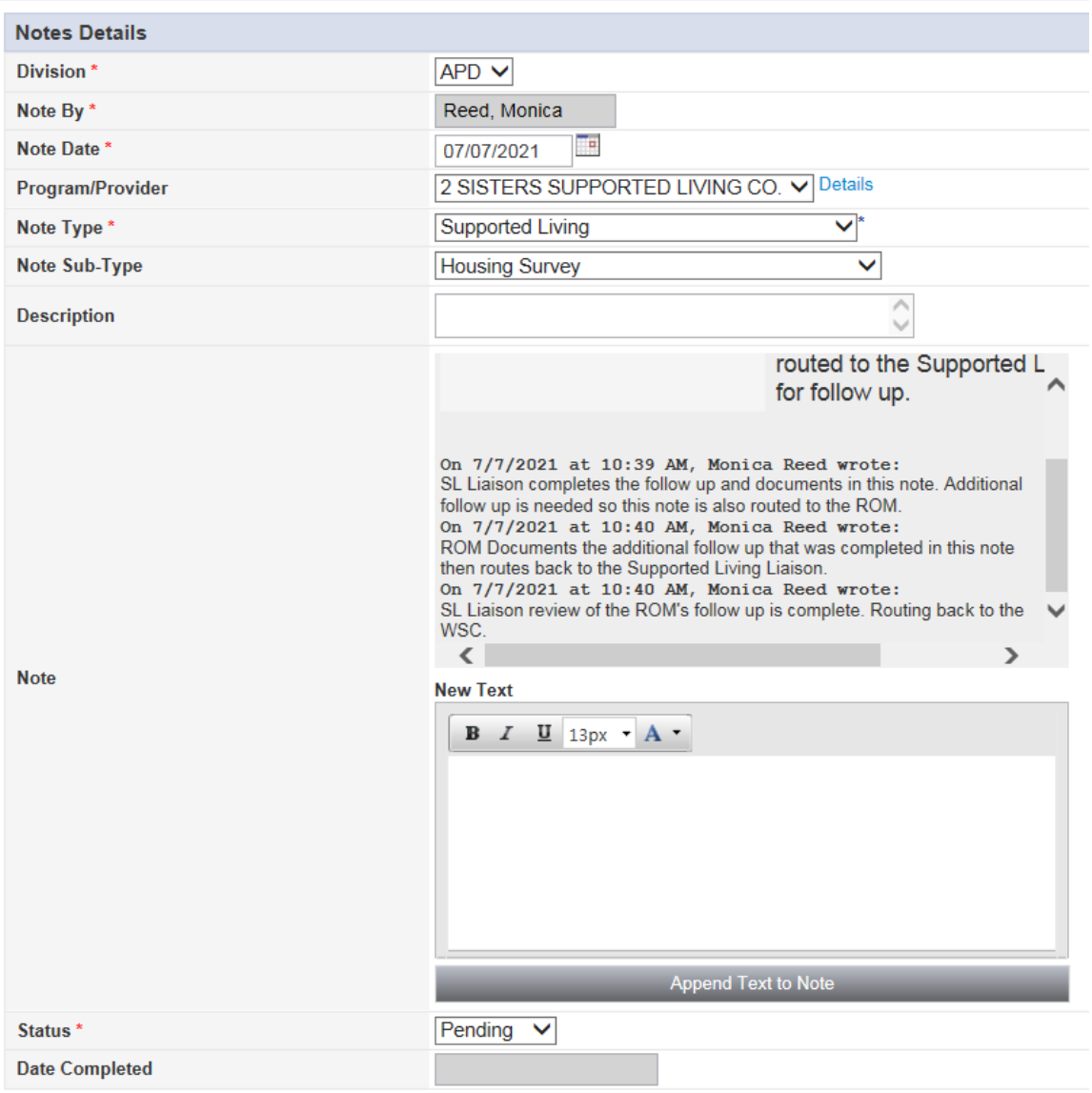
23. From the **File** menu, select **Save and Close Notes.**

24. If additional follow up is not needed, skip to 28. If additional follow up is needed, the ROM will monitor My Dashboard for incoming notes and review the needs for follow up in the Supported Living > Housing Survey Note. Once the follow up is complete, update the following fields:
    a. Note = details of the additional follow up
    b. Status = Pending
    c. Note Recipient = SL Liaison



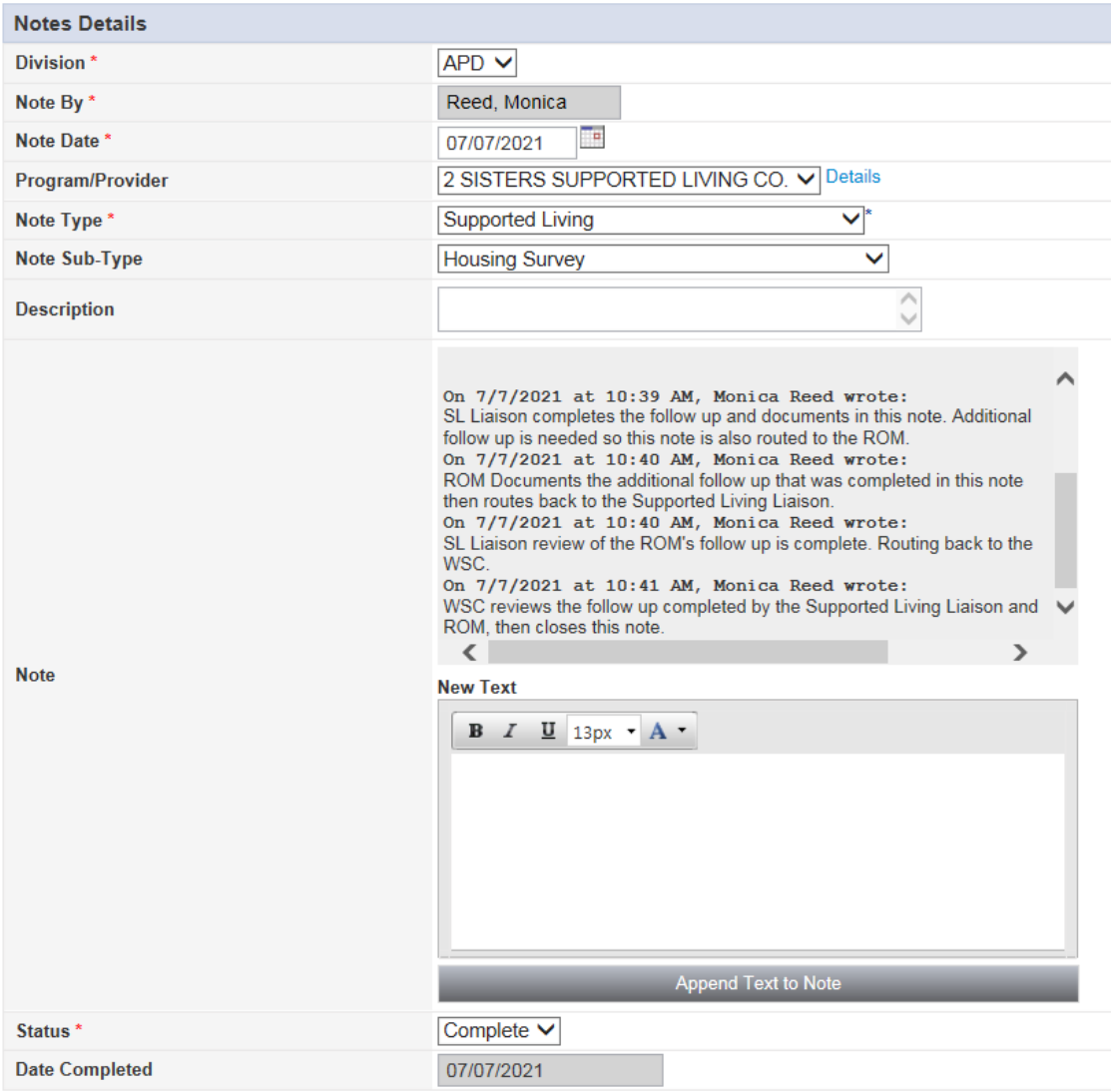
25. From the **File** menu, select **Save and Close Notes.**

26. From the **My Dashboard** > **Notes** queue, the SL Liaison will select the Supported Living > Housing Survey Note. Review the additional follow up by the ROM. Update the following fields:
    a. Note = details of the follow up
    b. Status = Pending
    c. Note Recipient = WSC



27. From the **File** menu, select **Save and Close Notes.**

28. The WSC will monitor My Dashboard for incoming notes and review the details of the follow up in the Supported Living > Housing Survey Note. Once the review is complete, update the following fields:
    a. Status = Complete
    b. Note Recipient = None



29. From the **File** menu, select **Save and Close Notes.** Proceed to Quarterly Home Safety and Health Review.

WSC reviews Housing Survey completed by SLC and there are waiver requests

30. If the WSC is reviewing a Housing Survey completed by a SLC and there are waiver requests due to the consumer's health or safety, the WSC will route the Housing Survey note to the Supported Living Liaison for follow up.

31. From the **My Dashboard** > **Notes** queue, the WSC will select the Supported Living > Housing Survey Note. Review the note and update the following fields:

a. Note = details of concerns
b. Status = Pending
c. Note Recipient = SL Liaison

32. From the **File** menu, select **Save and Close Notes.**

33. The Supported Living Liaison will monitor My Dashboard for incoming notes. The Supported Living Liaison will complete the follow up and document in the Housing Survey Note. The Supported Living Liaison may need to route the note to the ROM for additional follow up.

34. From the **My Dashboard** > **Notes** queue, the SL Liaison will select the Supported Living > Housing Survey Note. Review the note and complete the follow up. Update the following fields:
    a. Note = details of the follow up
    b. Status = Pending
    c. Note Recipient = WSC if follow up is complete. ROM if additional follow up is needed.

35. From the **File** menu, select **Save and Close Notes.**

36. If additional follow up is not needed, skip to 38. If additional follow up is needed, the ROM will monitor My Dashboard for incoming notes and review the needs for follow up in the Supported Living > Housing Survey Note. Once the follow up is complete, update the following fields:
    a. Note = details of the additional follow up
    b. Status = Pending
    c. Note Recipient = SL Liaison

37. From the **File** menu, select **Save and Close Notes.**

38. From the **My Dashboard** > **Notes** queue, the SL Liaison will select the Supported Living > Housing Survey Note. Review the additional follow up by the ROM. Update the following fields:
    a. Note = details of the follow up
    b. Status = Pending
    c. Note Recipient = WSC

39. From the **File** menu, select **Save and Close Notes.**

40. The WSC will monitor My Dashboard for incoming notes and review the details of the follow up in the Supported Living > Housing Survey Note. Once the review is complete, update the following fields:
    a. Status = Complete
    b. Note Recipient = SLC

41. From the **File** menu, select **Save and Close Notes.**

42. The Supported Living Coach will monitor My Dashboard for incoming notes and note the location approval and follow up. Proceed to Quarterly Home Safety and Health Review.

Quarterly Home Safety and Health Review (form referenced with this tickler has been renamed as APD Health and Safety Checklist form)

1. Before a consumer signs a lease, the Initial Housing Survey form must be completed. If the consumer already has their own home/lease, the APD Health and Safety Checklist is completed. Following either the Initial Housing Survey or the APD Health and Safety Checklist, the APD Health and Safety Checklist is required every 90 days.

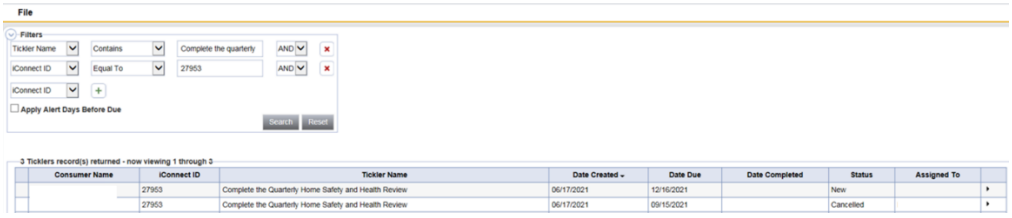
2. When the Initial Housing Survey or the Quarterly Home Safety, and Health Review is saved with Status = Complete, a Workflow Wizard triggers a tickler for the person who completed the form due in 90 days.
    a. Complete the Quarterly Home Safety and Health Review

Remember!

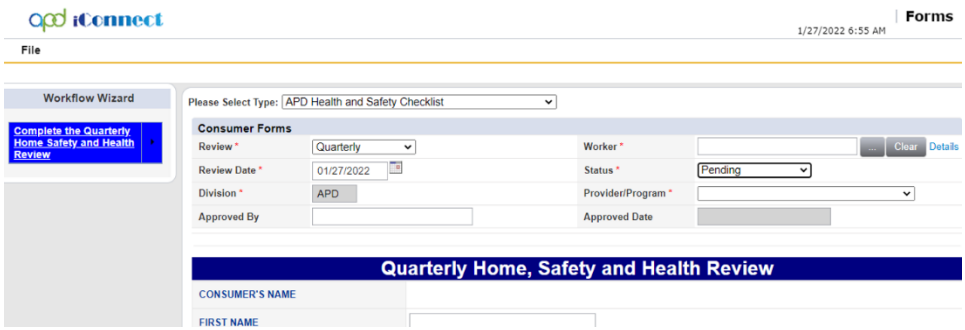
*The "Quarterly Home, Safety and Health Review" form's name has been changed to "**APD Health and Safety Checklist**." When completing the tickler, please select APD Health and Safety Checklist from the Form List Dropdown menu.*

3. The provider monitors My Dashboard for incoming Ticklers. A Workflow Wizard will continue to trigger a tickler every 90 days after a Quarterly Home Safety and Health Review tickler is completed.

4. There can be a scenario where two Quarterly Home Safety and Health Review ticklers exist if someone moves before the end of their lease. A Quarterly Home Safety and Health Review tickler is triggered after the Initial Housing Survey for lease #1. A second Quarterly Home Safety and Health Review tickler will be triggered after the Initial Housing Survey for lease #2. The oldest tickler should be cancelled.



5. From the Tickler queue, select the **Quarterly Home Safety and Health Review tickler** to open it. The APD Health and Safety Checklist Form screen design is displayed.



6. In the header, update the following fields:
    a. Provider/Program = Supported Living Provider
    b. Status = Draft

7. Answer the questions in the form.

8. Click **File** > **Save Form**. Save the form in Draft or Pending status until all applicable fields are completed.

NOTE: the tickler will be marked as complete after the first save of the form.

9. Once the form is complete, change the **Status** = Complete. Click **File** > **Save and Close Forms**.

10. Each time the APD Health and Safety Checklist form is saved with Status = Complete, a Workflow Wizard triggers a tickler for the person completing the form due in 90 days.
    a. Quarterly Home Safety and Health Review

Remember!

*The "Quarterly Home, Safety and Health Review" form's name has been changed to "**APD Health and Safety Checklist**." When completing this tickler, please select APD Health and Safety Checklist from the Form List Dropdown menu.*

11. The provider monitors My Dashboard for incoming Ticklers. Repeat steps 3-9.