



State of Florida
Agency for Persons with Disabilities

Harmony for APD iConnect
Supported Living Training Manual Version 2.2
4/29/2022

Supported Living

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Supported Living

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](#)

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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.

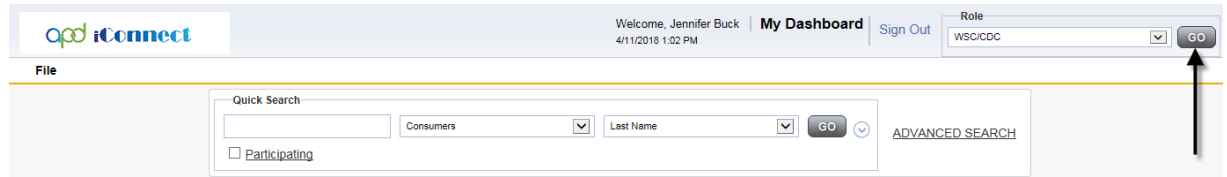
1. If a Supported Living Coach is not needed, create the [Supported Living Request Note](#) to begin the process.
2. Update the [Person-Centered Support Plan](#).
3. [Request a new algorithm](#) (EZ iBudget Calculator) based on a change in living setting.
4. Identify the services and supports that the 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

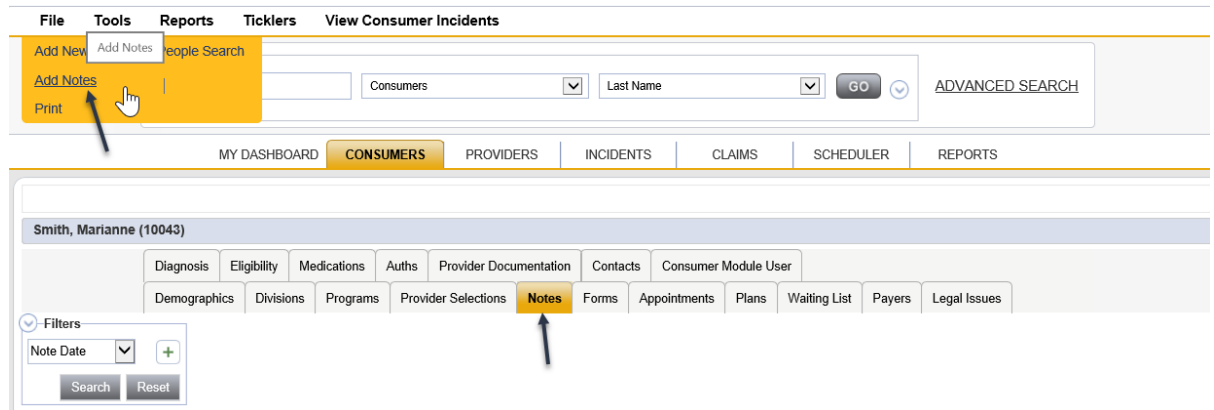
If a Supported Living Coach is not needed, the Supported Living Request Note is created to begin the process in APD iConnect.

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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

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Notes Details	
Division *	APD ▾
Note By *	Buck, Jennifer
Note Date *	05/17/2021 
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▾ Details
Note Type *	Supported Living ▾*
Note Sub-Type	Supported Living Referral ▾
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>
	<div><p>New Text</p><p>B <i>I</i> <u>U</u> 13px ▾ A ▾</p><div style="border: 1px solid #ccc; padding: 5px; min-height: 50px;">Supported Living Request Note Details</div><p style="text-align: center; background-color: #444; color: white; padding: 5px;">Append Text to Note</p></div>
Status *	Complete ▾
Date Completed	07/07/2021

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.

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The screenshot shows the iConnect system interface. At the top, the user is logged in as Alice Sheppard, with a role of WSCI/CDC. The main navigation bar includes 'File', 'Tools', 'Ticklers', and 'View Consumer Incidents'. Below this is a search bar with a 'Quick Search' field, a dropdown for 'Consumers', and a 'Last Name' field. A 'Participating' checkbox is also visible. The main content area shows a record for 'Sheppard, Alice (10053)'. A navigation bar below the record name includes tabs for 'Diagnosis', 'Eligibility', 'Medications', 'Auths', 'Provider Documentation', 'Contacts', 'Consumer Module User', 'Demographics', 'Divisions', 'Programs', 'Provider Selections', 'Notes', 'Forms', 'Appointments', 'Plans', 'Waiting List', and 'Payers'. The 'Forms' tab is selected and highlighted. A filter dropdown is set to 'Form'. Below the filter is a table with one record: 'Person Centered Support Plan'. The table columns are 'Form', 'Review', 'Review Date', 'Worker', 'Division', and 'Status'. The record shows 'Initial' review, '04/13/2018' review date, 'Buck, Jennifer' worker, 'APD' division, and 'Pending' status. Navigation buttons for the table are at the bottom.

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**.

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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)

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	07/07/2021
Program/Provider *	2 SISTERS SUPPORTED LIVING CO. ▼ Details
Note Type *	EZ iBudget ▼*
Note Sub-Type	WSC Request ▼
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 13px ▼ A ▼</p><p>request for new EZ from WSC</p></div>
Status *	Pending ▼
Date Completed	<input type="text"/>

4. From the **File** menu, select **Save and Close Note**.
5. The Waiver Liaison will monitor **My Dashboard** for incoming notes.

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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

Notes Details	
Division *	APD ▾
Note By *	Reed, Monica
Note Date *	07/07/2021 
Program/Provider *	2 SISTERS SUPPORTED LIVING CO. ▾ Details
Note Type *	EZ iBudget ▾*
Note Sub-Type	Update Budget ▾
Description	<input type="text"/>
Note	<p>On 7/7/2021 at 8:31 AM, Monica Reed wrote: request for new EZ from WSC On 7/7/2021 at 8:31 AM, Monica Reed wrote: request the Waiver Lead update the budget based on the new algorithm</p> <p>New Text</p> <div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 13px A ▾</p><div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></div> <p style="text-align: center; background-color: #f0f0f0; padding: 2px;">Append Text to Note</p>
Status *	Pending ▾
Date Completed	<input type="text"/>

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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.

File

Welcome, Jennifer Buck | Ticklers
6/22/2021 2:18 PM

Filters

Status Equal To New AND

iConnect ID +

Apply Alert Days Before Due

Search Reset

180 Ticklers record(s) returned - now viewing 1 through 15

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
	27953	Complete the AIM process within 30 days.	06/22/2021	07/22/2021		New	Buck, Jennifer
	27953	Quarterly Meeting - Recurring	06/17/2021	09/15/2021		New	Buck, Jennifer

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

211 Ticklers record(s) returned - now viewing 1 through 15

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
	59217	Complete the AIM process within 30 days.	06/29/2021	07/29/2021		New	Buck, Jennifer
	59217	Complete Assignment of		07/29/2021		New	Buck, Jennifer
	59217	Quarterly Meeting		09/27/2021		New	Buck, Jennifer
	59217	Implementation-Transit		06/29/2021		New	Buck, Jennifer
	59217	Complete Initial Housing		09/27/2021		New	Buck, Jennifer
	59217	Individual Financial Pro		06/29/2021		New	Buck, Jennifer
	59217	Contact the Support Co		06/29/2021		New	Buck, Jennifer
	59217	Disaster Plan		06/29/2021		New	Buck, Jennifer
	59217	Complete Functional Community Assessment		08/13/2021		New	Buck, Jennifer

Message from webpage

Complete the AIM process within 30 days.

OK

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

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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	

Cancel

Reassign

Complete

View Consumers Record

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

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Notes Details	
Division *	APD ▼
Note By *	Reed, Monica
Note Date *	07/07/2021
Program/Provider *	2 SISTERS SUPPORTED LIVING CO. ▼ Details
Note Type *	EZ iBudget ▼*
Note Sub-Type	Update Budget ▼
Description	
Note	<p>On 7/7/2021 at 8:31 AM, Monica Reed wrote: request for new EZ from WSC</p> <p>On 7/7/2021 at 8:31 AM, Monica Reed wrote: request the Waiver Lead update the budget based on the new algorithm</p> <p>On 7/7/2021 at 8:32 AM, Monica Reed wrote: Budget has been updated</p>
	<p>New Text</p> <p>B <i>I</i> <u>U</u> 13px A ▼</p> <p>Append Text to Note</p>
Status *	Complete ▼
Date Completed	07/07/2021

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

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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

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Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	07/07/2021
Program/Provider *	2 SISTERS SUPPORTED LIVING CO. ▼ Details
Note Type *	Consumer Choice - Provider Interview ▼*
Note Sub-Type	Supported Living ▼
Provider Interviewed *	A Test Provider ... Clear Details
Date Provider Interviewed *	07/06/2021
Description	interview completed
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 16px A ▼</p><p>WSC indicates in the note if the consumer chose this provider</p></div>
Status *	Complete ▼
Date Completed	07/07/2021

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

APD iConnect | Provider
7/7/2021 12:12 PM

File

Division * APD

Selected By Reed, Monica ... Clear Details

Selection Date 08/01/2021

Provider * A Test Provider ... Clear

Referral Type * Supported Living

Disposition * Open

Disposition Date 08/01/2021

Provider Worker * Buck, Jennifer ... Clear Details

Comments

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

APD iConnect | Marianne Smith | Planned Services
4/9/2018 1:53 PM

File Tools

Plan Information

Planned Services

Plan Reviews

QSI Needs

Plan Notes

Filters
Max Amount

Search Reset

1 Planned Services record(s) returned - now viewing 1 through 1

Provider	Service Code	Service Description	Total No of Units	Unit Type	Rate	Max Amount	Begin Date	End Date	Auth ID	
A Test Provider	0199	Support Coordination	1.0000	Month	\$148.69	\$148.69	03/27/2018			<input type="checkbox"/>
			1.0000			\$148.69				<input type="checkbox"/>

<< First < Previous Retrieve 15 Records at a time Next > Last >>

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.

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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.

The screenshot shows the iConnect interface. At the top right, it says "Welcome, Jennifer Buck | Ticklers" and "7/16/2021 7:22 AM". Below the header is a "File" menu. A "Filters" section contains dropdowns for "Status", "Equal To", "New", and "AND", along with a "Search" and "Reset" button. Below the filters, it says "178 Ticklers record(s) returned - now viewing 1 through 15". A table lists ticklers with columns: Consumer Name, iConnect ID, Tickler Name, Date Created, Date Due, Date Completed, Status, and Assigned To. A modal message box is overlaid on the table, containing a warning icon and the text: "Print the Assignment of Duties and Responsibilities word merge and fill out the hard copy. Obtain signatures and attached the signed version to a Note." with an "OK" button.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
	27953	Complete Assignment of Duties and Responsibilities	07/16/2021	08/15/2021		New	Buck, Jennifer
	34191	Check status of AIM due to new algorithm and follow the appropriate	07/16/2021	08/06/2021		New	Buck, Jennifer
	34191	Complete Assignment of Duties and Responsibilities		08/06/2021		New	Buck, Jennifer
	34191	Complete Assignment of Duties and Responsibilities		08/06/2021		New	Buck, Jennifer
	34191	Review/Update Individual Information		08/06/2021		New	Buck, Jennifer
	34191	Individual Information		08/06/2021		New	Buck, Jennifer
	14695	SAN Request		08/06/2021		New	Buck, Jennifer
	59217	Complete Assignment of Duties and Responsibilities		08/06/2021		New	Buck, Jennifer

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**.

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The screenshot shows the iConnect interface with the 'Word Merge' menu open. The menu items are: Annual Status Review Form, Assignments of Duties and Responsibilities, IFS Request for Additional Information, Notice of Agency Action, Notice of Agency Determination on Request for Individual and Family Support Services, Notice of Case Closure, Notice of Pending Termination of Waiver Services, Notice of Termination of Waiver Services, Notice of Termination of Waiver Services for Non-Compliance, and WSC Cover Letter New To Waiver. The background shows a 'Demographics' form for a consumer with ID 27953, including fields for Salutation, Last Name, First Name, Consumer Photo, Medicaid ID, Age (37), Race (Caucasian), Ethnicity (USA), and Marital Status.

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

The screenshot shows a 'Preview (read-only)' window for a 'Word Merge' document. The document is titled 'Agency for Persons with Disabilities – Best Practice Checklist' and 'Assignment of Duties and Responsibilities for Serving Clients in Supported Living'. It includes a date of 'June 2017' and fields for 'Consumer', 'Support Coordinator/Contact Info', 'Supported Living Coach/Contact Info', and 'Personal Support Provider/Contact Info'. The interface includes a toolbar with icons for print, save, and share, and a 'Sign In' button.



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**.

The screenshot shows the 'View Consumer Incidents' page. The 'Add Notes' button is highlighted in the top navigation bar. The 'Notes' tab is selected in the consumer record navigation bar. The consumer record is for 'Smith, Marianne (10043)'. The 'Notes' tab is highlighted in the navigation bar, and the 'Add Notes' button is highlighted in the top navigation bar.

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

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- 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

Notes Details	
Division *	APD ▾
Note By *	Reed, Monica ▾
Note Date *	07/07/2021 
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▾ Details
Note Type *	Supported Living ▾*
Note Sub-Type	Supporting Documentation ▾
Description	Signed Assignment of Duties and Responsibilities 
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 13px A ▾</p><div style="height: 100px;"></div></div>
Status *	Complete ▾
Date Completed	07/07/2021

- 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**.

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oConnect iConnect

Welcome, Jennifer Buck | Ticklers
6/22/2021 5:41 PM

File

Filters

Status Equal To New AND

iConnect ID +

Apply Alert Days Before Due

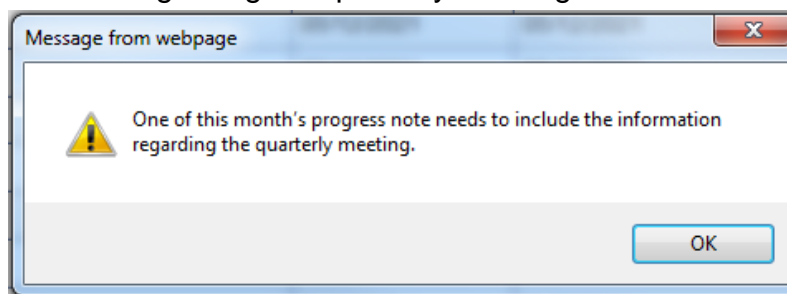
Search Reset

187 Ticklers record(s) returned - now viewing 1 through 15

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
	27953	Quarterly Meeting	06/22/2021	09/20/2021		New	Buck, Jennifer
	27953	Complete Assignment of Duties and Responsibilities	06/22/2021	07/22/2021		New	Buck, Jennifer
	27953	Contact the Support Coordinator to Review/Update the Personal Disaster Plan	06/22/2021	06/22/2021			
	27953	Implementation-Transition Plan	06/22/2021	06/22/2021			
	27953	Complete Functional Community Assessment	06/22/2021	08/06/2021			
	27953	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.	06/22/2021	09/20/2021			

WSC Quarterly Meeting

- 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:
 - Quarterly Meeting – due in 90 days
- The WSC will monitor My Dashboard for assigned Ticklers.
- 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.



- 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.

Supported Living

The screenshot displays the iConnect software interface for a 'Session Note'. At the top, the 'iConnect' logo is on the left, and the text 'Last Updated by j buck@apdcares.org at 5/13/2021 5:53:13 PM' is on the right. Below the header, there is a 'File' menu and a 'Session Note' button. The main form area is titled 'WSC Progress Note' and contains several sections: 'Session Note' (a text area), 'Person Contacted/Attendees' (a text area), 'Type of Contact' (a dropdown menu with options: Home Visit, Facility Visit, School Visit, Support Plan Meeting, Support Plan Pre-Planning, Telephone Conference, Other), and a rich text editor with a toolbar (Bold, Italic, Underline, 13px font size, and text color). The 'Type of Contact' dropdown is currently set to 'Support Living Quarterly'. At the bottom left of the form, there is a 'Progress Note' label.

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


Supported Living

- 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 APD Health and Safety Checklist also known as the 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.*


Welcome, Jennifer Buck | **Ticklers**

6/22/2021 5:41 PM

File

Filters

Status Equal To New AND

iConnect ID +

Apply Alert Days Before Due

Search Reset

187 Ticklers record(s) returned - now viewing 1 through 15

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
	27953	Contact the Support Coordinator to Review/Update the Personal Disaster Plan	06/22/2021	06/22/2021		New	Buck, Jennifer
	27953	Implementation-Transition Plan	06/22/2021	06/22/2021		New	Buck, Jennifer
	27953	Complete Functional Community Assessment	06/22/2021	08/06/2021		New	Buck, Jennifer
	27953	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.	06/22/2021	09/20/2021		New	Buck, Jennifer
	27953	Individual Financial Profile	06/22/2021	06/22/2021		New	Buck, Jennifer

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](#).

Supported Living

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.

oood iConnect | Forms
6/22/2021 5:44 PM

File

Workflow Wizard

Implementation-Transition Plan

Please Select Type: Implementation Plan

Consumer Forms

Review * Initial

Review Date * 06/22/2021

Division * APD

Approved By

Worker * Buck, Jennifer

Status * Draft

Provider/Program

Approved Date

IMPLEMENTATION PLAN

Date Created

Effective Start Date:

Effective End Date:

Identify individuals who participated in developing the implementation plan.

Add New Relation Edit Relation Search Existing Relations Clear

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.

Supported Living

- 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.

The screenshot shows the APD iConnect interface. On the left is a 'Workflow Wizard' with a list of steps. The 'Individual Financial Profile' step is highlighted in blue and has a red note: 'Individual Financial Profile required if a Home Subsidy has been requested. Can be cancelled if not.' The main form area is titled 'Please Select Type: Individual Financial Profile'. It contains a 'Consumer Forms' section with fields for Review (Initial), Review Date (05/17/2021), Division (APD), Approved By, Worker (Buck, Jennifer), Status (Draft), and Approved Date. Below this is the 'INDIVIDUAL FINANCIAL PROFILE' form with fields for Consumer First Name, Consumer Last Name, Number of Roommates Sharing Expenses, Personal Supports, Current Savings Account Balance, and Savings Account Balance as of.

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.

Supported Living


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

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	07/07/2021 
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▼ Details
Note Type *	Supported Living ▼*
Note Sub-Type	Individual Financial Profile ▼
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 10pt ▼ A ▼</p><p>Signed Individual financial profile attached</p></div>
Status *	Complete ▼
Date Completed	07/07/2021

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

Supported Living

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

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	07/07/2021 
Program/Provider	A Test Provider ▼ Details
Note Type *	Supported Living ▼*
Note Sub-Type	Individual Financial Profile ▼
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 13px ▼ A ▼</p><p>Signed Individual financial profile attached for WSC review</p></div>
Status *	Pending ▼
Date Completed	<input type="text"/>


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

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

- a. Note = Note if a home subsidy is needed
- b. Status = Complete

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica
Note Date *	07/07/2021 
Program/Provider	A Test Provider ▼ Details
Note Type *	Supported Living ▼*
Note Sub-Type	Individual Financial Profile ▼
Description	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>On 7/7/2021 at 10:23 AM, Monica Reed wrote: Signed Individual financial profile attached for WSC review On 7/7/2021 at 10:24 AM, Monica Reed wrote: WSC review is complete - In Home Subsidy is needed</p></div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"><p>New Text</p><p>B <i>I</i> <u>U</u> 13px A ▼</p><div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div><p style="text-align: center;">Append Text to Note</p></div>
Status *	Complete ▼
Date Completed	07/07/2021


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:

Supported Living

- 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

Notes Details	
Division *	APD ▾
Note By *	Reed, Monica ▾
Note Date *	07/07/2021 
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▾ Details
Note Type *	Supported Living ▾*
Note Sub-Type	In Home Subsidy Request ▾
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 10pt ▾ A ▾</p><p>WSC submitting In Home Subsidy request to the region </p></div>
Status *	Complete ▾
Date Completed	07/07/2021

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.

Supported Living


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:
- Division = defaults to APD
 - Note By = defaults to self
 - Note Date = defaults to today
 - Program/Provider = select the WSC's agency
 - Note Type = Supported Living
 - Note Subtype = In Home Subsidy Approval or In Home Subsidy Denial
 - Description = Decision
 - Note = summary of the approval or denial
 - Status = Complete
 - Recipient = Supported Living Provider or WSC
 - Attachment = Subsidy request form

Notes Details	
Division *	APD
Note By *	Buck, Jennifer
Note Date *	06/28/2021
Program/Provider	
Note Type *	Supported Living
Note Sub-Type	In Home Subsidy Approval
Description	
Note	<p>B <i>I</i> <u>U</u> 13px A</p>
Status *	Complete
Date Completed	06/28/2021

Supported Living

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

Supported Living

Notes Details	
Division *	APD ▾
Note By *	Reed, Monica ▾
Note Date *	07/07/2021 
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▾ Details
Note Type *	Supported Living ▾*
Note Sub-Type	IFP Refused ▾
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 10pt ▾ A ▾</p><p>IFP was not completed because consumer didn't want to provide the details.</p></div>
Status *	Complete ▾
Date Completed	07/07/2021

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.

Supported Living

The screenshot shows the APD iConnect interface. At the top left is the logo and at the top right is the date and time: 5/17/2021 10:41 AM. Below the logo is a 'File' menu. The main area is titled 'Workflow Wizard' and contains a list of steps: 'Implementation Plan', 'Individual Financial Profile' (with a sub-note: 'Required if a Home Subsidy has been requested. Can be cancelled if not.'), and 'Contact the Support Coordinator to Review/Update the Personal Disaster Plan' (which is highlighted in blue). To the right of the wizard is a large grey area with the text: 'Contact the Support Coordinator to Review/Update the Personal Disaster Plan'.

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.

The screenshot shows the APD iConnect 'Functional Community Assessment' form. At the top left is the logo and at the top right is the user name and time: John Sheppard 1/4/2019 2:03 PM. Below the logo is a 'File' menu. The main area is titled 'Workflow Wizard' and contains a list of steps: 'Complete Functional Community Assessment' (which is highlighted in blue). To the right of the wizard is a large grey area with the text: 'Please Select Type: Functional Community Assessment'. Below this is a 'Consumer Forms' section with fields for 'Review *' (Initial), 'Worker *' (Buck, Jennifer), 'Review Date *' (01/04/2019), 'Status *' (Draft), 'Division *' (APD), 'Provider/Program *' (A TEST Provider), 'Approved By', and 'Approved Date'. Below this is a 'FUNCTIONAL COMMUNITY ASSESSMENT' section with fields for 'CONSUMER'S NAME :', 'FIRST NAME*' (John), 'MIDDLE NAME', 'LAST NAME*' (Sheppard), 'SUFFIX', 'STAFF PERSON COMPLETING ASSESSMENT*', and 'MONTH/YEAR ORIGINAL ASSESSMENT COMPLETED'. At the bottom of the form is a blue bar with the text: 'A. MEDICATION'.

Supported Living

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 APD Health and Safety Checklist also known as the Quarterly Home Safety and Health Review

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 APD Health and Safety Checklist also known as the Quarterly Home Safety and Health Review.
2. Select the tickler to open it. The Forms page displays.

The screenshot shows the iConnect Forms page. At the top, there is a navigation bar with the iConnect logo, a date/time stamp (1/27/2022 8:49 AM), and a 'Forms' button. Below the navigation bar is a 'Workflow Wizard' section with a blue box containing instructions: '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.' The main form area is titled 'Please Select Type: APD Health and Safety Checklist'. It contains a 'Consumer Forms' section with the following fields: 'Review' (Initial), 'Review Date' (01/27/2022), 'Division' (APD), 'Worker' (empty), 'Status' (Pending), 'Provider/Program' (empty), 'Approved By' (empty), and 'Approved Date' (empty). Below the form is a blue header for 'Quarterly Home, Safety and Health Review' and a 'CONSUMER'S NAME' section with a 'FIRST NAME' field.

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.

Supported Living

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 [APD Health and Safety Checklist also known as 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

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

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	07/07/2021 
Program/Provider	A Test Provider ▼ Details
Note Type *	Supported Living ▼*
Note Sub-Type	Housing Survey ▼
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 10pt ▼ A ▼</p><p>Signed housing survey attached for WSC review</p></div>
Status *	Pending ▼
Date Completed	<input type="text"/>

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

Supported Living

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

Notes Details	
Division *	APD ▾
Note By *	Reed, Monica
Note Date *	07/07/2021 
Program/Provider	A Test Provider ▾ Details
Note Type *	Supported Living ▾*
Note Sub-Type	Housing Survey ▾
Description	<input type="text"/>
Note	<p>On 7/7/2021 at 10:30 AM, Monica Reed wrote: Signed housing survey attached for WSC review On 7/7/2021 at 10:31 AM, Monica Reed wrote: WSC will add Note regarding Approval or disapproval of the location and add the SLC as a note recipient for notification of the decision</p> <p>New Text</p> <div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 13px ▾ A ▾</p><div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></div> <p style="text-align: center; background-color: #444; color: white; padding: 5px; margin-top: 5px;">Append Text to Note</p>
Status *	Complete ▾
Date Completed	07/07/2021

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 [APD](#)

Supported Living

[Health and Safety Checklist also known as the 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

Supported Living

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	07/07/2021
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▼ Details
Note Type *	Supported Living ▼*
Note Sub-Type	Housing Survey ▼
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 10pt A ▼</p><p>signed housing survey completed by WSC is attached.</p></div>
Status *	Complete ▼
Date Completed	07/07/2021

18. From the **File** menu, select **Save and Close Notes**. Proceed to [APD Health and Safety Checklist also known as the 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

Supported Living

- j. Recipient = Supported Living Liaison
- k. Attachment = signed Housing Survey

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	07/07/2021 
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▼ Details
Note Type *	Supported Living ▼*
Note Sub-Type	Housing Survey ▼
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 12pt A ▼</p><p>the WSC completes the Housing Survey and there are waiver requests due to the consumer's health or safety. This note is routed to the Supported Living Liaison for follow up.</p></div>
Status *	Pending ▼
Date Completed	<input type="text"/>

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.

Supported Living

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica
Note Date *	07/07/2021
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▼ Details
Note Type *	Supported Living ▼*
Note Sub-Type	Housing Survey ▼
Description	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Note	<p>On 7/7/2021 at 10:36 AM, Monica Reed wrote: the WSC completes the Housing Survey and there are waiver requests due to the consumer's health or safety. This note is routed to the Supported Living Liaison for follow up.</p> <p>On 7/7/2021 at 10:37 AM, Monica Reed wrote: Supported Living Liaison completes the follow up and documents in this note. No additional FU is needed so the note is routed back to the WSC.</p> <div style="border: 1px solid #ccc; padding: 5px;"><p>New Text</p><p>B <i>I</i> <u>U</u> 13px A ▼</p><div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div><p style="text-align: center;">Append Text to Note</p></div>
Status *	Pending ▼
Date Completed	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>

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

Supported Living

Notes Details	
Division *	APD ▾
Note By *	Reed, Monica
Note Date *	07/07/2021
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▾ Details
Note Type *	Supported Living ▾*
Note Sub-Type	Housing Survey ▾
Description	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>and there are waiver requ consumer's health or safe routed to the Supported L for follow up.</p><p>On 7/7/2021 at 10:39 AM, Monica Reed wrote: SL Liaison completes the follow up and documents in this note. Additional follow up is needed so this note is also routed to the ROM. On 7/7/2021 at 10:40 AM, Monica Reed wrote: ROM Documents the additional follow up that was completed in this note then routes back to the Supported Living Liaison.</p></div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"><p>New Text</p><p>B <i>I</i> <u>U</u> 13px A ▾</p><div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div><p style="text-align: center; background-color: #444; color: white; padding: 5px;">Append Text to Note</p></div>
Status *	Pending ▾
Date Completed	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>

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:

- Note = details of the follow up
- Status = Pending
- Note Recipient = WSC

Supported Living


Notes Details	
Division *	APD ▾
Note By *	Reed, Monica
Note Date *	07/07/2021
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▾ Details
Note Type *	Supported Living ▾*
Note Sub-Type	Housing Survey ▾
Description	<input type="text"/>
Note	<p>routed to the Supported L for follow up.</p> <p>On 7/7/2021 at 10:39 AM, Monica Reed wrote: SL Liaison completes the follow up and documents in this note. Additional follow up is needed so this note is also routed to the ROM. On 7/7/2021 at 10:40 AM, Monica Reed wrote: ROM Documents the additional follow up that was completed in this note then routes back to the Supported Living Liaison. On 7/7/2021 at 10:40 AM, Monica Reed wrote: SL Liaison review of the ROM's follow up is complete. Routing back to the WSC.</p> <p>New Text</p> <p>B <i>I</i> <u>U</u> 13px ▾ A ▾</p> <p><input type="text"/></p> <p>Append Text to Note</p>
Status *	Pending ▾
Date Completed	<input type="text"/>

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

Supported Living

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica
Note Date *	07/07/2021 
Program/Provider	2 SISTERS SUPPORTED LIVING CO. ▼ Details
Note Type *	Supported Living ▼*
Note Sub-Type	Housing Survey ▼
Description	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p>On 7/7/2021 at 10:39 AM, Monica Reed wrote: SL Liaison completes the follow up and documents in this note. Additional follow up is needed so this note is also routed to the ROM.</p><p>On 7/7/2021 at 10:40 AM, Monica Reed wrote: ROM Documents the additional follow up that was completed in this note then routes back to the Supported Living Liaison.</p><p>On 7/7/2021 at 10:40 AM, Monica Reed wrote: SL Liaison review of the ROM's follow up is complete. Routing back to the WSC.</p><p>On 7/7/2021 at 10:41 AM, Monica Reed wrote: WSC reviews the follow up completed by the Supported Living Liaison and ROM, then closes this note.</p></div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"><p>New Text</p><div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> 13px ▼ A ▼</p><div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></div><p style="text-align: center; background-color: #f0f0f0; padding: 5px;">Append Text to Note</p></div>
Status *	Complete ▼
Date Completed	07/07/2021

29. From the **File** menu, select **Save and Close Notes**. Proceed to [APD Health and Safety Checklist also known as the 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.

Supported Living

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

Supported Living

- 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 [APD Health and Safety Checklist also known as the Quarterly Home Safety and Health Review](#).

APD Health and Safety Checklist also known as the Quarterly Home Safety and Health Review

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 also known as the Quarterly Home Safety and Health Review 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.

- 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.
- 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.

File

Filters

Tickler Name Contains Complete the quarterly AND X

iConnect ID Equal To 27953 AND X

iConnect ID +

Apply Alert Days Before Due

Search Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
	27953	Complete the Quarterly Home Safety and Health Review	06/17/2021	12/16/2021		New	
	27953	Complete the Quarterly Home Safety and Health Review	06/17/2021	09/15/2021		Cancelled	

- 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.

apd iConnect Forms 1/27/2022 6:55 AM

File

Workflow Wizard

Complete the Quarterly Home, Safety and Health Review

Please Select Type: APD Health and Safety Checklist

Consumer Forms

Review * Quarterly Worker * Clear Details

Review Date * 01/27/2022 Status * Pending

Division * APD Provider/Program *

Approved By Approved Date

Quarterly Home, Safety and Health Review

CONSUMER'S NAME

FIRST NAME

- In the header, update the following fields:

Supported Living

- 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.