



State of Florida
Agency for Persons with Disabilities

APD iConnect
ICF Training Manual Version 3.2
05/09/2023

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Introduction

A Client can express interest in entering an ICF at any point, during the Waiver application process or even after being placed on the Waiting List or Waiver. If on the Waiver, the Waiver Support Coordinator (WSC) will be responsible for initiating the ICF Request. If on the Waiting List, the Waiting List Workstream Worker (WLSC) will initiate the ICF Request.

1. ICF Admissions

The ICF Admission process includes the following steps:

1. Complete ICF Admission tasks
2. Complete the Residential Referral form.
3. Create ICF Program record & Complete the ICF Referral Tracking form
4. Complete QSI Assessment if over 90 days
5. Generate ICF Authorization Letter
6. Complete Initial Admission Paperwork

1a. Complete ICF Admission Tasks

The WSC/WLSC will complete the ICF Admission process.

Role(s): Waiver Support Coordinator (WSC/CDC) or Region Waiting List Workstream Worker

1. The WSC/WLSC will complete the following ICF Admission Tasks:
 - a. Signed copy of Choice Counseling (paper- attach)
 - b. Signed Documentation of Choice (paper- attach)
 - c. Verify Waiver Eligibility Worksheet (form)
 - d. Attach Guardian Paperwork and/or Supporting Documentation (paper- attach)
 - e. Verify QSI Completion Date (form)
 - f. Central Admissions Cover Sheet (paper- attach)
 - g. Person Centered Support Plan (signed paper – attach)
2. If the Client is on the Waiver, the Waiver Support Coordinator (WSC) will create a **Note** to the Region Waiver Workstream Worker and Clinical Workstream Lead. If not, the Region Waiting List Workstream Worker (WLSC) will create a **Note** to the Clinical Workstream Lead.

ICF

3. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Provider/Program = select own WSC agency/provider record if applicable
 - b. Note Type = ICF
 - c. Sub-Type = ICF-IID Request
 - d. Status = Pending
 - e. Attachments = Add documentation from ICF Admission Tasks
 - e. Recipients = Region Waiver Workstream Lead & Clinical Workstream Lead OR the Region Waiting List Workstream Lead & Clinical Workstream Lead when the client is not on the waiver.

The screenshot shows the 'Notes Details' form in the 'iConnect' system. The form is divided into several sections:

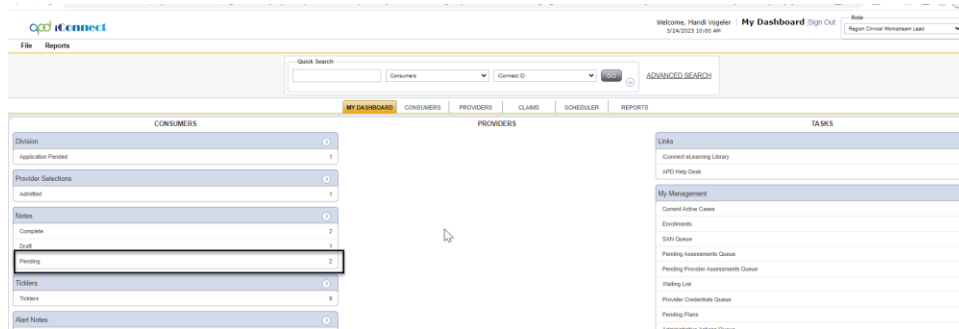
- Notes Details:** This section contains fields for 'Division', 'Note By', 'Note Date', 'Program/Provider', 'Note Type', 'Note Sub-Type', 'Description', 'Status', and 'Date Completed'. The 'Note Type' is set to 'ICF' and the 'Note Sub-Type' is set to 'ICF-IID Request'. The 'Status' is set to 'Pending'.
- Attachments:** This section has a button to 'Add Attachment' and a table for displaying attachments. Currently, there are no attachments displayed.
- Note Recipients:** This section has a button to 'Add Note Recipient' and a table for displaying recipients. The table has columns for 'Name', 'Date Sent', 'Date Read', 'Status', and 'Date Signed'. One recipient is listed: 'Vogeler, Mandi' with a 'Date Sent' of '3/24/2023' and a 'Status' of 'Unread'.

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

Role(s): Region Waiver Workstream Lead and Clinical Workstream Lead

4. The Region Waiver Workstream Lead monitors **My Dashboard** for incoming notes from the WSC to be notified of new ICF-IID Requests and notes the Clinical Workstream Lead was also notified as a note recipient.
5. The Clinical Workstream Lead monitors **My Dashboard** for incoming notes to be notified of new ICF-IID Requests and to reassign the Disenrollment ticklers to the Waiver Workstream Lead to ensure the waiver disenrollment process occurs for the client later

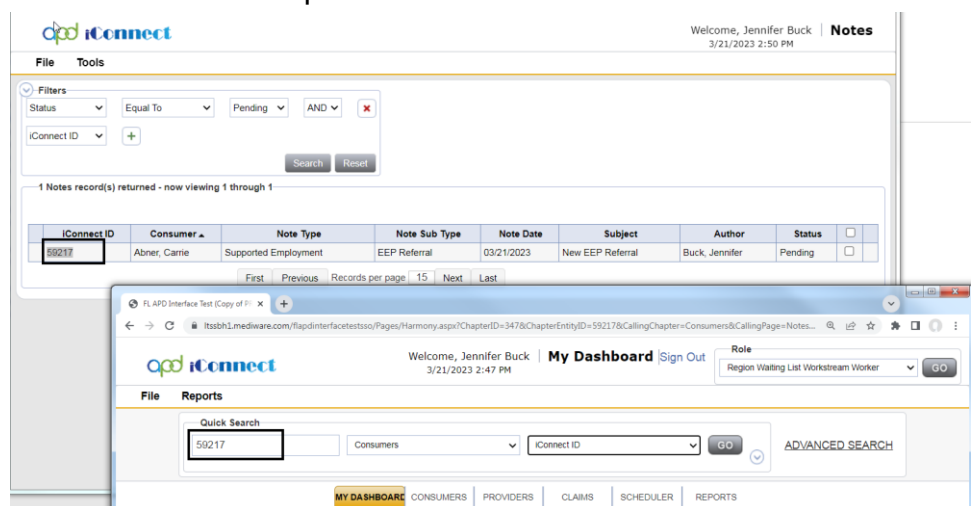
in the workflow and ensure behavioral concerns are addressed if they exist. Select the **My Dashboard > Consumers > Pending > Notes** queue.



6. Click on the note to review the details. Keep the note open.
7. Review the client's record and most recent QSI to determine if there are any behavior concerns. If there are behavioral concerns, proceed to the [Behavioral Concerns](#) section. If there are no behavioral concerns, proceed to the [Complete the Residential Referral Form](#) section.

Tip

Navigate quickly from the My Dashboard > Notes queue to the client's record by copying the iConnect ID from the Notes queue and pasting it into the Consumer > Quick Search. The Note queue window will remain open for convenience.



1b. Complete Residential Referral Form

If there are not any behavioral concerns, the Regional Clinical Workstream Lead would have routed the ICF-IID Request note directly to the MCM. Others are first routed to the Area Behavioral Analysis (ABA) who will later route to the MCM after the ICF/IID Behavioral Rate Screening Tool is completed.

Role: Region Clinical Workstream Worker (MCM)

- If there are no behavior concerns, the Clinical Workstream Lead will notify the MCM via a note in APD iConnect. From the existing ICF-IID Request note, update the following fields:
 - Note = denote there are no behavioral concerns to address
 - Status = Pending
 - Note Recipient = Medical Case Manager (MCM)
- From the **File** menu, select **Save and Close Note**.

The screenshot shows the 'Notes Details' form in the APD iConnect system. The form is for a note created by 'Viguer, Mendi' on '03/24/2023'. The note type is 'ICF' and the sub-type is 'ICF-IID Request'. The status is 'Pending'. The note recipient is 'Viguer, Mendi'. The note content is 'ICF-IID Request'. The note is currently in the 'Pending' status. The 'Note Recipients' table shows two recipients: 'Viguer, Mendi' and 'Bus, Jennifer'. A black arrow points to the 'Viguer, Mendi' name in the table.

Name	Date Sent	Date Read	Status	Date Signed	Action
Viguer, Mendi	03/24/2023		Unread		Remove
Bus, Jennifer	03/24/2023		Unread		Remove

- MCM will work **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

ICF

CONSUMERS

Category	Count
Division	1
Application Pending	1
Provider Selections	1
Admitted	1
Notes	3
Complete	1
Pending	3
Ticklers	9
Alert Notes	0
Unread Alert Notes	0

- Select the Pending ICF-IID Request Note from the **Notes** queue and reviews the details of the request. Keep the note record open.

cpd itconnect

Filters: Status: Equal To: Pending AND

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

ICF-IID ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
0004	Adams, Leah	Facility Placement	Residential Planning Request	03/20/2023		Vogel, Vland	Pending
0004	Adams, Leah	Facility Placement	Residential Planning Request	03/20/2023		Vogel, Vland	Pending
0004	Adams, Leah	ICF	ICF-IID Request	03/24/2023		Vogel, Vland	Pending

- The MCM, Waiver Support Coordinator (WSC/CDC) or WLSC will initiate the Residential Referral Form. Navigate to the clients record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select "Residential Referral Form" The Form Details page displays. Update the following fields:
 - Review = select As Needed
 - Review Date = default to today
 - Division = defaults to APD
 - Worker = self
 - Status = Pending if LOR is 3; Choose Complete if the LOR is not 3. Complete the fields in the form
 - Placement Request For? = ICF
 - Fill out remainder of the form appropriately.
 - Select the Level of Reimbursement at bottom of form.
 - Signature = Search for and select the name of the MCM

6. From the **File** menu, select **Save and Close**

7. The MCM will update the existing ICF-IID Request note now that the Residential Referral Form is complete. From the open note record, update the following fields:
- Note = details of the completed referral form
 - Status = Pending
 - Note Recipient = WSC or WLSC and State Office Residential Intake Specialist. The WSC or WLSC are added as notifications, but the State Office Residential Intake Specialist will have to complete the next round of tasks for the admission.

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023		Unread	
Vogler, Mandi	03/24/2023		Unread	
Reed, Monica	3/24/2023		Unread	

ICF

8. From the **File** menu, select **Save and Close Notes**. Proceed to the [State Office Tasks](#) section.

1c. Behavioral Concerns

Role: Regional Clinical Workstream Lead & Regional Clinical Workstream Worker (ABA)

1. If there are behavioral concerns, the Clinical Workstream Lead will notify the ABA via a note in APD iConnect. From the existing ICF-IID Request note, update the following fields:
 - a. Note = denote the behavioral concerns the ABA should address
 - b. Status = Pending
 - c. Note Recipient = ABA

Notes Details

Division:

Note By:

Note Date:

Program/Provider:

Note Type:

Note Sub-Type:

Description:

Note:

Status:

Date Completed:

Attachments

Add Attachment

Document:

Category:

Action:

There are no attachments to display.

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	Action
Vigilante, Vland	03/24/2023		Unread		Remove
Buck, Jennifer	03/24/2023		Unread		Remove

2. From the **File** menu, select **Save and Close Notes**.
3. The Regional Clinical Workstream Worker (ABA) monitors **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.
4. Select the Pending ICF-IID Request Note from the **Notes** queue and review clients record. Keep the note record open.

ICF

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
0054	Adams, Leah	Facility Placement	Residential Planning Request	03/24/2023		Vogeler, Mandi	Pending
0054	Adams, Leah	Facility Placement	Residential Planning Request	03/24/2023		Vogeler, Mandi	Pending
0054	Adams, Leah	ICF	ICF-IID Request	03/24/2023		Vogeler, Mandi	Pending

5. The ABA will also complete the ICF/IID Behavioral Screening Tool. Navigate to the clients record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select "ICF/IID Behavioral Screening Tool." The Form Details page displays. Update the following fields:
 - a. Review = select As Needed
 - b. Review Date = default to today's date
 - c. Division = defaults to APD
 - d. Worker = Self
 - e. Status = Complete
 - f. Complete the fields on the form.

Please Select Type: ICF/IID Behavioral Rate Screening Tool

Consumer Forms

Review: Worker: [Details](#)

Review Date: Status: [Details](#)

Division: Provider/Program:

Approved By: [Details](#) Approved Date:

ICF/IID Behavioral Rate Screening Tool

1 Worker record(s) returned - now viewing 1 through 1

Name	ID
Vogeler, Mandi	2500

Search

Behavioral Characteristics: Must meet at least one within the last 6 months to be determined eligible. Please check all that apply

Engaged in behavior that caused injury to self or others that required emergency room or other inpatient care from a physician or other health care professional ☒

Engaged in behavior that creates life threatening situations, such as, excessive eating or drinking, vomiting, urinating, eating non-nutritive substances, refusing to eat, swallowing excessive amounts of air and severe insomnia ☒

Engaged in unauthorized fire setting ☐

Attempted suicide ☒

Intentionally caused damage to property in excess of \$1,000 in value during one incident ☐

Engaged in behavior that was unable to be controlled via less restrictive means and necessitated the use of restraints, either mechanically, manually, or by commitment to a crisis stabilization unit, three or more times in a 30 day period, or six times or more ☐

Engaged in behavior that resulted in the recipient's arrest and/or confinement ☒

Engaged in sexual behavior with any person who did not consent or is considered unable to consent to such behavior, or engaged in sexual behavior that caused injury to self or others requiring emergency room or other inpatient care from a physician or other ☐

If the supervision and environment is such that the recipient lacks opportunity for engaging in these serious behaviors, the behavior analyst providing services must provide data, probes or other documented evidence to the regional behavior analyst ☐

Comments/Justification:

6. From the **File** menu, select **Save Forms**.
7. The ABA must print a copy of the screening tool to PDF. From the **File** menu, select **Print**.

ICF

The screenshot shows the iConnect software interface. The 'File' menu is open, and 'Close Forms' is highlighted. Other options in the menu include 'Spell Check', 'Save Forms', 'Save and Close Forms', 'Copy From Previous', 'Print', and 'Close'. The background shows a form with fields for 'Rate Screening Tool', 'As Needed', '03/31/2023', 'APD', and 'Vogeler, Mandi'.

8. From the **File** menu, select **Close Forms**

9. Navigate to the Notes tab and select the existing ICF-IID Request note.
From the open note record, update the following fields:

- Note = details of the addressed behavioral concerns
- Status = Pending
- Attach any supporting documentation used to demonstrate eligibility must be included as an attachment in the note, regardless of where else the information may be found.**
- Note Recipient = MCM

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

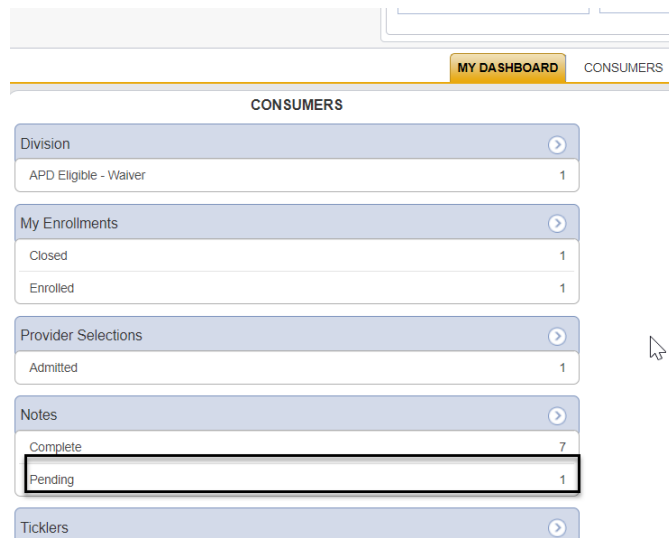
The screenshot shows the 'Note Details' form in the iConnect software. The form includes fields for 'Division', 'Note By', 'Note Date', 'Program/Provider', 'Note Type', 'Note Sub-Type', and 'Description'. The 'Note Type' is set to 'ICF-IID Request'. The 'Status' is set to 'Pending'. The 'Date Completed' field is empty. The 'Attachments' section shows 'There are no attachments to display'. The 'Note Recipients' section shows a table with columns for 'Name', 'Date Sent', 'Date Read', 'Status', and 'Date Signed'. The table contains two rows: 'Vogeler, Mandi' and 'Buch, Jennifer'.

11. MCM Receives updates and proceeds with [Complete Residential Referral Form](#) Section.

1d. State Office Tasks

Role: State Office Worker

1. State Office Residential Intake Specialist will work **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.



The screenshot shows the 'MY DASHBOARD' interface with the 'CONSUMERS' section selected. The 'Notes' queue is highlighted, showing 'Complete' (7) and 'Pending' (1) counts. The 'Pending' count is highlighted with a red box.

CONSUMERS	
Division	1
APD Eligible - Waiver	1
My Enrollments	1
Closed	1
Enrolled	1
Provider Selections	1
Admitted	1
Notes	7
Complete	7
Pending	1
Ticklers	

2. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request.
3. If there is missing documentation, return the note to the WSC/WLSC. If there is not missing information, skip to step 9.
 - a. Mark Note as Read, update the following fields:
 - b. Note = details of the missing information/ documentation
 - c. Status = Pending
 - d. Note Recipient = WSC or WLSC.

Notes Details

Division *

Note By *

Note Date *

Program/Provider [Details](#)

Note Type *

Note Sub-Type

Description

Note

On 3/24/2023 at 11:34 AM, Mandi Vogeler wrote:
For Behavior issues, add ASA to Note
On 3/24/2023 at 11:35 AM, Mandi Vogeler wrote:
Add MCH to Note
On 3/24/2023 at 11:43 AM, Mandi Vogeler wrote:
Add WSC/VLSC and ICF Coordinator

New Text

Append Text to Note

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023		Unread	
Vogeler, Mandi	03/24/2023		Unread	
Reed, Monica	3/24/2023		Unread	

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

WSC/WLSC Responds to request for additional information.

Role: Waiver Support Coordinator (WSC/CDC) or Region Waiting List Workstream Worker

- The WSC/WLSC will monitor **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

MY DASHBOARD **CONSUMERS**

CONSUMERS

Division 1

My Enrollments

Closed 1

Enrolled 1

Provider Selections

Admitted 1

Notes

Complete 7

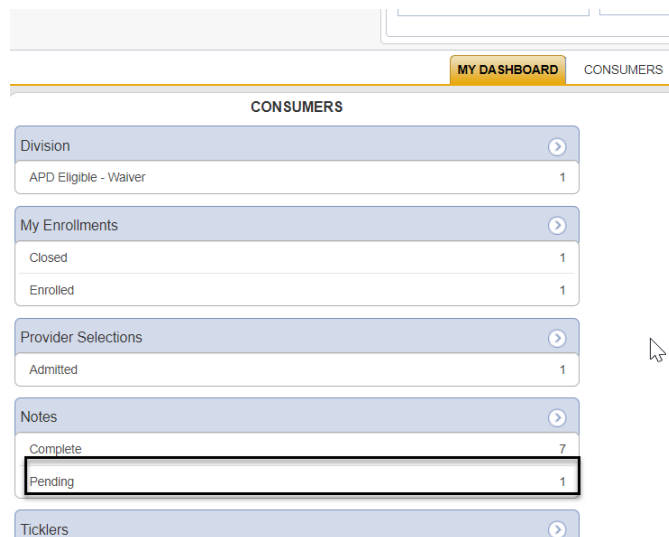
Pending 1

Ticklers

6. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request. Update the following fields:
 - a. Note = details of the missing information/documentation
 - b. Status = Pending
 - c. Attachments = Include the documentation requested by the SO Residential Intake Specialist
 - d. Note Recipient = SO Residential Intake Specialist.
 - e. Mark Note as Read
7. From the **File** menu, select **Save and Close Notes**.

Role: State Office Worker

8. The SO Residential Intake Specialist will work **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.



The screenshot shows the 'MY DASHBOARD' interface with the 'CONSUMERS' section selected. The 'Notes' section is highlighted, showing a count of 7 for 'Complete' and 1 for 'Pending'. The 'Pending' count is highlighted with a red box.

CONSUMERS	
Division	1
APD Eligible - Waiver	1
My Enrollments	1
Closed	1
Enrolled	1
Provider Selections	1
Admitted	1
Notes	7
Complete	7
Pending	1
Ticklers	

9. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request.
10. Now that the documentation is complete, the note can be sent to the ICF Coordinator. Update the following fields:
 - a. Note = details that the packet is complete
 - b. Status = Pending

ICF

- c. Note Recipient = ICF Coordinator.

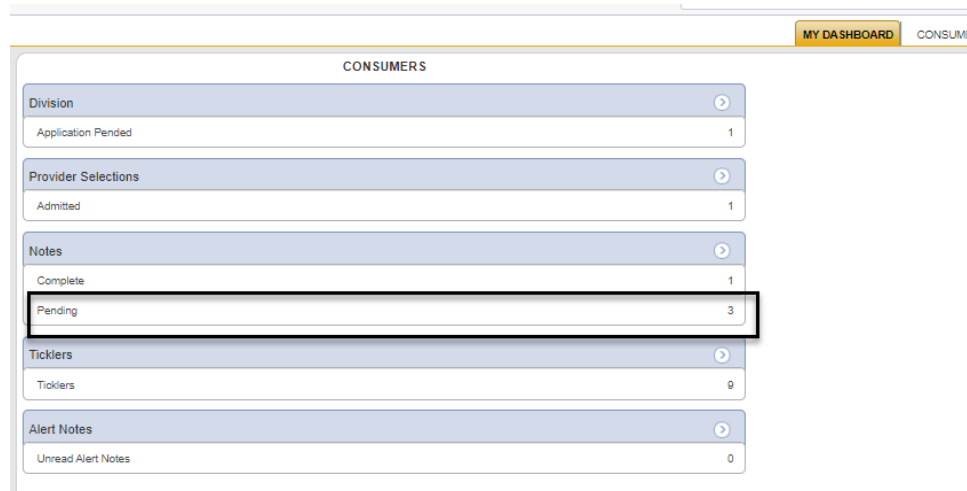
11. From the **File** menu, select **Save and Close Notes**. Proceed to the [ICF Coordinator Tasks](#) section.

1e. ICF Coordinator Tasks

The ICF Coordinator is responsible for updating the workers on the client's division record, coordinating the review of referrals with LOR = 3, reviewing the completed admission packet, creating the ICF/IID program enrollment, ensuring that the QSI is dated within 90 days (from receipt of the completed residential referral packet), sending out the ICF Authorization letter, and wrapping up documentation when the client is admitted. The Authorization may only be sent if there is a confirmed QSI date or an existing QSI is less than 90 days old.

Role: State Office Worker (ICF Coordinator)

1. The ICF Coordinator will work **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.



MY DASHBOARD CONSUMERS

Division	
Application Pending	1

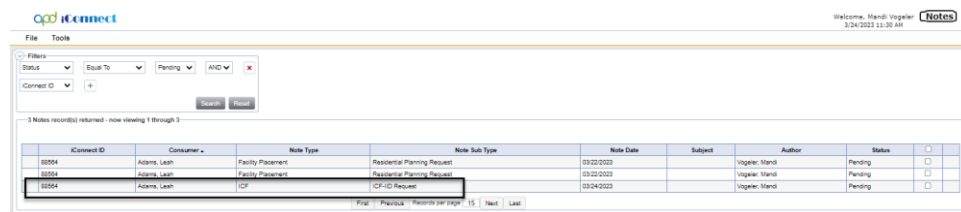
Provider Selections	
Admitted	1

Notes	
Complete	1
Pending	3

Ticklers	
Ticklers	9

Alert Notes	
Unread Alert Notes	0

2. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request.



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

ICF Connect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
00004	Adams, Leah	Facility Placement	Residential Planning Request	09/22/2023		Vogelstein, David	Pending
00004	Adams, Leah	Facility Placement	Residential Planning Request	09/22/2023		Vogelstein, David	Pending
00004	Adams, Leah	ICF-IID Request		09/24/2023		Vogelstein, David	Pending

First Previous Records per page: 10 Next Last

ICF

3. The ICF Coordinator will ensure the ICF Admission tasks have been completed. If additional documentation is needed or corrections need to be made, the ICF Coordinator will communicate with the WSC/WLSC or MCM through the ICF-IID note in APD iConnect to collect the additional information. Update the following fields:
 - a. Note = details of the missing information or corrections needed
 - b. Status = Pending
 - c. Note Recipient = WSC/WLSC or MCM depending on the missing information.
4. From the **File** menu, select **Save and Close Notes**.
5. The WSC/WLSC or MCM will monitor My Dashboard for incoming notes. The WSC/WLSC or MCM will update the ICF-IID Note with the missing information and send back to the ICF Coordinator. Update the following fields:
 - a. Note = details of the additional information provided, or corrections made
 - b. Status = Pending
 - c. Note Recipient = SO Residential Intake Specialist
6. From the **File** menu, select **Save and Close Notes**.
7. The SO Residential Intake Specialist will monitor My Dashboard for incoming notes. The SO Residential Intake Specialist will review the updates provided by the WSC/WLSC or MCM and complete the note. Update the following fields:
 - a. Note = confirm all requested information has been received and packet is complete.
 - b. Status = Complete
8. If the admission tasks were completed and requests for additional information were not needed, the SO Residential Intake Specialist would have noted the completion and closed the note. Update the following fields:
 - a. Note = confirm the admission packet is complete
 - b. Status = Complete
9. From the File menu, select Save and Close Notes.

ICF

10. Once the admission packet has been reviewed and is complete, the ICF Coordinator will update the workers on the client's Division record. Navigate to the client's record and click on the **Division** tab. Select the existing division record. Update the following fields:

- Disposition = APD Eligible – ICF/IID
- Primary Worker = ICF Coordinator
- Secondary Worker = WLSC (if on waiting list) or WSC (if on the waiver)
- Interested in ICF/IID = Yes

11. When the client's Division page is saved with Interested in ICF/IID = Yes, a workflow wizard will trigger a tickler for the WSC/WLSC (Secondary Worker):

- Complete the waiver enrollment process.

This tickler applies to new applicants only.

WSC/WLSC receives ticklers

Role: Waiver Support Coordinator (WSC/CDC) or Regional Waiting List Workstream Worker

12. The WSC/WLSC will view their ticklers from My Dashboard and select the “Complete the waiver enrollment process” tickler. As the tickler states, this tickler applies to new applicants only. If this client is already on the waiver or waiting list, this tickler does not apply and can be cancelled by the WSC/WLSC.

Carrie Abner | Ticklers
4/3/2023 4:36 PM

File

Filters
Status: [v] Equal To: [v] New: [v] AND: [v] X
Status: [v] +
☐ Apply Alert Days Before Due
Search Reset

Itssbhl1.medware.com says
Complete the waiver enrollment process if this is a new applicant. If this is an existing consumer coming from the waiting list, cancel this tickler.
OK

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

Assigned To	Tickler Name	Date Due	Date Created	Date Completed	Status
Buck, Jennifer	Complete the waiver enrollment process	04/03/2023	04/03/2023		New
Buck, Jennifer	Verify Accuracy of Preliminary Waiting List Category	04/03/2023	04/03/2023		New
Buck, Jennifer	Complete the Waiver Eligibility Worksheet	05/18/2023	04/03/2023		New

13. If this is a new applicant, the WSC/WLSC will proceed with the application and eligibility process with the client and mark the tickler as complete. From the tickler **flyout** menu, select **Complete**.

Carrie Abner | Ticklers
4/3/2023 4:36 PM

File

Filters
Status: [v] Equal To: [v] New: [v] AND: [v] X
Status: [v] +
☐ Apply Alert Days Before Due
Search Reset

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

Assigned To	Tickler Name	Date Due	Date Created	Date Completed	Status
Buck, Jennifer	Complete the waiver enrollment process	04/03/2023	04/03/2023		New
Buck, Jennifer	Verify Accuracy of Preliminary Waiting List Category	04/03/2023	04/03/2023		New
Buck, Jennifer	Complete the Waiver Eligibility Worksheet	05/18/2023	04/03/2023		New

Cancel Edit Reassign Complete

14. If this is not a new applicant, the WSC/WLSC will cancel the tickler. From the tickler **flyout** menu, select **Cancel**.

Carrie Abner | Ticklers
4/3/2023 4:36 PM

File

Filters
Status: [v] Equal To: [v] New: [v] AND: [v] X
Status: [v] +
☐ Apply Alert Days Before Due
Search Reset

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

Assigned To	Tickler Name	Date Due	Date Created	Date Completed	Status
Buck, Jennifer	Complete the waiver enrollment process	04/03/2023	04/03/2023		New
Buck, Jennifer	Verify Accuracy of Preliminary Waiting List Category	04/03/2023	04/03/2023		New
Buck, Jennifer	Complete the Waiver Eligibility Worksheet	05/18/2023	04/03/2023		New

Cancel Edit Reassign Complete


1f. Level of Reimbursement (LOR) 3 – Behavioral

If the LOR on the Residential Referral Form is equal to 3 because of behavioral issues, the Agency Senior Behavior Analyst or Designee will need to review and approve the LOR before the ICF Coordinator proceeds with completing the Admission Packet.

ICF

Role: State Office Worker (Agency Senior Behavior Analyst or Designee)

1. The ICF Coordinator will add the Agency Senior Behavior Analyst or Designee as a recipient to the existing ICF-IID Request note. From the open note record, update the following fields:
 - a. Note = details of the request for a LOR 3 approval
 - b. Status = Pending
 - c. Note Recipient = Agency Senior Behavior Analyst or Designee

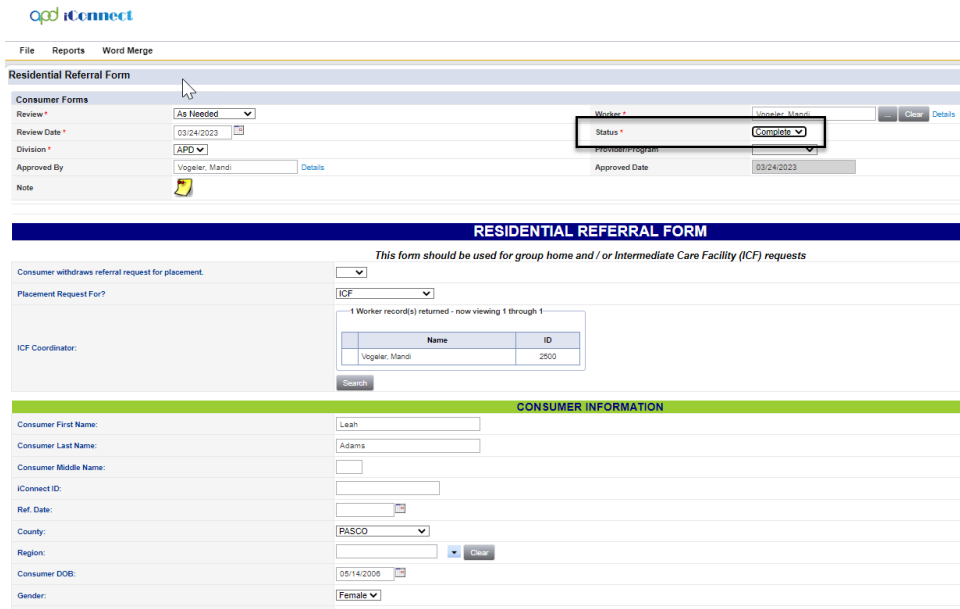
Notes Details	
Division *	APD ▼
Note By *	Buck, Jennifer
Note Date *	04/03/2023 
Program/Provider	▼
Note Type *	ICF ▼*
Note Sub-Type	ICF-IID Request ▼
Description	LOR = 3
Note	<div>On 4/3/2023 at 4:56 PM, Jennifer Buck wrote: ABA review</div> <div>New Text <div>B <i>I</i> <u>U</u> 16px A ▼</div><div></div><div>Append Text to Note</div></div>
Status *	Pending ▼
Date Completed	

2. From the **File** menu, select **Save and Close Notes**.
3. ABA will work **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

CONSUMERS	
Division	
Application Pending	1
Provider Selections	
Admitted	1
Notes	
Complete	1
Pending	3
Ticklers	
Ticklers	9
Alert Notes	
Unread Alert Notes	0

4. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request. This note will be completed later in the workflow after the ICF Coordinator confirms the admission packet is complete.
5. The Agency Senior Behavior Analyst or Designee will navigate to the **Forms** tab. Select the Pending Residential Referral Form from the list view. Review the content of the form. Update the following fields:
 - a. If LOR 3 is approved, change the Status = Complete. No additional fields need to be updated. The approval will be noted by the Agency Senior Behavior Analyst or Designee in the ICF-IID Request note and sent back to the ICF Coordinator.
 - b. If LOR 3 is NOT approved, the status will remain = Pending until the MCM review is complete. The denial will be noted by the Agency Senior Behavior Analyst or Designee in the ICF-IID Request note and sent back to the MCM.

ICF



Residential Referral Form


Consumer Forms

Review * **As Needed**

Review Date * 03/24/2023

Division * **APD**

Approved By Vogeler, Mandi

Note 

Worker *

Status * **Complete**

Provider Program

Approved Date 03/24/2023

RESIDENTIAL REFERRAL FORM

This form should be used for group home and / or Intermediate Care Facility (ICF) requests

Consumer withdraws referral request for placement.

Placement Request For? **ICF**

1 Worker record(s) returned - now viewing 1 through 1

Name	ID
Vogeler, Mandi	2500

CONSUMER INFORMATION

Consumer First Name: Leah

Consumer Last Name: Adams

Consumer Middle Name:

iConnect ID:

Ref. Date:

County: **PASCO**

Region:

Consumer DOB: 05/14/2009

Gender: **Female**

6. From the **File** menu, select **Save and Close Form**.
7. The Agency Senior Behavior Analyst or Designee will update the existing ICF-IID Request note once the LOR review is complete. From the open note record, update the following fields:
 - a. Note = note the approval or denial of the LOR 3
 - b. Status = Pending
 - c. Attach any supporting documentation/matrix
 - d. Note Recipient = ICF Coordinator if LOR 3 is approved. MCM if LOR 3 is NOT approved.

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program/Provider T CARE LLC Details

Note Type * ICF

Note Sub-Type ICF/IID Request

Description

On 3/24/2023 at 11:34 AM, Mandi Vogeler wrote:
For Behavior issues, add ADA to Note
On 3/24/2023 at 11:35 AM, Mandi Vogeler wrote:
Add MCM to Note
On 3/24/2023 at 11:43 AM, Mandi Vogeler wrote:
Add WSC/WLSC and ICF Coordinator

Note

New Text

Approval of LOR

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document Description Category

There are no attachments to display

Note Recipients

Add Note Recipient: Clear

Name	Date Sent	Date Read	Status	Date Signed
Buok, Jennifer	03/24/2023		Unread	
Reed, Monica	03/24/2023		Unread	
Vogeler, Mandi	03/24/2023		Unread	

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

LOR 3 Denied & MCM update necessary

Role: Region Clinical Workstream Worker (MCM)

If the Agency Senior Behavior Analyst or Designee does approve the LOR 3, no MCM review is needed. Proceed to [Admission Packet Complete](#) section.

If the Agency Senior Behavior Analyst or Designee does not approve the LOR 3, MCM needs to update the LOR on the form. The Agency Senior Behavior Analyst or Designee included the MCM as a note recipient on the existing ICF/IID Request Note.

1. MCM will work **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

ICF

CONSUMERS

Category	Count
Division	
Application Pending	1
Provider Selections	
Admitted	1
Notes	
Complete	1
Pending	3
Ticklers	
Ticklers	9
Alert Notes	
Unread Alert Notes	0

2. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the denial. Keep the note record open.

APD iConnect

Filters: Status: Pending, Equal To: AND

ICF-IID ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
0004	Adams, Leah	Facility Placement	Residential Planning Request	03/20/2023		Vogelstein, Staci	Pending
0004	Adams, Leah	Facility Placement	Residential Planning Request	03/20/2023		Vogelstein, Staci	Pending
0004	Adams, Leah	ICF	ICF-IID Request	03/24/2023		Vogelstein, Staci	Pending

3. The MCM must update the Residential Referral Form. Navigate to the clients record and select the **Forms** tab. Select the Pending “Residential Referral Form” from the list. The Form Details page displays. Update the following fields:
 - a. Status = Complete
 - b. Level of Reimbursement = change from 3 to 2 or 1.
 - c. Signature = Search for and select the name of the MCM if not already populated.
 - d. Date = Current Date

APD State Office / MCM only:

LEVEL OF REIMBURSEMENT: 3

0 record(s) returned

Signature

Date

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

ICF

5. The MCM will update the existing ICF-IID Request note after the Residential Referral Form is complete and LOR has been updated. From the open note record, update the following fields:
 - a. Note = details of the completed referral form
 - b. Status = Pending
 - c. Note Recipient = ICF Coordinator

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program Provider T CARE LLC Details

Note Type * ICF

Note Sub-Type ICF-IID Request

Description

Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient: [Text Box] Clear

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023		Unread	
Vogeler, Mandi	03/24/2023		Unread	
Reed, Monica	3/24/2023		Unread	

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

1g. Admission Packet Complete

Role: State Office Worker (ICF Coordinator)

If the Level of Reimbursement is not equal to 3 or if it is equal to 3 and has been reviewed by the Agency Senior Behavior Analyst or Designee and/or MCM, the ICF Coordinator can complete the next task to confirm the Admission Packet is complete.

1. ICF Coordinator monitors **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue

CONSUMERS	
Division	
Application Pending	1
Provider Selections	
Admitted	1
Notes	
Complete	1
Pending	3
Ticklers	
Ticklers	9
Alert Notes	
Unread Alert Notes	0

2. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request. Keep the note record open.
3. The ICF Coordinator verifies completion of ICF Admission tasks and confirms that all documents are correct and complete:
 - a. Signed copy of Choice Counseling
 - b. Signed Documentation of Choice
 - c. Verify Waiver Eligibility Worksheet
 - d. Attach Guardian Paperwork/ Medical Proxy and/or Supporting Documentation
 - e. Verify QSI Completion Date
 - f. Central Admissions Cover Sheet
 - g. Verify Residential Referral Form has LOR and MCM signature.

Note: Due to length of time to get an ICF to accept, sometimes referrals may go out while the documents are being completed/corrected

4. If the documents are completed, the ICF Coordinator will note it in the ICF-IID Request note. From the open note record, update the following fields:
 - a. Note = details of the completed documentation
 - b. Status = Complete
 - c. Attachments = Ensure that all supporting documentation from step 3 is attached, if not, attach the missing documentation.

ICF

Notes Details

Division *

Note By *

Note Date *

Program/Provider [Details](#)

Note Type *

Note Sub-Type

Description

Note

On 3/24/2023 at 11:34 AM, Mandi Vogeler wrote:
For Behavior Issues, add ABA to Note
On 3/24/2023 at 11:35 AM, Mandi Vogeler wrote:
Add MCM to Note
On 3/24/2023 at 11:43 AM, Mandi Vogeler wrote:
Add WSC/WLSC and ICF Coordinator
On 3/24/2023 at 12:03 PM, Mandi Vogeler wrote:
Complete documentation

New Text

B *I* U 16pt

Append Text to Note

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023		Unread	
Reed, Monica	03/24/2023		Unread	
Vogeler, Mandi	03/24/2023		Unread	

5. From the **File** menu, select **Save and Close Notes**. Proceed to the [Create ICF Program](#) section.

WSC/WLSC/MCM Responds to request for additional information.

Role: Waiver Support Coordinator (WSC/CDC), Region Waiting List Workstream Worker, or Medical Case Manager (MCM)

6. If documents are not complete, the ICF Coordinator uses the existing ICF-IID Request note to request follow up from the WLSC, WSC or MCM, depending on what documentation is missing. From the open note record, update the following fields:
 - a. Note = Missing/Incorrect items
 - b. Status = Pending
 - c. Recipient = WSC/WLSC or MCM (Depending on items that are missing or incorrect)

ICF

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program/Provider 1 CARE LLC Details

Note Type * ICF

Note Sub-Type ICF-IID Request

Description

On 3/24/2023 at 11:34 AM, Mandi Vogeler wrote:
For Behavior issues, add ABA to Note
On 3/24/2023 at 11:35 AM, Mandi Vogeler wrote:
Add MCM to Note
On 3/24/2023 at 11:43 AM, Mandi Vogeler wrote:
Add WSC/WLSC and ICF Coordinator

Note

New Text

Missing or incomplete documentation

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient: [Search] [Clear]

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023		Unread	
Reed, Monica	03/24/2023		Unread	
Vogeler, Mandi	03/24/2023		Unread	

7. WSC/WLSC or MCM will monitor **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue

cpd connect

Welcome, Mandi Vogeler 3/24/2023 11:30 AM Notes

File Tools

Filters: Status: Pending Note Type: ICF-IID Request

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

ICF ID	Consumer *	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
0054	Adams, Leah	Facility Placement	Residential Planning Request	03/22/2023		Vogeler, Mandi	Pending	<input type="checkbox"/>
0054	Adams, Leah	Facility Placement	Residential Planning Request	03/22/2023		Vogeler, Mandi	Pending	<input type="checkbox"/>
0054	Adams, Leah	ICF	ICF-IID Request	03/24/2023		Vogeler, Mandi	Pending	<input type="checkbox"/>

Find Previous Records (10) Next Last

8. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request. Keep the note record open.
9. The WSC/WLSC or MCM will complete the follow up requested by the ICF Coordinator, update the existing ICF-IID Request note and return to the ICF Coordinator. From the open note record, update the following fields:
 - a. Note = details of the updates that have been made and/or additional documentation provided
 - b. Status = Pending
 - c. Note Recipient = ICF Coordinator
10. From the **File** menu, select **Save and Close Notes**.

ICF

The ICF Coordinator will repeat the steps listed in the [1g. Admission Packet Complete](#) section until the packet/documents are completed.

1h. Create ICF Program Record

Role: State Office Worker (ICF Coordinator)

1. The ICF Coordinator will create the ICF/IID program enrollment record. Navigate to the clients record and select the **Program** tab. From the **File** menu, **Add Program**. The Program Details page displays. Update the following fields:
 - a. Division = Defaults to APD
 - b. Referral Date = Date the referral was approved
 - c. Create Date = Defaults to today's date
 - d. Program = ICF/IID
 - e. Disposition = Open
 - f. Disposition Date = Defaults to today's date
 - g. Enrollment Type = Blank
 - h. Primary Worker = ICF Coordinator
 - i. Program Begin Date = date the enrollment began

The screenshot shows the 'Program Details' form in the APD iConnect system. The form is titled 'Program' and has a 'File' menu and 'Tools' button. The form fields are as follows:

- Division: APD (dropdown)
- Referral Date: 09/24/2023 (calendar icon)
- Create Date: 09/24/2023 (calendar icon)
- Program: ICF/IID (dropdown)
- Disposition: Open (dropdown)
- Disposition Date: 09/24/2023 (calendar icon)
- Enrollment Type: (dropdown)
- Primary Worker: Vogeler, Mandi (dropdown)
- Program Begin Date: 09/19/2023 (calendar icon)
- Expected Deactivation Date: (calendar icon)
- Comments: (text area)
- LOC Completed Prior To Enrollment: ☐
- Deactivation Data: (text area)

2. From the **File** menu, select **Save and Close Programs**.
3. Outside of APD iConnect the ICF Coordinator will send the admission packet to one or more ICFs and track on the Referral Tracking Form.

1i. ICF Referral Tracking form

Role: State Office Worker (ICF Coordinator)

ICF

1. The ICF Coordinator will create the ICF Referral Tracking form for the client to document the ICFs that have received the Admission Packet and their response. A new form is created for each month referrals are sent. Navigate to the **Forms** tab. From the **File** menu, **Add Forms** and select the “ICF Referral Tracking” form. Update the following fields:
 - a. Review = As Needed
 - b. Review Date = default to today’s date
 - c. Division = defaults to APD
 - d. Worker = self
 - e. Status = Pending. This form will be updated as responses from the ICFs are received.
 - f. ICF name = select from dropdown
 - g. Date referral sent to ICF = enter the date
 - h. Which xxxx Center = select the correct location when this field is displayed. This field will only display for some ICFs.
 - i. Date ICF Response = remains blank until a response is received
 - j. ICF Response = remains blank until a response is received
 - k. Other Reason for ICF = remains blank until a response is received.
 - l. Add ICF = check this box if a second, third, etc, ICF needs to be tracked.

The screenshot shows the 'iConnect' web application interface. At the top, there's a header with the 'iConnect' logo and a 'Forms' tab. Below the header, a 'File' menu is open, showing 'Please Select Type: ICF Referral Tracking'. The main form area is titled 'Consumer Forms'. It contains several fields: 'Review' (dropdown menu set to 'Initial'), 'Review Date' (calendar icon showing '03/24/2023'), 'Worker' (text field with 'Buck, Jennifer' and 'Clear'/'Details' buttons), 'Status' (dropdown menu set to 'Draft'), 'Division' (dropdown menu set to 'APD'), 'Provider/Program' (dropdown menu), and 'Approved By' (text field). Below these fields, there's a note: 'A new form will be needed each month to track all the ICFs that a referral is sent to for this consumer. Please add information for each ICF/ID facility that was sent a referral. This form should remain in Pending status for the month, to allow users to update as ICF facilities respond to the referral.' Under this note, there's a 'Hide Text' link. The form then lists ICF entries. The first entry, 'ICF #1', has a dropdown menu set to 'ANN STORCK CENTER, INC.', a 'Date Referral Sent To ICF #1' field with a calendar icon showing '03/22/2023', a 'Date ICF #1 Responded' field with a calendar icon, an 'ICF #1 Response' dropdown menu, and an 'Other Reason for ICF #1' text area. Below this, there's a 'Which Ann Storck Center?' dropdown menu set to '1790 SW 43RD WAY, FT LAUDERDALE, FL 33'. At the bottom, there are two checkboxes: 'Add ICF #2?' and 'Add ICF #3?'. The 'Add ICF #2?' checkbox is checked.

2. From the **File** menu, select **Save and Close Forms**.
3. If an ICF responds they have accepted the admission, the ICF Coordinator will update the ICF Referral Tracking form for that ICF. Navigate to the **Forms** tab. Select the existing ICF Referral Tracking form. Update the following fields:

ICF

- a. Date ICF Response = date the ICF accepted
- b. ICF Response = Accepted
- c. Other Reason for ICF = blank
- d. Status = Complete. The tracking form can only be complete when there is an ICF that has accepted the admission.

The screenshot shows the 'iConnect' web application interface. At the top, there's a 'File' menu and a 'Forms' tab. The main content area is titled 'Consumer Forms'. It contains several input fields and dropdown menus for tracking ICF referrals. The 'Please Select Type:' dropdown is set to 'ICF Referral Tracking'. Below this, there are fields for 'Review' (set to 'Initial'), 'Review Date' (set to '03/24/2023'), 'Division' (set to 'APD'), 'Approved By' (empty), 'Worker' (set to 'Buck, Jennifer'), 'Status' (set to 'Draft'), 'Provider/Program' (empty), and 'Approved Date' (empty). A note states: 'A new form will be needed each month to track all the ICFs that a referral is sent to for this consumer. Please add information for each ICF/ID facility that was sent a referral. This form should remain in Pending status for the month, to allow users to update as ICF facilities respond to the referral.' Below this note, there's a 'Hide Text' link. The 'ICF #1' section includes a dropdown for 'ANN STORCK CENTER, INC.', a 'Date Referral Sent To ICF #1' field (set to '03/22/2023'), a 'Date ICF #1 Responded' field (set to '03/29/2023'), an 'ICF #1 Response' dropdown (set to 'Accepted'), an 'Other Reason for ICF #1' text area, and a 'Which Ann Storck Center?' dropdown (set to '1790 SW 43RD WAY, FT LAUDERDALE, FL 33'). At the bottom, there's an 'Add ICF #2?' checkbox.

4. From the **File** menu, select **Save and Close Forms**. Proceed to the [QSI Validation](#) section.
5. If more than one ICF accepts, the ICF Coordinator will document on the ICF Referral Tracking form. The ICF Coordinator will communicate with the WSC to ensure that the WSC will coordinate with the Consumer to choose from available ICFs. For each ICF that the Client does not choose, the ICF Coordinator will reach out to the ICF via email.
6. If an ICF denies the client's admission, they will notify the ICF Coordinator by email. The ICF Coordinator will update the ICF Referral Tracking form for that ICF. Navigate to the **Forms** tab. Select the existing ICF Referral Tracking form. Update the following fields:
 - a. Date ICF Response = date the ICF denied
 - b. ICF Response = Declined
 - c. Other Reason for ICF = enter if applicable
 - d. Status = Pending. The tracking form will remain open so it can be updated with responses from other ICFs.

ICF

APD iConnect | Forms
3/24/2023 5:29 PM

File

Please Select Type: ICF Referral Tracking

Consumer Forms

Review *	Initial	Worker *	Buck, Jennifer	Clear	Details
Review Date *	03/24/2023	Status *	Draft		
Division *	APD	Provider/Program			
Approved By		Approved Date			

A new form will be needed each month to track all the ICFs that a referral is sent to for this consumer.
Please add information for each ICF/ID facility that was sent a referral. This form should remain in Pending status for the month, to allow users to update as ICF facilities respond to the referral.

Hide Text

ICF #1	ANN STORCK CENTER, INC.
Date Referral Sent To ICF #1	03/22/2023
Date ICF #1 Responded	03/29/2023
ICF #1 Response	Declined
Other Reason for ICF #1	
Which Ann Storck Center?	1790 SW 43RD WAY, FT LAUDERDALE, FL 33
Add ICF #2?	<input type="checkbox"/>

7. From the **File** menu, select **Save and Close Forms**. Remember to start a new form for each month until the ICF accepts the admission.
8. The ICF Coordinator will also attach that email to a note in APD iConnect. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Note Type = ICF
 - b. Sub Type = ICF Response - Denied
 - c. Status = Complete
 - d. Attachment = Attach a copy of the denial email sent by the ICF
 - e. Recipients = Region Waiver Workstream Lead & Clinical Workstream Lead OR just the Clinical Workstream Lead when the client is not on the waiver.

ICF

The screenshot shows the 'Notes Details' form in the APD iConnect system. The form is divided into several sections: 'Notes Details' with fields for Division, Note By, Note Date, Program/Provider, Note Type, Note Sub-Type, Description, Note, Status, and Date Completed; 'Attachments' with a table header (Document, Description, Category) and a message 'There are no attachments to display'; and 'Note Recipients' with a table header (Name, Date Sent, Date Read, Status, Date Signed) and a 'Clear' button. The form is currently displaying a note with the status 'Complete' and the date '03/24/2023'.

9. From the **File** menu, select **Save and Close Notes**. The ICF Coordinator will continue to monitor responses from other ICFs until one accepts.

1j. QSI Validation

After the ICF admission acceptance is received, the ICF Coordinator must validate that the QSI is current and less than 90 days old. These tasks must be completed before an Authorization Letter can be sent to the ICF.

Role: State Office Worker (ICF Coordinator)

1. The ICF Coordinator will view the QSI in APD iConnect to verify the QSI is current and complete before issuing an Authorization letter. If QSI is current, skip to the [1k. ICF Authorization](#) Letter section, else go to next step.
2. If the QSI is older than 90 days, the ICF Coordinator will request a new assessment be completed. Navigate to the **Notes** tab. From the **File** menu, select **Add Note**, to send a note to the Clinical Lead who will assign an Assessor to complete another QSI.
 - a. Note Type = QSI
 - b. Note Sub Type = QSI Request
 - c. Status = Pending
 - d. Recipient = Clinical Workstream Lead

Notes Details

Division * [APD ▼]
 Note By * [Vogeler, Mandi ▼]
 Note Date * [03/24/2023 ▼]
 Program/Provider [▼]
 Note Type * [QSI ▼]
 Note Sub-Type [QSI Request ▼]
 Description [Text Area]
 Note [Text Area: Assign to QSI Assessor to complete QSI]
 Status * [Pending ▼]
 Date Completed [Field]
Attachments
 Add Attachment
 Document Description Category
 There are no attachments to display
Note Recipients
 Add Note Recipient: [Field] [Clear]

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	3/24/2023		Unread	

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

Role: Clinical Workstream Lead

- The Clinical Workstream Lead will monitor **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

My Dashboard

Quick Search: [Field] Consumers [▼] Connect ID [▼] [GO] [ADVANCED SEARCH]

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

CONSUMERS

Division	Count
Application Pending	1
Provider Selections	1
Admitted	1
Notes	2
Complete	2
Draft	1
Pending	2
Ticklers	9
Alert Notes	1

PROVIDERS

Links

- Connect eLearning Library
- APD Help Desk

My Management

- Current Active Cases
- Enrollments
- SAN Queue
- Pending Assessments Queue
- Pending Provider Assessments Queue
- Waiting List
- Provider Credentials Queue
- Pending Plans

- Select the QSI Request Note from the **Notes** queue and reviews the details of the request. Keep the note record open.
- The Clinical Workstream Lead will assign the QSI Assessor and add him/her to the **QSI Request** Note. Update the following fields:
 - Note Type = QSI
 - Note Subtype = QSI Request
 - Status = Pending

d. Recipient = QSI Assessor

Notes Details

Division * [APD ▼]

Note By * [Vogeler, Mandi]

Note Date * [03/24/2023]

Program/Provider [▼]

Note Type * [QSI ▼]

Note Sub-Type [QSI Request ▼]

Description

On 3/24/2023 at 12:27 PM, Mandi Vogeler wrote:
Assign to QSI Assessor to complete QSI

Note

New Text

Complete QSI

Append Text to Note

Status * [Pending ▼]

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient: [] [Clear]

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	03/24/2023		Unread	
Buck, Jennifer	3/24/2023		Unread	

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

Role: QSI Assessor

8. The QSI Assessor will monitor **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

CONSUMERS

Division [Chevron Right]

Application Pending 1

Provider Selections [Chevron Right]

Admitted 1

Notes [Chevron Right]

Complete 1

Pending 3

Ticklers [Chevron Right]

Ticklers 9

Alert Notes [Chevron Right]

Unread Alert Notes 0

9. Select the QSI Request Note from the **Notes** queue and reviews the details of the request. The QSI Assessor will follow current practices to schedule and administer the QSI with the client.

10. The QSI Assessor will complete the QSI form in APD iConnect. Navigate to the **Forms** tab and from the **File** menu click **Add Forms** and select the **Questionnaire Situational Information** form. Update the following fields:

- a. Review = select As Needed
- b. Review Date = default to today's date
- c. Division = defaults to APD
- d. Worker = Self
- e. Status = Complete
- f. Complete the fields on the form

11. From the **File** menu, select **Save and Close Forms**.

12. Once the QSI is completed the QSI Assessor will respond to the QSI Request **Note**. This note is still accessible from **My Dashboard**. Select the **Consumers > Pending > Notes** queue. Select the QSI Request Note from the **Notes** queue and update the following fields:

- a. Note Sub-Type = QSI Status Complete
- b. Note = acknowledge the QSI has been completed. If the QSI changes the waiting list category add in the Note "QSI has changed the waiting list category & needs to be updated"
- c. Status = Complete
- d. Recipient = ICF Coordinator as notification to proceed with the Authorization Letter and Clinical Workstream Lead as notification the assigned QSI was completed.

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program/Provider

Note Type * OSI

Note Sub-Type * OSI Request

Description

On 3/24/2023 at 12:27 PM, Mandi Vogeler wrote:
Assign to QSI Assessor to complete QSI
On 3/24/2023 at 12:32 PM, Mandi Vogeler wrote:
Complete QSI
On 3/24/2023 at 12:32 PM, Mandi Vogeler wrote:
QSI is complete

Note

New Text

Append Text to Note

Status * Complete

Date Completed 03/24/2023

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023		Unread	
Vogeler, Mandi	03/24/2023		Unread	

- e. Recipient = Region Waiting List Workstream Lead if the QSI changes the waiting list category.

On 3/24/2023 at 12:27 PM, Mandi Vogeler wrote:
Assign to QSI Assessor to complete QSI
On 3/24/2023 at 12:32 PM, Mandi Vogeler wrote:
Complete QSI
On 3/24/2023 at 12:32 PM, Mandi Vogeler wrote:
QSI is complete

Note

New Text

QSI has changed the WaitList Category. Please update

Append Text to Note

Status * Complete

Date Completed 03/24/2023

13. From the **File** menu, select **Save and Close Notes**. If the Waiting List category does not change, proceed to the [ICF Authorization Letter](#) section.

Role: Region Waiting List Workstream Lead

14. The Region Waiting List Workstream Lead will monitor **My Dashboard** for incoming notes. Select the **Consumers > Complete > Notes** queue.

ICF

15. Select the QSI Request Note from the **Notes** queue and review the details of waiting list category change. The Region Waiting List Workstream Lead will follow current practices to change the waiting list category.

1k. ICF Authorization Letter

Once the ICF Admission has been accepted and the ICF Coordinator has confirmed the QSI is less than 90 days and represents the client's current situation, the ICF Coordinator will send the ICF Authorization Letter to the ICF. The ICF will confirm the admission date.

Role: State Office Worker (ICF Coordinator)

1. If the QSI did not have to be completed, skip to Step 4.
2. If the QSI had to be completed, the ICF Coordinator will work **My Dashboard** for incoming notes. Select the **Consumers > Complete > Notes** queue.
3. Select the QSI Request Note from the **Notes** queue and reviews the details of the completion. The ICF Authorization Letter can now be sent.
4. Navigate to the clients **Demographics** tab & from the **Word Merge** menu, select the **ICF Authorization Letter**.

The screenshot displays the iConnect software interface. At the top, there is a navigation bar with tabs: File, Edit, Tools, Reports, Ticklers, and Word Merge. The Word Merge dropdown menu is open, showing a list of templates: Annual Status Review Form, ICF Authorization Letter (highlighted with a red box and a mouse cursor), ICF Request, 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 Personal Disaster Plan. Below the menu, the client's demographics are visible for Leah Adams (88564). The demographics table includes fields for iConnect ID, Salutation, Last Name, First Name, Consumer Photo, Middle Name, Alias, Date of Birth, Date of Death, and Status.

Demographics	
iConnect ID	88564
Salutation	
Last Name	Adams
First Name	Leah
Consumer Photo	
Middle Name	
Alias	
Date of Birth	5/14/2006
Date of Death	
Status	Active

ICF

5. Generate the letter. Save it to your device so it can be edited. Enter the tentative admission date. Save your changes. From the Word Merge Preview window, upload the saved document to a note in APD iConnect. Update the following fields:

The screenshot shows the APD iConnect interface with a 'Word Merge Preview' window open. The preview displays a letter titled 'ICF/DD REFERRAL FOR ADMISSION AUTHORIZATION' from the 'agency for persons with disabilities, State of Florida'. The letter is addressed to Ron DeSantis, Governor, and is dated 3/24/2023. The letter content states that it has been determined by APD Central Office staff that a facility has a vacancy appropriate to meet the needs of an individual, and that the ICF/DD provider can make the final determination of admission approval. The letter is signed by Carrie Abner, Administrator.

- a. Note Type = ICF
- b. Note Sub-Type = Authorization Letter
- c. Status = Pending
- d. Recipient = Self

The screenshot shows the 'Notes Details' form in APD iConnect. The form is filled out with the following information:

- Division: APD
- Note By: Vogler, Mandi
- Note Date: 03/24/2023
- Program/Provider: [Empty]
- Note Type: ICF
- Note Sub-Type: Authorization Letter
- Description: [Empty]
- Note: [Empty]
- Status: Pending
- Date Completed: [Empty]
- Attachments: [Empty]
- Note Recipients: [Empty]

The 'Note' field contains a preview of the letter content, which matches the content shown in the Word Merge Preview window.

ICF

6. From the **File** menu, select **Save and Close Notes**.
7. External to APD iConnect, the ICF Coordinator will send the ICF Authorization Letter to the ICF who will confirm the official admission date.
16. Once the Authorization letter comes back from the ICF with the admission date confirmed, the ICF Coordinator will update the pending Authorization Letter note. This note is still accessible from **My Dashboard**. Select the **Consumers > Pending > Notes** queue. Select the Authorization Letter note from the **Notes** queue and update the following fields:
 - a. Note Sub-Type = ICF Admission Pending
 - b. Status = Pending. Note will remain in Pending status until it is confirmed the client has been admitted.

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program/Provider

Note Type * ICF

Note Sub-Type * ICF Admission Pending

Description

Note

On 3/24/2023 at 12:41 PM, Mandi Vogeler wrote:
Auth letter sent
On 3/24/2023 at 12:42 PM, Mandi Vogeler wrote:
ICF Admission Pending

New Text

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document Description Category

There are no attachments to display

Note Recipients

Add Note Recipient

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	03/24/2023		Unread	

17. From the **File** menu, select **Save and Close Notes**. Proceed to the [Client Admitted](#) section.

11. Client Admitted

Role: State Office Worker (ICF Coordinator)

ICF

1. Once Client has been admitted, the ICF Coordinator will update the workers on the **Division** record. Navigate to the **Division** tab, **select** the APD Eligible – ICF/IID record. Update the following fields:
 - a. Primary worker = Receiving MCM
 - b. Secondary worker = Receiving Clinical Workstream Lead

The screenshot shows the 'Division' record in the 'icfconnect' system. The form is titled 'Division' and includes a 'File' menu and a 'Word Merge' button. The form fields are as follows:

Field	Value
APD	APD Eligible - ICF/IID
Disposition	APD Eligible - ICF/IID
Disposition Date	02/24/2023
Open Date	02/10/2023
Date Entry Date	02/10/2023
Primary Worker	Ingber, Mandi
Secondary Worker	Ingber, Mandi
Received in ICF/IID	Yes
Application Received Date	02/10/2023
Age Category at Time of Application	6 and Above
Application Pending Due Date	05/01/2023
Eligibility Documentation Complete Date	
Referral Source	
Referral Date	02/10/2023



CAUTION

The workers on the Division record must be updated **BEFORE** the ICF > Admission Pending note is updated in order to trigger the ticklers for the MCM and Clinical Workstream Lead.

2. From the **File** menu, select **Save and Close Division**.
3. The ICF Coordinator will wrap up the ICF Admission process by closing the ICF > Admission Pending note. This note is still accessible from **My Dashboard**. Select the **Consumers > Pending > Notes** queue. Select the Admission Pending note from the **Notes** queue and update the following fields:
 - a. Note Subtype = ICF Admitted
 - b. Status = Complete
 - c. Recipient = WSC/WLSC, Clinical Workstream Lead and if transition from Waiver – Waiver Workstream Lead

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program/Provider

Note Type * ICF

Note Sub-Type ICF Admitted

Description

On 3/24/2023 at 12:41 PM, Mandi Vogeler wrote:
AUM letter sent
On 3/24/2023 at 12:42 PM, Mandi Vogeler wrote:
ICF Admission Pending
On 3/24/2023 at 12:45 PM, Mandi Vogeler wrote:
Consumer Admitted

Note

New Text

Append Text to Note

Status * Complete

Date Completed 03/24/2023

Attachments

Add Attachment

Document Description Category

There are no attachments to display

Note Recipients

Add Note Recipient

Clear

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	03/24/2023		Unread	

4. From the **File** menu, select **Save and Close Notes**.
5. When the ICF > ICF Admitted note is saved in Complete status, a Workflow Wizard triggers ticklers for the MCM (Primary Worker) and the Clinical Workstream Lead (Secondary Worker.)
 - a. The MCM receives tickler to:
 - Initiate the Admission Review

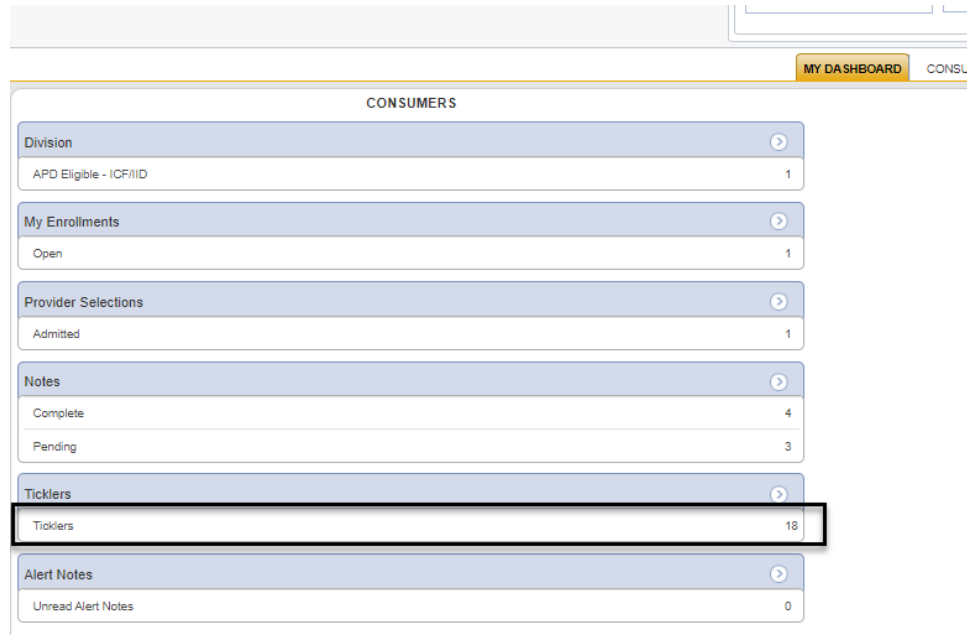
Message to update Demographics (Add Residence address, make primary, living setting, etc.)

Click here to proceed to [Admission Review](#) section.
 - b. The Clinical Workstream Lead receives the following ticklers that will be reassigned to the Region Waiver Workstream Lead:
 - Send the Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via a note.
 - End Date Planned Services, Authorizations, Plan and Budget.
 - Update APD Waiver Program End Date
 - Has WSC returned the client's physical file to the regional office?
 - Close the waitlist record. Cancel if client is not on the waitlist.
 - Proceed to the [Disenrollment Complete](#) section.

1m. Admission Review

Role: Region Clinical Workstream Worker (MCM)

1. MCM will monitor **My Dashboard** for incoming **Ticklers**.

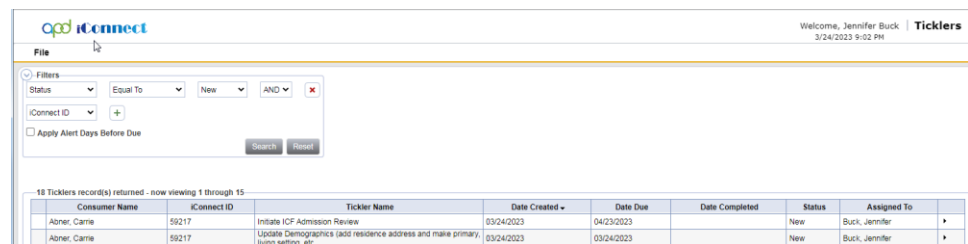


MY DASHBOARD CONSU

CONSUMERS

Filter	Count
Division	
APD Eligible - ICF/IID	1
My Enrollments	
Open	1
Provider Selections	
Admitted	1
Notes	
Complete	4
Pending	3
Ticklers	
Ticklers	18
Alert Notes	
Unread Alert Notes	0

2. Two ticklers were triggered when the ICF Admitted Note was saved as complete.
 - a. Update Demographics (Add Residence address, make primary, living setting, etc.)
 - i. Remember to ensure that that Cost Plans have been ended prior to updating the living setting as updating this field will prevent cost plan validation from being completed.
 - b. Initiate the Admission Review



iConnect Welcome, Jennifer Buck 3/24/2023 5:02 PM **Ticklers**

File

Filters: Status Equal To New AND x

iConnect ID +

☐ Apply Alert Days Before Due

Search Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Abner, Carrie	59217	Initiate ICF Admission Review	03/24/2023	04/23/2023		New	Buck, Jennifer
Abner, Carrie	59217	Update Demographics (add residence address and make primary living setting, etc.)	03/24/2023	03/24/2023		New	Buck, Jennifer

3. The first tickler reminds the MCM to update the client's address on their demographic page to their new residence. From the tickler flyout menu,

the MCM can select the **View Client Record** shortcut to open the client's record. If this is a client coming from the waiting list, the MCM can cancel this tickler by selecting Cancel from the tickler flyout menu.

- a. Remember to ensure that that Cost Plans have been ended prior to updating the living setting as updating this field will prevent cost plan validation from being completed.

The screenshot shows the iConnect Ticklers interface. At the top, there's a header with the iConnect logo and a welcome message for Jennifer Buck. Below the header is a filter section with dropdowns for Status, Equal To, New, and AND, and a search button. The main area displays a table of 17 ticklers. The first tickler is highlighted, and a flyout menu is open, showing options: Cancel, Edit, Reassign, Complete, and View Consumers Record.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Abner, Carrie	59217	Update Demographics (add residence address and make primary living setting, etc.)	03/24/2023	03/24/2023		New	Cancel
Abner, Carrie	59217	Complete Support Plan Short Form	03/24/2023	05/06/2023		New	Edit
Abner, Carrie	59217	Generate Notice of APD Eligibility/Ineligibility	03/24/2023	05/06/2023		New	Reassign
Abner, Carrie	59217	Verify Mental Health Diagnosis	03/24/2023	05/06/2023		New	Complete
Abner, Carrie	59217	Verify Accuracy of Preliminary Waiting List Category	03/24/2023	03/24/2023		New	View Consumers Record
Abner, Carrie	59217	Complete the Waiver Eligibility Worksheet	03/24/2023	05/06/2023		New	

4. When the address has been updated, the MCM can mark this ticker as complete, by selecting the Complete from the tickler flyout menu.
5. From the tickler queue, click on the second tickler, "Initiate Admission Review". This is a reminder to the MCM to complete the on-site visit in order for the initial admission paperwork (also referred to as Day 1 and UR) to be completed. This paperwork is completed outside of APD iConnect but will be scanned and attached to note.
6. Clicking on the "Initiate Admission Review" tickler will open the Note Details page. Update the following fields:
 - a. Note Type = ICF
 - b. Note Sub-Type = ICF Admission Review
 - c. Status = Complete
 - d. Attachments = Attach the initial admission review paperwork

7. From the **File** menu, select **Save and Close Notes**. The tickler will automatically be marked as complete.
8. The MCM will provide the admission paperwork to the Vendor that will be managing the case outside of APD iConnect.
9. Outside of iConnect, the Vendor will complete the 30-day Initial review and 180-day reviews and submit the review paperwork to the MCM.
10. The MCM will scan the review documentation from the Vendor and attach to a note in APD iConnect. From the client's record, select the **Notes** tab. From the **File** menu click **Add Note**. The Note Details page displays. Update the following fields.
 - a. Note Type = ICF
 - b. Note Sub Type = Initial 30-day Review or 180-day Review
 - c. Status = Complete
11. From the **File** menu, select **Save and Close Notes**.

ICF

Notes Details

Division *

Note By *

Note Date *

Program/Provider

Note Type *

Note Sub-Type

Description

Note

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category
There are no attachments to display		

Note Recipients

Name	Date Sent	Date Read	Status	Date Signed
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1n. Disenrollment Complete

Role: Region Clinical Workstream Lead

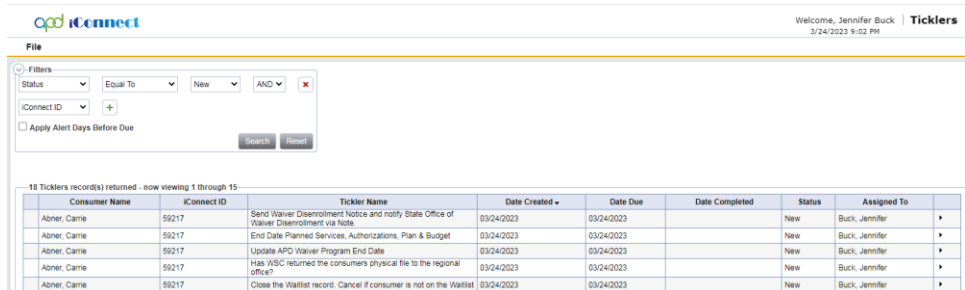
1. The Clinical Workstream Lead will monitor **My Dashboard** for incoming **Ticklers**.

MY DASHBOARD **CONSUMERS**

Category	Count
Division	1
My Enrollments	1
Provider Selections	1
Notes	4
Notes	3
Ticklers	18
Alert Notes	0

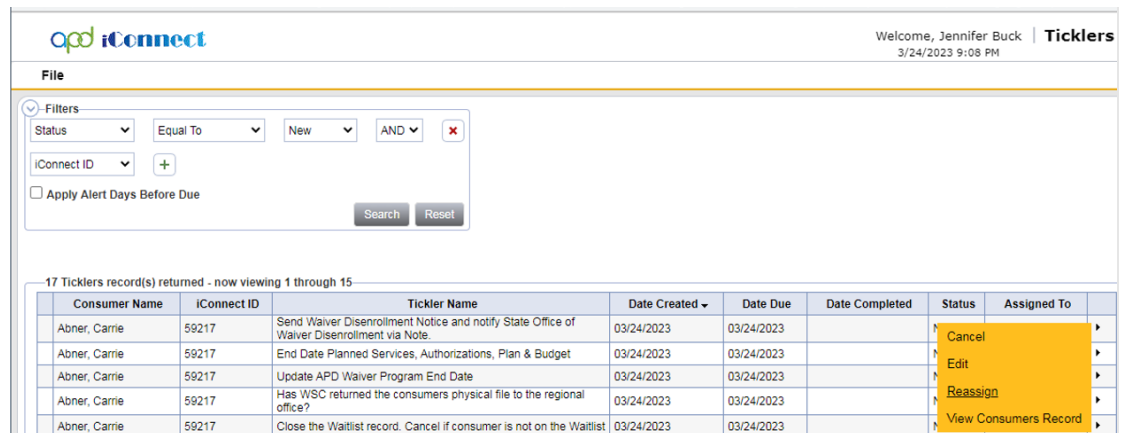
ICF

2. Five ticklers were triggered when the ICF Admitted Note was saved as complete. The Clinical Workstream Lead will reassign each to the Region Waiver Workstream Lead:
 - a. Send the Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via a note.
 - b. End Date Planned Services, Authorizations, Plan and Budget.
 - c. Update APD Waiver Program End Date
 - d. Has WSC returned the client's physical file to the regional office?
 - e. Close the waitlist record. Cancel if client is not on the waitlist.



Consumer Name	ICConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Abner, Carrie	59217	Send Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via Note.	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	End Date Planned Services, Authorizations, Plan & Budget	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	Update APD Waiver Program End Date	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	Has WSC returned the consumers physical file to the regional office?	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	Close the Waitlist record. Cancel if consumer is not on the Waitlist	03/24/2023	03/24/2023		New	Buck, Jennifer

3. To reassign each tickler, from the **tickler flyout menu**, select **Reassign**.



Consumer Name	ICConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Abner, Carrie	59217	Send Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via Note.	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	End Date Planned Services, Authorizations, Plan & Budget	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	Update APD Waiver Program End Date	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	Has WSC returned the consumers physical file to the regional office?	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	Close the Waitlist record. Cancel if consumer is not on the Waitlist	03/24/2023	03/24/2023		New	Buck, Jennifer

4. Search for and select the name of the Region Waiver Workstream Lead.
5. Repeat these steps for each tickler.

Role: Region Waiver Workstream Lead

6. The Clinical Workstream Lead will monitor **My Dashboard** for incoming **Ticklers**.

CONSUMERS	
Division	
APD Eligible - ICF/IID	1
My Enrollments	
Open	1
Provider Selections	
Admitted	1
Notes	
Complete	4
Pending	3
Ticklers	
Ticklers	18
Alert Notes	
Unread Alert Notes	0

7. Five ticklers were triggered when the ICF Admitted Note was saved as complete and were reassigned to the Region Waiver Workstream Lead by the Clinical Workstream Lead. The Region Waiver Workstream Lead will follow current disenrollment processes.
 - a. Send the Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via a note.
 - b. End Date Planned Services, Authorizations, Plan and Budget.
 - c. Update APD Waiver Program End Date
 - d. Has WSC returned the client's physical file to the regional office?
 - e. Close the waitlist record. Cancel if client is not on the waitlist.
8. The "Send the Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via a note" tickler will be marked as completed when the note is saved.
9. The "End Date Planned Services, Authorizations, Plan and Budget" tickler will be marked as complete when the Region Waiver Workstream Lead marks the tickler as complete from the tickler flyout menu.

qcd iConnect

Welcome, Jennifer Buck | Ticklers
3/24/2023 9:08 PM

File

Filters

Status Equal To New AND X

iConnect ID +

☐ Apply Alert Days Before Due

Search Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Abner, Carrie	59217	Send Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via Note.	03/24/2023	03/24/2023		New	Buck, Jennifer
Abner, Carrie	59217	End Date Planned Services, Authorizations, Plan & Budget	03/24/2023	03/24/2023			
Abner, Carrie	59217	Update APD Waiver Program End Date	03/24/2023	03/24/2023			
Abner, Carrie	59217	Has WSC returned the consumers physical file to the regional office?	03/24/2023	03/24/2023			
Abner, Carrie	59217	Close the Waitlist record. Cancel if consumer is not on the Waitlist	03/24/2023	03/24/2023			
Abner, Carrie	59217	Initiate ICF Admission Review	03/24/2023	04/23/2023			
Abner, Carrie	59217	Complete the waiver enrollment process.	03/24/2023	03/24/2023			

10. The “Update APD Waiver Program End Date” tickler will be marked as complete when the Region Waiver Workstream Lead marks the tickler as complete from the tickler flyout menu.
11. The “Has WSC returned the client’s physical file to the regional office?” tickler will be marked as complete when the Region Waiver Workstream Lead marks the tickler as complete from the tickler flyout menu.
12. The “Close the waitlist record. Cancel if client is not on the waitlist” tickler will be marked as complete when the Region Waiver Workstream Lead marks the tickler as complete from the tickler flyout menu.

2. ICF Transition to Waiver

The client expresses interest in leaving an ICF to their Medical Case Manager (MCM.) The client may also express interest in leaving to their provider. The provider will notify the MCM.

2a. Document of Choice

The MCM will complete the choice counseling process with the client. As part of the waiver eligibility process, the Clinical Workstream Lead will verify the QSI and initiate the process for a new QSI when it's older than 3 years or does not reflect the client's current circumstance. The Behavior Analyst will complete the Behavior Analysis Services Eligibility (BASE) form.

The ICF Coordinator will oversee the transition process where the WSC is selected, the State Office creates the enrollment record, and the client moves.

Role: Region Clinical Workstream Worker (MCM) and Region Clinical Workstream Lead

1. If the ICF resident is not a client of APD, the MCM will refer the client to the Region Waiting List Workstream Lead who will initiate the waiver application process. Once the client is eligible, the Region Waiting List Workstream Lead will notify the MCM.
2. The MCM will complete the choice counseling process with the client outside of APD iConnect. The MCM will obtain the signed Document of Choice from the client and save to a note in APD iConnect. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields.
 - a. Note Type = ICF
 - b. Note Subtype = Document of Choice
 - c. Note = Group home or family home selected
 - d. Status = Complete
 - e. Attachment = Document of Choice
 - f. Note Recipient = ICF Coordinator and Clinical Workstream Lead.

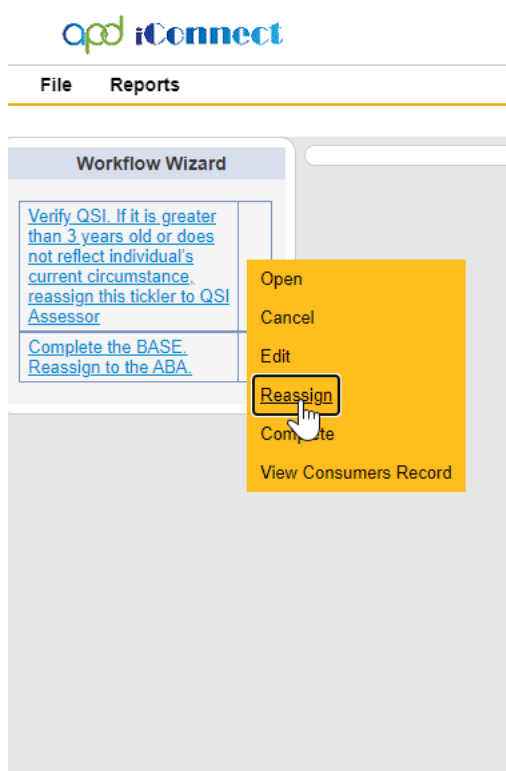
ICF

The screenshot shows the 'iConnect' system interface. At the top, there's a 'File' menu and a 'Tools' button. Below this is the 'Notes Details' section. It contains several dropdown menus: 'Division' (APD), 'Note By' (Vogeler, Mandi), 'Note Date' (03/24/2023), 'Program/Provider', 'Note Type' (ICF), and 'Note Sub-Type' (Document of Choice). There's a 'Description' field with a rich text editor showing 'Group home or family home selected' and 'Attach Document of Choice'. Below this is a 'Status' dropdown set to 'Complete' and a 'Date Completed' field set to '03/24/2023'. The 'Attachments' section shows 'There are no attachments to display'. The 'Note Recipients' section has an 'Add Note Recipient' button and a table with one recipient: 'Vogeler, Mandi' with 'Date Sent' of '3/24/2023' and 'Status' of 'Unread'.

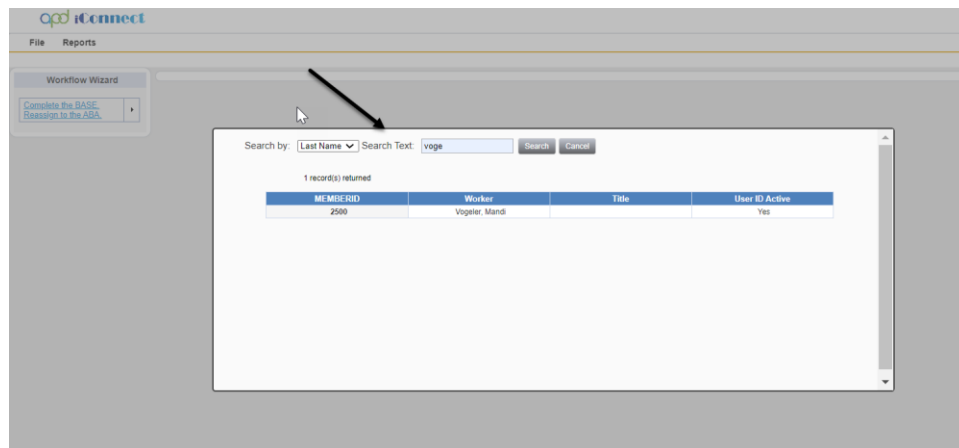
3. From the **File** menu, select **Save and Close Note**.
4. When the ICF > Document of Choice note is saved in Complete status,
 - a. Verify QSI.
 - b. Complete the BASE.

The screenshot shows the 'iConnect' system interface with the 'File' menu and 'Reports' button. A 'Workflow Wizard' dialog box is open, displaying two tasks. The first task is 'Verify QSI. If it is greater than 3 years old or does not reflect individual's current circumstance, reassign this tickler to QSI Assessor'. The second task is 'Complete the BASE. Reassign to the ABA.'. Two black arrows point to the right of each task, indicating the next steps in the workflow.

5. From the tickler flyout menu of the “Verify QSI” tickler, the Clinical Workstream Lead will select Reassign. The Clinical Workstream Lead will search for and select the name of the MCM, who is responsible for assigning the task to a QSI Assessor. Proceed to [Verify QSI](#) section.



6. From the tickler flyout menu of the “Complete the BASE” tickler, the Clinical Workstream Lead will select Reassign. The Clinical Workstream Lead will search for and select the name of the ABA who is responsible for completing the task. Proceed to [Complete the BASE](#) section.



ICF

- The ICF Coordinator is a recipient on the MCM's ICF > Document of Choice note. Proceed to [ICF Coordinator Tasks](#) section.

2b. Verify QSI

Role: Region Clinical Workstream Lead

- Region Clinical Workstream Lead monitors **My Dashboard** for incoming Notes and Ticklers (keep both) from the MCM to verify the QSI.

- If QSI is greater than 3 years or does not reflect the client's current circumstance, use **View Client Record** shortcut from the tickler flyout menu so that it will open the client's record so that a Note can be created.

Consumer Name	iConnect ID	Ticker Name	Date Created	Date Due	Date Completed	Status	Assigned To
Adams, Leah	88564	Complete the BASE. Reasoning to the ABA.	8/25/2023	8/25/2023		New	Vigilant, Mandi
Adams, Leah	88564	Verify QSI. If it is greater than 3 years old or does not reflect individual's current circumstance, reassign this tickler to QSI Assessor.	8/25/2023	8/25/2023		New	Vigilant
Adams, Leah	88564	Complete the BASE. Reasoning to the ABA.	8/24/2023	8/24/2023		New	Vigilant
Adams, Leah	88564	Close the Waitlist record. Cancel if consumer is not on the Waitlist.	8/24/2023	8/24/2023		New	Vigilant
Adams, Leah	88564	End Date Planned Services, Authorizations, Plan & Budget	8/24/2023	8/24/2023		New	Vigilant
Adams, Leah	88564	Update APD Inverse Program End Date	8/24/2023	8/24/2023		New	Vigilant
Adams, Leah	88564	Has VISC returned the consumer's physical file to the regional office?	8/24/2023	8/24/2023		New	Vigilant

- From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields. Send to assigned QSI Assessor with instruction to complete new QSI.
 - Note Type = QSI
 - Subtype = QSI Request
 - Status = Pending
 - Recipient = QSI Assessor

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program/Provider

Note Type * QSI

Note Sub-Type QSI Request

Description

On 3/24/2023 at 12:27 PM, Mandi Vogeler wrote:
Assign to QSI Assessor to complete QSI

Note

New Text

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient: Clear

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023		Unread	
Vogeler, Mandi	03/24/2023		Unread	

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

5. Navigate back to the Ticker list view. Reassign the tickler to QSI Assessor.

qcd iConnect Welcome, Mandi Vogeler | Tickers
3/25/2023 3:08 PM

File

Filters

Status Equal To New AND

iConnect ID +

☒ Apply Alert Days Before Due Refresh Cancel

21 Tickers record(s) returned - now viewing 1 through 15

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Adams, Leah	88564	Complete the BASE. Reassign to the ADA	03/25/2023	03/25/2023		New	Vogeler, Mandi
Adams, Leah	88564	Verify QSI. If it is greater than 3 years old or does not reflect individual's current circumstance, reassign this tickler to QSI Assessor	03/25/2023	03/25/2023		New	Vogeler, Mandi
Adams, Leah	88564	Complete the BASE. Reassign to the ADA	03/24/2023	03/24/2023		New	Vogeler, Mandi
Adams, Leah	88564	Close the Waiver record. Cancel if consumer is not on the Waiver	03/24/2023	03/24/2023		New	Vogeler, Mandi
Adams, Leah	88564	End Date Planned Services, Authorizations, Plan & Budget	03/24/2023	03/24/2023		New	Vogeler, Mandi
Adams, Leah	88564	Update APD Waiver Program End Date	03/24/2023	03/24/2023		New	Vogeler, Mandi
Adams, Leah	88564	Has WSC returned the consumer physical file to the regional center?	03/24/2023	03/24/2023		New	Vogeler, Mandi

Role: QSI Assessor

- QSI Assessor monitors **My Dashboard** for incoming Notes AND Ticklers.
- See section [1j. QSI Validation](#) to complete the QSI.
- QSI Assessor responds to Pending note that QSI is completed.
 - Note Type = QSI
 - Subtype = QSI Request
 - Status = Complete
 - Recipient = Region Clinical Workstream Lead

ICF

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program/Provider

Note Type * QSI

Note Sub-Type QSI Request

Description

On 3/24/2023 at 12:27 PM, Mandi Vogeler wrote:
Assign to QSI Assessor to complete QSI

Note

New Text

QSI Complete

Append Text to Note

Status * Complete

Date Completed 03/25/2023

Attachments

Add Attachment

Document Description Category

There are no attachments to display

Note Recipients

Add Note Recipient: Clear

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023		Unread	
Vogeler, Mandi	03/24/2023		Unread	

- From the **File** menu, select **Save and Close Notes**.
- QSI Assessor navigates back to the Tickler list view and marks tickler complete.

icconnect Welcome, Mandi Vogeler | Ticklers
3/25/2023 3:10 PM

File

Filters

Status Equal To New AND

iConnect ID +

☒ Apply Alert Days Before Due Search Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Complete	Status	Assigned To
Adams, Leah	88564	Complete the BASE. Reassign to the ABA.	03/25/2023	03/25/2023		New	Vogeler, Mandi
Adams, Leah	88564	Verify QSI. If it is greater than 3 years old or does not reflect individual's current circumstance, reassign this tickler to QSI Assessor	03/24/2023	03/25/2023		New	Vog
Adams, Leah	88564	Complete the BASE. Reassign to the ABA.	03/24/2023	03/24/2023		New	Vog
Adams, Leah	88564	Close the Waitlist record. Cancel if consumer is not on the Waitlist	03/24/2023	03/24/2023		New	Vog
Adams, Leah	88564	End Date Planned Services, Authorizations, Plan & Budget	03/24/2023	03/24/2023		New	Vog
Adams, Leah	88564	Update APD Waiver Program End Date	03/24/2023	03/24/2023		New	Vog
Adams, Leah	88564	Has WSC returned the consumers physical file to the regional office?	03/24/2023	03/24/2023		New	Vog

Cancel Edit Reassign Complete View Consumers Record

2c. Complete the Behavior Analysis Services Eligibility form (BASE)

Role: Region Clinical Workstream Worker (Area Behavioral Analyst - ABA)

- The ABA will monitor **My Dashboard** for incoming **Ticklers**.

CONSUMERS	
Division	APD Eligible - ICF/IID 1
My Enrollments	Open 1
Provider Selections	Admitted 1
Notes	Complete 4 Pending 3
Ticklers	Ticklers 18
Alert Notes	Unread Alert Notes 0

12. The ABA will also complete the BASE. Navigate to the clients record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select “LRC Chair Behavior analysis Services Eligibility R”. The Form Details page displays. Update the following fields:

- Review = select As Needed
- Review Date = default to today
- Division = defaults to APD
- Worker = Self
- Status = Complete
- Complete the fields on the form

ATTACHMENT E
LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)

Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or an approval for the rate, hours or cost plan.

Consumer Name: Leah Adams

First Name: Leah
Middle Name:
Last Name: Adams
Suffix:
Review Date: 03/25/2023
Support Coordinator:
Senior Behavior Analyst:
0 record(s) returned

Form Details:

Review *	As Needed	Worker *	Vogeler, Mandi
Review Date *	03/25/2023	Status *	Complete
Division *	APD	Provider/Program	
Approved By	Vogeler, Mandi	Approved Date	03/25/2023

- From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields.
 - Note Type = ICF
 - Subtype = ICF Transition Planning

ICF

- c. Description = BASE Completed
- d. Status = Complete
- e. Recipient = Region Clinical Workstream Lead

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/25/2023

Program/Provider

Note Type * ICF

Note Sub-Type ICF Transition Planning

Description BASE Completed

Note

Status * Complete

Date Completed 03/25/2023

Attachments

[Add Attachment](#)

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient: [Clear](#)

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	3/25/2023		Unread	

- From the **File** menu, select **Save and Close Notes**.
- Navigate to My Dashboard and select the Tickler records. From the tickler flyout menu, the ABA will mark tickler as complete.

File

Filters: Status: Equal To: New: AND: Apply Alert Days Before Due

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

Consumer Name	ICF Connect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Adams, Leah	88564	Complete the BASE. Reassign to the ABA.	03/25/2023	03/25/2023		New	Vogeler
Adams, Leah	88564	Close the Waitlist record. Cancel if consumer is not on the Waitlist	03/24/2023	03/24/2023		New	Vogeler
Adams, Leah	88564	End Date Planned Services. Authorizations, Plan & Budget	03/24/2023	03/24/2023		New	Vogeler
Adams, Leah	88564	Update APD Waiter Program End Date	03/24/2023	03/24/2023		New	Vogeler
Adams, Leah	88564	Map ICF- returned the consumer physical file to the regional office	03/24/2023	03/24/2023		New	Vogeler
Adams, Leah	88564	Send Waiter Disenrollment notice and notify State Office of Waiter Disenrollment via Note	03/24/2023	03/24/2023		New	Vogeler

2d. ICF Coordinator Tasks

Role: State Office Worker (ICF Coordinator)

- The ICF Coordinator will work **My Dashboard** for incoming notes. Select the **Consumers > Complete > Notes** queue.

Quick Search: [] Consumers [v] iConnect ID [v] GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

CONSUMERS

- Division: 1
- My Enrollments: 1
- Provider Selections: 1
- Notes:
 - Complete: 4
 - Pending: 3
- Ticklers: 19

PROVIDERS

TASKS

- Links:
 - iConnect eLearning Library
 - APD Help Desk
- My Management:
 - Current Active Cases
 - Enrollments
 - SNV Queue
 - Pending Assessments Queue
 - Pending Provider Assessments Queue
 - Waiting List
 - Provider Credential Queue
 - Pending Plans
 - Administrative Actions Queue

2. Click on the Document of Choice note to review the details.

Filters: Status [v] Equal To [v] Complete [v] AND [v] iConnect ID [v] + Search Reset

5 Notes record(s) returned - now viewing 1 through 5

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
8854	Adams, Leah	Provider Facility Referral	I'm Interested	03/22/2023	Are you interested?	Vogler, Mandi	Complete
8854	Adams, Leah	Forensic	Involuntary Commitment Order	03/22/2023		Vogler, Mandi	Complete
8854	Adams, Leah	ICF	ICF-ID Request	03/24/2023		Vogler, Mandi	Complete
8854	Adams, Leah	ICF	Document of Choice	03/24/2023		Vogler, Mandi	Complete



Tip

Navigate quickly from the My Dashboard > Notes queue to the client's record by copying the iConnect ID from the Notes queue and pasting it into the Client > Quick Search. The Note queue window will remain open for convenience.

Filters: Status [v] Equal To [v] Pending [v] AND [v] iConnect ID [v] + Search Reset

1 Notes record(s) returned - now viewing 1 through 1

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Pending

First Previous Records per page: 15 Next Last

FLAPD Interface Test (Copy of P: x) itsbhlmediware.com/flapdinterfacetests/Pages/Harmony.aspx?ChapterID=347&ChapterEntityID=59217&CallingChapter=Consumers&CallingPage=Notes...

Quick Search: 59217 Consumers iConnect ID GO ADVANCED SEARCH

ICF

3. ICF Coordinator updates the workers on the client's division record. from the client' record, select the Division tab. Select the APD Eligible – ICF-IID record. Update the following:
 - a. Primary Worker = ICF Coordinator
 - b. Secondary Worker = Receiving Waiting List Workstream Lead (if known, else the ICF Coordinator will return to the Division Record and update the secondary worker record once the receiving Region is known.

The screenshot shows the 'Division' tab in the iConnect software. The form is for an 'APD Eligible - ICF-IID' record. The 'Primary Worker' field is highlighted with a red box, and the 'Secondary Worker' field is also highlighted. The 'Referral Source' field is set to 'Parent'.

5. From the **File** menu, select **Save and Close Division**.
4. ICF Coordinator documents transition planning progress in a note in APD iConnect. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields.
 - a. Note Type = ICF
 - b. Note Subtype = ICF Transition Planning
 - c. Description = "ICF Transition to (indicate licensed home or other setting as noted on Documentation of Choice)"
 - d. Status = Pending
 - e. Note = Based on client's choice of living setting, identify lead for monitoring transition (WL WS Lead or RPC)
 - f. Note Recipient = MCM + RPC or Waiting List Workstream Lead (receiving Waiting List Workstream Lead if known, or home Waiting List Workstream Lead /Secondary Worker) + Waiver Workstream Lead

ICF

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program/Provider

Note Type * ICF

Note Sub-Type ICF Transition Planning

Description "ICF Transition to (indicate licensed home or other setting as noted on Documentation of Choice)"

Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient: [Input Field] [Clear]

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	3/24/2023		Unread	

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

6. The ICF Coordinator tasks resume in the [Client's Transition](#) section.

2e. WSC Selection Process

Role: Region Waiting List Workstream Lead or Clinical Workstream Worker (RPC)

1. The Region Waiting List Workstream Lead or RPC will monitor **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.
 - a. Locate the note with Note Type = ICF and Note Subtype = ICF Transition Planning and review the information contained.

Welcome, Mandi Vogeler 3/23/2023 3:36 PM **My Dashboard** Sign Out

File Reports

Quick Search: [Input Field] Consumers [Dropdown] Connect ID [Dropdown] [GO] [ADVANCED SEARCH](#)

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

CONSUMERS

- Division: APD Enigma - ICF (1)
- My Enrollments: 1
- Provider Selections: 1
- Notes: 6 Complete, 3 Pending
- Ticklers: 19

PROVIDERS

TASKS

- Links: Connect eLearning Library, APD Help Desk
- My Management: Current Active Cases, Enrollments, SAN Queue, Pending Assessments Queue, Pending Provider Assessments Queue, Waiting List, Provider Credentials Queue, Pending Plans

2. Complete the WSC Selection Process with the Client. Document information in a Note. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields.
 - a. Note Type = WSC Selection
 - b. Sub-Type = Selection Form Sent
 - c. Status = Pending
 - d. Attachment = Copy of the Selection Form Notification
 - e. Recipient = Self

Notes Details

Division: APD

Note By: Vogeler, Mandi

Note Date: 03/25/2023

Program/Provider:

Note Type: WSC Selection

Note Sub-Type: Selection Form Sent

Description:

Note:

Status: Pending

Date Completed:

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	3/25/2023		Unread	

3. From the **File** menu, select **Save and Close Notes**.
4. Saving the form with Note Type = WSC Selection and Note Sub-Type = Selection Form sent triggers a tickler for a 15-day WSC Selection Reminder. Navigate to the Ticklers section on the My Dashboard tab. Unclick "Apply Alert Days Before Due" to view tickler.

Ticklers

Filters: Status: New, Equal To, AND

Apply Alert Days Before Due: ☐

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

Consumer Name	Connect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Adams, Leah	88564	15 Day WSC Selection Reminder	03/25/2023	04/09/2023		New	Vogeler, Mandi
Adams, Leah	88564	Attach Signed Document of Choice Counseling (Annual)	03/25/2023	03/24/2024		New	Vogeler, Mandi
Adams, Leah	88564	Complete the BASE. Reassign to the ABA	03/25/2023	03/25/2023		New	Vogeler, Mandi
Adams, Leah	88564	Attach Signed Document of Choice Counseling (Annual)	03/24/2023	03/23/2024		New	Vogeler, Mandi
Adams, Leah	88564	Close the Waitlist record. Cancel if consumer is not on the Waitlist	03/24/2023	03/24/2023		New	Vogeler, Mandi

5. Once the selection form is received the Region Waiting List Workstream Lead or RPC, navigate to the Notes tab and update existing note.
 - a. Note Type = WSC Selection
 - b. Sub-Type = Initial Assignment
 - c. Recipient = WSC
 - d. Status = Complete
 - e. Attachment = completed selection form

Notes Details

Division *

Note By *

Note Date *

Program/Provider

Note Type *

Note Sub-Type

Description

On 3/25/2023 at 3:44 PM, Mandi Vogeler wrote:
Attach completed selection form

Note

New Text

B *I* U 16px A

Append Text to Note

Status *

Date Completed

Attachments

[Add Attachment](#)

6. From the **File** menu, select **Save and Close Notes**.
7. If WSC not selected in 15 days, send a note to Waiver Lead to auto assign a WSC. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields.
 - a. Note Type = WSC Selection
 - b. Sub Type = ICF or SNF Transition Assignment
 - c. Status = Pending
 - d. Recipient = Waiver Workstream Lead

Notes Details

Division *

Note By *

Note Date *

Program/Provider

Note Type *

Note Sub-Type

Description

On 3/25/2023 at 3:46 PM, Mandi Vogeler wrote:
WSC not selected in 15.

New Text

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status
Vogeler, Mandi	03/25/2023		Unread

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

Role: Region Waiver Workstream Lead

9. The Waiver Workstream Lead monitors **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

		MY DASHBOARD	CONSUMERS
CONSUMERS			
Division			
Application Pended			1
Provider Selections			
Admitted			1
Notes			
Complete			1
Pending			3
Ticklers			
Ticklers			9
Alert Notes			
Unread Alert Notes			0

10. The Waiver Workstream Lead will respond back to this note with the assigned WSC. From the client's record, select the **Notes** tab.

ICF

Select the Pending ICF or SNF Transition Assignment **Note**. Update the following fields.

- a. Note Type = WSC Selection
- a. Sub Type = ICF or SNF Transition Assignment
- b. Note = Include information on the assigned WSC.
- c. Status = Complete
- d. Recipient = Waiting List Workstream Lead or RPC

Note Recipients				
Name	Date Sent	Date Read	Status	Date Signed
Viguer, Mandi	03/25/2023		Unread	

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

Role: Region Waiting List Workstream Lead or Clinical Workstream Worker (RPC)

3. Once the note is received by the Region Waiting List Workstream Lead or RPC, navigate to the Notes tab and update existing note.
 - a. Note Type = WSC Selection
 - b. Sub-Type = Initial Assignment
 - c. Status = Complete
 - d. Recipient = WSC
4. From the **File** menu, select **Save and Close Notes**.

11. The Region Waiting List Lead or the RPC will update the workers on the client's Division record. Navigate to the client's **Division** tab. Select the active Division record.

- Disposition = APD Eligible – ICF/SNF Transition
- Disposition Date = Must be date of the client's signature on the WSC Selection form OR the date of auto-assignment of WSC (when client's fail to return a selection form)
- Primary Worker: change from ICF Coordinator to WSC.
Starts the 90 day transition clock.
- Secondary Worker: remains WL WS Lead

- From the **File** menu, select **Save and Close Division**

12. Updating the division record with Disposition = APD Eligible – ICF/SNF Transition triggers the following WFW.
- Complete ICF to Waiver Transition in 90 Days Region (Waiting List Workstream Lead – Secondary Worker) Due in 90 days. Visible immediately.

Reference [Chapter 5 of the Case Management Training for Standard APD Waiver Enrollment](#) manual to follow the steps outlined for the standard waiver enrollment processes.

2f. Waiver Enrollment

Role: State Office Enrollment

1. The State Office Enrollment will complete the standard enrollment processes. In the clients record, select the Division tab, and update the Division record.

a. Disposition = APD Eligible - Waiver

The screenshot shows the iConnect system interface. The top navigation bar includes 'File' and 'Word Merge'. The left sidebar has 'Division' selected. The main area displays the 'Events' tab for a client record. The 'Disposition' dropdown is set to 'APD Eligible - Waiver'. Other fields include 'Disposition Date' (03/25/2023), 'Open Date' (02/10/2023), 'Data Entry Date' (02/10/2023), 'Primary Worker' (Vogler, Mandi), 'Secondary Worker' (Vogler, Mandi), 'Application Received Date' (03/24/2023), 'Interested in ICFID' (Yes), 'Age Category at Time of Application' (6 and Above), 'Application Pending Due Date' (05/01/2023), 'Eligibility Documentation Complete Date', 'Referral Date' (02/10/2023), 'Referral Source' (Parent), 'Referral Reason', 'Court Order Date' (02/10/2023), 'Name' (Hicoryth Abbott), and 'Title' (Mother).

b. From the **File** menu, select **Save and Close Division**

2. Saving the Division record triggers a tickler to Create “Enrolled” APD Waiver Program record.

The screenshot shows the iConnect system interface. The top navigation bar includes 'File' and 'Reports'. The left sidebar has 'Workflow Wizard' selected. The main area displays a workflow wizard with a button labeled 'Enroll in APD Waiver'. A message box on the right says 'Create/Update the APD Waiver Program Record with Disposition = Enrolled.'

3. In the clients record, select the **Program** tab, from the **File** menu, **Add Program**.
 - a. Program = APD Waiver
 - b. Disposition = Enrolled
 - c. Disposition Date = Current Date
 - d. Enrollment Type = ICF/SNF Transition
 - e. Primary Worker = WSC
 - f. Program Begin Date = Date Client transitioned in the Waiver Program

itconnect

Leah Adams
3/25/2023 4:20 PM

Program

File Tools

Division * APD

Referral Date 03/25/2023

Create Date 03/25/2023

Program * APD Waiver

Disposition * Enrolled

Disposition Date * 03/25/2023

Enrollment Type * ICF/SNF Transition

Primary Worker * Vogeler, Mandi

Program Begin Date * 03/25/2023

Expected Deactivation Date

Comments

LOC completed prior to enrollment ☐

Deactivation Data

4. Also on the Program tab, select the Open ICF Program record and update the following fields:
 - a. Disposition = Closed
 - b. Enrollment Type = Leave Blank
 - c. Deactivated To = APD Waiver
 - d. Deactivated Reason = APD Waiver

itconnect

Leah Adams
Last Updated by mvogeler@apdcares.org
at 3/24/2023 11:17:29 PM

Program

Division * APD

Referral Date 03/24/2023

Create Date 03/24/2023

Program * ICF-RID

Disposition * Closed

Disposition Date * 03/25/2023

Enrollment Type

Program Begin Date 03/13/2023

Expected Deactivation Date

Comments

LOC completed prior to enrollment ☐

Deactivation Data

Deactivated To APD Waiver

Deactivated Date * 03/25/2023

Deactivated

Deactivation Reason APD Waiver

Role: Region Waiting List Workstream Lead or Clinical Workstream Worker (RPC)

- The Region Waiting List Workstream Lead or RPC will run a monthly report to monitor transitions every 30, 60, 90 days.

From the My Dashboard screen, use the Reports menu dropdown to select ICF Waiver Transition Report to retrieve a monthly report to monitor ICF Transition to the Waiver.

Welcome, Caroline Shorter | My Dashboard | Sign Out | 5/9/2023 8:52 PM | Role: Region Clinical Workstream Worker

File Reports

- 393.11 Annual Tracking
- 916 Monthly Tracking
- APD Service Authorizations
- Assigned Psychologist Report
- Bed Availability
- ICF Waiver Transition Report**
- Missing Provider - ICF Waiver Transition Report
- Pending Notes - Consumers HAR
- Pending SANs
- Plan Report

Advanced Search: Last Name [GO]

Tabs: DARC CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

PROVIDERS

TASKS

Links: iConnect eLearning Library, APD Help Desk

My Management: Current Active Cases

- The Region Waiting List Workstream Lead or RPC will confirm that the client was enrolled on the waiver by State Office Enrollment through the existence of the APD Waiver program record on the client's **Programs** tab.
 - Program = APD Waiver
 - Status = Enrolled
 - Enrollment Type = "ICF/SNF Transition"

Adams, Leah (88564)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User

Demographics Divisions Consumer Budgets **Programs** Provider Selections SAN Notes Forms Appointments Plans Waiting List Payers

Filters: Disposition [Not Equal To] [AND] [X]

Program [APD Waiver]

Programs record(s) returned - now viewing through

Division	Program	Worker	Disposition	Disposition Date	Create Date	Enroll type	Deactivated Date
APD	APD Waiver	Vogeler, Mandi	Enrolled	03/25/2023	03/25/2023	ICF/SNF Transition	
APD	ICF/SNF	Vogeler, Mandi	Closed	03/25/2023	03/25/2023		03/25/2023

First Previous Records per page: 15 Next Last

2g. Client's Transition

ICF

The 90-day transition was met.

The date the WSC was assigned as the primary worker on the client's division record is the date the waiver enrollment is complete and occurred within 90 days.

Role: Region Waiting List Workstream Lead or Clinical Workstream Worker (RPC)

1. Document the 90-day transition into the Waiver via updating the ICF/Transition Planning note. From the client's record, select the **Notes** tab and open the existing ICF Transition Planning Note. Update the following fields.
 - a. Note type = ICF
 - b. Sub Type = ICF Transition Planning
 - c. Note = Document the outcome of the 90 Transition
 - d. Recipient = ICF Coordinator
 - e. Status = Pending

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/25/2023

Program/Provider

Note Type * ICF

Note Sub-Type ICF Transition Planning

Description

Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	3/25/2023		Unread	

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

Role: State Office Worker (ICF Coordinator)

3. ICF Coordinator monitors **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

MY DASHBOARD CONSUMER

CONSUMERS

Division	Application Pending	1
Provider Selections	Admitted	1
Notes	Complete	1
	Pending	3
Ticklers	Ticklers	9
Alert Notes	Unread Alert Notes	0

4. Confirm the move date with the MCM or the withdrawal and update the Pending ICF Transition Planning note. Update the following fields.
 - a. Note type = ICF
 - b. Sub Type = ICF Transition Planning
 - c. Note = Document findings
 - d. Status = Complete

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/25/2023

Program/Provider

Note Type * ICF

Note Sub-Type ICF Transition Planning

Description

Note

On 3/25/2023 at 4:26 PM, Mandi Vogeler wrote:
Add ICF Coordinator
On 3/25/2023 at 4:32 PM, Mandi Vogeler wrote:
Complete

New Text

Append Text to Note

Status * Complete

Date Completed 03/25/2023

Attachments

Add Attachment

Document Description Category

There are no attachments to display

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status
Vogeler, Mandi	03/25/2023		Unread

5. From the **File** menu, select **Save**.
 - a. From the Tool Menu Dropdown, Mark Note as Read to remove from My Dashboard

The 90-day Transition was NOT met.

Role: Region Waiting List Workstream Lead or Clinical Workstream Worker (RPC)

1. If the 90-day transition was not met, document the details of why transition timeline was not met via a new note. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields.
 - a. Note Type = ICF
 - b. Sub Type = Reason Timeline Unmet
 - c. Notes = reason why did not transition within 90 days
 - d. Status = Pending
 - e. Recipient = WSC for FU and ICF Coord as FYI

opd iConnect

File Tools

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/25/2023

Program/Provider

Note Type * ICF

Note Sub-Type Reason Timeline Unmet

Description

Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient: Clear

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	3/25/2023		Unread	

2. From the **File** menu, select **Save and Close Notes**.
3. The Tickler can be marked as complete because the Note will be used to track the follow-up until the client has moved.

ICF

adconnect

Welcome, Mandi Ungeler | Ticklers

3/25/2023 4:35 PM

File

Filters

Status: Equal To: New: AND: +

ICconnect ID: +

Apply Alert Days Before Due

Search: Reset

40 Ticklers records returned - now viewing 1 through 15

Consumer Name	ICconnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Adams, Leah	88564	Waiver Eligibility Worksheet Reminder	8/25/2023	8/24/2024		New	Vigener, Mandi
Adams, Leah	88564	Annual Plan Review	8/25/2023	8/24/2024		New	Vigener, Mandi
Adams, Leah	88564	Annual Plan Review (recurring)	8/25/2023	8/24/2024		New	Vigener, Mandi
Adams, Leah	88564	Complete AIM	8/25/2023	8/24/2023		New	Vigener, Mandi
Adams, Leah	88564	Initiate Person Centered Support Plan	8/25/2023	8/25/2023		New	Vigener, Mandi
Adams, Leah	88564	Upload Support Planning Docs	8/25/2023	8/25/2023		New	Vigener, Mandi
Adams, Leah	88564	Complete Cost Plan	8/25/2023	8/25/2023		New	Vigener, Mandi
Adams, Leah	88564	Initiate and/or Update the Cost Plan	8/25/2023	8/25/2023		New	Vigener, Mandi
Adams, Leah	88564	ICF to WSC Transition	8/25/2023	8/25/2023		New	State Office Environment
Adams, Leah	88564	Complete the ICF to Waiver Transition in 90 Days	8/25/2023	8/25/2023		New	Vigener, Mandi
Adams, Leah	88564	Complete the ICF to Waiver Transition in 90 Days	8/25/2023	8/25/2023		New	Vigener, Mandi
Adams, Leah	88564	15 Day WSC Selection Reminder	8/25/2023	8/25/2023		New	Vigener, Mandi
Adams, Leah	88564	Attach Signed Document of Choice Counseling (Annual)	8/25/2023	8/24/2024		New	Vigener, Mandi
Adams, Leah	88564	Complete the B-40: Reasoning to the ADA	8/25/2023	8/25/2023		New	Vigener, Mandi
Adams, Leah	88564	Attach Signed Document of Choice Counseling (Annual)	8/24/2023	8/23/2024		New	Vigener, Mandi

First Previous Records per page: 15 Next Last

Role: Waiver Support Coordinator (WSC)

- The WSC will monitor **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.

MY DASHBOARD CONSUMERS

CONSUMERS

Division	
Application Pended	1
Provider Selections	
Admitted	1
Notes	
Complete	1
Pending	3
Ticklers	
Ticklers	9
Alert Notes	
Unread Alert Notes	0

- Complete follow up to get client moved and respond to Waiting List Workstream Lead via existing note. From the client's record, select the **Notes** tab. From the list view select the "ICF/Reason Timeline unmet" **Note**, update the following fields.
 - Note Type = ICF
 - Sub Type = Reason Timeline unmet
 - Recipient = Waiting List Workstream Lead or RPC

ICF

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/25/2023

Program/Provider

Note Type * ICF

Note Sub-Type Reason Timeline Unmet

Description

Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	3/25/2023		Unread	

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

Client chooses to remain in ICF.

7. If the client decides that they want to remain in the ICF (they do not want to move), notify the Waiver Lead and MCM via a note. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields.
- Note Type = ICF
 - Sub Type = Consumer Request
 - Description = Chooses to remain in ICF
 - Note = Request MCM to redo Documentation of Choice and Waiver Lead to initiate Waiver disenrollment
 - Recipients = Waiver Lead & MCM & Clinical Lead
 - Status = Complete

Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/25/2023

Program/Provider

Note Type * ICF

Note Sub-Type Consumer Request

Description Chooses to remain in ICF

Note

Status * Complete

Date Completed 03/25/2023

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status
Vogeler, Mandi	3/25/2023		Unread

8. From the **File** menu, select **Save and Close Notes**.
9. The Waiver Workstream Lead will proceed through current disenrollment process. (Need to disenroll from Waiver. Change program and division record back to ICF instead of Waiver.) See Case Management Training Guide for the Waiver Disenrollment process.
10. MCM will proceed with documentation and attaching to a new note. Add Clinical Workstream Lead as FYI
 - a. Note Type = ICF
 - b. Note Sub-Type = Document of Choice
 - c. Status = Pending
 - d. Recipient = Clinical Workstream Lead
11. From the **File** menu, select **Save and Close Notes**.
12. MCM will also need to send the ICF Transition Planning Note back to ICF Coordinator. From the client's record, select the **Notes** tab. From the **File** menu, select the Pending ICF Transition Planning note. Update the following fields:

ICF

- a. Note type = ICF
- b. Sub Type = ICF Transition Planning
- c. Recipient = ICF Coordinator
- d. Status = Complete

Notes Details

Division *

Note By *

Note Date *

Program/Provider

Note Type *

Note Sub-Type

Description

On 3/25/2023 at 4:26 PM, Mandi Vogeler wrote:
Add ICF Coordinator

Note

New Text

Append Text to Note

Status *

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status
Vogeler, Mandi	03/25/2023		Unread

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