



State of Florida
Agency for Persons with Disabilities

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

Table of Contents

Introduction 3

1. ICF Admissions 3

1a. Complete ICF Admission Tasks 3

1b. Complete Residential Referral Form 6

1c. Behavioral Concerns 9

1d. State Office Tasks 12

 WSC/WLSC Responds to request for additional information. 13

1e. ICF Coordinator Tasks 15

 WSC/WLSC receives ticklers 17

1f. Level of Reimbursement (LOR) 3 – Behavioral 18

 LOR 3 Denied & MCM update necessary 22

1g. Admission Packet Complete 24

 WSC/WLSC/MCM Responds to request for additional information.... 26

1h. Create ICF Program Record 28

1i. ICF Referral Tracking form 28

1j. QSI Validation 32

1k. ICF Authorization Letter 37

1l. Client Admitted 39

1m. Admission Review 42

1n. Disenrollment Complete 45

2. ICF Transition to Waiver 49

2a. Document of Choice 49

2b. Verify QSI 52

2c. Complete the Behavior Analysis Services Eligibility form (BASE) 54

2d. ICF Coordinator Tasks 56

2e. WSC Selection Process 59

2f. Waiver Enrollment 65

2g. Client’s Transition 67

 The 90-day transition was met. 68

 The 90-day Transition was NOT met 70

 Client chooses to remain in ICF. 72

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.

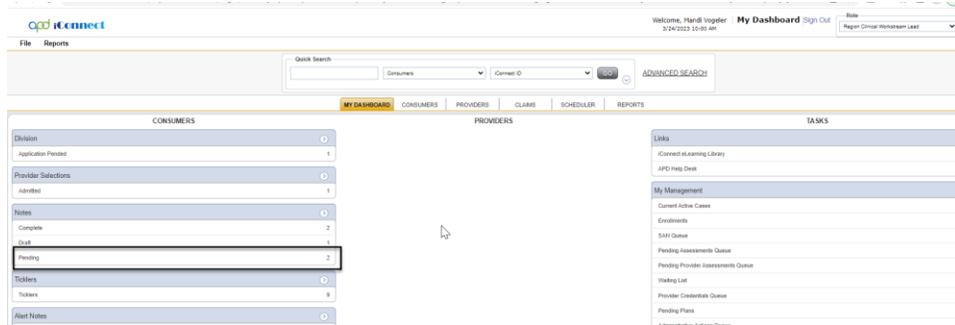
| Name | Date Sent | Date Read | Status | Date Signed |
|---------------|-----------|-----------|--------|-------------|
| Vogler, Mandi | 3/24/2023 | | Unread | |

-
-
-
-
-
- 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

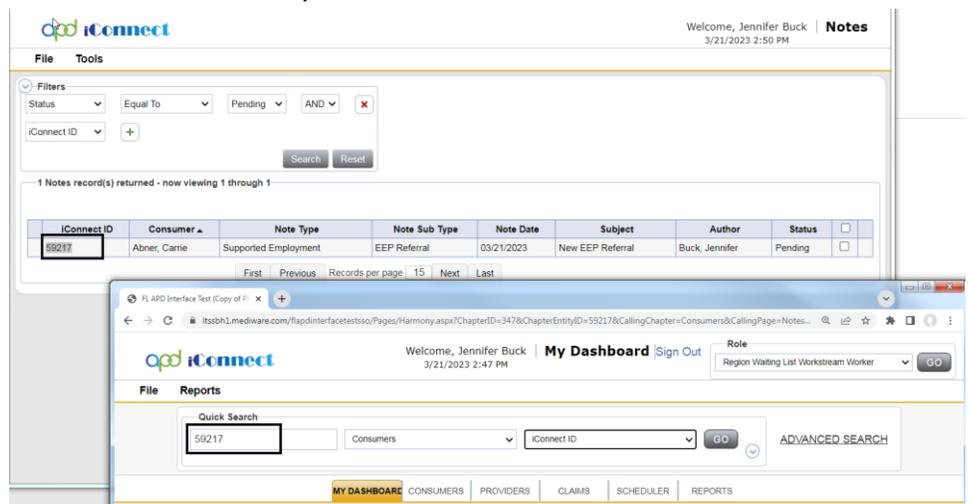
in the workflow and ensure behavioral concerns are addressed if they exist. Select the **My Dashboard > Consumers > Pending > Notes** queue.



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.



ICF

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)

1. 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:
 - a. Note = denote there are no behavioral concerns to address
 - b. Status = Pending
 - c. Note Recipient = Medical Case Manager (MCM)
2. From the **File** menu, select **Save and Close Note**.

The screenshot displays the 'Notes Details' form in the APD iConnect system. The form is for an 'ICF-IID Request' note. Key fields include:

- Note By:** Vignar, Mandi
- Note Date:** 03/24/2023
- Program Provider:** T CARE LLC
- Note Type:** ICF
- Note Sub-Type:** ICF-IID Request
- Status:** Pending

At the bottom, the 'Note Recipients' section contains a table with the following data:

| Name | Date Sent | Date Read | Status | Date Signed | Action |
|----------------|------------|-----------|--------|-------------|--------|
| Vignar, Mandi | 03/24/2023 | | Unread | | Remove |
| Bock, Jennifer | 3/24/2023 | | Unread | | Remove |

An arrow points to the 'Add Note Recipient' button above the table.

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

ICF

MY DASHBOARD CONSUME

CONSUMERS

- Division: Application Pended (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 reviews the details of the request. Keep the note record open.

cpd icconnect

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

File Tools

Filters: Status Equal To Pending AND Comment ID

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

| ID | Consumer | Note Type | Note Sub Type | Note Date | Subject | Author | Status | |
|------|-------------|--------------------|------------------------------|------------|---------|----------------|---------|--------------------------|
| 1854 | Adams, Leah | Facility Placement | Residential Planning Request | 03/22/2023 | | Vogeler, Mandi | Pending | <input type="checkbox"/> |
| 1854 | Adams, Leah | Facility Placement | Residential Planning Request | 03/22/2023 | | Vogeler, Mandi | Pending | <input type="checkbox"/> |
| 1854 | Adams, Leah | ICF | ICF-IID Request | 03/24/2023 | | Vogeler, Mandi | Pending | <input type="checkbox"/> |

5. 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:
 - a. Review = select As Needed
 - b. Review Date = default to today
 - c. Division = defaults to APD
 - d. Worker = self
 - e. Status = Pending if LOR is 3; Choose Complete if the LOR is not 3. Complete the fields in the form
 - f. Placement Request For? = ICF
 - g. Fill out remainder of the form appropriately.
 - h. Select the Level of Reimbursement at bottom of form.
 - i. 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

- 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)

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

The screenshot displays the 'Notes Details' form in APD iConnect. The form includes the following fields and values:

- Division: APD
- Note By: Vigder, Mandi
- Note Date: 03/24/2023
- Program Provider: T CARE LLC
- Note Type: ICF
- Note Sub-Type: ICF-IIID Request
- Status: Pending

The 'Note Recipients' table at the bottom of the form is highlighted with a black arrow pointing to the 'Name' column. The table contains the following data:

| Name | Date Sent | Date Read | Status | Date Signed | Action |
|----------------|------------|-----------|--------|-------------|--------|
| Vigder, Mandi | 03/24/2023 | | Unread | | Remove |
| Buck, Jennifer | 03/24/2023 | | Unread | | Remove |

- From the **File** menu, select **Save and Close Notes**.
- The Regional Clinical Workstream Worker (ABA) monitors **My Dashboard** for incoming notes. Select the **Consumers > Pending > Notes** queue.
- Select the Pending ICF-IIID 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 | |
|-------------|-------------|--------------------|------------------------------|------------|---------|---------------|---------|--------------------------|
| 18554 | Adams, Leah | Facility Placement | Residential Planning Request | 03/22/2023 | | Vogler, Mandi | Pending | <input type="checkbox"/> |
| 18554 | Adams, Leah | Facility Placement | Residential Planning Request | 03/22/2023 | | Vogler, Mandi | Pending | <input type="checkbox"/> |
| 18554 | Adams, Leah | ICF | ICF-IID Request | 03/24/2023 | | Vogler, Mandi | Pending | <input type="checkbox"/> |

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.

Consumer Forms

Review: Worker: [Cancel](#) [Details](#)

Review Date: Status: [Details](#)

Division: Provider/Program: [Details](#)

Approved By: Approved Date:

ICF/IID Behavioral Rate Screening Tool

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

Service/Support Coordinator or Designee:

| Name | ID |
|---------------|------|
| Vogler, 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, vomiting, 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 in-patient 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. At the top left is the 'iConnect' logo. Below it is a 'File' menu with several options: 'Spell Check', 'Save Forms', 'Save and Close Forms', 'Copy From Previous', 'Print', and 'Close Forms'. A mouse cursor is pointing at 'Close Forms', which is highlighted in orange. To the right of the menu, there are several dropdown menus and text fields: 'Rate Screening Tool', 'As Needed', '03/31/2023', 'APD', and 'Vogeler, Mandi'. Below the menu, there is a search bar with the text '1 Worker record(s) returned' and a search button. Below the search bar, there is a section titled 'Behavioral Characteristics: Must meet at least one within the last 6 months to'. There are two checkboxes with blue checkmarks: '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' and 'Engaged in behavior that creates life-threatening situations, such as, excessive eating or drinking, vomiting, ruminating, eating non-nutritive substances, refusing to eat, swallowing excessive amounts of air and severe insomnia'.

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:

- a. Note = details of the addressed behavioral concerns
- b. Status = Pending
- c. **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.**
- d. Note Recipient = MCM

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

The screenshot shows the 'Notes Details' form in the software. The form has several fields: 'Division' (APD), 'Note By' (Vogeler, Mandi), 'Note Date' (03/24/2023), 'Program/Provider' (TEAM LLC), 'Note Type' (ICF), and 'Note Sub-Type' (ICF-IID Request). The 'Description' field contains the text: 'On 3/24/2023 at 11:34 AM, Mandi Vogeler wrote: For Behavior notes, add MCM to Note on 3/24/2023 at 11:39 AM, Mandi Vogeler wrote: Add MCM to Note'. Below the description is a 'New Text' field with a text area and a 'New Text' button. The 'Status' field is set to 'Pending'. Below the status field is an 'Attachments' section with a table for 'Document', 'Description', and 'Category'. There are no attachments displayed. Below the attachments is a 'Note Recipients' section with a table for 'Name', 'Date Sent', 'Date Read', 'Status', and 'Date Signed'. The table has two rows: 'Vogeler, Mandi' with 'Date Sent' 03/24/2023 and 'Status' Unread; and 'Buch, Jennifer' with 'Date Sent' 3/24/2023 and 'Status' Unread.

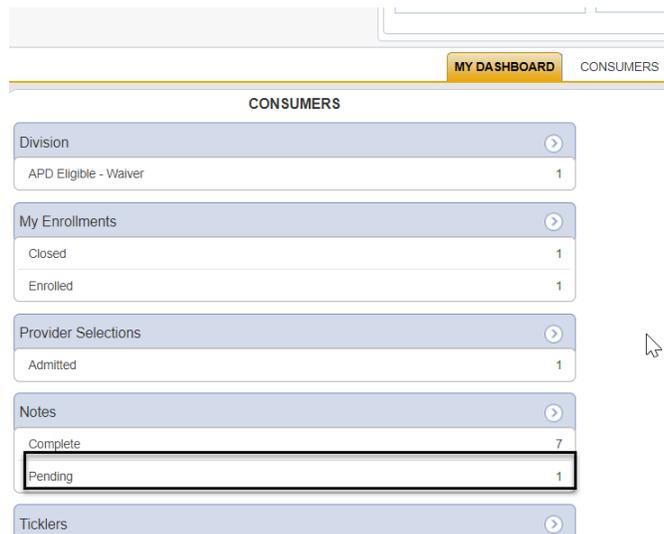
ICF

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.



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.

4. 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

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

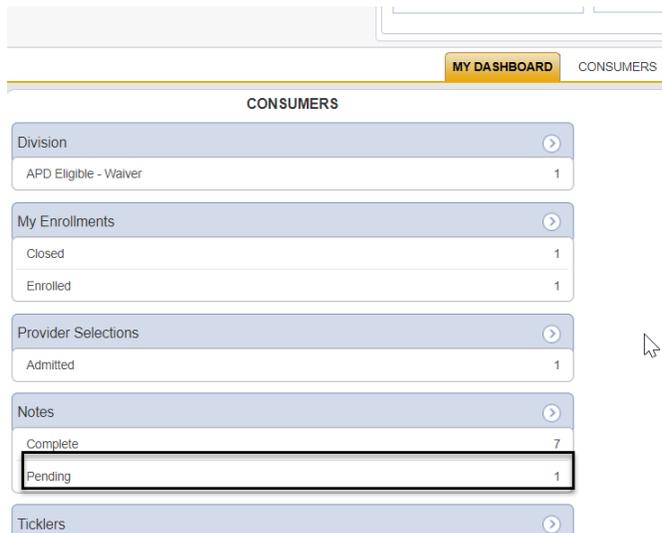
ICF

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.



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.

The screenshot shows a web dashboard with a navigation bar at the top containing 'MY DASHBOARD' and 'CONSUMERS'. Below this is a section titled 'CONSUMERS' with several expandable categories:

- Division: Application Pended (1)
- Provider Selections: Admitted (1)
- Notes: Complete (1), Pending (3) [highlighted]
- 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.

The screenshot shows the 'icconnect' application interface. At the top right, it says 'Welcome, Mandi Vogelweh 3/24/2023 11:35 AM' and has a 'Notes' button. Below is a 'File Tools' section with filters for Status (Pending), Equal To, and AND. A table below shows 3 notes recorded, with the first one highlighted:

| ICConnect ID | Consumer | Note Type | Note Sub Type | Note Date | Subject | Author | Status |
|--------------|-------------|--------------------|------------------------------|------------|---------|-----------------|---------|
| 0004 | Adams, Leah | Facility Placement | Residential Planning Request | 03/22/2023 | | Vogelweh, Mandi | Pending |
| 0004 | Adams, Leah | Facility Placement | Residential Planning Request | 03/22/2023 | | Vogelweh, Mandi | Pending |
| 0004 | Adams, Leah | ICF | ICF-IID Request | 03/24/2023 | | Vogelweh, Mandi | Pending |

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

The screenshot shows the iConnect system interface for updating a Division record. The form is titled "Division" and includes the following fields:

- Disposition ***: APD Eligible - ICF/IID (highlighted with a red box)
- Disposition Date**: 03/24/2023
- Open Date**: 02/10/2023
- Data Entry Date**: 02/10/2023
- Primary Worker ***: Vogeler, Mandi (highlighted with a red box)
- Secondary Worker**: Vogeler, Mandi (highlighted with a red box)
- Application Received Date ***: 02/10/2023
- Interested in ICF/IID**: Yes (highlighted with a red box)
- Age Category at Time of Application ***: 6 and Above
- Application Pended Due Date**: 05/01/2023
- Eligibility Documentation Complete Date**: [empty]

The **Referral Source** section includes the following fields:

- Referral Date**: 02/10/2023
- Referral Source ***: Parent
- Referral Reason**: [empty]
- Court Order Date**: 02/10/2023
- Name**: Hilceyth Abbott
- Title**: Mother
- Agency**: 7650 Test Street Apt 8
- Address**: [empty]
- City**: PORT RICHEY
- State**: FL
- Zip Code**: 34868
- Main Phone**: (984)880-8199
- Business Phone**: [empty]
- Cell Phone**: [empty]
- Fax Number**: [empty]
- Email**: test@aol.com

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.

The screenshot shows the iConnect Ticklers interface. A pop-up message from Itssbh1L.medware.com is displayed, stating: "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." Below the message is an "OK" button. The main interface shows a table of ticklers with the following data:

| 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**.

The screenshot shows the iConnect Ticklers interface. A flyout menu is open over the first tickler, showing options: "Cancel", "Edit", "Reassign", and "Complete". The "Complete" option is highlighted in yellow. The table of ticklers is the same as in the previous screenshot.

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

The screenshot shows the iConnect Ticklers interface. A flyout menu is open over the first tickler, showing options: "Cancel", "Edit", "Reassign", and "Complete". The "Cancel" option is highlighted in yellow. The table of ticklers is the same as in the previous screenshots.

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 | <input type="text"/> |
| Note Type * | ICF ▾ |
| Note Sub-Type | ICF-IID Request ▾ |
| Description | LOR = 3 |
| Note | <p>On 4/3/2023 at 4:56 PM, Jennifer Buck wrote: ABA review</p> <p>New Text</p> <p>B <i>I</i> <u>U</u> 16px A ▾</p> <p><input type="text"/></p> <p>Append Text to Note</p> |
| Status * | Pending ▾ |
| Date Completed | <input type="text"/> |

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 Pended | 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.

RESIDENTIAL REFERRAL FORM

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

Consumer Forms

Review *

Review Date *

Division *

Approved By

Note

Worker *

Status *

Provider/Program

Approved Date

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?

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

| Name | ID |
|----------------|------|
| Vogeler, Mandi | 2500 |

CONSUMER INFORMATION

Consumer First Name:

Consumer Last Name:

Consumer Middle Name:

iConnect ID:

Ref. Date:

County:

Region:

Consumer DOB:

Gender:

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 I CARE LLC

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 ASA 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

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 |
|-----------------|------------|-----------|--------|-------------|
| Bluck, 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

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)

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

File Tools

Filters: Status Equal To Pending AND Comment ID

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

| ICMent ID | Consumer | Note Type | Note Sub Type | Note Date | Subject | Author | Status | |
|-----------|-------------|------------------|------------------------------|------------|---------|---------------|---------|--------------------------|
| 18584 | Adams, Leah | Family Placement | Residential Planning Request | 03/22/2023 | | Vogler, Mandi | Pending | <input type="checkbox"/> |
| 18584 | Adams, Leah | Family Placement | Residential Planning Request | 03/22/2023 | | Vogler, Mandi | Pending | <input type="checkbox"/> |
| 18584 | Adams, Leah | ICF | ICF-IID Request | 03/24/2023 | | Vogler, Mandi | Pending | <input type="checkbox"/> |

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

Search

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 * [Vogelar, 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

On 3/24/2023 at 11:34 AM, Mandi Vogelar wrote:
For Behavior Issues, add ABA to Note
On 3/24/2023 at 11:35 AM, Mandi Vogelar wrote:
Add MCM to Note
On 3/24/2023 at 11:43 AM, Mandi Vogelar wrote:
Add WSC-VL-SIC and ICF Coordinator

New Text
Append Text to Note

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 | |
| Vogelar, 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

ICF

MY DASHBOARD CONSUMER

CONSUMERS

| Division | |
|--------------------|---|
| Application Pended | 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 * 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 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

Note

New Text

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 | |
| Reed, Monica | 03/24/2023 | | Unread | |
| Vogeler, Mandi | 03/24/2023 | | Unread | |

- 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)

- 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:
 - Note = Missing/Incorrect items
 - Status = Pending
 - Recipient = WSC/WLSC or MCM (Depending on items that are missing or incorrect)

ICF

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

| IConnect ID | Consumer | Note Type | Note Sub Type | Note Date | Subject | Author | Status |
|-------------|-------------|--------------------|------------------------------|------------|---------|----------------|---------|
| 18584 | Adams, Leah | Facility Placement | Residential Planning Request | 03/22/2023 | | Vogeler, Mandi | Pending |
| 18584 | Adams, Leah | Facility Placement | Residential Planning Request | 03/22/2023 | | Vogeler, Mandi | Pending |
| 18584 | Adams, Leah | ICF | ICF-IID Request | 03/24/2023 | | Vogeler, Mandi | Pending |

- Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request. Keep the note record open.
- 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:
 - Note = details of the updates that have been made and/or additional documentation provided
 - Status = Pending
 - Note Recipient = ICF Coordinator
- 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 includes a 'File' menu and 'Tools' button. The form fields are as follows:

- Division: APD (dropdown)
- Referral Date: [Date field]
- Create Date: 03/24/2023 (date field)
- Program: ICF/IID (dropdown)
- Disposition: Open (dropdown)
- Disposition Date: 03/24/2023 (date field)
- Enrollment Type: [Blank] (dropdown)
- Primary Worker: Vogel, Mandi (dropdown)
- Program Begin Date: 03/13/2023 (date field)
- Expected Deactivation Date: [Date field]
- Comments: [Text area]
- LOC Completed Prior To Enrollment:
- Deactivation Data: [Section header]

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' interface for the 'ICF Referral Tracking' form. The form is titled 'Consumer Forms' and is currently in 'Draft' status. The 'Review' field is set to 'Initial', 'Review Date' is '03/24/2023', and 'Division' is 'APD'. The 'Worker' is 'Buck, Jennifer'. The 'ICF #1' is 'ANN STORCK CENTER, INC.' and the 'Date Referral Sent To ICF #1' is '03/22/2023'. The 'Which Ann Storck Center?' field is set to '1790 SW 43RD WAY, FT LAUDERDALE, FL 33'. There are also checkboxes for 'Add ICF #2?' and 'Add ICF #3?'. The form includes a 'Hide Text' button and a note about the form's purpose.

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 right, it says 'Forms' and the date '3/24/2023 5:29 PM'. Below the header is a 'File' menu. The main content area is titled 'Consumer Forms' and contains a form for 'ICF Referral Tracking'. The form includes fields for 'Review *' (Initial), 'Worker *' (Buck, Jennifer), 'Review Date *' (03/24/2023), 'Status *' (Draft), 'Division *' (APD), 'Provider/Program', 'Approved By', and 'Approved Date'. Below these fields is 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.' There is a 'Hide Text' link. The form also includes fields for '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' (Accepted), 'Other Reason for ICF #1' (a text area), 'Which Ann Storck Center?' (1790 SW 43RD WAY, FT LAUDERDALE, FL 33), and '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

The screenshot shows the 'iConnect' interface for 'Consumer Forms'. The page title is 'File' and the date is '3/24/2023 5:29 PM'. The form is titled 'Please Select Type: ICF Referral Tracking'. Under 'Consumer Forms', there are several fields: 'Review *' (Initial), 'Review Date *' (03/24/2023), 'Division *' (APD), 'Approved By' (empty), 'Worker *' (Buck, Jennifer), 'Status *' (Draft), 'Provider/Program' (empty), and 'Approved Date' (empty). Below these fields is 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.' There is a 'Hide Text' link. The main form area contains: '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' (empty text area), 'Which Ann Storck Center?' (1790 SW 43RD WAY, FT LAUDERDALE, FL 33), and 'Add ICF #2?' (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 displays the APD iConnect interface for a 'Notes Details' form. The form is structured as follows:

- Notes Details:**
 - Division: APD
 - Note By: Vogeler, Mandi
 - Note Date: 03/24/2023
 - Program/Provider: [Empty]
 - Note Type: ICF
 - Note Sub-Type: ICF Response-Denied
 - Description: [Empty]
 - Note: [Empty]
 - Status: Complete
 - Date Completed: 03/24/2023
- Attachments:**
 - Document: [Empty]
 - Description: [Empty]
 - Category: [Empty]
- Note Recipients:**
 - Add Note Recipient: [Empty]

Below the form, there are two tables with headers:

| Document | Description | Category |
|-------------------------------------|-------------|----------|
| There are no attachments to display | | |

| Name | Date Sent | Date Read | Status | Date Signed |
|------|-----------|-----------|--------|-------------|
|------|-----------|-----------|--------|-------------|

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

- 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.

- 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

| Document | Description | Category |
|-------------------------------------|-------------|----------|
| There are no attachments to display | | |

| 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.

| Category | Count |
|--------------------|-------|
| Application Pended | 1 |
| Admitted | 1 |
| Complete | 1 |
| Pending | 3 |
| Ticklers | 9 |
| 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.

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

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 system interface. At the top, the logo 'iConnect' is visible. Below it, a navigation bar includes 'File', 'Edit', 'Tools', 'Reports', 'Ticklers', and 'Word Merge'. The 'Word Merge' dropdown menu is open, showing a list of document templates: 'Annual Status Review Form', 'ICF Authorization Letter', 'IES 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'. A mouse cursor is hovering over the 'ICF Authorization Letter' option. Below the menu, the client's profile for 'Adams, Leah (88564)' is shown, including a 'Demographics' tab with fields for iConnect ID, Salutation, Last Name, First Name, Consumer Photo, Middle Name, Alias, Date of Birth, Date of Death, and Status.

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:

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

| Name | Date Sent | Date Read | Status | Date Signed |
|---------------|------------|-----------|--------|-------------|
| Vogler, Mandi | 03/24/2023 | | Unread | |

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.

| 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

| Field | Value |
|---|------------------------|
| Division * | APD |
| Disposition * | APD Eligible - ICF/IID |
| Disposition Date | 02/24/2023 |
| Open Date | 02/10/2023 |
| State Entry Date | 02/10/2023 |
| Primary Worker * | Viggo, Mandi |
| Secondary Worker * | Viggo, Mandi |
| Transferred to ICF/IID | Yes |
| Application Received Date * | 02/10/2023 |
| Age Category at Time of Application * | 6 and Above |
| Application Pending Due Date | 05/11/2023 |
| 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

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**.



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



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,

ICF

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 is a header with the iConnect logo and a user greeting: "Welcome, Jennifer Buck 3/24/2023 9:08 PM". Below the header is a "File" section with a "Filters" dropdown. The filter section includes a "Status" dropdown set to "New", a "Date" dropdown set to "Equal To", and a "Tickler" dropdown set to "AND". There is also a checkbox for "Apply Alert Days Before Due" and "Search" and "Reset" buttons. Below the filters is a table with 17 ticklers returned, showing columns for Consumer Name, iConnect ID, Tickler Name, Date Created, Date Due, Date Completed, Status, and Assigned To. The table contains 7 rows of ticklers for the consumer "Abner, Carle".

| Consumer Name | iConnect ID | Tickler Name | Date Created | Date Due | Date Completed | Status | Assigned To |
|---------------|-------------|--|--------------|------------|----------------|--------|-----------------------|
| Abner, Carle | 59217 | Update Demographics (add residence address and make primary living setting, etc) | 03/24/2023 | 03/24/2023 | | New | Cancel |
| Abner, Carle | 59217 | Complete Support Plan Short Form | 03/24/2023 | 05/09/2023 | | New | Edit |
| Abner, Carle | 59217 | Generate Notice of APD Eligibility/Ineligibility | 03/24/2023 | 05/09/2023 | | New | Reassign |
| Abner, Carle | 59217 | Verify Mental Health Diagnosis | 03/24/2023 | 05/09/2023 | | New | Complete |
| Abner, Carle | 59217 | Verify Accuracy of Preliminary Waiting List Category | 03/24/2023 | 03/24/2023 | | New | View Consumers Record |
| Abner, Carle | 59217 | Complete the Waiver Eligibility Worksheet | 03/24/2023 | 05/09/2023 | | 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

The screenshot displays the 'Notes' interface in APD iConnect. The 'Workflow Wizard' on the left indicates the current step is 'Initial ICF Admission Review'. The 'Notes Details' section includes the following information:

- Division:** APD
- Note By:** Vigilante, Mandi
- Note Date:** 03/24/2023
- Program Provider:** (empty)
- Note Type:** ICF
- Note Sub-Type:** ICF Admission Review
- Description:** A text area with a placeholder 'Enter the Initial Admission details'.
- Status:** Complete
- Date Completed:** 03/24/2023

Below the details are sections for 'Attachments' (with an 'Add Attachment' link) and 'Note Recipients' (with an 'Add Note Recipient' link and a table with columns: Name, Date Sent, Date Read, Status, Date Signed).

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 * APD

Note By * Vogeler, Mandi

Note Date * 03/24/2023

Program Provider

Note Type * ICF

Note Sub-Type * Initial 30-day Review

Description

Note

Vendor will scan and attach Initial 30 day review documentation.

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 |
|------|-----------|-----------|--------|-------------|
|------|-----------|-----------|--------|-------------|

1n. Disenrollment Complete

Role: Region Clinical Workstream Lead

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

MY DASHBOARD **CONSUMERS**

CONSUMERS

Division 1

APD Eligible - ICF/IID

My Enrollments 1

Open

Provider Selections 1

Admitted

Notes 4

Complete

Pending 3

Ticklers 18

Alert Notes 0

Unread Alert Notes

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 | 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 | | 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 | 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 | | 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**.

ICF

MY DASHBOARD CONSU

CONSUMERS

| Category | 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 |

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.

The screenshot shows the iConnect Ticklers interface. At the top, there is a header with the iConnect logo, a welcome message for Jennifer Buck, and the date 3/24/2023 9:08 PM. Below the header is a 'File' section with a 'Filters' box containing dropdown menus for Status (set to 'New'), Equal To, AND, and a search button. The main area displays a table of 17 tickler records, with the first 15 visible. A yellow flyout menu is open over the second record, 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 | 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

Notes Details

Division * APD
Note By * Vogeler, Mandi
Note Date * 03/24/2023
Program/Provider
Note Type * ICF
Note Sub-Type * Document of Choice
Description
Note
Status * Complete
Date Completed 03/24/2023

Attachments

| Document | Description | Category |
|-------------------------------------|-------------|----------|
| There are no attachments to display | | |

Note Recipients

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

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

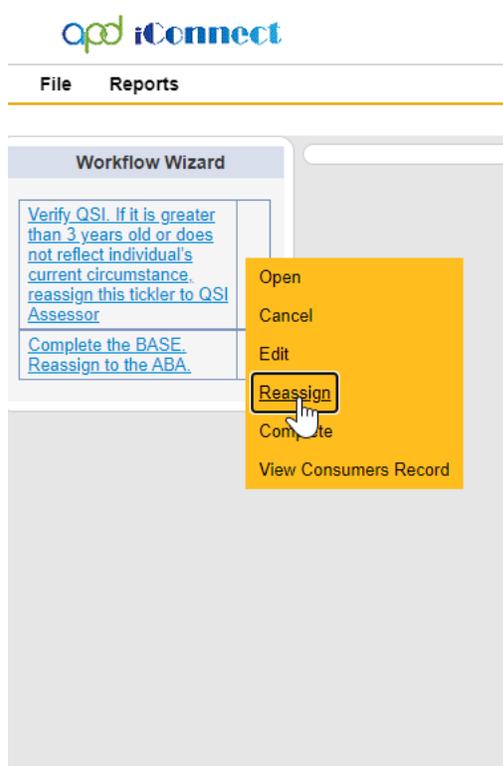
4. When the ICF > Document of Choice note is saved in Complete status, a Workflow Wizard triggers 2 ticklers for the Clinical Workstream Lead.
- Verify QSI.
 - Complete the BASE.

Workflow Wizard

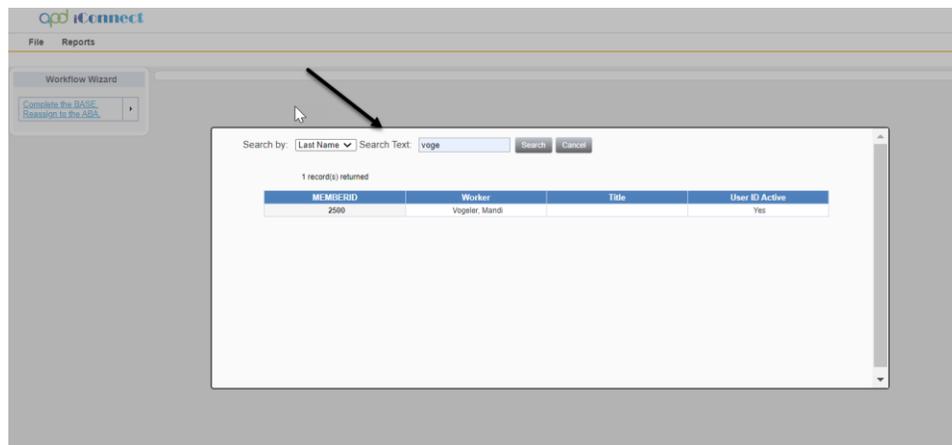
- [Verify QSI. If it is greater than 3 years old or does not reflect individual's current circumstance, reassign this tickler to QSI Assessor](#)
- [Complete the BASE. Reassign to the ABA.](#)

ICF

- 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.



- 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.



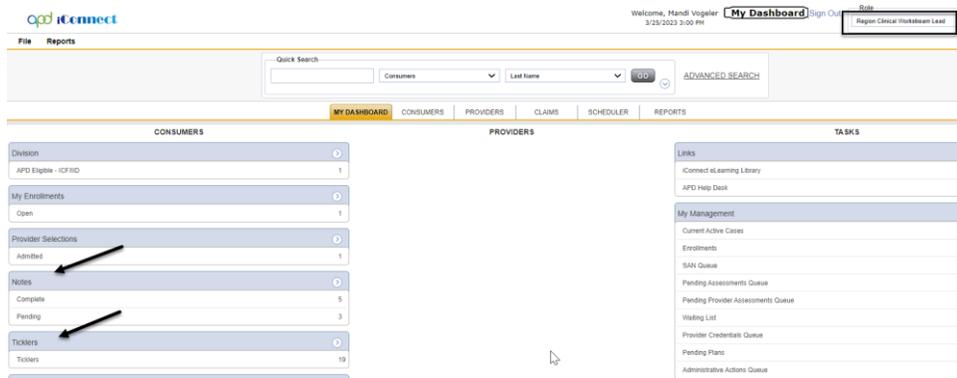
ICF

7. 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

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



2. 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.



3. 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.
 - a. Note Type = QSI
 - b. Subtype = QSI Request
 - c. 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 11:27 PM, Mandi Vogeler wrote:
Assign to QSI Assessor to complete QSI

Note

New Text

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.

opd 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 Cancel Reset

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 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 | 03/25/2023 | 03/25/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 88564 | Complete the BASE. Reassign to the ABA | 03/24/2023 | 03/24/2023 | | 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 |
| 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 WFO returned the consumer physical file to the regional center? | 03/24/2023 | 03/24/2023 | | New | Vogeler, Mandi |

Role: QSI Assessor

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

Note

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

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

| 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. 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. | 03/25/2023 | 03/25/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 88564 | Complete the BASE. Reassign to the ABA. | 03/24/2023 | 03/24/2023 | | 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 |
| 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 consumers physical file to the regional office? | 03/24/2023 | 03/24/2023 | | New | Vogeler, Mandi |

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

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

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

ICF

| CONSUMERS | |
|------------------------|----|
| Division | 1 |
| APD Eligible - ICF/IID | 1 |
| My Enrollments | 1 |
| Open | 1 |
| Provider Selections | 1 |
| Admitted | 1 |
| Notes | 4 |
| Complete | 4 |
| Pending | 3 |
| Ticklers | 18 |
| Alert Notes | 0 |
| 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: 0 record(s) returned
Senior Behavior Analyst:
18 characters remaining

- 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

| 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. Navigate to My Dashboard and select the Tickler records. From the tickler flyout menu, the ABA will mark tickler as complete.

| Consumer Name | IConnect 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, 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 |
| 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 | Stop IFC: returned the consumer physical file to the regional office | 03/24/2023 | 03/24/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 88564 | Send Waiver Disenrollment notice and notify State Office of Waiver Disenrollment via Note | 03/24/2023 | 03/24/2023 | | New | Vogeler, Mandi |

2d. ICF Coordinator Tasks

Role: State Office Worker (ICF Coordinator)

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

The screenshot shows the 'My Dashboard' interface. At the top, it says 'Welcome, Mandi Vogler 3/24/2023 3:45 PM'. There are navigation tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'CLAIMS', 'SCHEDULER', and 'REPORTS'. The 'CONSUMERS' section is active, showing a list of items: Division (APD Eligible - ICFID: 1), My Enrollments (Open: 1), Provider Selections (Admitted: 1), Notes (Complete: 4, Pending: 3), Tickers (Ticklers: 19), and Quick Search. On the right, there are 'Links' (iConnect eLearning Library, APD Help Desk) and 'My Management' (Current Active Cases, Enrollments, SAK Queue, Pending Assessments Queue, Pending Provider Assessments Queue, Waiting List, Provider Credentials Queue, Pending Plans, Administrative Actions Queue).

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

The screenshot shows the 'Notes' queue. It has filters for Status (Equal To), Complete, and AND. There are 5 notes returned. The table below shows the details:

| 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 | ICF-Subtype | 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.

This screenshot illustrates the process of navigating from the Notes queue to a client's record. The top part shows the 'Notes' queue with the 'Document of Choice' note (iConnect ID: 89217) highlighted. The bottom part shows the 'Client' Quick Search page where the iConnect ID '89217' has been entered into the search field. The browser address bar shows the URL: 'https://itsbhl.mediware.com/llapdinterfacetestsso/Pages/Harmony.aspx?ChapterID=347&ChapterEntityID=59217&CallingChapter=Consumers&CallingPage=Notes...'.

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 'iConnect' software interface. The 'Division' tab is active, displaying a record for 'APD Eligible - ICFIID'. The form contains the following fields and values:

- Disposition: APD
- Disposition Date: 03/26/2023
- Open Date: 02/10/2023
- Data Entry Date: 03/26/2023
- Primary Worker: Vogler, Mandi
- Secondary Worker: Vogler, Mandi
- Application Document Date: 03/26/2023
- Interested in ICFIID: Yes
- Age Category at Time of Application: 6 and Above
- Application Pending Due Date: 05/12/2023
- Eligibility Documentation Complete Date: [Empty]
- Referral Source: [Empty]
- Referral Date: 02/10/2023
- Referral Source: 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:

| 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 **My Dashboard** Sign Out

3/23/2023 3:34 PM

Region Clinical Workstream Worker

Quick Search: Consumers

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

CONSUMERS

Division APD Engine - ICF ID 1

My Enrollments 1

Provider Selections 1

Notes Complete 6 Pending 3

Tickers 19

PROVIDERS

Links iConnect 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

| Document | Description | Category |
|-------------------------------------|-------------|----------|
| There are no attachments to display | | |

Note Recipients

| 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.

28 Ticklers record(s) returned - now viewing 1 through 10

| Consumer Name | Contact ID | Tickler Name | Date Created | Date Due | Date Completed | Status | Assigned To |
|---------------|------------|---|--------------|------------|----------------|--------|----------------|
| Adams, Leah | 8854 | 15 Day WSC Selection Reminder | 03/25/2023 | 04/09/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Attach Signed Document of Choice Counseling Consent | 03/25/2023 | 03/24/2024 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Complete the BASE, Reassign to the ABA | 03/25/2023 | 03/25/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Attach Signed Document of Choice Counseling Consent | 03/24/2023 | 03/23/2024 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | 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 * APD

Note By * Vogeler, Mandi

Note Date * 03/25/2023

Program/Provider

Note Type * WSC Selection

Note Sub-Type Initial Assignment

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 * Complete

Date Completed 03/25/2023

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

| 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.

| Category | Count |
|--------------------|-------|
| Application Pended | 1 |
| Admitted | 1 |
| Complete | 1 |
| Pending | 3 |
| Ticklers | 9 |
| 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

The screenshot shows a 'Notes Details' form with the following fields and values:

- Division: APD
- Note By: Vogelar, Mandi
- Note Date: 03/25/2023
- Program/Provider: [Empty]
- Note Type: WSC Selection
- Note Sub-Type: ICF or SNF Transition Assignment
- Description: [Empty]
- Note: [Empty]
- Status: Complete
- Date Completed: 03/25/2023

A 'New Text' dialog box is open, showing the text 'Complete' and an 'Append Text to Note' button.

Below the form, there are sections for 'Attachments' and 'Note Recipients'. The 'Note Recipients' section shows a table with one recipient:

| Name | Date Sent | Date Read | Status | Date Signed |
|----------------|------------|-----------|--------|-------------|
| Vogelar, 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.

- a. Disposition = APD Eligible – ICF/SNF Transition
- b. 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)
- c. Primary Worker: change from ICF Coordinator to WSC. *Starts the 90 day transition clock.*
- d. Secondary Worker: remains WL WS Lead

e. 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.

- a. 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 interface for a client's record. The 'Division' tab is selected. The 'Disposition' dropdown menu is open, showing 'APD Eligible - Waiver' as the selected option. Other fields include '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' (Hicelyth 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.

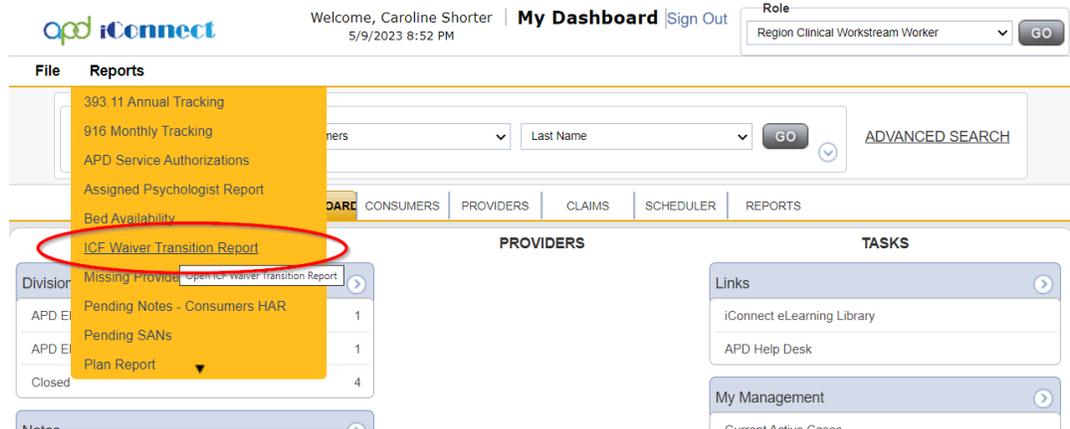
The screenshot shows the iConnect interface with a workflow wizard. The 'Enroll in APD Waiver' button is highlighted. A message box says 'Create/Update the APD Waiver Program Record with Disposition = Enrolled.'

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

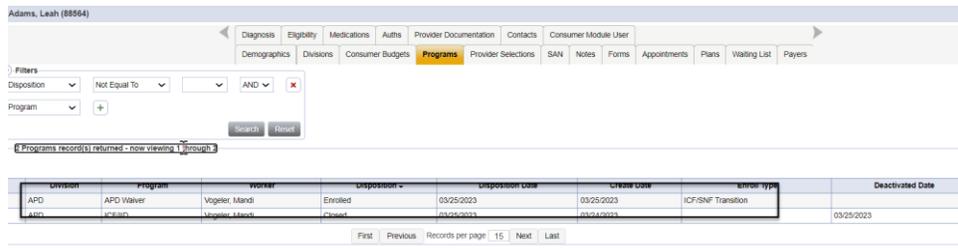
4. Also on the Program tab, select the Open ICF Program record and update the following fields:
 - a. Disposition = Closed
 - b. Enrollment Type = Leave Blank
 - c. Deactivated To = APD Waiver
 - d. Deactivated Reason = APD Waiver

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

- 5. 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.



- 6. 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.
 - a. Program = APD Waiver
 - b. Status = Enrolled
 - c. Enrollment Type = "ICF/SNF Transition"



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

The screenshot shows the iConnect interface for editing a note. The 'Notes Details' section contains the following information:

- Division: APD
- Note By: Vogeler, Mandi
- Note Date: 03/25/2023
- Program/Provider: [Empty]
- Note Type: ICF
- Note Sub-Type: ICF Transition Planning
- Description: [Empty]
- Note: Add ICF Coordinator
- Status: Pending
- Date Completed: [Empty]

The 'Attachments' section shows 'There are no attachments to display'.

The 'Note Recipients' section includes a table with the following data:

| 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.

ICF

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 |

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

Status * Complete

Date Completed 03/25/2023

Attachments

Document Description Category

Note Recipients

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

ICF

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

The screenshot shows the 'Notes Details' form in the iConnect system. The form fields are as follows:

- Division: APD
- Note By: Vogeler, Mandi
- Note Date: 03/25/2023
- Program/Provider: [Empty]
- Note Type: ICF
- Note Sub-Type: Reason Timeline Unmet
- Description: [Empty]
- Note: Reason why Transition was not met in 90 days.
- Status: Pending
- Date Completed: [Empty]

Below the form is an 'Attachments' section with a table header:

| Document | Description | Category |
|-------------------------------------|-------------|----------|
| There are no attachments to display | | |

Below the attachments is a 'Note Recipients' section with a table:

| 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.

The screenshot shows the 'Ticklers' interface with a filter menu and a table of 15 records. The filter menu includes options for Status, Equal To, New, AND, and IConnect ID. The table has columns for Consumer Name, IConnect ID, Ticker Name, Date Created, Date Due, Date Completed, Status, and Assigned To. A row is highlighted with a yellow background, and a context menu is visible over it with options like Cancel, Edit, Reassign, and Complete.

| Consumer Name | IConnect ID | Ticker Name | Date Created | Date Due | Date Completed | Status | Assigned To |
|---------------|-------------|--|--------------|------------|----------------|--------|-------------------------|
| Adams, Leah | 8854 | Waiver Eligibility Worksheet Reminder | 03/25/2023 | 03/24/2024 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Annual Plan Review | 03/25/2023 | 03/24/2024 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Annual Plan Review (recurring) | 03/25/2023 | 03/24/2024 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Complete ARI | 03/25/2023 | 04/24/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Initiate Person-Centered Support Plan | 03/25/2023 | 03/25/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Upload Support Planning Docs | 03/25/2023 | 03/25/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Complete Cost Plan | 03/25/2023 | 05/09/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Initiate and/or Update the Cost Plan | 03/25/2023 | 03/25/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Enroll in APC Waiver | 03/25/2023 | 03/25/2023 | | New | State Office Enrollment |
| Adams, Leah | 8854 | Complete the ICF to Waiver Transition in 90 Days | 03/25/2023 | 06/23/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Complete the ICF to Waiver Transition in 90 Days | 03/25/2023 | 06/23/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | 15 Day WSC Selection Reminder | 03/25/2023 | 04/09/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Attach Signed Document of Choice Counseling (Annual) | 03/25/2023 | 03/24/2024 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Complete the S-402: Reassign to the AGA | 03/25/2023 | 03/25/2023 | | New | Vogeler, Mandi |
| Adams, Leah | 8854 | Attach Signed Document of Choice Counseling (Annual) | 03/24/2023 | 03/23/2024 | | New | Vogeler, Mandi |

Role: Waiver Support Coordinator (WSC)

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

The screenshot shows the 'MY DASHBOARD' interface with a 'CONSUMERS' section. It lists various queues with their respective counts. The 'Notes' section is expanded, and the 'Pending' queue is highlighted with a black border, showing a count of 3.

| Queue | Count |
|--------------------|----------|
| Application Pended | 1 |
| Admitted | 1 |
| Complete | 1 |
| Pending | 3 |
| Tickers | 9 |
| 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.
 - a. Note Type = ICF
 - b. Sub Type = Consumer Request
 - c. Description = Chooses to remain in ICF
 - d. Note = Request MCM to redo Documentation of Choice and Waiver Lead to initiate Waiver disenrollment
 - e. Recipients = Waiver Lead & MCM & Clinical Lead
 - f. 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 * APD

Note By * Vogeler, Mandi

Note Date * 03/25/2023

Program/Provider

Note Type * ICF

Note Sub-Type ICF Transition Planning

Description

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

Note

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: Clear

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

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