agency for persons with disabilities

State of Florida

State of Florida

Agency for Persons with Disabilities

iConnect

Employment Services Training Manual Version 6

4/11/24

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Employment Services Introduction

APD employment services begin when a client expresses their desire to work, either to their Waiver Support Coordinator (if the client is on the iBudget Waiver), or the pre-enrollment Support Coordinator or Employment Liaison (if the client is on the Pre-Enrollment).

If the client is on the waiver, the Waiver Support Coordinator will refer him or her to the Florida Division of Vocational Rehabilitation (VR) by completing and submitting a VR application for supported employment services. After the client has been approved for VR services, he or she will begin to receive Phase I services (time-limited supports needed to obtain a job and reach stabilization). Phase 1 is typically paid for by VR.

Once the client achieves an employment outcome, the Support Coordinator will need to communicate with the VR counselor to determine when the client has reached stabilization to ensure the client is able to transition to Phase 2 services with APD.

APD may provide Phase 1 services if VR services are not available, providing there is documentation of the VR denial of services.

During Phase 2 (long-term, ongoing supports needed to maintain employment indefinitely), the client will choose an APD Supported Employment Provider. If the client's existing Cost Plan does not have available funding for supported employment, the SANs process will be initiated. The Supported Employment Provider will need to complete an Employment Stability Plan (ESP) within 30 days of receiving the client's support plan from the Support Coordinator. Supported employment services will be provided for the client according to the ESP and documented in iConnect until Phase 2 services are faded, completed, or terminated.

Pre-Enrollment Employment Services

When a client on pre-enrollment expresses an interest in employment, the Region Pre-Enrollment Worker or designee will initiate a referral to the Employment Enhancement Project.

Employment Enhancement Project (EEP) Referral

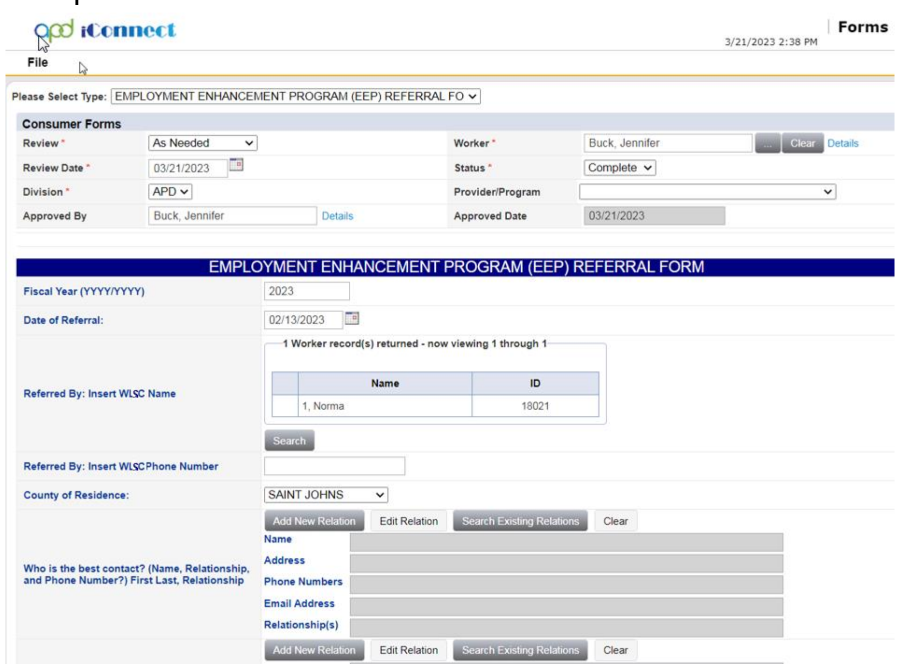
Role: Region Pre-Enrollment Workstream Worker or Designee

1. A client on pre-enrollment expresses an interest in employment.

2. The regional worker contacts the client and/or legal representative to assess the client's interest in employment as soon as possible and documents on the Employment Enhancement Project Referral form (EEP.)

3. Search for and select the client's record.

4. From the client's record, select the **Forms** tab. From the **File** menu, select **Add Form**. Update the following fields:
    a. Form = Employment Enhancement Program (EEP) Referral Form
    b. Review = As Needed
    c. Review Date = today
    d. Division = APD
    e. Worker = Self
    f. Status = Complete
    g. Provider/Program = Blank
    h. Complete the fields in the form

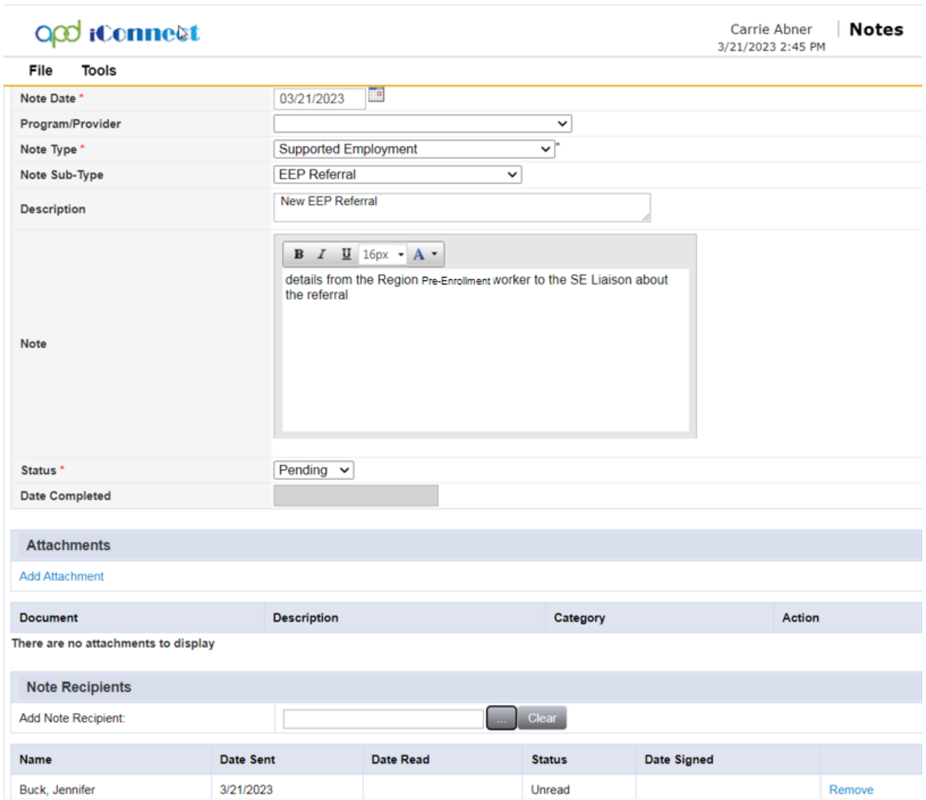


5. From the **File** menu, select **Save and Close Forms**.

6. pre-enrollment Workstream Worker or Region designee notifies the Supported Employment (SE) Liaison of the referral via a note. From

the client's record, select the **Notes** tab. From the **File** menu, select **Add Note.** Update the following fields.

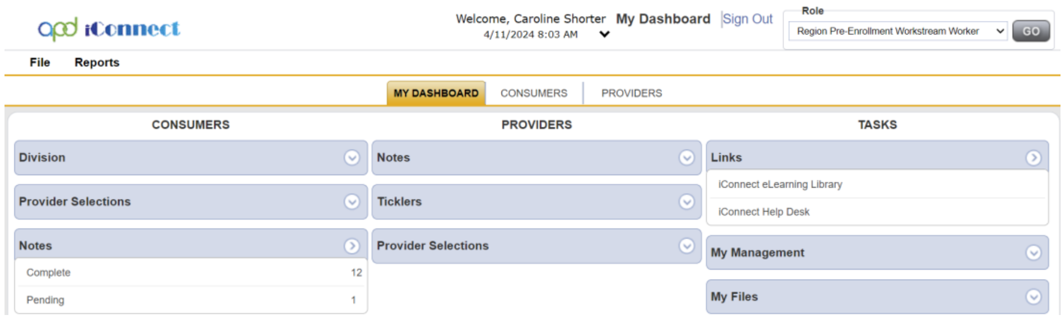
a. Note Type = Supported Employment
b. Note Subtype = EEP Referral
c. Description = "New EEP Referral"
d. Note = Add any needed details
e. Status = Pending
f. Note Recipient = SE Liaison



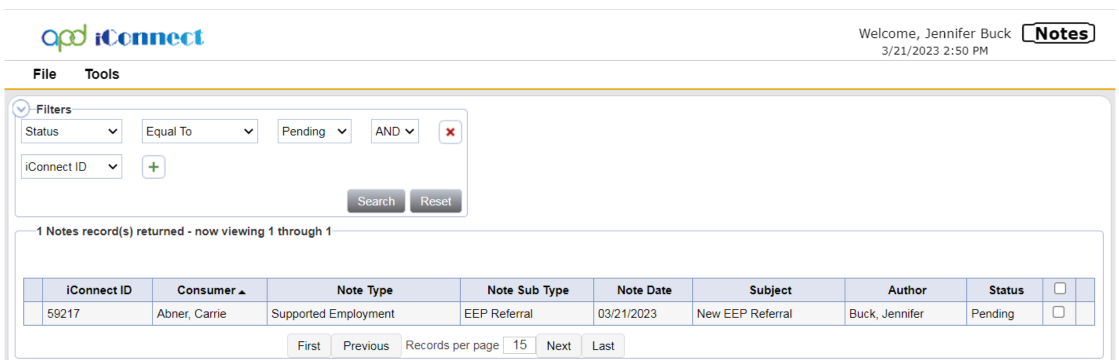
7. From the **File** menu, select **Save and Close Note**.

Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

8. The SE Liaison will work **My Dashboard** for incoming notes. Select the **Consumer** > **Pending** > **Notes** queue.

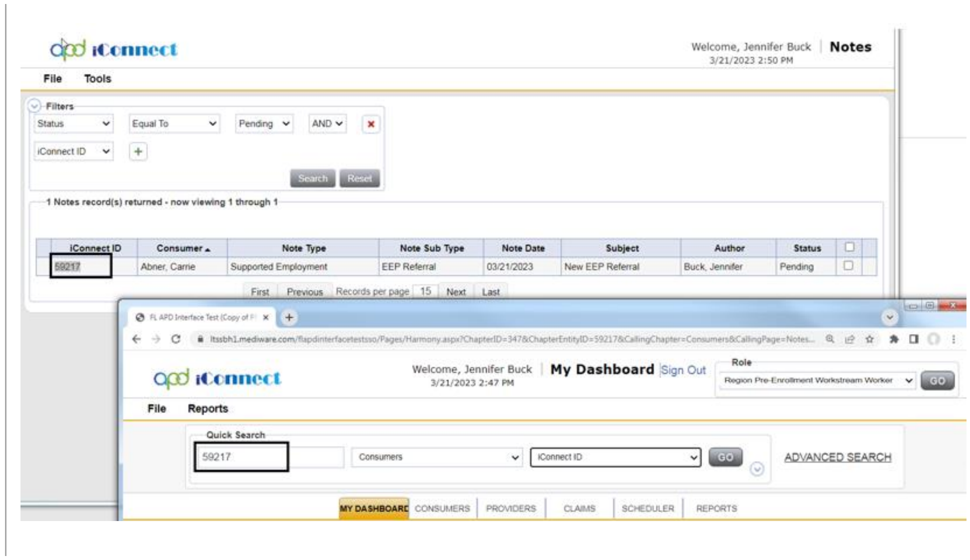


9. SE Liaison will click on the note to review the details then contact the client to determine which phase of service is needed. The SE Liaison will also check the Vocational Rehab (VR) Data Sharing Report outside of iConnect to confirm the client's current status with VR. The SE Liaison will document his/her findings in the pending note and on client demographics.

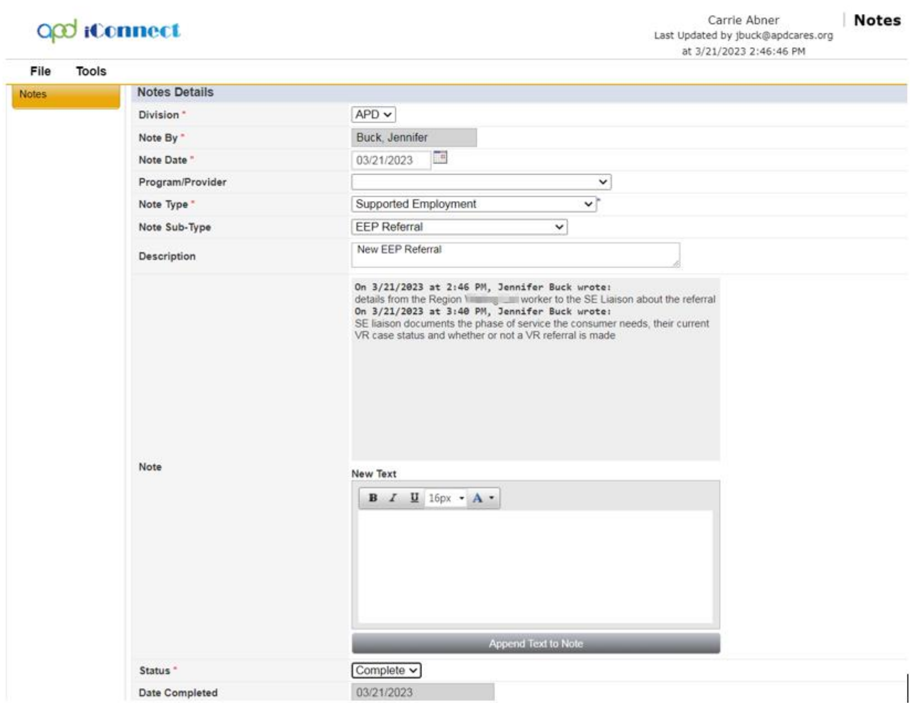


Tip

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.



10. After clicking on the note from the **My Dashboard** > **Notes** queue the Note Details page displays. Update the following fields:
    a. Note = summary of the discussion with the client, the phase of service needed and current VR case status.
    b. Status = Complete



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

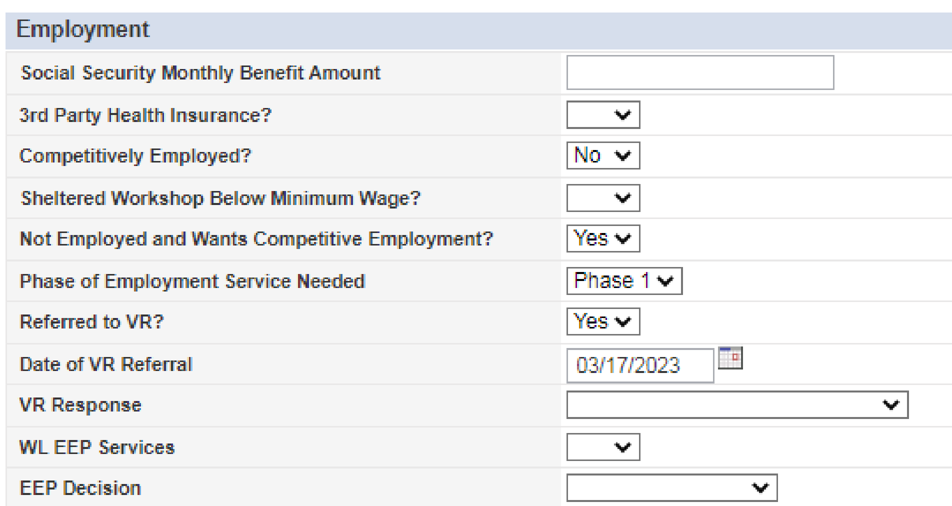
12. Phase 1 services are to gain employment and require the VR Referral process if the client is eligible. Proceed to the Vocational Rehab (VR) Referral section.

13. Phase 2 services are for ongoing supports to maintain employment. Proceed to the EEP Eligibility Determination section.

Vocational Rehab (VR) Referral

Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

1. The SE Liaison must also update **Demographics** with the Phase of Service needed and the VR Referral status. Navigate to the Demographics tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields in the Employment section:
    a. Competitively Employed? = No
    b. Sheltered Workshop Below Minimum Wage = blank
    c. Not Employed and Wants Competitive Employment? = Yes
    d. Phase of Employment Service Needed = Phase 1 or Phase 2. (for this example, select Phase 1)
    e. Referred to VR = Yes or No (for this example, select Yes)
    f. Date of VR Referral = visible when Referred to VR = Yes. Enter the date the referral packet is sent to VR



Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed?	No
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment?	Yes
Phase of Employment Service Needed	Phase 1
Referred to VR?	Yes
Date of VR Referral	03/17/2023
VR Response	
WL EEP Services	
EEP Decision	

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

3. Outside of iConnect, the SE Liaison sends the referral packet to VR. The referral packet contains:
   a. VR Referral form (available on the VR site)
   b. Any applicable assessments
   c. Support Plan Short form
   d. Any other employment related documents

4. The SE Liaison adds a note in iConnect with the contents of the referral packet. Navigate to the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:
   a. Note Type = Supported Employment
   b. Note Sub Type = VR Application
   c. Status = Complete
   d. Attachments = attach the VR referral packet documentation.

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

6. Outside of iConnect, VR completes the process to determine eligibility for Phase 1 services. Monthly, the SE Liaison will check the VR Data Sharing Report outside of iConnect to see if VR funding has been approved. The SE Liaison may also reach out directly to the VR Counselor outside of iConnect to find out VR funding has been approved.

   Proceed to the VR Funding Approved or VR Funding Denied section.

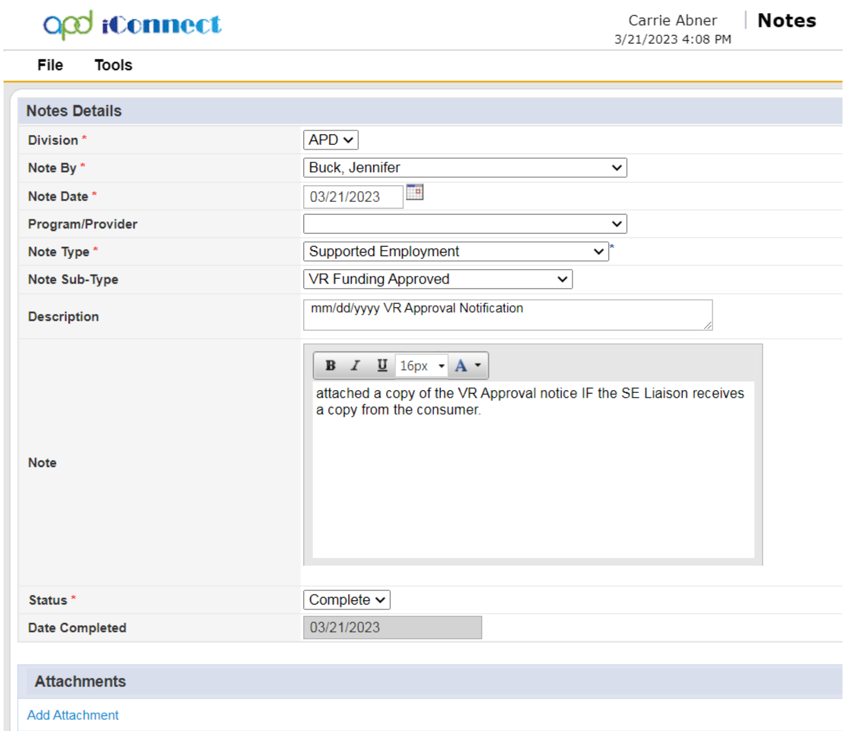
VR Funding Approved

Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

1. If VR funding is approved, VR will send the VR Approval Notice to the client outside of iConnect. The SE Liaison will document in a

note in iConnect. Navigate to the client’s **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:

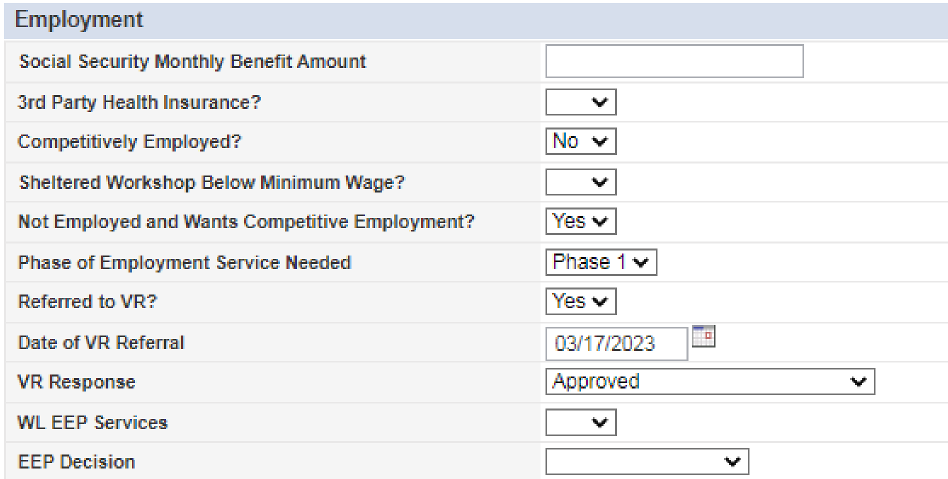
a. Note Type = Supported Employment
b. Note Subtype = VR Funding Approved
c. Description = mm/dd/yyyy VR Approval Notification
d. Status = Complete
e. Attachment = Approval notice from VR if the SE Liaison received a copy from the client.



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

3. Navigate to the **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:

a. VR Response = Approved



Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed?	No
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment?	Yes
Phase of Employment Service Needed	Phase 1
Referred to VR?	Yes
Date of VR Referral	03/17/2023
VR Response	Approved
WL EEP Services	
EEP Decision	

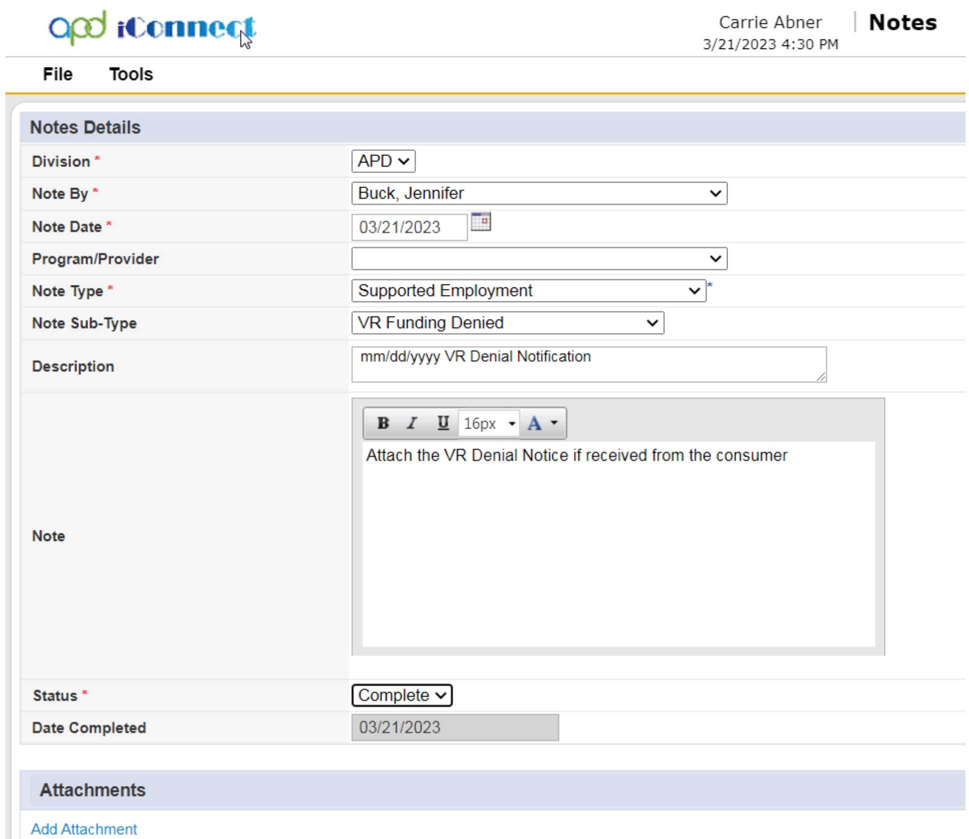
4. From the **File** menu, select **Save and Close Demographics.**

5. Monthly, the SE Liaison monitors the VR Data Sharing Report to know when the client has gained employment. The SE Liaison may also reach out to the VR Counselor directly to know when the client has gained employment. Proceed to Client Gains Employment section.

VR Funding Denied

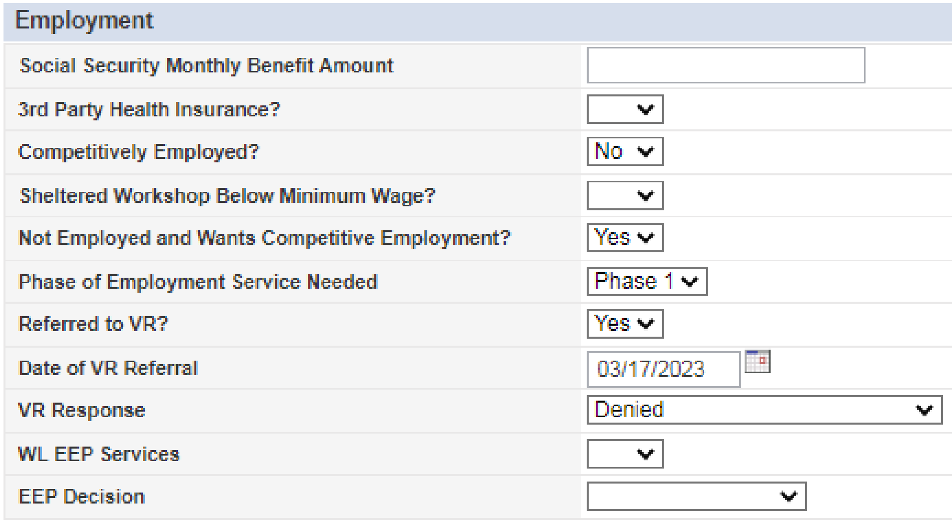
Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

1. If VR funding is denied, VR will send the VR Denial Notice to the client outside of iConnect. The SE Liaison will document in a note in iConnect. Navigate to the client’s **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:
    a. Note Type = Supported Employment
    b. Note Subtype = VR Funding Denied
    c. Description = MM/DD/YYYY VR Denial Notification
    d. Status = Complete
    e. Attachment = Denial notice from VR if the SE Liaison received a copy from the client.



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

3. Like other employment updates, the client Demographics tab must also be updated. Navigate to the **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
    a. VR Response = Denied



Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed?	No
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment?	Yes
Phase of Employment Service Needed	Phase 1
Referred to VR?	Yes
Date of VR Referral	03/17/2023
VR Response	Denied
WL EEP Services	
EEP Decision	

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

5. A client who is not eligible for Phase 1 services under VR can still receive Phase 1 services under EEP. Proceed to the EEP Eligibility Determination section.

Client Gains Employment

Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

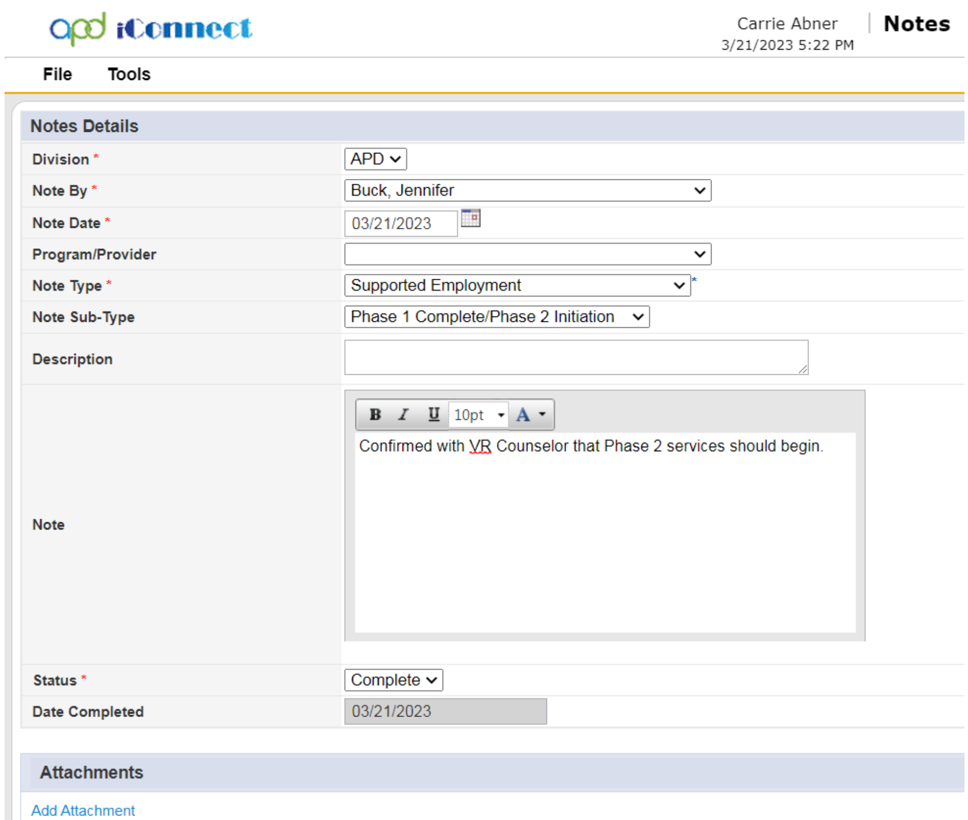
1. The client continues to receive pre-employment support services through VR until employed. Monthly, the SE Liaison monitors the VR Data Sharing Report outside of iConnect to know when the client has gained employment. The SE Liaison may also reach out to the VR Counselor directly to know when the client has gained employment.

2. The SE Liaison will confirm with the VR Counselor if Phase 2 services should begin, outside of iConnect. The client and VR Counselor may also decide Phase 2 services are not needed. In either case, the SE Liaison will document in a note and on the client's demographics page in iConnect.

3. Navigate to the consumer record and click **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:

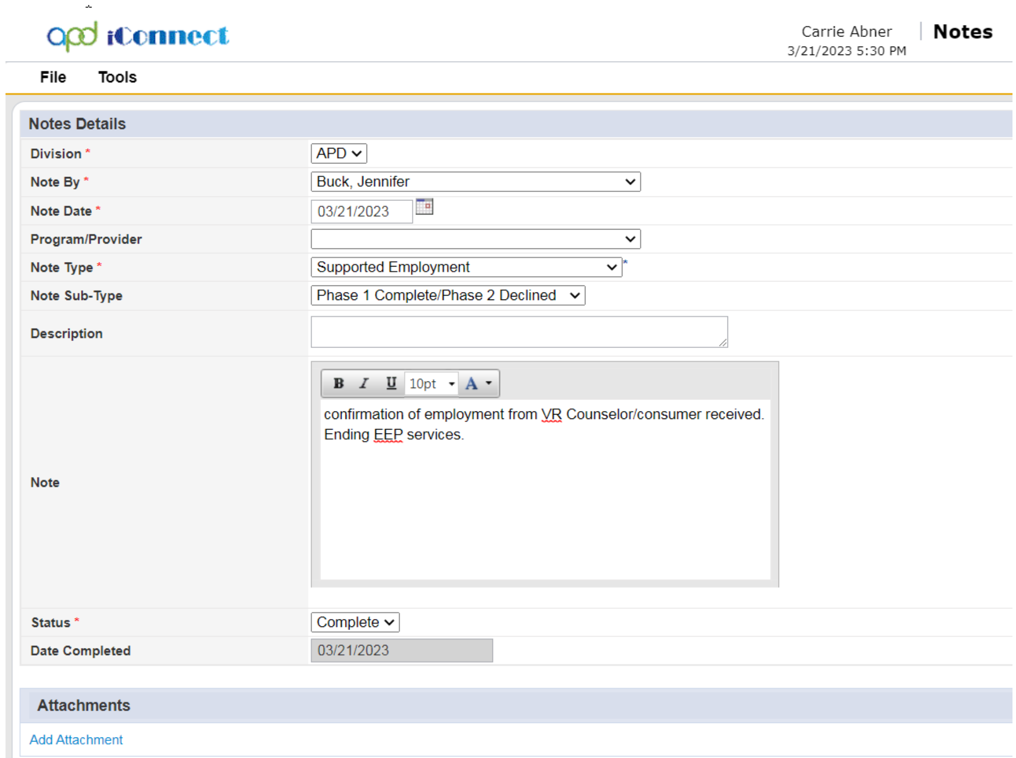
Phase 2 Services Should Begin:

a. Note Type = Supported Employment
b. Note Subtype = Phase 1 Complete. Phase 2 Initiation
c. Note = confirmation from VR Counselor that Phase 2 services should begin.
d. Status = Complete



Phase 2 Services Declined:

a. Note Type = Supported Employment
b. Note Subtype = Phase 1 Complete. Phase 2 Declined
c. Note = confirmation of employment from VR Counselor/client received. Ending EEP services.
d. Status = Complete



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

5. Like other employment updates, the client Demographics tab must also be updated. Navigate to the **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:

   Phase 2 Services Should Begin:

   a. Competitively Employed = Yes
   b. Hire Date = enter the client's hire date
   c. Average Monthly Earnings from Employment = enter the client's average monthly earnings
   d. Hourly Wage = enter the client's hourly wage
   e. Not Employed and Wants Competitive Employment = No
   f. Sheltered Workshop Below Minimum Wage = leave blank
   g. Phase of Employment Service Needed = Phase 2
   h. EEP Services = leave blank

Employment	
Social Security Monthly Benefit Amount	$914.00
3rd Party Health Insurance?	
Competitively Employed? *	Yes
Indicate Hire Date	4/30/2023
Average Monthly Earnings from Employment	$400.00
Hourly Wage	$15.00
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	No
Phase of Employment Service Needed	Phase 2
Referred to VR?	Yes
Date of VR Referral	03/17/2023
VR Response	Approved
EEP Services	
EEP Decision	

Phase 2 Services Declined:

a. Competitively Employed = Yes
b. Hire Date = enter the client's hire date
c. Average Monthly Earnings from Employment = enter the client's average monthly earnings
d. Hourly Wage = enter the client's hourly wage
e. Not Employed and Wants Competitive Employment = No
f. Sheltered Workshop Below Minimum Wage = leave blank
g. Phase of Employment Service Needed = blank

Employment	
Social Security Monthly Benefit Amount	$914.00
3rd Party Health Insurance?	
Competitively Employed? *	Yes
Indicate Hire Date	4/30/2023
Average Monthly Earnings from Employment	$400.00
Hourly Wage	$15.00
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	No
Phase of Employment Service Needed	
Referred to VR?	Yes
Date of VR Referral	03/17/2023
VR Response	Approved
EEP Services	
EEP Decision	

6. From the **File** menu, select **Save and Close Demographics**. If Phase 2 services are being pursued, proceed to the EEP Eligibility Determination section.

EEP Eligibility Determination

The Employment Enhancement Project (EEP) is available to APD clients who are on the pre-enrollment and desire employment. The client must be at least 18, and not in school to be eligible for the EEP. (If the client is still in school, they are eligible for the VR STAR program. The EEP will be denied in these cases.)

Similar to Supported Employment services on the waiver, if the client is denied Phase 1 services from VR, they can receive Phase 1 services under EEP. If the client is employed, they are eligible for Phase 2 services under EEP.

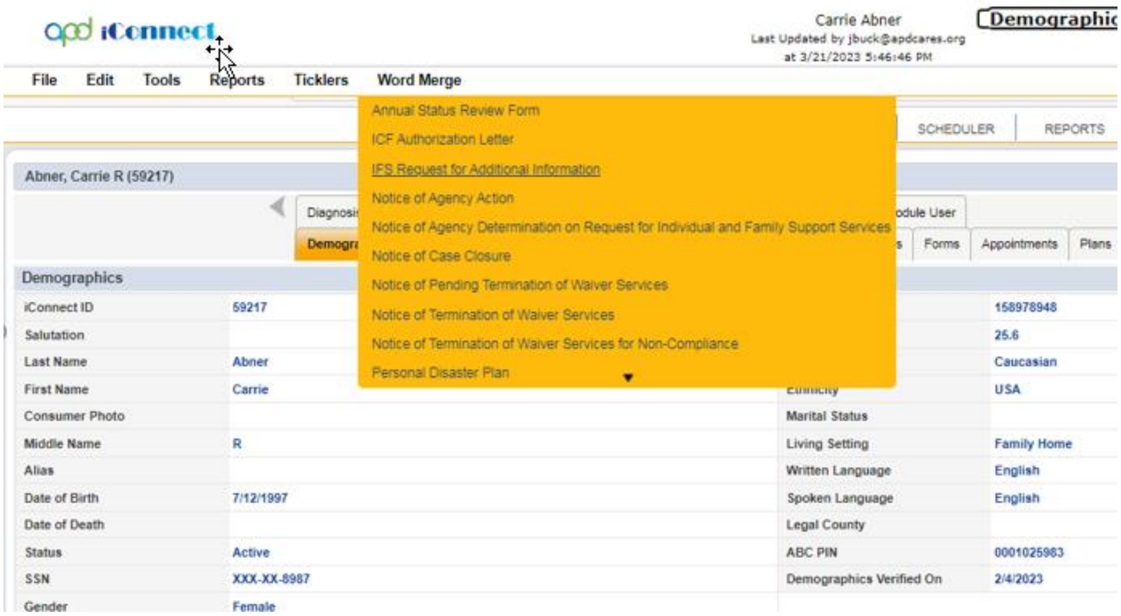
The SE Liaison will determine the client's eligibility under EEP and document in iConnect.

Additional Information

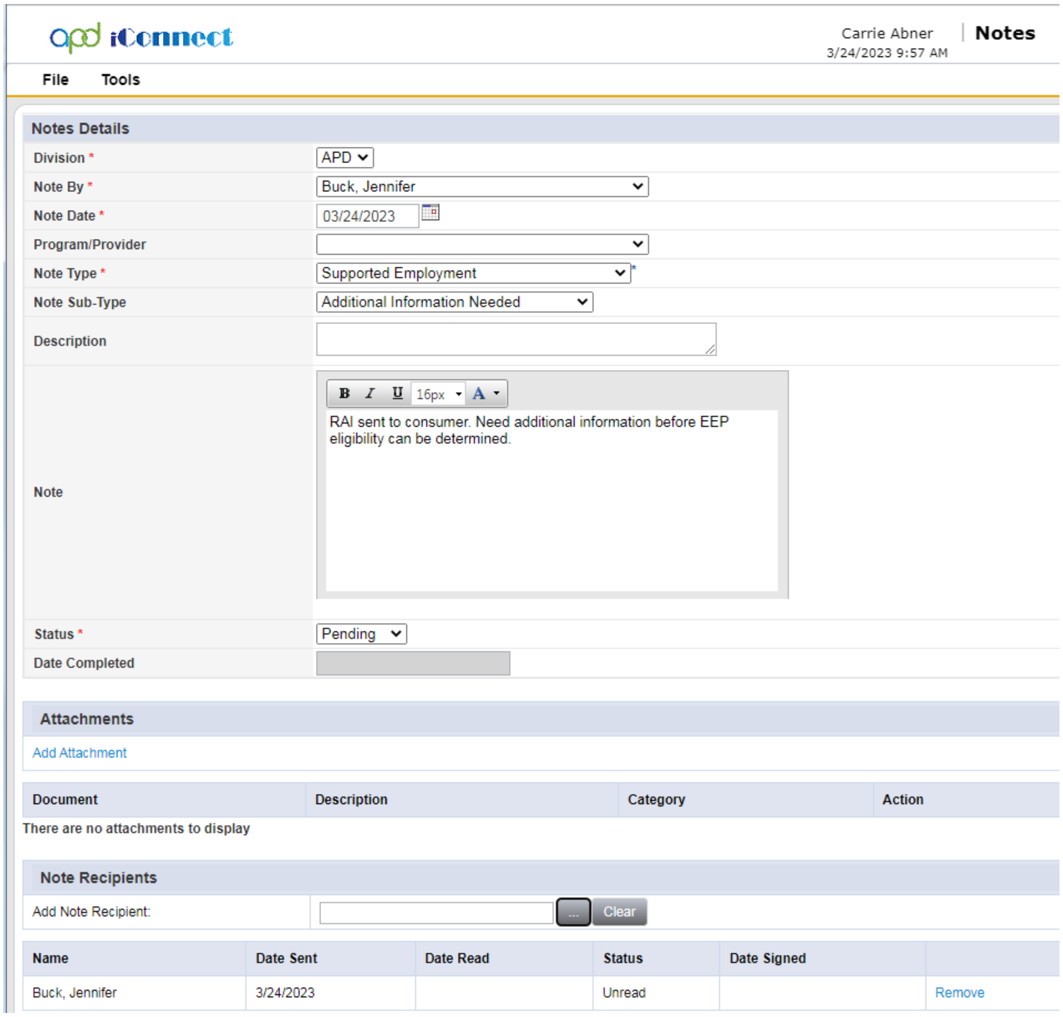
Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

If additional information is needed during the EEP eligibility determination process, the SE Liaison will send the IFS Request for Additional Information word merge to the client and document on a note that it was sent.

1. The Request for Additional Information for IFS Funding word merge will be sent and is located on the client's **Demographics** page, from the **Word Merge** toolbar.



2. Generate the Notice. Save it to the device so it can be edited. Save changes. From the Word Merge Preview window, upload the saved document to a note in iConnect.   Update the following fields:
   a. Division APD
   b. Note Type = Supported Employment
   c. Note Sub Type = Additional Information Needed
   d. Note = date the request for additional information notice is sent to the client and the information requested.
   e. Status = Pending
   f. Recipient = Self. This will keep the note on My Dashboard so it can be tracked easily and accessed when the client provides the additional information.



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

4. When the additional information is received from the client, update the existing Supported Employment note. Select **My Dashboard > Consumer > Notes > Pending** to display a list of notes requiring follow up. Locate the client's note from the list and select it to open the note details page. Update the following fields:
    a. Note = comment that the requested information was/was not received.
    b. Status = Complete

Note

Any update to the note will use the append box. Select the Append Text to Note button to add text to the Note. Appended text is marked with the date, time, and user name the new comment is added.

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

6. Proceed to the EEP Eligible or IFS Funding Denied section.

EEP Eligible

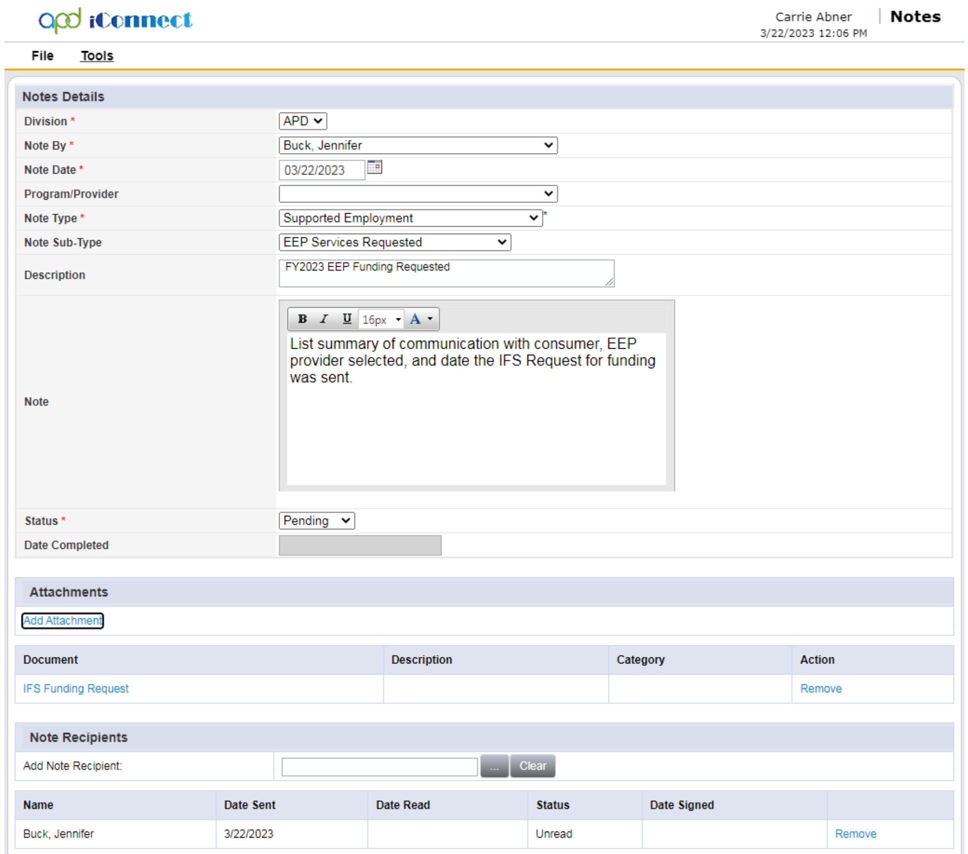
Role: Region Pre-Enrollment Workstream Worker (SE Liaison)
Once the SE Liaison determines that the client is eligible for EEP Services, the SE Liaison contacts the client to confirm the type of assistance needed, discuss the initial amount of EEP services (100 units if employed. 200 units if not), and the client's provider preferences. The SE Liaison will document this information in a note in iConnect later in the workflow.

1. After confirming provider preferences with the client, outside of iConnect the SE Liaison contacts prospective EEP providers to determine their availability. The SE Liaison will select the one that best meets the client's preferences and needs.

2. Outside of iConnect, the SE Liaison will also submit the IFS request for EEP funding via email.

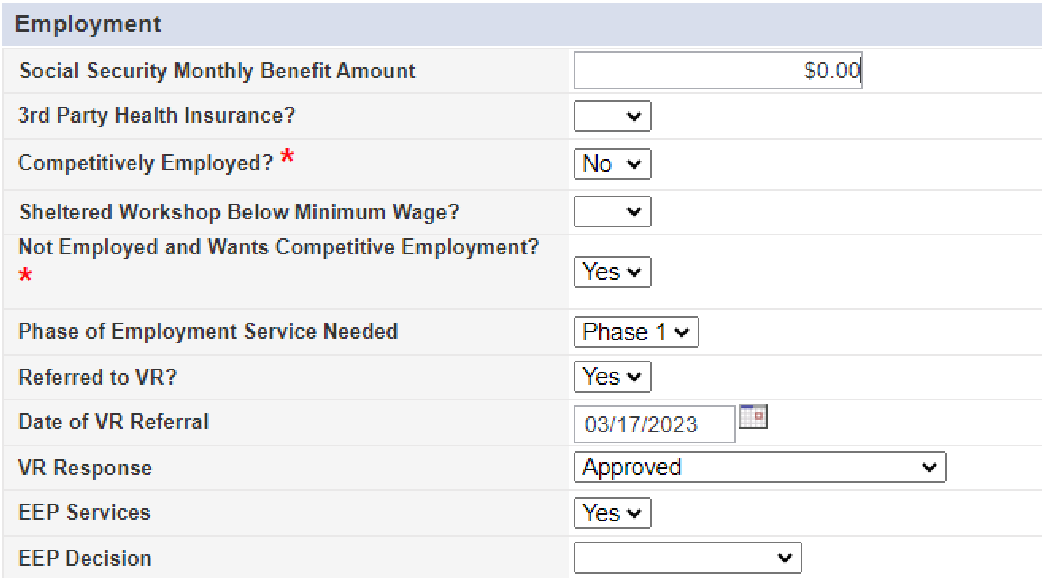
3. The SE Liaison documents the completion of these tasks in a note in client's record in iConnect. Navigate to the client **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:
    a. Note Type = Supported Employment
    b. Note Subtype = EEP Services Requested
    c. Description = FY#### EEP Funding Requested
    d. Note = List summary of communication with client, EEP provider selected, and date the IFS Request for funding was sent.
    e. Status = Pending
    f. Attachments = Attach a copy of the IFS request for EEP funding email

g. Recipient = Self. This will keep the note on My Dashboard so it can be tracked easily and accessed when the client provides the additional information.



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

5. Select the **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
   a. EEP Services = Yes



Employment	
Social Security Monthly Benefit Amount	$0.00
3rd Party Health Insurance?	
Competitively Employed? *	No
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	Yes
Phase of Employment Service Needed	Phase 1
Referred to VR?	Yes
Date of VR Referral	03/17/2023
VR Response	Approved
EEP Services	Yes
EEP Decision	

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

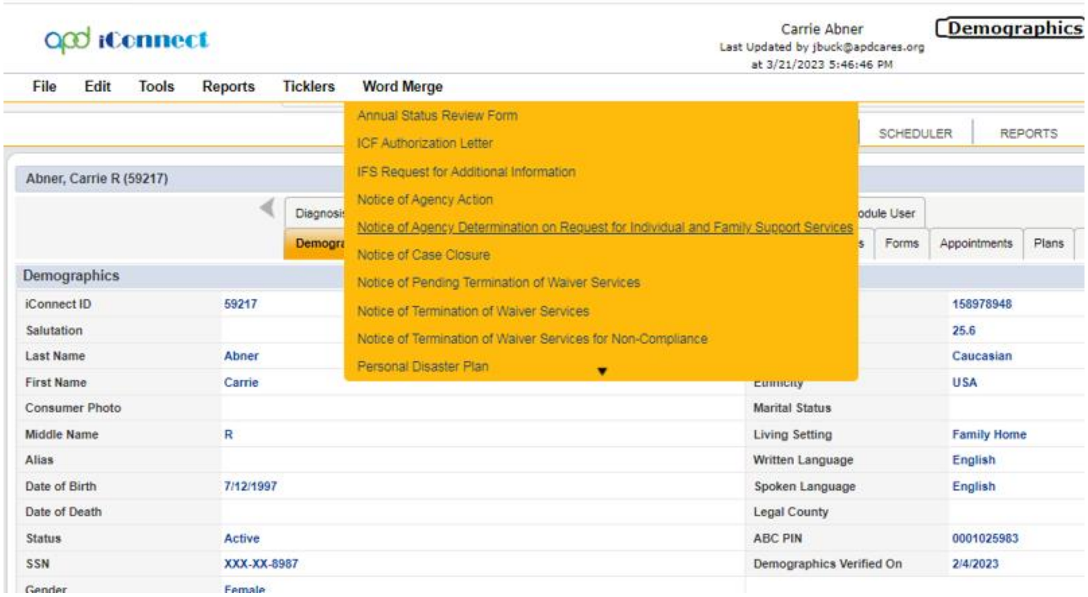
IFS Funding Denied

Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

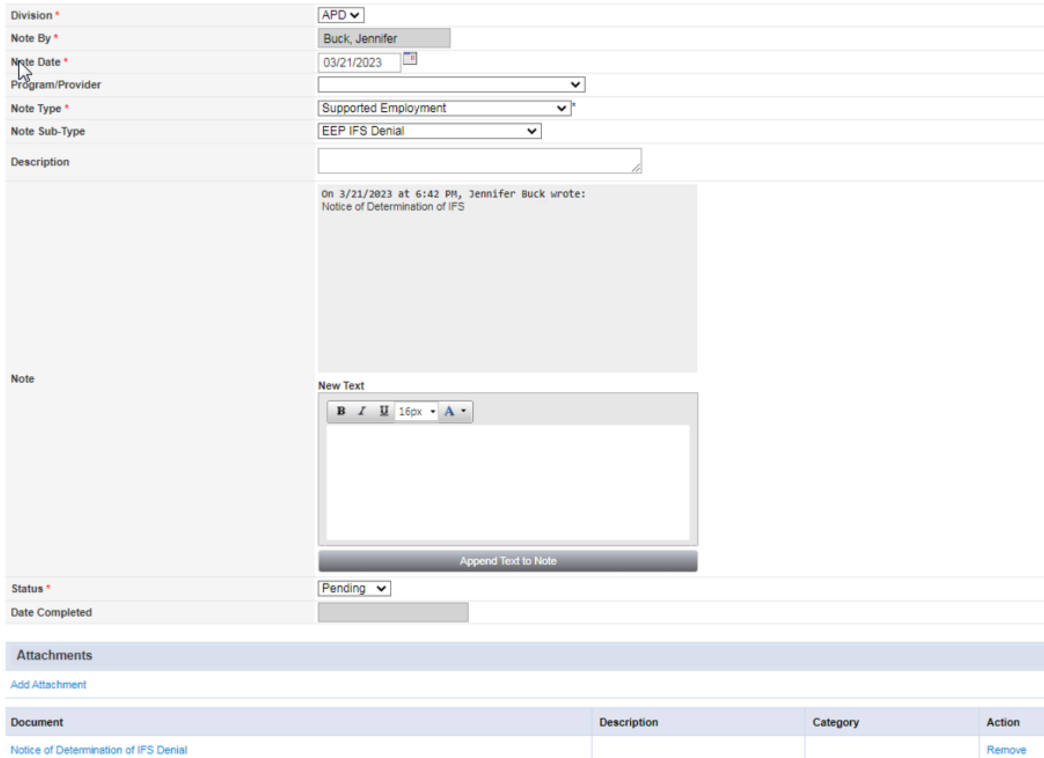
When the consumer is determined ineligible for EEP services, the SE Liaison will send The Notice of Agency Determination of Request for Individual and Family Support Services to the consumer.

1. The Notice of Agency Determination of Request for Individual and Family Support Services word merge is located on the client's

Demographics page, from the **Word Merge** toolbar.

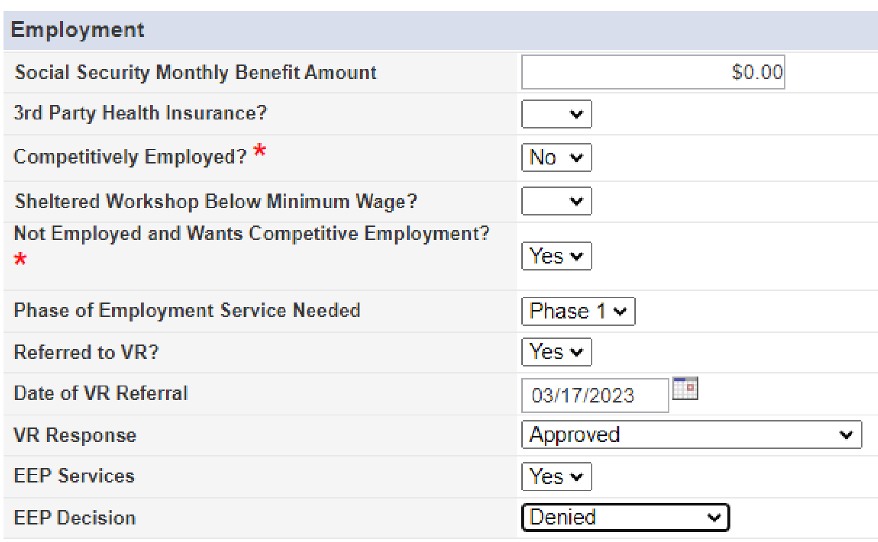


2. Generate the Notice. Save it to the device so it can be edited. Save changes. From the Word Merge Preview window, upload the saved document to a note in iConnect. Update the following fields:
   a. Note Type = Supported Employment
   b. Note Sub Type = EEP IFS Denial
   c. Note = comment that the Notice of Agency Determination of Request for Individual and Family Support Services is ready to be sent to the client.
   d. Status = Pending
   e. Recipient = PESC



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

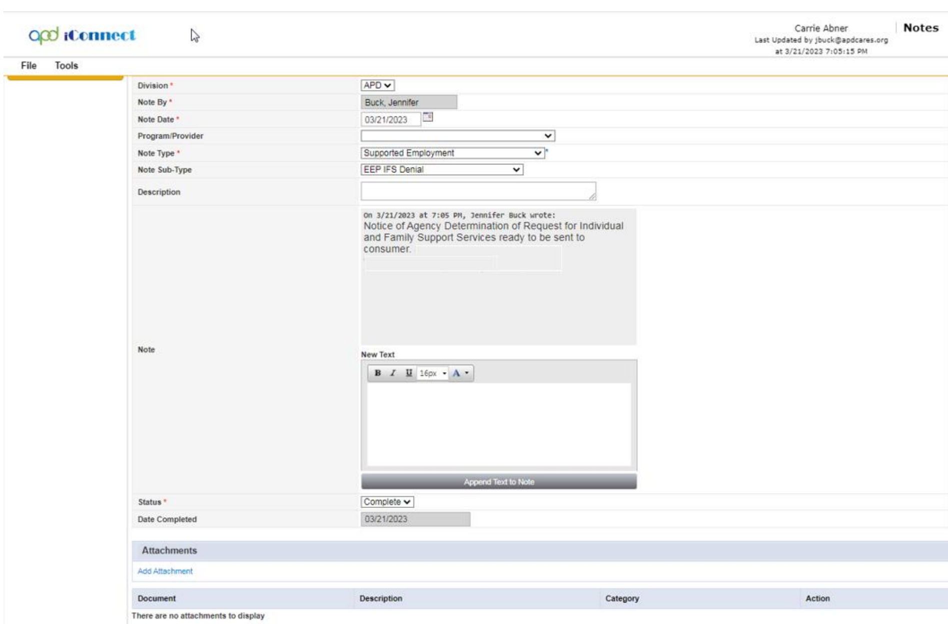
4. Like other employment updates, the client Demographics tab must also be updated. Navigate to the **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
   a. EEP Decision = Denied



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

6. Regional Staff must send all adverse determinations to the Office of the General Counsel (OGC) external to iConnect. The OGC will review and if the notice requires substantive changes will be returned to the regional staff for further review external to iConnect. Once the notice is approved by the reviewing attorney, the Agency Clerk issues the notice with administrative hearing rights and copies the ROM and Regional employee who requested the action external to iConnect. All approvals must be reviewed, approved, and issued external to iConnect by the Region. The Regional employee will include this Notice into iConnect as a Note once finalized.

7. The SE Liaison will return to the existing EEP IFS Denial note and update the following fields:
    a. Note Type = Supported Employment
    b. Note Sub Type = EEP IFS Denial
    c. Note Recipient = No recipient needed.
    d. Attachment = Attach a copy of the approved Notice of Agency Determination of Request for Individual and Family Support Services returned from OGC.
    e. Status = Complete



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

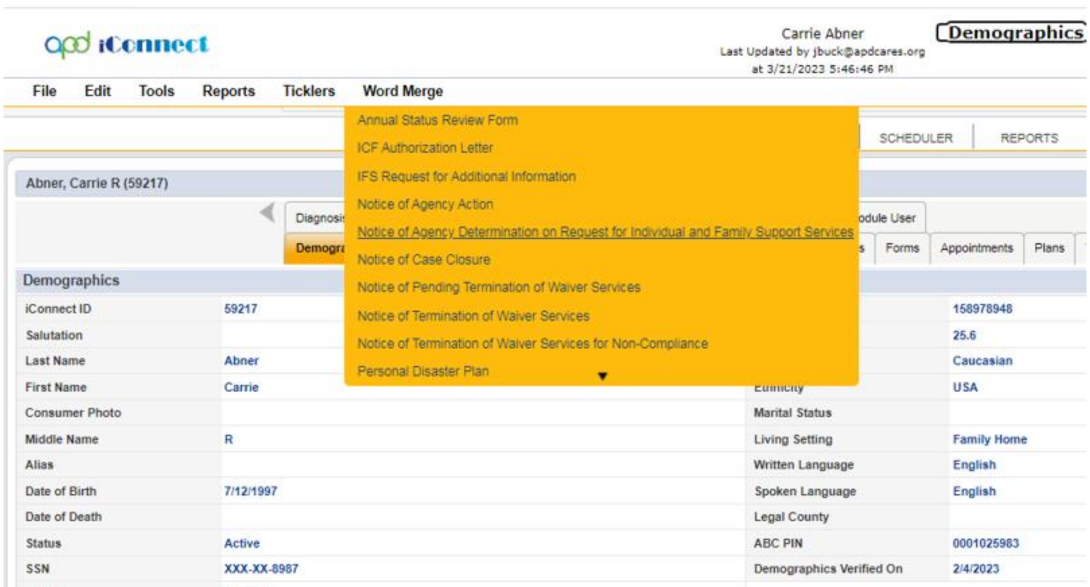
9. A client may also choose to pursue due process. The Notice of Agency Determination of Request for Individual and Family Support Services provides instruction to the client. He/She will follow the instructions in that Notice to initiate due process. The SE Liaison is not involved. Following an administrative hearing, it may be decided the client is eligible for EEP services. In these cases, proceed to the EEP Eligible section.

IFS Funding Approved

Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

The Administrative Workstream Worker will notify the SE Liaison by email if the request for IFS funding is approved. This includes full and partial approvals.

1. The Notice of Agency Determination of Request for Individual and Family Support Services word merge is located on the client's **Demographics** page, from the **Word Merge** toolbar.



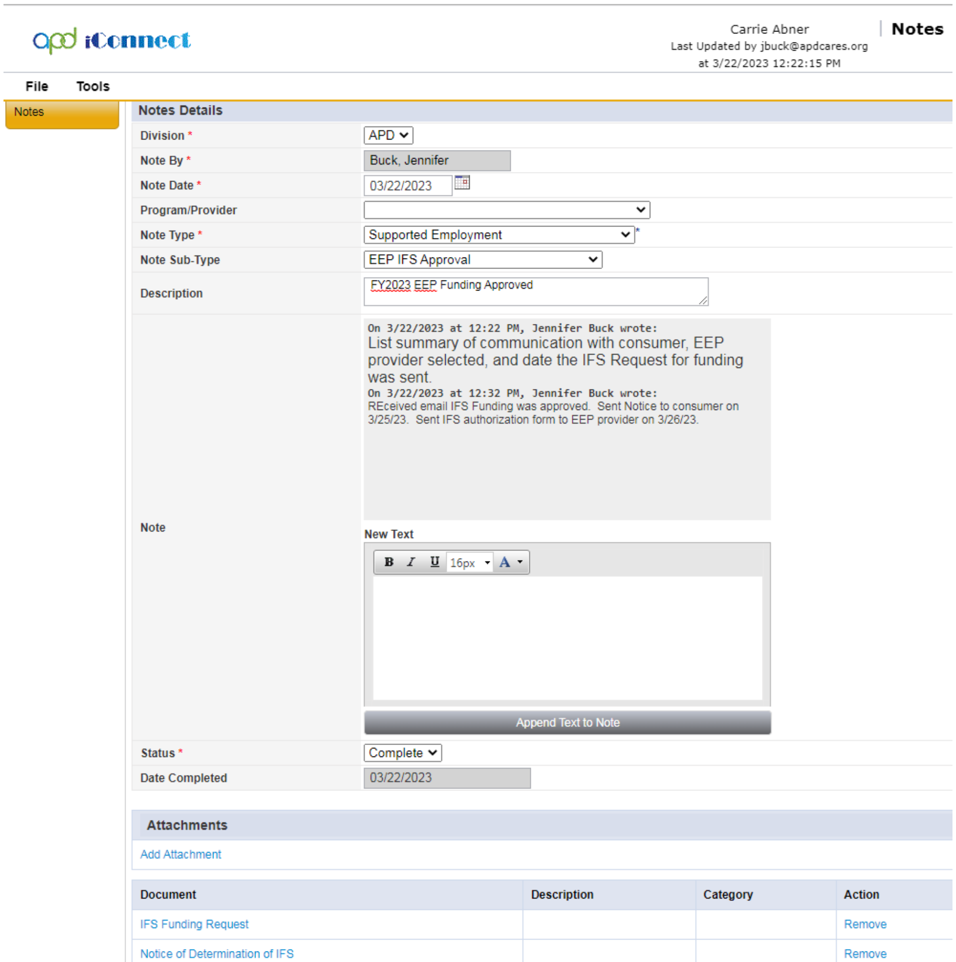
2. Generate the Notice. Save it to device so it can be edited. Save your changes. Send to the client outside of iConnect. It will be saved as an attachment to a note in Step 4.

Note

State Office does NOT have to review the IFS Word Merge before sending to EEP Provider.

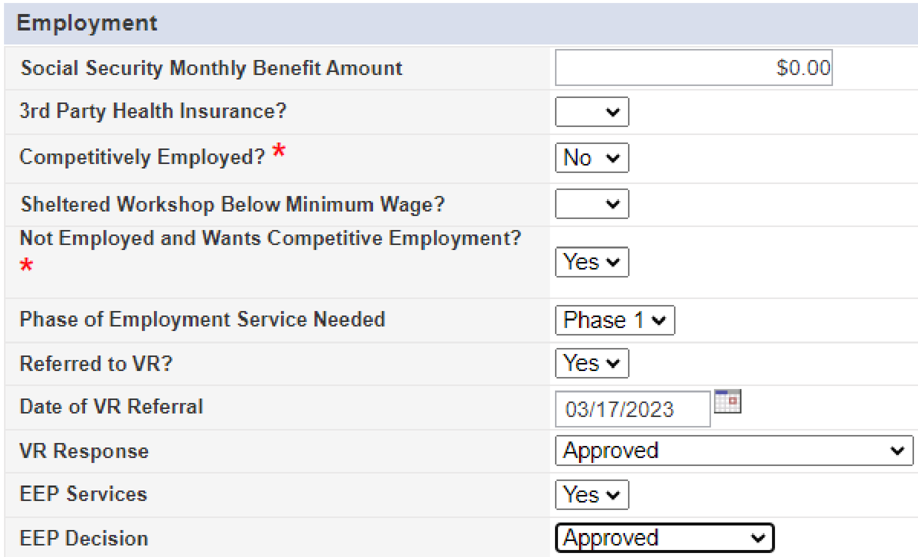
3. The SE Liaison will create the IFS Authorization form and send to the EEP provider outside of iConnect.

4. The SE Liaison will document both tasks have been completed in the existing EEP Services Requested note. This note is accessible under the **Notes** tab of the client's record or from the **My Dashboard > Consumer > Note> Pending** queue. When the note has been located, select it to open the Note details page. Update the following fields:
    a. Note Type = Supported Employment
    b. Note Sub Type = EEP IFS Approval
    c. Description = FY#### EEP Funding Approved
    d. Note = Enter the date the Notice was sent
    e. Status = Complete
    f. Attachments = the IFS Funding Request email is already attached. Add the Notice of Agency Determination of Request for Individual and Family Support Services too.



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

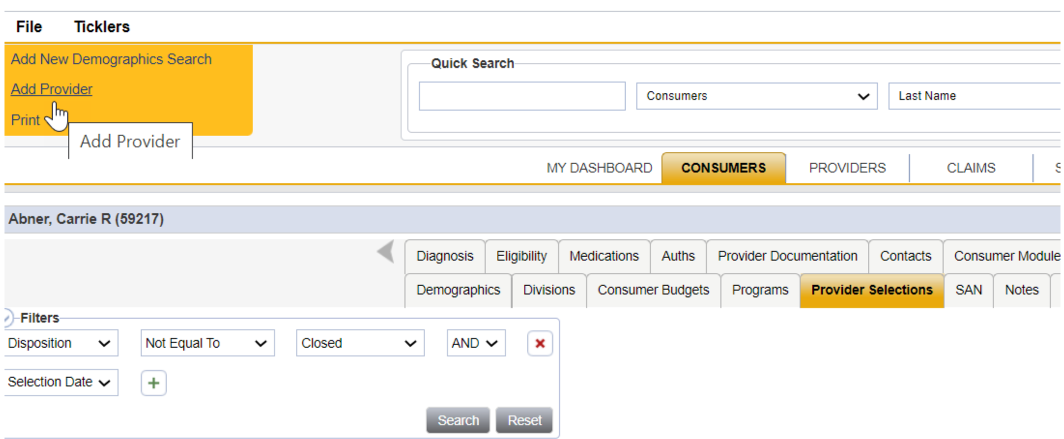
6. Like other employment updates, the client Demographics tab must also be updated. Navigate to the **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
    a. EEP Decision = Approved or Partially Approved.



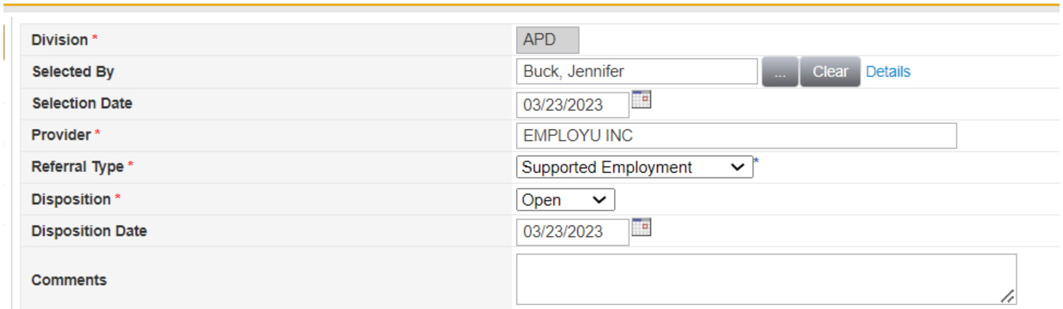
Employment	
Social Security Monthly Benefit Amount	$0.00
3rd Party Health Insurance?	
Competitively Employed? *	No
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	Yes
Phase of Employment Service Needed	Phase 1
Referred to VR?	Yes
Date of VR Referral	03/17/2023
VR Response	Approved
EEP Services	Yes
EEP Decision	Approved

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

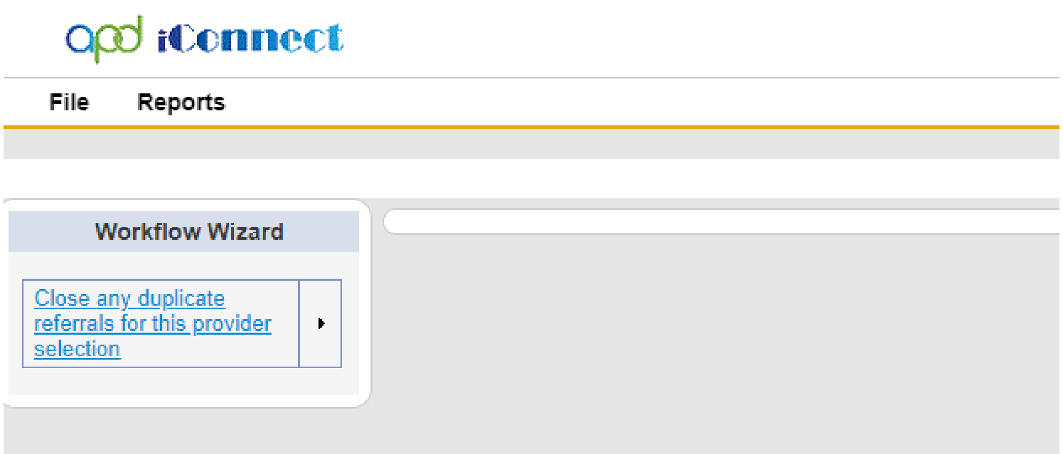
8. In iConnect, the SE Liaison will create the Provider Selection record for the provider chosen by the client. Navigate to the client's **Provider Selection** page. From the **File** menu, select **Add Provider**.



9. The Provider Details page displays. Update the following fields:
   a. Provider = Search for and select the LSD 2 provider name
   b. Referral Type = Supported Employment
   c. Disposition = Open
   d. Provider Worker = the name of the designee for the selected provider.



10. From the **File** menu, select **Save and Close**
    a. Workflow Wizard triggers a tickler to “Close any duplicate referrals for this provider selection” to the worker named in the “selected by” field.
        i. Mark this tickler as complete once the task is completed.
    b. Workflow Wizard triggers a tickler to “Notify ROM SE Services Exceeded 90 Days” to the worker named in the “selected by” field.
        i. Mark this tickler as complete once the task is completed.
        ii. This Tickler is due in 90 days as a reminder to notify the ROM if employment is not achieved within 90 days. It does fire 90 days in advance so that it is a constant reminder. If the consumer achieves (or has already achieved) employment, this tickler can be cancelled.



Individual Plan for Employment

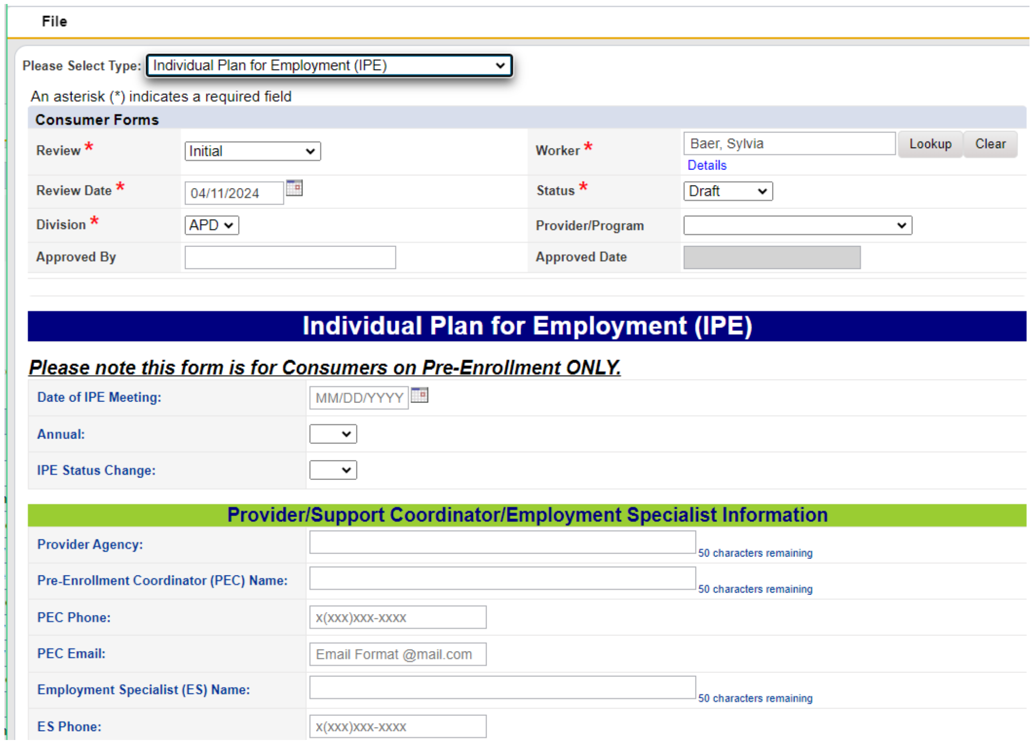
Once the EEP Provider/Job Coach receives the IFS Authorization form from the SE Liaison, he/she works with the pre-enrollment client and develops an Individual Plan for Employment (IPE) within 30 days. Nonwaiver providers will submit a paper form to region designee, who will attach it to a note.

Waiver providers can decide to complete the IPE form in iConnect or continue paper. If the form is completed in iConnect, it must still be printed and signed. That signed version will be attached to a note for the SE Liaison in iConnect.

Role: Service Provider

1. If an EEP Provider/Job Coach completes the IPE on paper, it will be signed by the client and sent to the SE Liaison outside of iConnect. Skip to Step 5.

2. If the Waiver provider completes the IPE in iConnect, he/she will navigate to the client's **Forms** tab. From the **File** menu, select **Add Form,** select the "Individual Plan for Employment" from the "Please Select Type" dropdown. The Form contents display. Update the following fields:
    a. Form = Individual Plan for Employment
    b. Review = As Needed
    c. Review Date = today
    d. Division = APD
    e. Worker = Self
    f. Status = **Ope**n status during support plan year. The provider will need to update this plan throughout the year. **Complete** status at end of the support plan year.
    g. Provider/Program = Select the agency of the EEP Provider/Job Coach
    h. Complete all sections of the form.

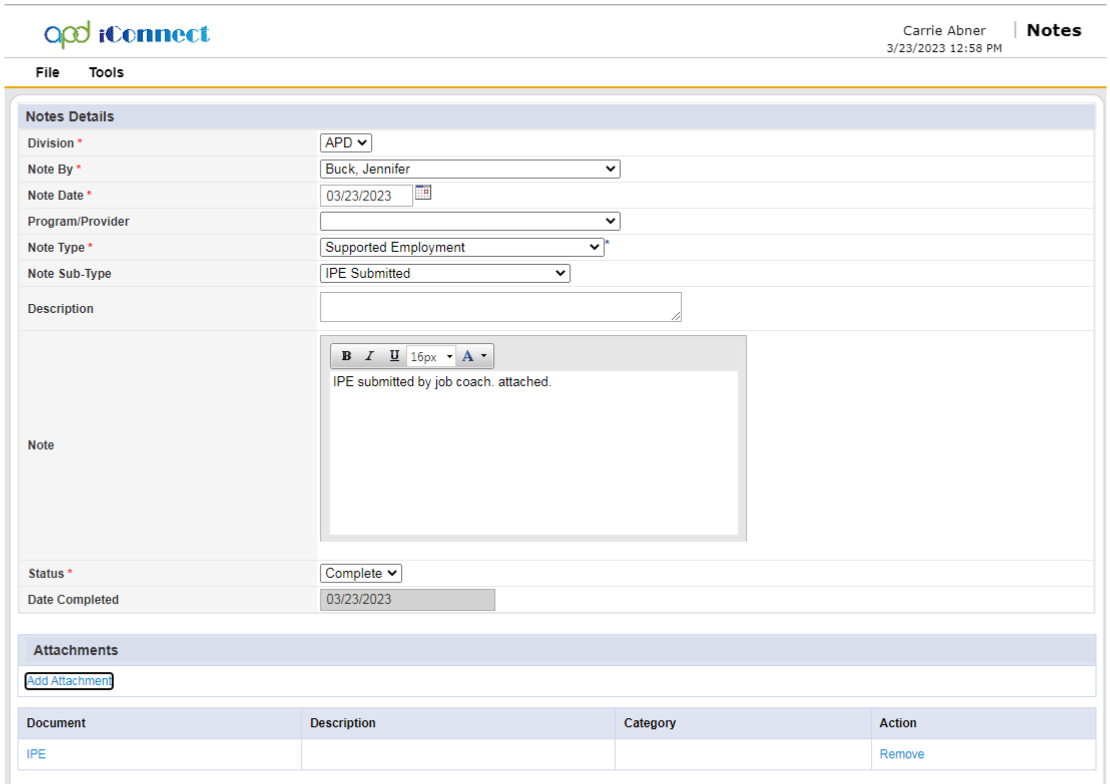


3. From the **File** menu, select **Save Forms**.

4. The EEP Provider/Job Coach will print the IPE and have it signed by the client.

Role: Service Provider or Region Pre-Enrollment Workstream Worker (SE Liaison)

5. The signed IPE will be attached to a note in iConnect. Regardless of whether it's the SE Liaison or the Waiver provider creating the note, it will be created the same way. Navigate to the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:
   a. Program/provider =
   b. Note Type = Supported Employment
   c. Note Sub Type = IPE Submitted
   d. Status = Complete
   e. Attachment = Attach copy of the signed IPE
   f. Recipient = SE Liaison if Waiver provider is creating the note. Blank if the SE Liaison is creating the note.



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

7. If the note was sent by the EEP Provider/Job Coach to the SE Liaison, the SE Liaison will retrieve it from **My Dashboard**.

8. The SE Liaison will work **My Dashboard** for incoming notes. Select the **Consumer** > **Completed** > **Notes** queue.

9. Click on the note to review the details. Follow up with the EEP Provider/Job Coach with any concerns. Proceed to [EEP Services Delivered](#) section.

EEP Services Delivered

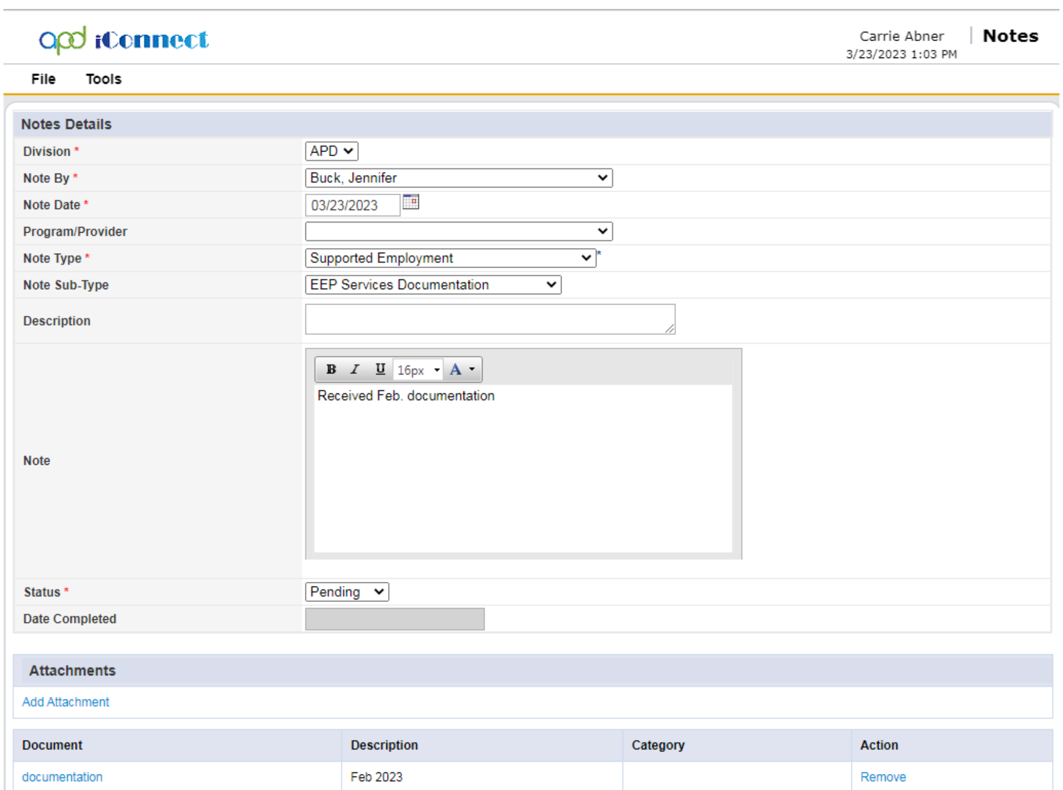
Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

Employment Services

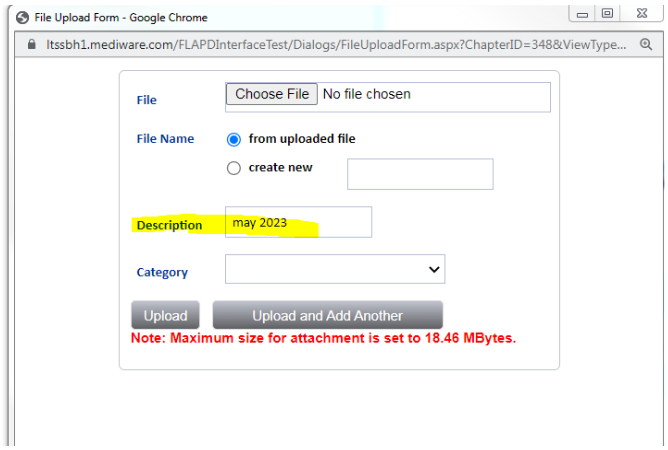
1. The EEP Provider/Job Coach documents their delivery of services to the client outside of iConnect. They submit their documentation and invoices monthly to the SE Liaison.
    a. Billing will remain external to iConnect.

2. The SE Liaison will attach the monthly documentation to a single note in iConnect. The documentation for the entire fiscal year will be housed in one or two notes.

3. The first month documentation is submitted, the SE Liaison creates a new note. Navigate to the client's **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
    a. Note Type = Supported Employment
    b. Sub Type = EEP Services Documentation
    c. Status = Pending
    d. Recipient = None
    e. Attachments = Attach the monthly documentation from the EEP Provider/Job Coach.



f. Attachment > Description = Enter the month and year of the attached documentation.



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

5. The following month(s) when the documentation is received, the SE Liaison will open the existing EEP Services Documentation note. Add a note describing the update and add another attachment, with this month's documentation.

6. The status will remain Pending until the end of the fiscal year so all progress can be entered under the same note. At the end of the fiscal year, the note will be changed to Complete status and a new note will be started to document progress for the next fiscal year.

Once the maximum quantity of attachments has been included, mark this note as complete and add a second note for the remaining months of EEP Service Documentation.

7. The EEP Provider/Job Coach will also complete a new Individual Plan for employment each year. Repeat the Individual Plan for Employment section.

8. If the client is receiving Phase 1 services under EEP, services continue until they no longer wish to be employed or gain

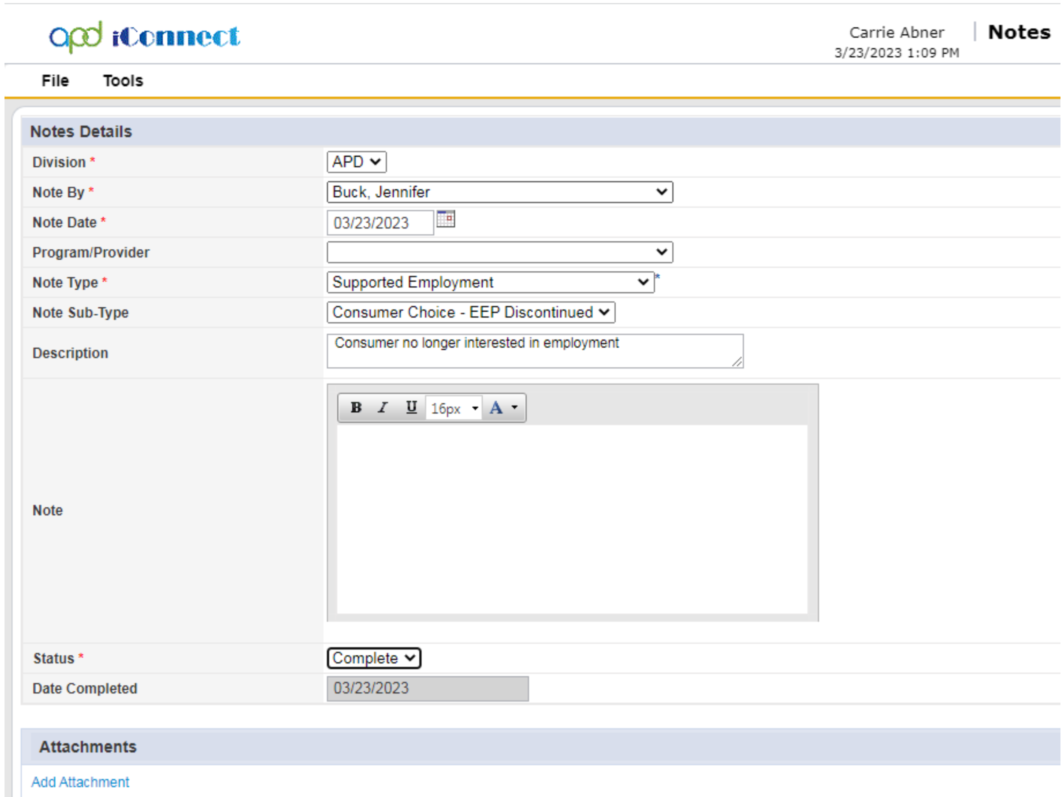
employment. Proceed to the Client No Longer Interested in Employment section or Client Gains Employment section.

9. If the client is receiving Phase 2 services under EEP, services continue until client no longer needs services and his/her job not jeopardized. Phase 2 services are typically delivered for years. Proceed to the Services No Longer Needed section.

Client No Longer Interested in Employment

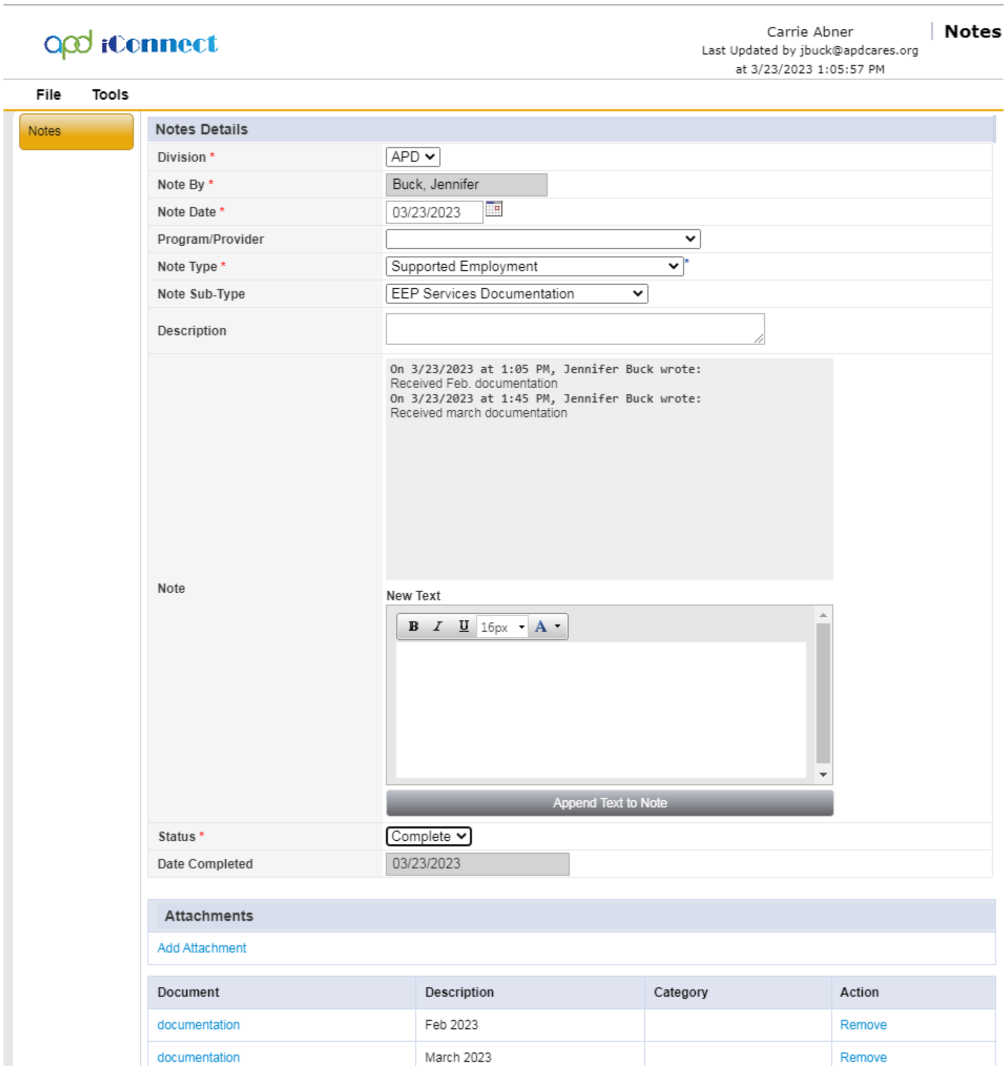
Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

1. If the client has been receiving Phase 1 services under EEP and is no longer interested in employment, the SE Liaison will document this in a note in iConnect. Navigate to the client's **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
    a. Note Type = Supported Employment
    b. Notes Subtype = Consumer Choice – EEP Discontinued
    c. Description = Client no longer interested in employment
    d. Status = Complete



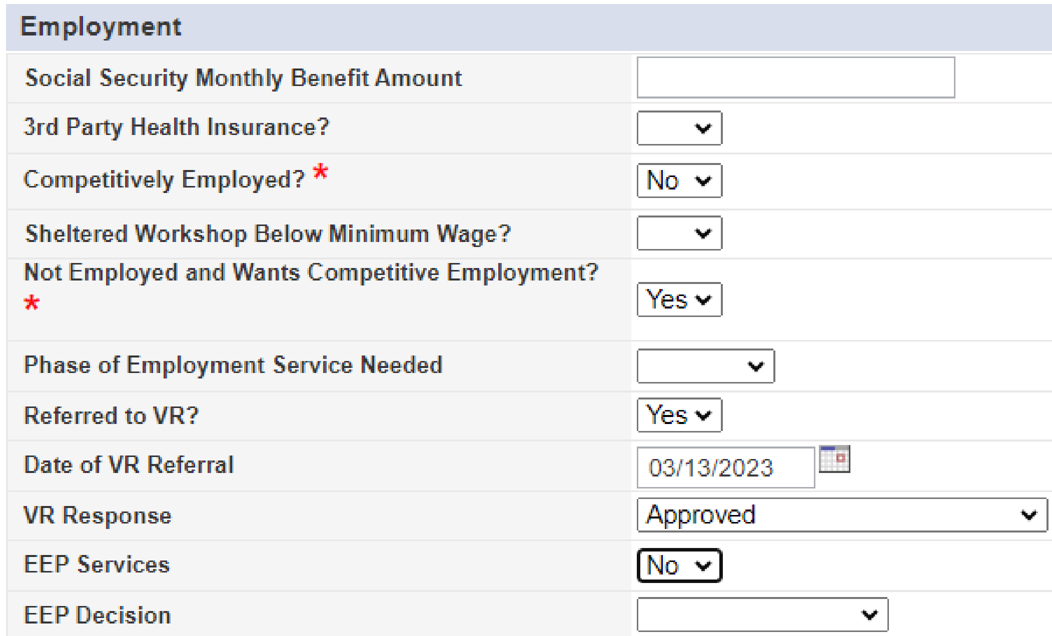
2. From the **File** menu, select **Save and Close Notes**.

3. After receiving final month's documentation from the EEP Provider/Job Coach, the SE Liaison will close out the EEP Services Documentation note. Navigate to the client's **Notes** tab. Select the EEP Services Documentation note to display the Note Details page. Update the following fields:
    a. Status = Complete
    b. Recipient = None
    c. Attachments = Attach the final month's documentation from the EEP Provider/Job Coach
    d. Attachment > Description = Enter the month and year of the attached documentation.



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

5. The SE Liaison will also update the employment information on demographics. Navigate to the client's **Demographic** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
   a. Not employed and wants competitive employment = No
   b. Phase of Employment Service Needed = blank
   c. EEP Services = No

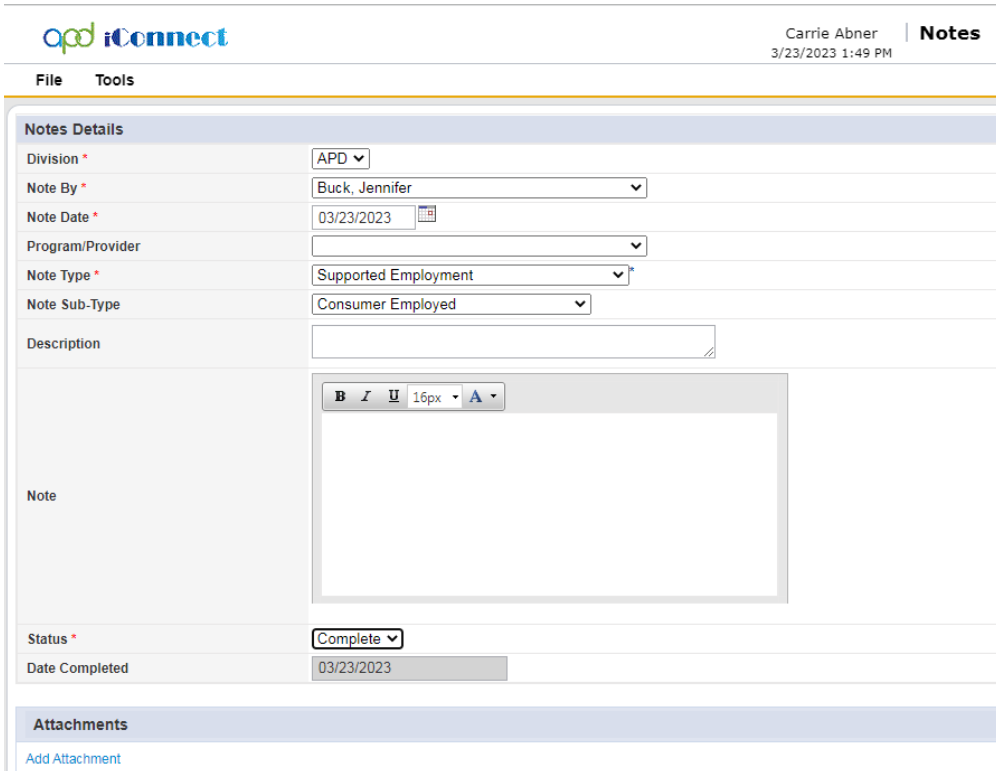


6. From the **File** menu, select **Save and Close Demographics.**

Client Gains Employment

Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

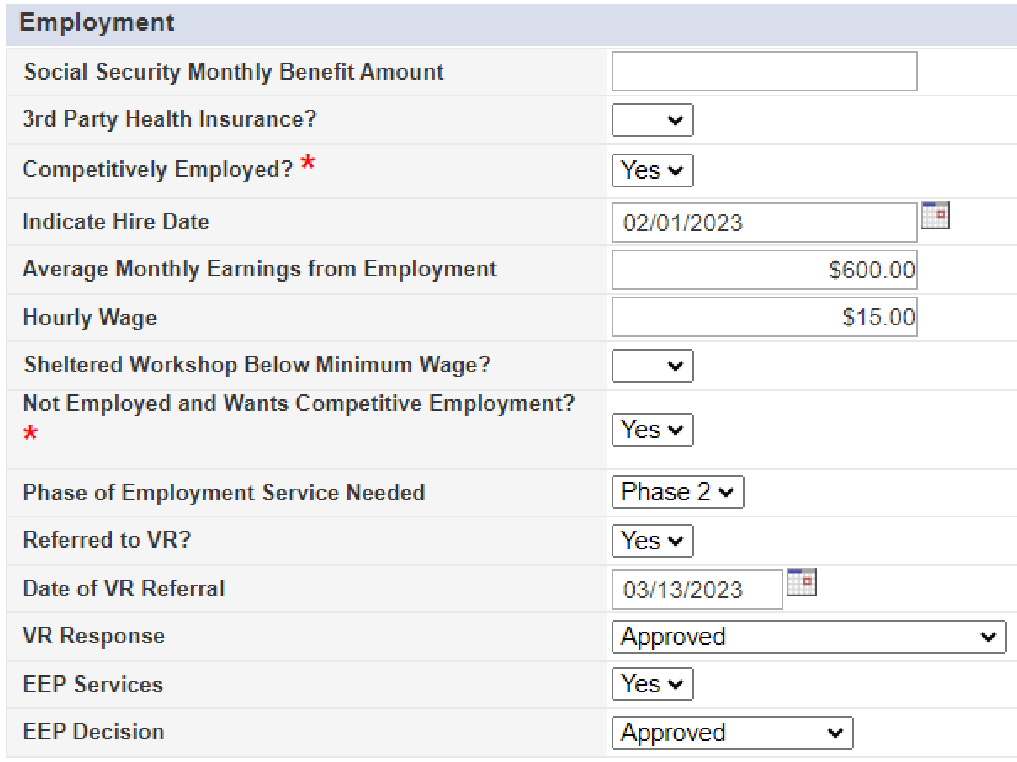
1. If the client has been receiving Phase 1 services under EEP and gains employment, the SE Liaison will document this in a note in iConnect. Navigate to the client's **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
    a. Note Type = Supported Employment
    b. Notes Subtype = Consumer Employed
    c. Status = Complete



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

3. The SE Liaison updates the employment information on demographics. Navigate to the client's **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
    a. Competitively Employed = Yes.
    b. Hire Date = Enter the date the client was hired
    c. Average Monthly earnings = Enter the amount
    d. Hourly Wage = Enter the amount
    e. Sheltered Workshop Below Minimum Wage = blank
    f. Not Employed and Wants Competitive Employment = No
    g. Phase of Employment Service Needed = blank if not pursuing phase 2, change to Phase 2 if you are
    h. Referred to VR = No change
    i. Date of VR = No change
    j. VR Response = No change
    k. EEP Services = No if not pursuing Phase 2 services. Yes if will be receiving Phase 2 services.

l. EEP Decision = Blank if not pursing Phase 2 services. Keep as Approved if receiving Phase 2 services.

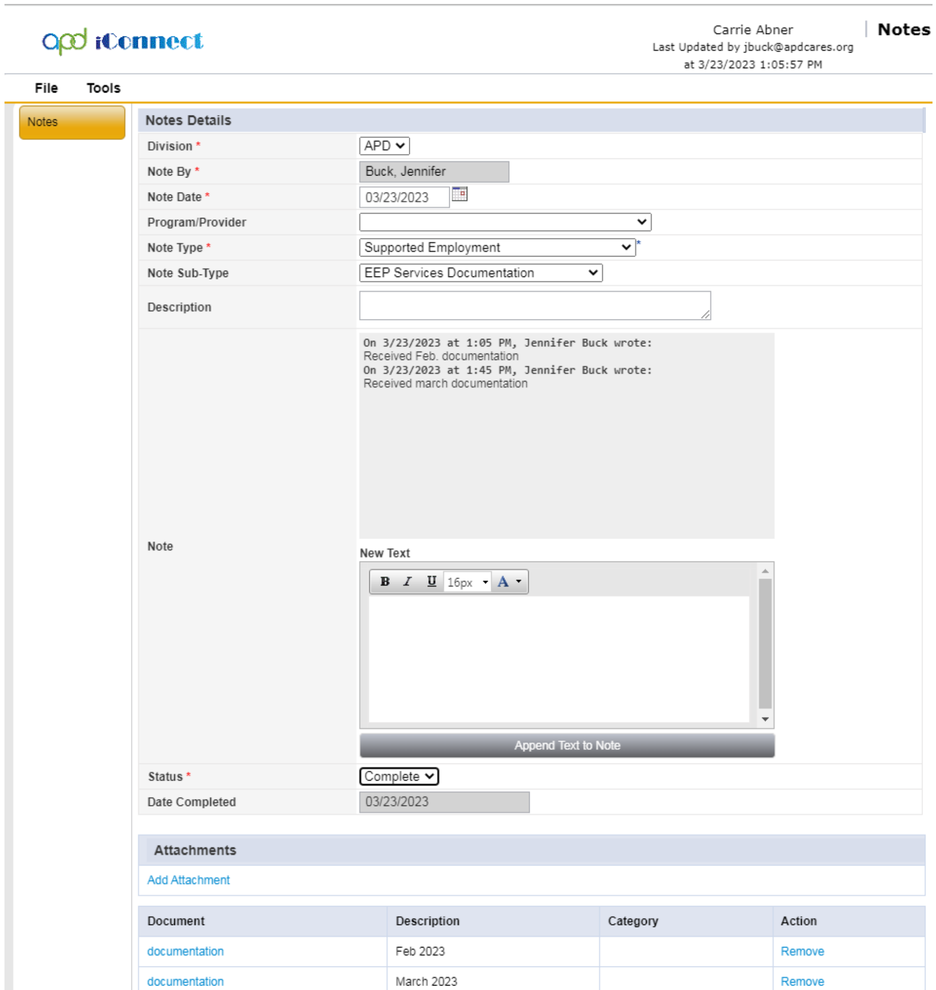


Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed? *	Yes
Indicate Hire Date	02/01/2023
Average Monthly Earnings from Employment	$600.00
Hourly Wage	$15.00
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	Yes
Phase of Employment Service Needed	Phase 2
Referred to VR?	Yes
Date of VR Referral	03/13/2023
VR Response	Approved
EEP Services	Yes
EEP Decision	Approved

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

5. The SE Liaison will not close out the EEP Services Documentation note that has housed the Phase 1 service information. The SE Liaison will continue adding Phase 2 documentation to this same note. Proceed to the EEP Services Delivered section.

6. If the client will not be receiving Phase 2 services, the SE Liaison will close out the EEP Services Documentation note. Navigate to the client's **Notes** tab. Select the EEP Services Documentation note to display the Note Details page. Update the following fields:
    a. Status = Complete
    b. Recipient = None
    c. Attachments = Attach the final month's documentation from the EEP Provider/Job Coach
    d. Attachment > Description = Enter the month and year of the attached documentation.



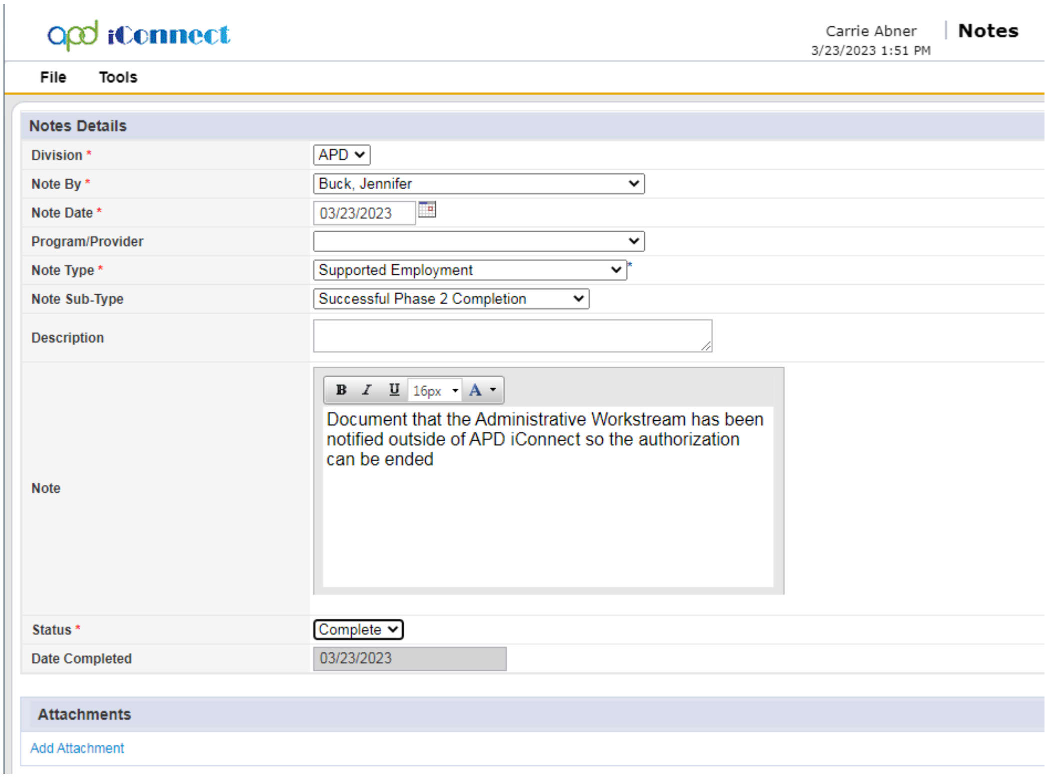
7. From the **File** menu, select **Save and Close Notes**.

Services No Longer Needed

Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

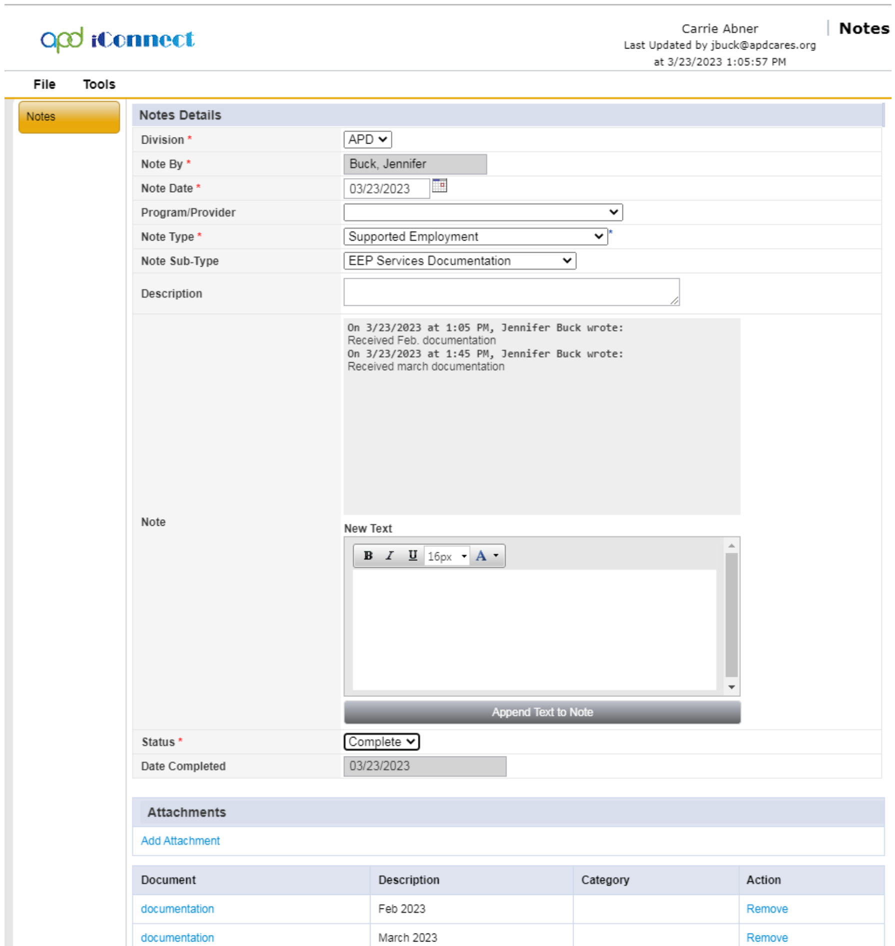
1. If the client has been receiving Phase 2 services under EEP and services are no longer needed, the EEP Provider/Job Coach will inform the SE Liaison outside of iConnect. The SE Liaison will document this in a note in iConnect. Navigate to the client's **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
   a. Note Type = Supported Employment
   b. Notes Subtype = Successful Phase 2 Completion

c. Note = Document that the Administrative Workstream has been notified outside of iConnect so the authorization can be ended.
d. Status = Complete



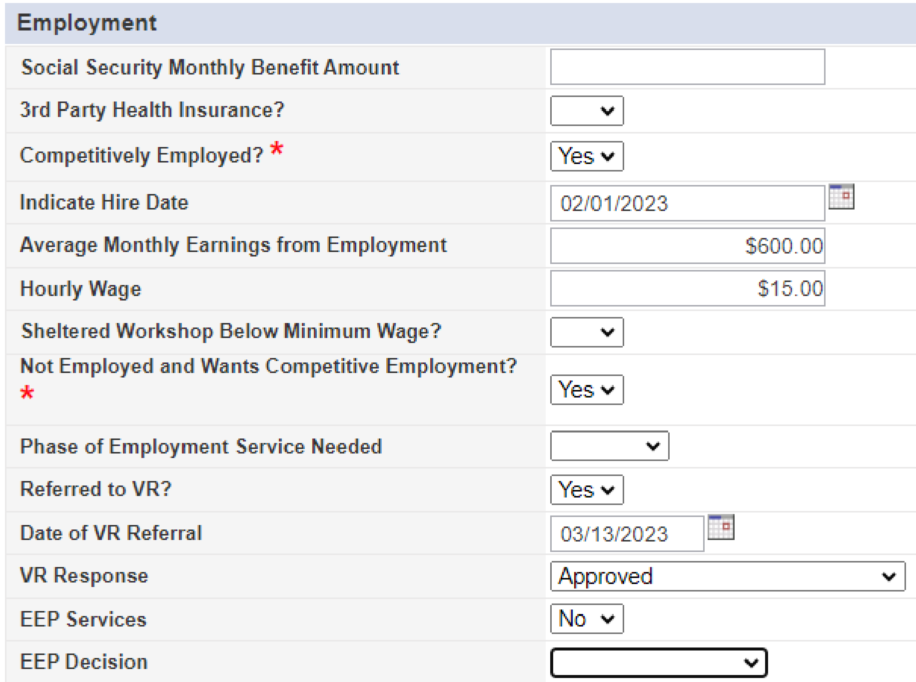
2. From the **File** menu, select **Save and Close Notes**.

3. After receiving final month's documentation from the EEP Provider/Job Coach, the SE Liaison will close out the EEP Services Documentation note. Navigate to the client's **Notes** tab. Select the EEP Services Documentation note to display the Note Details page. Update the following fields:
   a. Status = Complete
   b. Recipient = None
   c. Attachments = Attach the final month's documentation from the EEP Provider/Job Coach
   d. Attachment > Description = Enter the month and year of the attached documentation.



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

5. The SE Liaison will also update the employment information on demographics. Navigate to the client's **Demographic** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
    a. Phase of Employment Service Needed = blank
    b. EEP Services = No
    c. EEP Services = blank



Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed? *	Yes
Indicate Hire Date	02/01/2023
Average Monthly Earnings from Employment	$600.00
Hourly Wage	$15.00
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	Yes
Phase of Employment Service Needed	
Referred to VR?	Yes
Date of VR Referral	03/13/2023
VR Response	Approved
EEP Services	No
EEP Decision	

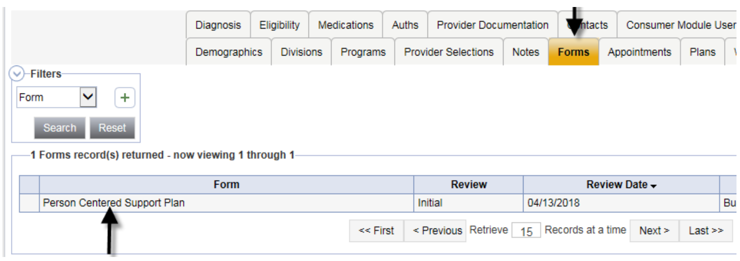
6. From the **File** menu, select **Save and Close Demographics.**

Waiver Employment Services

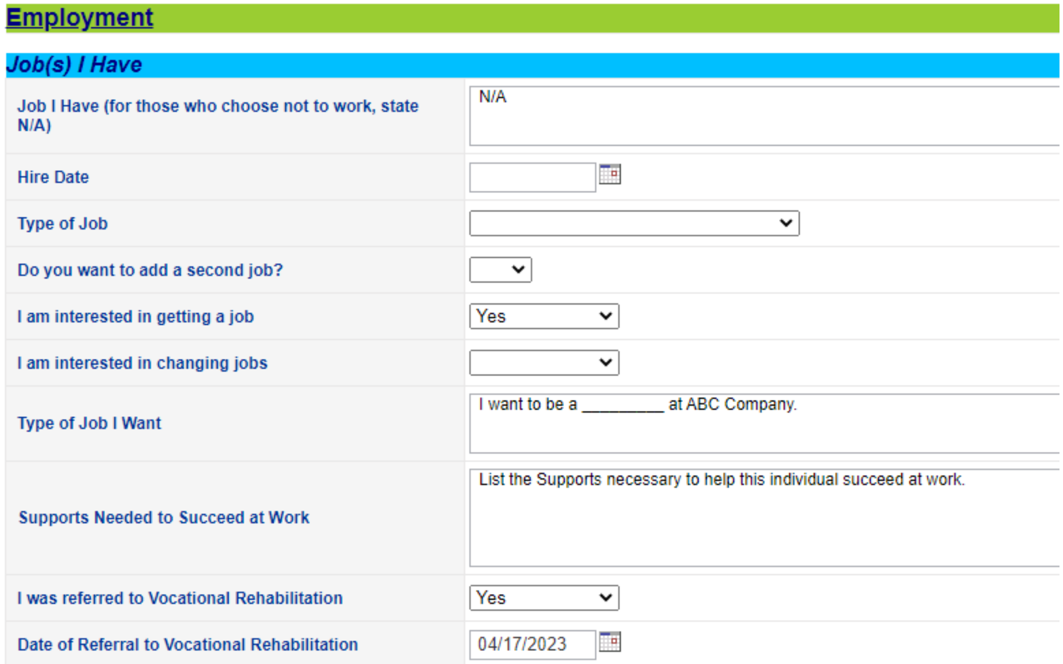
When a client on the waiver expresses an interest in employment, the Waiver Support Coordinator (WSC) will update the Support Plan and initiate the referral.

Role: Waiver Support Coordinator (WSC)

1. The WSC updates the Person-Centered Support Plan, including employment goals and proposed services necessary to assist the client in achieving those goals. The WSC will also complete a VR referral. Navigate to the client's **Forms** tab. A list of all forms is displayed. Locate and click the **Person-Centered Support Plan** to open the form.



2. In the Person-Centered Support Plan form, update the following:
    a. Employment Section > I am interested in getting a job = Yes
    b. Employment Section > Type of Job I Want = Enter the desired job of the client.
    c. Employment Section > Supports Needed to Succeed at Work = List the Supports necessary to help this individual succeed at work
    d. Employment Section > I was referred to Vocational Rehabilitation = Yes or No. (in this example select Yes)

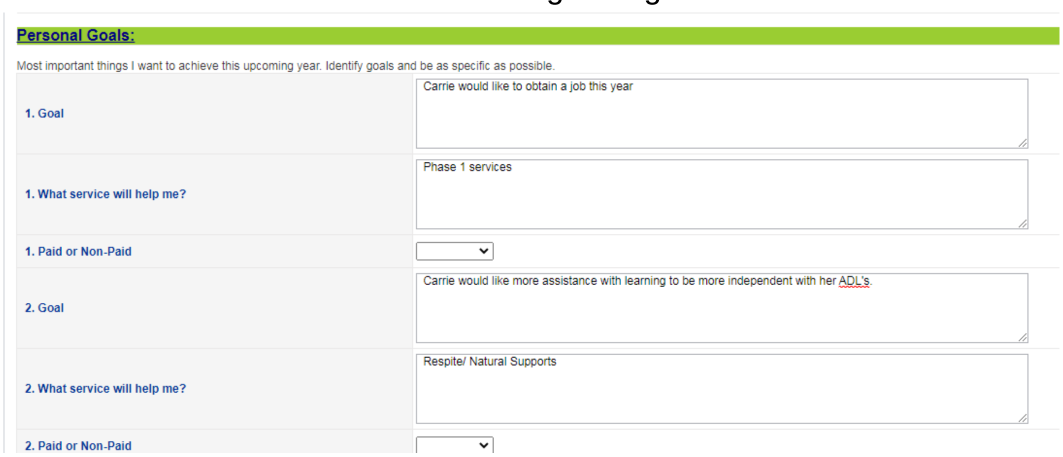


Employment

Job(s) I Have

Job I Have (for those who choose not to work, state N/A)	N/A
Hire Date	
Type of Job	
Do you want to add a second job?	
I am interested in getting a job	Yes
I am interested in changing jobs	
Type of Job I Want	I want to be a _________ at ABC Company.
Supports Needed to Succeed at Work	List the Supports necessary to help this individual succeed at work.
I was referred to Vocational Rehabilitation	Yes
Date of Referral to Vocational Rehabilitation	04/17/2023

e. Personal Goals = list the employment goals and services that will assist the client in achieving their goals.



Personal Goals:

Most important things I want to achieve this upcoming year. Identify goals and be as specific as possible.

1. Goal	Carrie would like to obtain a job this year
1. What service will help me?	Phase 1 services
1. Paid or Non-Paid	
2. Goal	Carrie would like more assistance with learning to be more independent with her ADL's.
2. What service will help me?	Respite/ Natural Supports
2. Paid or Non-Paid	

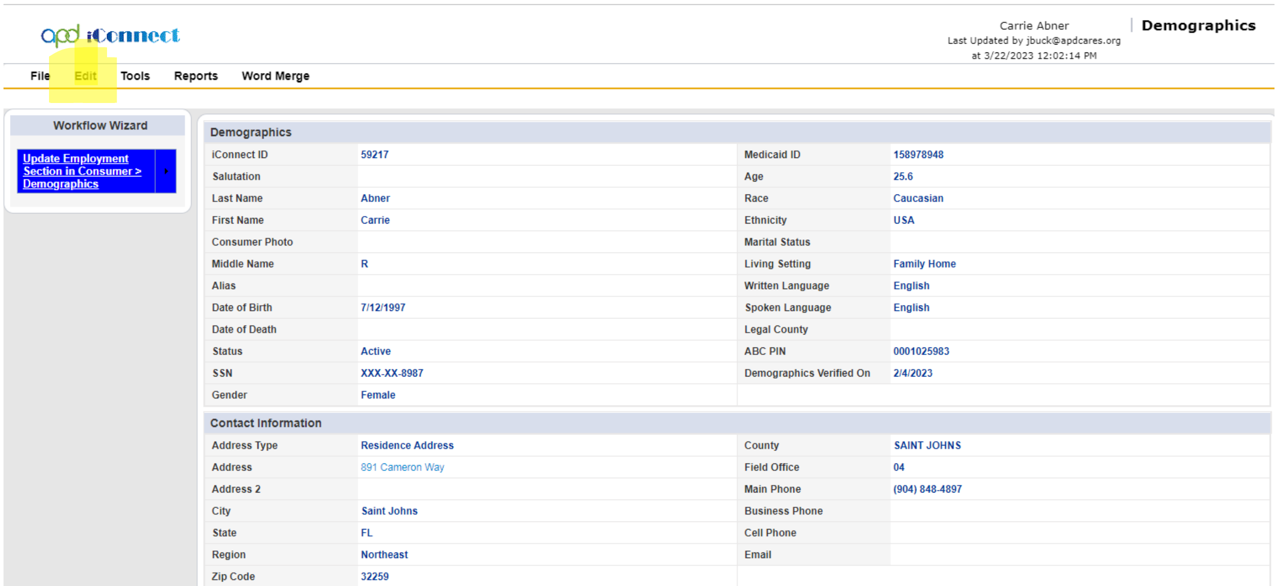
3. In the form header, save the form in **Open** status. The PCSP is updated several times throughout the year. It needs to remain editable.

Tip

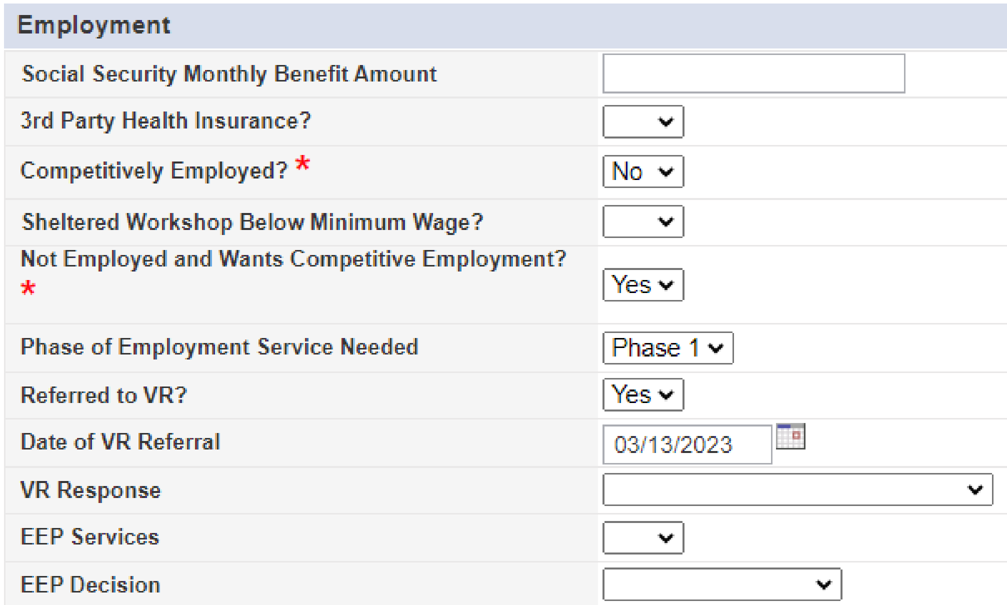
All required fields must be answered if you save with the Open status. If not, use the Draft status.

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

5. The first time the PCSP is saved with the “I am interested in getting a job” question answered as “Yes” a workflow wizard triggers a tickler for the WSC, reminding him/her to **“Update the Employment Section on the Consumer > Demographics”** page. Select the tickler and the Demographic Summary page displays.

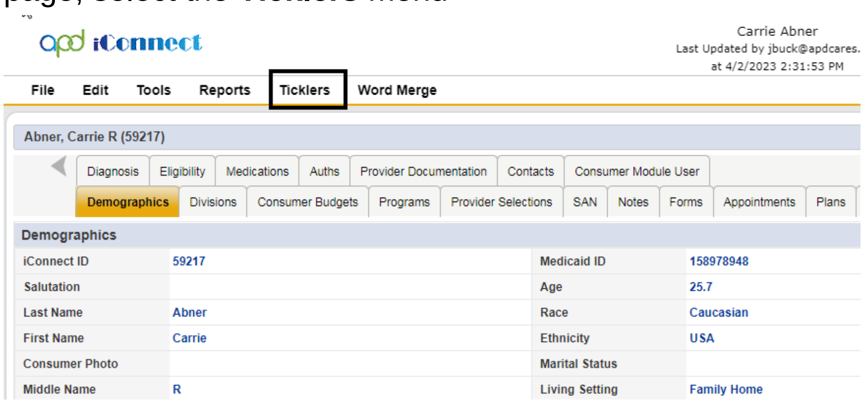


6. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
   a. Competitively Employed? = No
   b. Not Employed and Wants Competitive Employment? = Yes
   c. VR Referral = Yes if client is pursing Phase 1 services. Select No if they are pursuing Phase 2 services (in this example select Yes).
   d. VR Referral Date = Enter the date the VR Referral was sent for Phase 1 services.
   e. VR Response = Blank until decision is made by VR



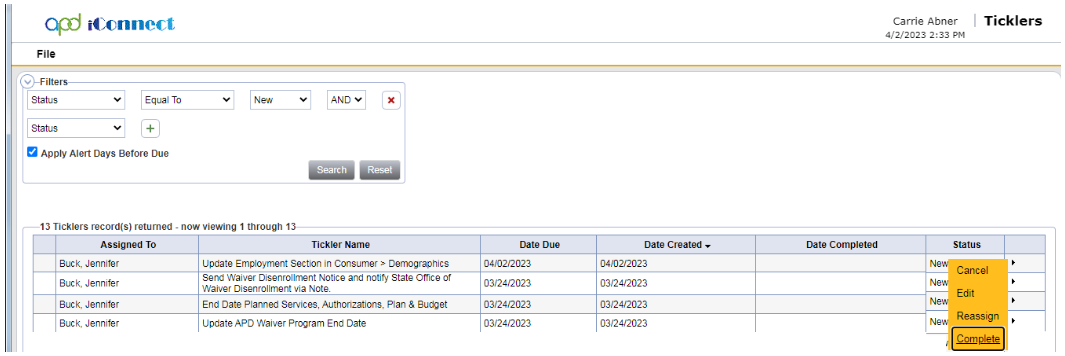
7. From the **File** menu, select **Save and Close Demographics**.

8. The workflow wizard window closes when the demographics page is saved and needs to be re-opened. From the Demographics page, select the **Tickers** menu



9. Ticklers for this client are listed. Search and/or sort the list to locate the “Update Employment Section in Consumer > Demographics” tickler.

10. From the **tickler flyout** menu, mark the tickler as **Complete**.



11. If the client is being referred to VR for Phase 1 services, proceed to the Vocational Rehab (VR) Referral section.

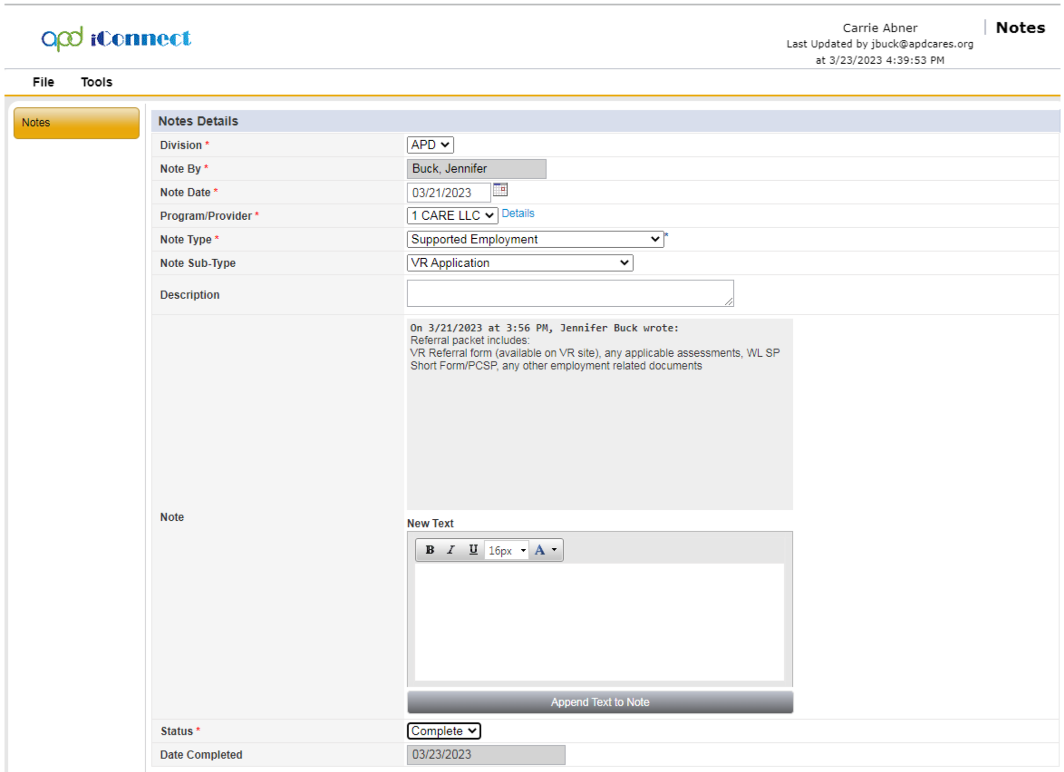
12. If the client is being referred for Phase 2 services, proceed to the Life Skills Development (LSD) 4 section.

Vocational Rehab (VR) Referral (Phase 1)

Role: Waiver Support Coordinator (WSC)

1. Outside of iConnect, the WSC sends the referral packet to VR. The referral packet contains:
    a. VR Referral form (available on the VR site)
    b. Any applicable assessments
    c. Person Centered Support Plan (PCSP)
    d. Any other employment related documents

2. The WSC adds a note in iConnect with the contents of the referral packet. Navigate to the **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:
    a. Program/Provider = Select the agency of the WSC
    b. Note Type = Supported Employment
    c. Note Sub Type = VR Application
    d. Status = Complete
    e. Attachments = Attach the VR referral packet documentation.



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

4. Outside of iConnect, VR completes the process to determine eligibility for Phase 1 services. Monthly, the Supported Employment (SE) Liaison will check the VR Data Sharing Report outside of iConnect to see if VR funding has been denied and notifies the WSC. The WSC will typically find out from the client when VR Funding has been approved. The WSC could also reach out directly to the VR Counselor outside of iConnect for approval status. Proceed to the VR Funding Approved or VR Funding Denied section.

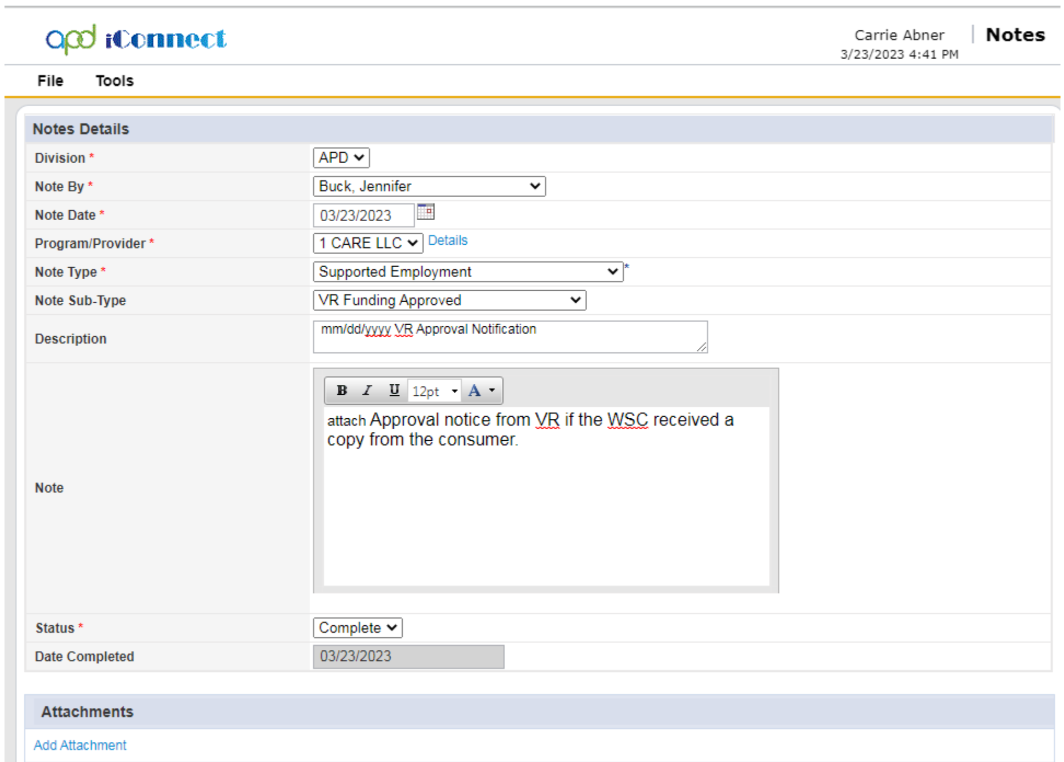
VR Funding Approved

Role: Waiver Support Coordinator (WSC)

1. If VR funding is approved, VR will send the VR Approval Notice to the client outside of iConnect. The WSC will document in a note in

iConnect. Navigate to the client's **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:

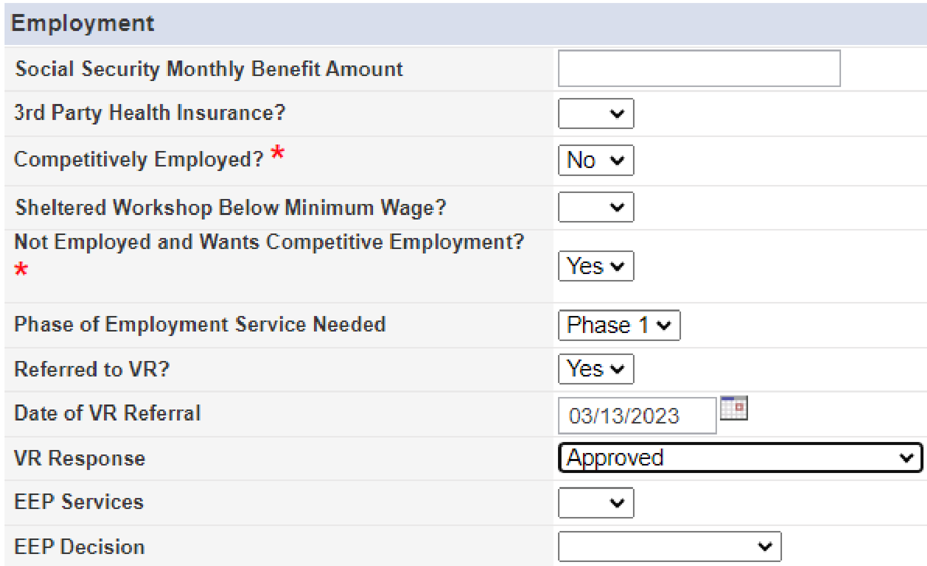
a. Program/Provider = Select the agency of the WSC
b. Note Type = Supported Employment
c. Note Subtype = VR Funding Approved
d. Description = mm/dd/yyyy VR Approval Notification
e. Status = Complete
f. Attachment = Approval notice from VR if the WSC received a copy from the client.



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

3. Like other employment updates, the client Demographics tab must also be updated. Navigate to the **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:

   a. VR Response = Approved



Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed? *	No
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	Yes
Phase of Employment Service Needed	Phase 1
Referred to VR?	Yes
Date of VR Referral	03/13/2023
VR Response	Approved
EEP Services	
EEP Decision	

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

5. The WSC stays in touch with the client as VR services are received and will document all VR contacts in their WSC Progress Note. Navigate to the **Provider Documentation** tab to add Progress Note.

6. The client will tell the WSC when he/she has gained employment. The WSC will confirm Phase 2 services should begin with the VR Counselor or the WSC may also find the client does not want to proceed with Phase 2 services. The WSC will document the initiation of Phase 2 services in their WSC Progress Note. Navigate to the **Provider Documentation** tab to add Progress Note.

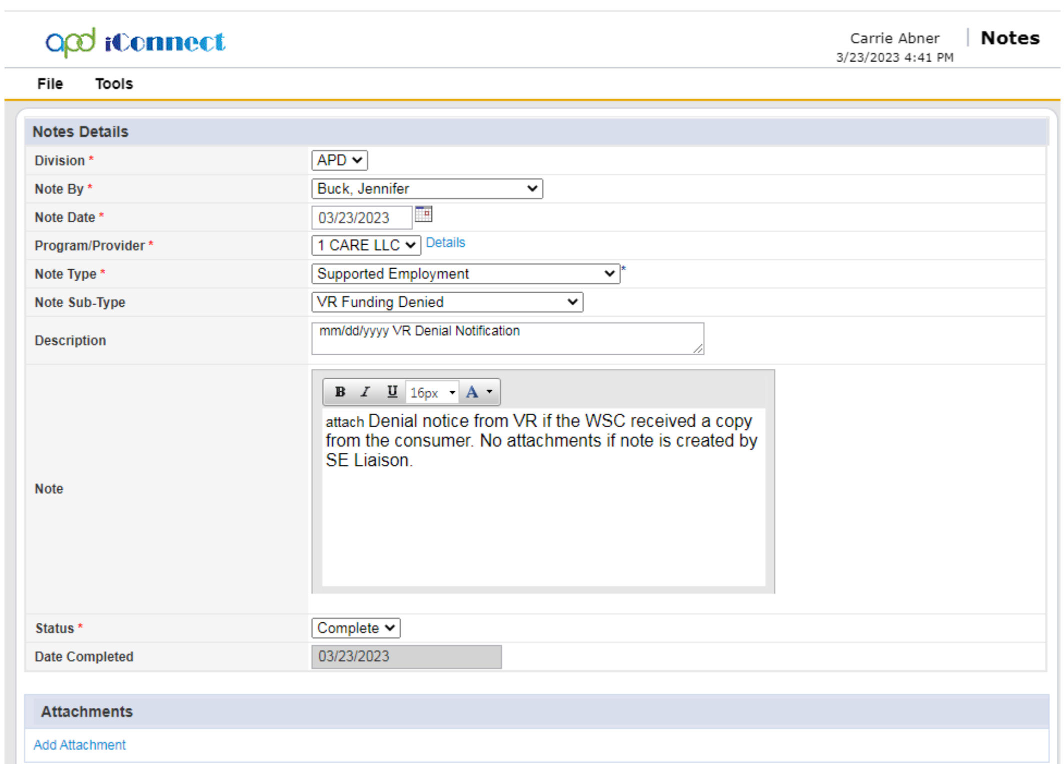
7. If Phase 2 services will be pursued, proceed to Client Gains Employment section.

8. If Phase 2 services will NOT be pursued, proceed to Services No Longer Needed section.

VR Funding Denied

Role: Region Pre-Enrollment Workstream Worker (SE Liaison) or Waiver Support Coordinator (WSC)

1. If VR funding is denied, VR will send the VR Denial Notice to the client outside of iConnect. The Supported Employment (SE) Liaison will monitor the VR Data Sharing Report and notifies the WSC when the client has been denied funding. The WSC may also find out about the denial directly from the client. The denial will be documented in a note in iConnect by either the SE Liaison or the WSC, whoever is notified first. Navigate to the client's **Notes** tab. From the **File** menu, select **Add Note**. Update the following fields:
    a. Program/Provider = Select the agency of the WSC
    b. Note Type = Supported Employment
    c. Note Subtype = VR Funding Denied
    d. Description = mm/dd/yyyy VR Denial Notification
    e. Status = Complete if the WSC creates the note. Pending if the SE Liaison creates the note.
    f. Attachment = Denial notice from VR if the WSC received a copy from the client. No attachments if note is created by SE Liaison. Note Recipient = No recipient if the note is created by the WSC. WSC if the note is created by the SE Liaison.



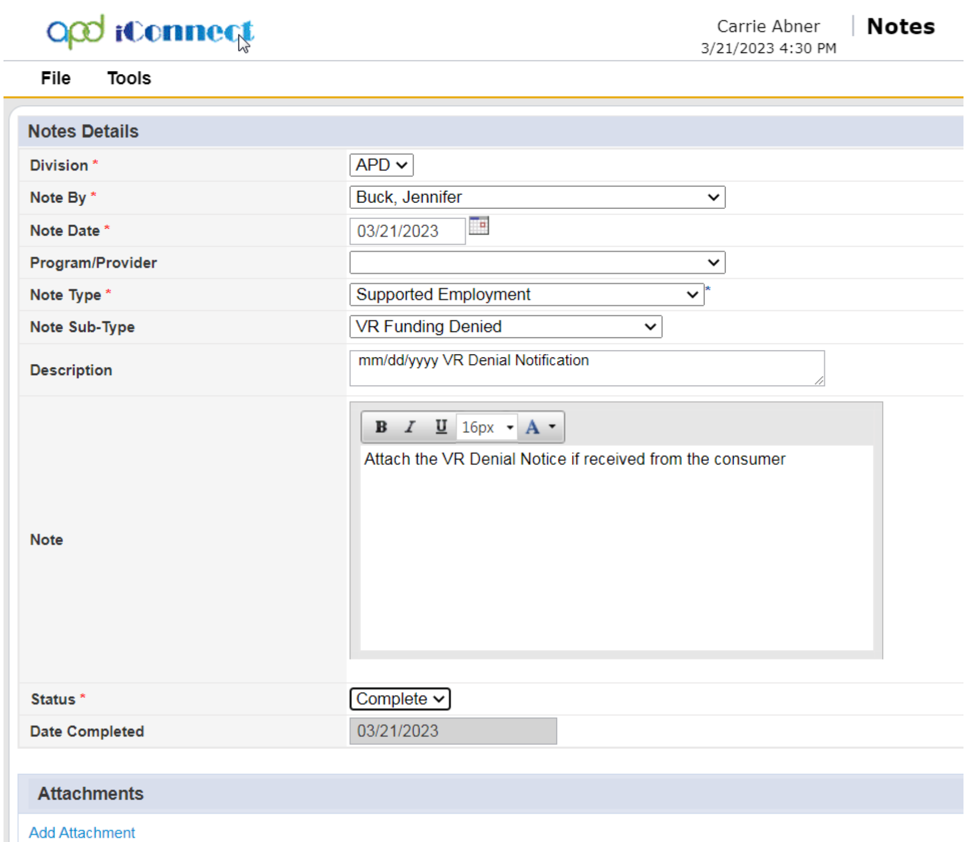
2. From the **File** menu, select **Save and Close Notes**.

3. If the note was created by the WSC, skip to step 7.

Role: Waiver Support Coordinator (WSC)

4. If the note was created by the SE Liaison, the WSC will monitor **My Dashboard** for incoming notes. Select the **Consumer** > **Pending** > **Notes** queue.

5. From the list, click on the VR Funding Denial note to review the details. If the WSC has a copy of the VR Funding Denial notice, he/she will attach a copy to the existing note.
   a. Note = additional details from the WSC if applicable
   b. Status = Complete
   c. Attachment = the VR Funding Denial notice if the WSC obtained a copy from the client.



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

7. The WSC must also note the denial/case closure and acknowledgment of exhausted benefits per the Handbook requirements in their Progress Note which is documented on the client's **Provider Documentation** tab in iConnect.

8. Like other employment updates, the client Demographics tab must also be updated. Navigate to the **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
    a. VR Response = Denied

Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed? *	No
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	Yes
Phase of Employment Service Needed	Phase 1
Referred to VR?	Yes
Date of VR Referral	03/13/2023
VR Response	Denied
EEP Services	
EEP Decision	

9. From the **File** menu, select **Save and Close Demographics.**

10. A client who is not eligible for Phase 1 services under VR has other employment options with APD. The client may benefit from LSD4 (prevocational skill development) or proceed to LSD2 (supported employment phases 1 and 2.). The WSC will update the client's PCSP and note the denial per the Handbook requirements in their Progress Note which is documented on the client's **Provider Documentation** tab in iConnect. Then the WSC will proceed to the Life Skills Development (LSD) 4 Services section.

(VR Phase 1) Pre-employment Support Services Delivered

Role: Waiver Support Coordinator (WSC)

1. The client receives services under VR. The WSC follows up with the client and obtains updates from the client on their employment progress.

2. The WSC documents the ongoing services delivered to the client (progress and needs per the Handbook requirements) in the WSC's Progress Note which is documented on the client's **Provider Documentation** tab in iConnect.

3. Proceed to the Client Gains Employment.

Client Gains Employment

Role: Waiver Support Coordinator (WSC)

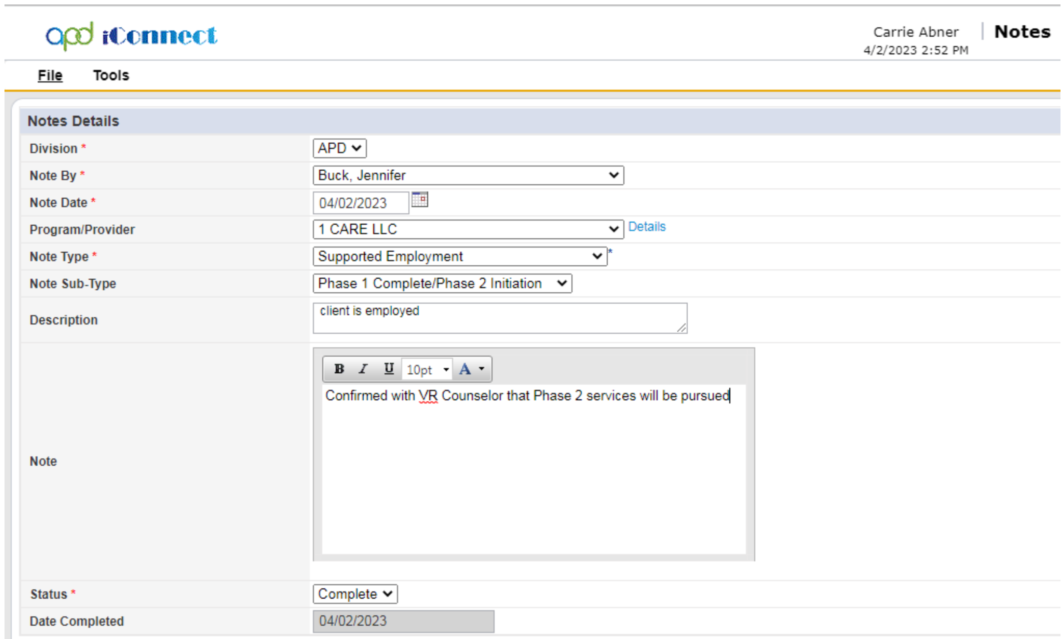
1. If the client has been receiving Phase 1 services and gains employment, the WSC will confirm whether Phase 2 services should begin with the VR Counselor and per the Handbook requirements in their Progress Note which is documented on the client's **Provider Documentation** tab in iConnect.

Phase 2 Services Will Begin

Role: Waiver Support Coordinator (WSC)

1. In addition to documenting any updates on the client's employment status and service needs in the Progress Note, the WSC will also document updates in a note in iConnect. Navigate to the client's **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
    a. Program/Provider = Select the agency of the WSC

b. Note Type = Supported Employment
c. Notes Subtype = Phase 1 Complete/Phase 2 Initiation
d. Description = Client is employed
e. Status = Complete



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

3. The WSC updates the employment information on demographics. Navigate to the client's **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
   a. Competitively Employed = Yes.
   b. Hire Date = Enter the date the client was hired
   c. Average Monthly earnings = Enter the amount
   d. Hourly Wage = Enter the amount
   e. Sheltered Workshop Below Minimum Wage = blank
   f. Not Employed and Wants Competitive Employment = No
   g. Phase of Employment Service Needed = Phase 2
   h. Referred to VR = No change
   i. Date of VR = No change
   j. VR Response = No change
   k. EEP Services = blank
   l. EEP Decision = blank

Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed? *	Yes
Indicate Hire Date	03/01/2023
Average Monthly Earnings from Employment	$600.00
Hourly Wage	$15.00
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	No
Phase of Employment Service Needed	Phase 2
Referred to VR?	Yes
Date of VR Referral	03/13/2023
VR Response	Approved
EEP Services	
EEP Decision	

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

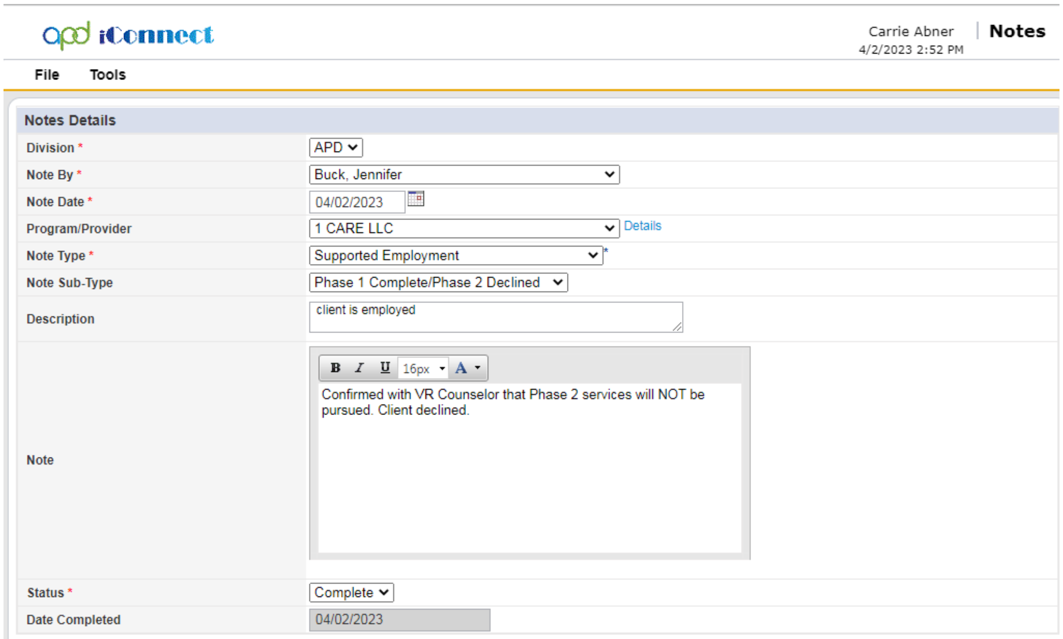
5. Proceed to the Life Skills Development (LSD) 2 Services section.

Phase 2 Services Declined

Role: Waiver Support Coordinator (WSC)

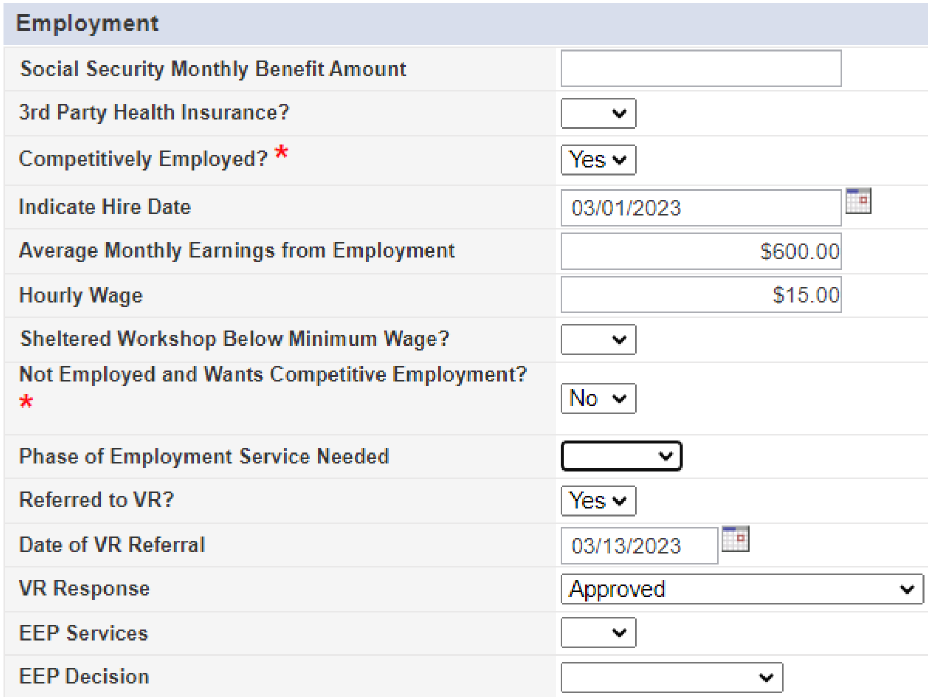
1. The client may inform the WSC they do not want to receive Phase 2 services. The WSC will confirm with the VR Counselor outside of iConnect.

2. In addition to documenting any updates on the client's employment status and service needs in the Progress Note, the WSC will also document updates in a note in iConnect. Navigate to the client's **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following:
    a. Program/Provider = Select the agency of the WSC
    b. Note Type = Supported Employment
    c. Note Subtype = Phase 1 Complete/Phase 2 Declined
    d. Description = Client is employed
    e. Status = Complete



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

4. The WSC updates the employment information on demographics. Navigate to the client's **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
    a. Competitively Employed = Yes.
    b. Hire Date = Enter the date the client was hired
    c. Average Monthly earnings = Enter the amount
    d. Hourly Wage = Enter the amount
    e. Sheltered Workshop Below Minimum Wage = blank
    f. Not Employed and Wants Competitive Employment = No
    g. Phase of Employment Service Needed = blank
    h. Referred to VR = No change
    i. Date of VR = No change
    j. VR Response = No change
    k. EEP Services = blank
    l. EEP Decision = blank



Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed? *	Yes
Indicate Hire Date	03/01/2023
Average Monthly Earnings from Employment	$600.00
Hourly Wage	$15.00
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	No
Phase of Employment Service Needed	
Referred to VR?	Yes
Date of VR Referral	03/13/2023
VR Response	Approved
EEP Services	
EEP Decision	

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

Life Skills Development (LSD) 4 Services

A client who is not eligible for Phase 1 services under VR has other employment options with APD. The client may benefit from LSD4 (prevocational skill development) or proceed to LSD2 (supported employment phases 1 and 2). The WSC must determine if the client can benefit from LSD4 or LSD2 based on the individual needs of the client.

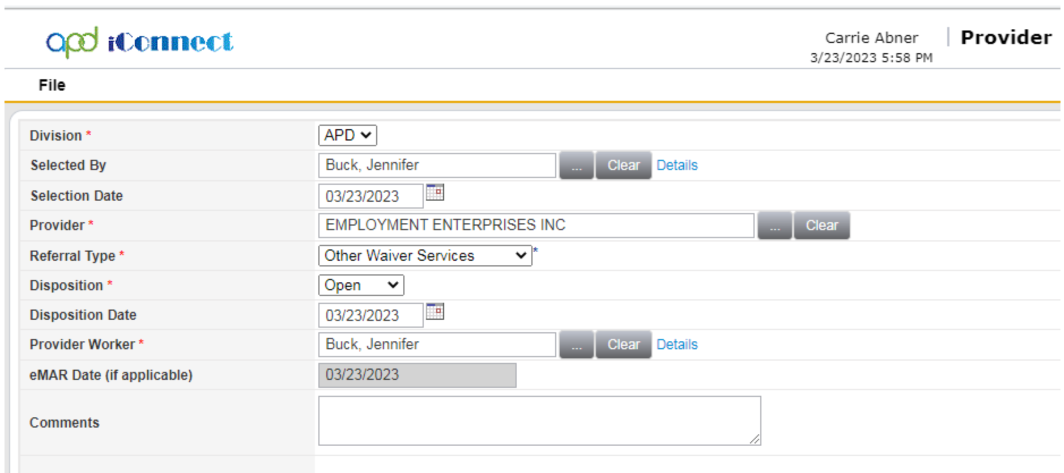
Role: Waiver Support Coordinator (WSC)

1. The WSC initiates the request for LSD 4 services via the current cost plan/authorization process.
   NOTE: Client can choose to go straight to LSD 2. But the general path will be LSD 4 and then to LSD 2.

2. If LSD 4 services are not approved, the WSC will submit a SAN request and follow the current processes.

3. Once LSD 4 services are approved via the cost plan/authorization or SAN process, the WSC will assist the client in selecting a provider outside of iConnect.

4. In iConnect, the WSC will create the Provider Selection record for the provider chosen by the client. Navigate to the client's **Provider Selection** page. From the **File** menu, select **Add Provider**. The Provider Details page displays. Update the following fields:
   a. Provider = Search for and select the LSD 4 provider name
   b. Referral Type = Other Waiver Services
   c. Disposition = Open
   d. Provider Worker = the name of the designee for the selected provider.



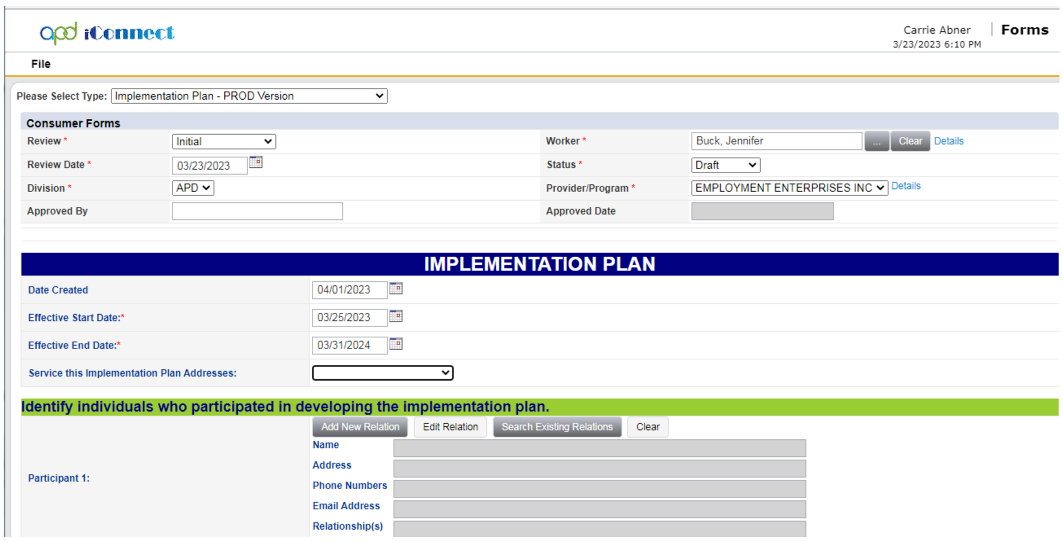
5. From the **File** menu, select **Save and Close Provider**.

6. The WSC will also complete the cost plan/authorization process for the LSD 4 services for this provider. The WSC will provide the authorization to the provider.

Role: Service Provider

7. Once the authorization is obtained, the provider begins delivering services. The provider is responsible for creating the Implementation Plan in iConnect. Navigate to the client's **Forms** tab. From the **File** menu, select **Add Form**. The Form contents display. Update the following fields:
   a. Form = Implementation Plan

b. Review = As Needed
c. Review Date = today
d. Division = APD
e. Worker = Self
f. Status = **Open** status during support plan year. The provider will need to update this plan throughout the year. **Complete** status at end of the support plan year.
g. Provider/Program = Select the name of the provider
h. Complete all sections of the form.



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

9. The Provider documents the ongoing services delivered to the client, their progress and needs per the Handbook requirements in their note which is documented on the client's **Provider Documentation** tab in iConnect.

10. The provider may continue to provide LSD4 services for up to 36 months. If the client desires to become competitively employed after LSD4 and needs assistance with obtaining a job, they will be referred to VR for Phase 1 Services. If VR services are denied again, the client can be referred to LSD2 Supported Employment for Phase 1 services. Proceed to the Vocational Rehab (VR) Referral section.

Role: Waiver Support Coordinator (WSC)

11. Once the client is competitively employed and Phase 1 services are complete (either through VR or LSD2 Supported Employment Phase 1 if denied by VR), the WSC and client may decide that Phase 2 LSD2 Supported Employment services are needed to provide ongoing job supports. Proceed to Life Skills Development (LSD) 2 Services section.

12. If the WSC and client decide Phase 2 LSD2 Supported Employment services are not needed, proceed to Life Skills Development (LSD) 2 Services Declined section.

Life Skills Development (LSD) 2 Services

Role: Waiver Support Coordinator (WSC)

1. If it is determined Phase 2 supported employment services are needed, the WSC documents the client's progress and needs per the Handbook requirements in their Progress Note which is documented on the client's **Provider Documentation** tab in iConnect.

2. The WSC updates the employment information on demographics. Navigate to the client's **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
    a. Competitively Employed = Yes.
    b. Hire Date = Enter the date the client was hired
    c. Average Monthly earnings = Enter the amount
    d. Hourly Wage = Enter the amount
    e. Sheltered Workshop Below Minimum Wage = blank
    f. Not Employed and Wants Competitive Employment = No
    g. Phase of Employment Service Needed = Phase 2
    h. Referred to VR = No change
    i. Date of VR = No change
    j. VR Response = No change
    k. EEP Services = blank
    l. EEP Decision = blank

Employment	
Social Security Monthly Benefit Amount	
3rd Party Health Insurance?	
Competitively Employed? *	Yes
Indicate Hire Date	03/01/2023
Average Monthly Earnings from Employment	$600.00
Hourly Wage	$15.00
Sheltered Workshop Below Minimum Wage?	
Not Employed and Wants Competitive Employment? *	No
Phase of Employment Service Needed	Phase 2
Referred to VR?	Yes
Date of VR Referral	03/13/2023
VR Response	Approved
EEP Services	
EEP Decision	

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

4. The WSC follows the current cost plan/authorization process to create an authorization for LSD 2 services.

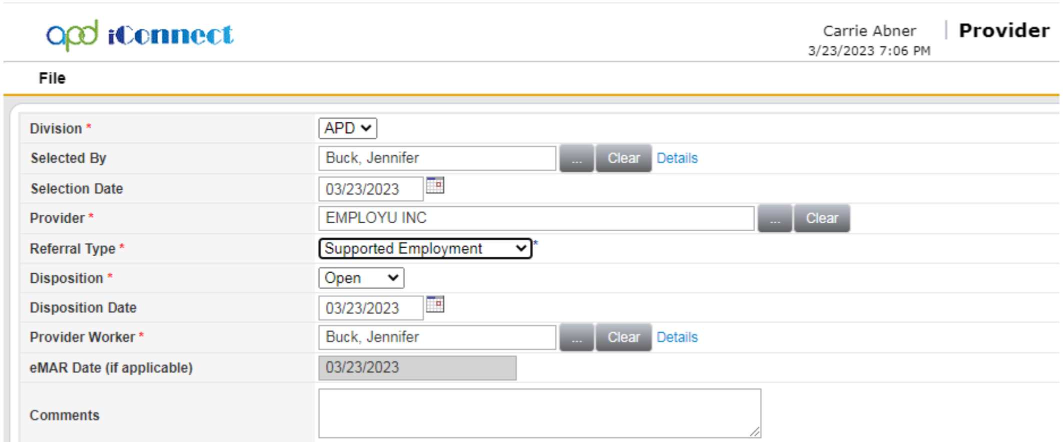
5. If LSD 2 services are not approved, the WSC will submit a SAN request and follow the current processes.

6. Once LSD 2 services are approved via the cost plan/authorization or SAN process, the WSC will assist the client in selecting a provider outside of iConnect.

7. If the client received LSD4 services prior to transitioning to LSD2 and the LSD 2 provider is NOT different than the LSD 4 provider, no changes are needed to the Provider Selection record.

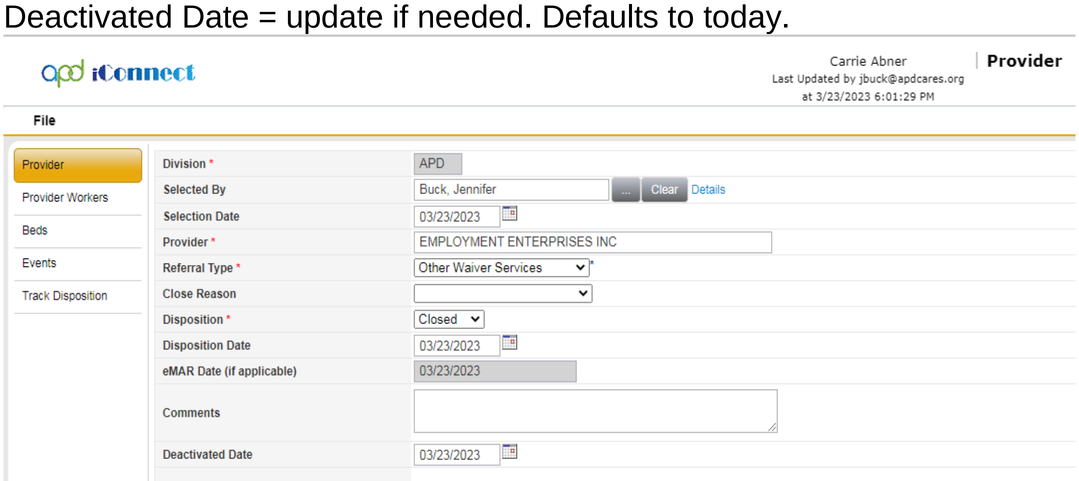
8. If the LSD 2 provider is different than the LSD 4 provider (or the client did not receive LSD 4 services previously), a new provider selection record will need to be created for the LSD 2 provider. In iConnect, the WSC will create the Provider Selection record for the provider chosen by the client. Navigate to the client's **Provider Selection** page. From the **File** menu, select **Add Provider**. The Provider Details page displays. Update the following fields:

a. Provider = Search for and select the LSD 2 provider name
b. Referral Type = Supported Employment
c. Disposition = Open
d. Provider Worker = the name of the designee for the selected provider.



9. From the **File** menu, select **Save and Close Provider**.

10. The WSC will close the Provider Selection record for the LSD 4 provider (if applicable). From the **Provider Selection** tab, select the name of the LSD 4 provider. The Provider Details page displays. Update the following fields.
    a. Status = Closed
    b. Deactivated Date = update if needed. Defaults to today.

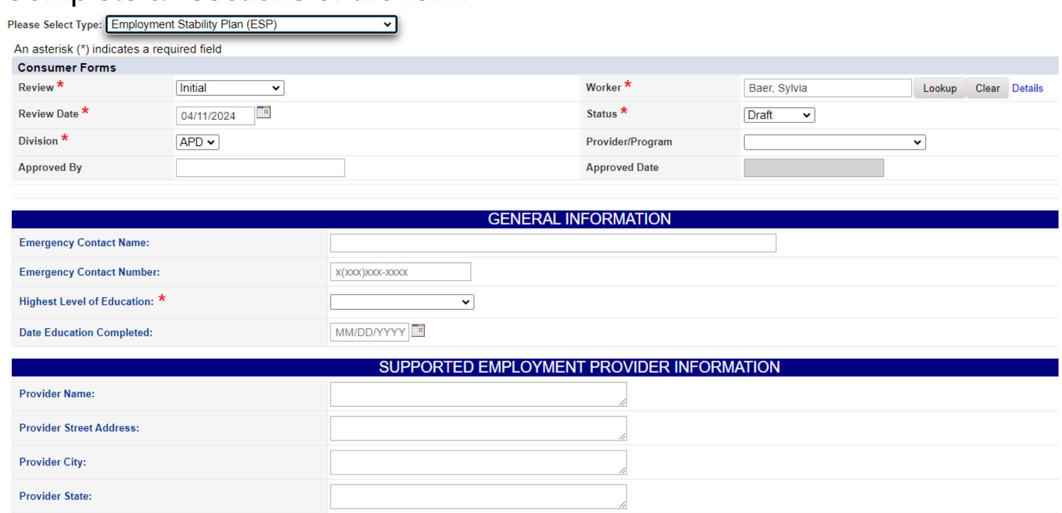


11. From the **File** menu, select **Save and Close Provider**.

12. The WSC will also complete the cost plan/authorization process for the LSD 2 services for this provider. The WSC will provide the authorization to the provider.

Role: Service Provider

13. Once the authorization is obtained, the provider begins delivering services. The provider is responsible for creating the Employment Stability Plan in iConnect. Navigate to the client's **Forms** tab. From the **File** menu, select **Add Form**. The Form contents display. Update the following fields:
    a. Form = Employment Stability Plan
    b. Review = As Needed
    c. Review Date = today
    d. Division = APD
    e. Worker = Self
    f. Status = **Ope**n status during support plan year. The provider will need to update this plan throughout the year. **Complete** status at end of the support plan year.
    g. Provider/Program = Select the name of the provider
    h. Complete all sections of the form.



14. From the **File** menu, select **Save Forms**.

15. The Provider documents the ongoing services delivered to the client, their progress and needs per the Handbook requirements in their note

which is documented on the client's **Provider Documentation** tab in iConnect.

16. Through routine support coordination activities, the WSC determines with the client how long LSD 2 services are needed. The WSC will repeat cost plan/authorization process for the LSD 2 services as long as the client needs. If LSD 2 services are not approved, the WSC will submit a SAN request and follow the current processes.

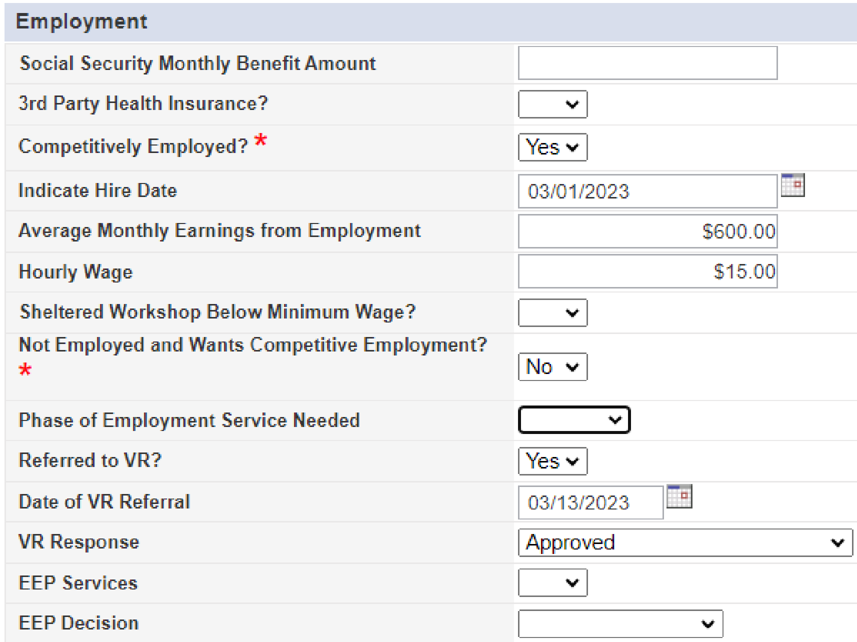
17. The provider will continue to provide LSD 2 services per authorizations provided by the WSC.

Life Skills Development (LSD) 2 Services Declined

Role: Waiver Support Coordinator (WSC)

1. Through routine support coordination activities, the WSC and client may decide Phase 2 services are not needed. The WSC documents the client's progress and needs per the Handbook requirements in their Progress Note which is documented on the client's **Provider Documentation** tab in iConnect.

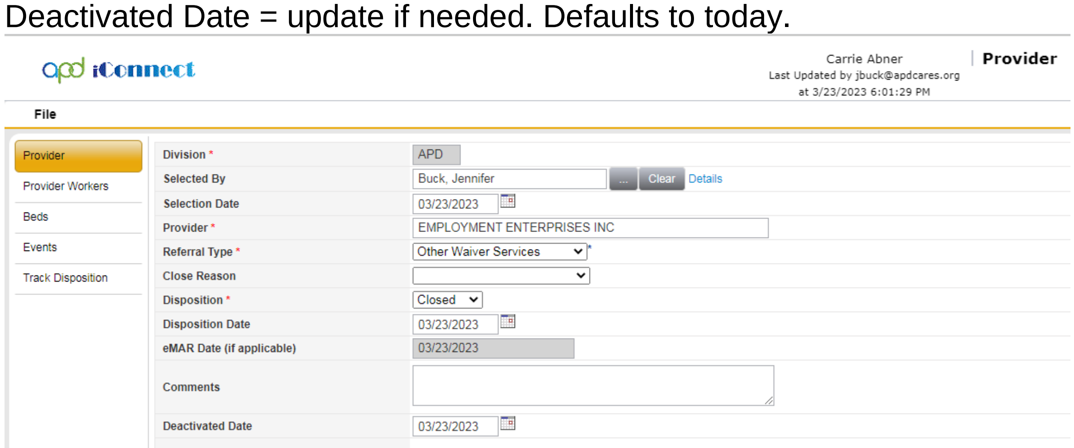
2. The WSC updates the employment information on demographics. Navigate to the client's **Demographics** tab. From the **Edit** menu, select **Edit Demographics**. Update the following fields:
    a. Competitively Employed = Yes.
    b. Hire Date = Enter the date the client was hired
    c. Average Monthly earnings = Enter the amount
    d. Hourly Wage = Enter the amount
    e. Sheltered Workshop Below Minimum Wage = blank
    f. Not Employed and Wants Competitive Employment = No
    g. Phase of Employment Service Needed = blank
    h. Referred to VR = No change
    i. Date of VR = No change
    j. VR Response = No change
    k. EEP Services = blank
    l. EEP Decision = blank



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

4. The WSC follows the current cost plan/authorization process to end the LSD 2 services and informs the provider.

5. The WSC will close the Provider Selection record for the LSD 2 provider. From the **Provider Selection** tab, select the name of the LSD 2 provider. The Provider Details page displays. Update the following fields.
   a. Status = Closed
   b. Deactivated Date = update if needed. Defaults to today.



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