



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

# Employment Services

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## Employment Services

### 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.

## Employment Services

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

The screenshot displays the iConnect web interface. At the top, the logo 'iConnect' is visible on the left, and the date '3/21/2023 2:38 PM' and the word 'Forms' are on the right. Below the logo is a 'File' menu. The main content area is titled 'Please Select Type: EMPLOYMENT ENHANCEMENT PROGRAM (EEP) REFERRAL FO'. Underneath, there is a 'Consumer Forms' section with several input fields: 'Review' (set to 'As Needed'), 'Review Date' (03/21/2023), 'Division' (APD), 'Approved By' (Buck, Jennifer), 'Worker' (Buck, Jennifer), 'Status' (Complete), and 'Approved Date' (03/21/2023). Below this is a section titled 'EMPLOYMENT ENHANCEMENT PROGRAM (EEP) REFERRAL FORM' with fields for 'Fiscal Year (YYYYYYYY)' (2023) and 'Date of Referral' (02/13/2023). A table shows '1 Worker record(s) returned - now viewing 1 through 1' with columns for 'Name' and 'ID', listing '1, Norma' with ID '18021'. There are also fields for 'Referred By: Insert WISC Name', 'Referred By: Insert WISC Phone Number', and 'County of Residence' (SAINT JOHNS). At the bottom, there are sections for 'Who is the best contact?' with fields for Name, Address, Phone Numbers, Email Address, and Relationship(s), each with 'Add New Relation', 'Edit Relation', 'Search Existing Relations', and 'Clear' buttons.

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

## Employment Services

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

The screenshot shows the iConnect Notes form. The top right corner displays the user name 'Carrie Abner' and the time '3/21/2023 2:45 PM'. The 'Notes' tab is selected. The form includes a 'File' menu and a 'Tools' section. The main form fields are: 'Note Date' (03/21/2023), 'Program/Provider' (dropdown), 'Note Type' (Supported Employment), 'Note Sub-Type' (EEP Referral), 'Description' (New EEP Referral), 'Note' (Rich text editor with content: 'details from the Region Pre-Enrollment worker to the SE Liaison about the referral'), 'Status' (Pending), and 'Date Completed' (empty). Below the form is an 'Attachments' section with an 'Add Attachment' link and a table with columns 'Document', 'Description', 'Category', and 'Action'. The table is currently empty. Below that is a 'Note Recipients' section with an 'Add Note Recipient' input field and a 'Clear' button. At the bottom is a table with columns 'Name', 'Date Sent', 'Date Read', 'Status', 'Date Signed', and 'Remove'. The table contains one row: 'Buck, Jennifer', '3/21/2023', empty, 'Unread', empty, and 'Remove'.

Document	Description	Category	Action
There are no attachments to display			

Name	Date Sent	Date Read	Status	Date Signed	Remove
Buck, Jennifer	3/21/2023		Unread		Remove

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.

# Employment Services

oecd iConnect

Welcome, Caroline Shorter My Dashboard Sign Out

Role: Region Pre-Enrollment Workstream Worker

4/11/2024 8:03 AM

File Reports

MY DASHBOARD CONSUMERS PROVIDERS

CONSUMERS PROVIDERS TASKS

Division Notes Links

Provider Selections Ticklers IConnect eLearning Library IConnect Help Desk

Notes Provider Selections My Management My Files

Complete 12 Pending 1

- 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.

oecd iConnect

Welcome, Jennifer Buck

3/21/2023 2:50 PM

File Tools

Filters

Status Equal To Pending AND

iConnect ID +

Search Reset

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

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

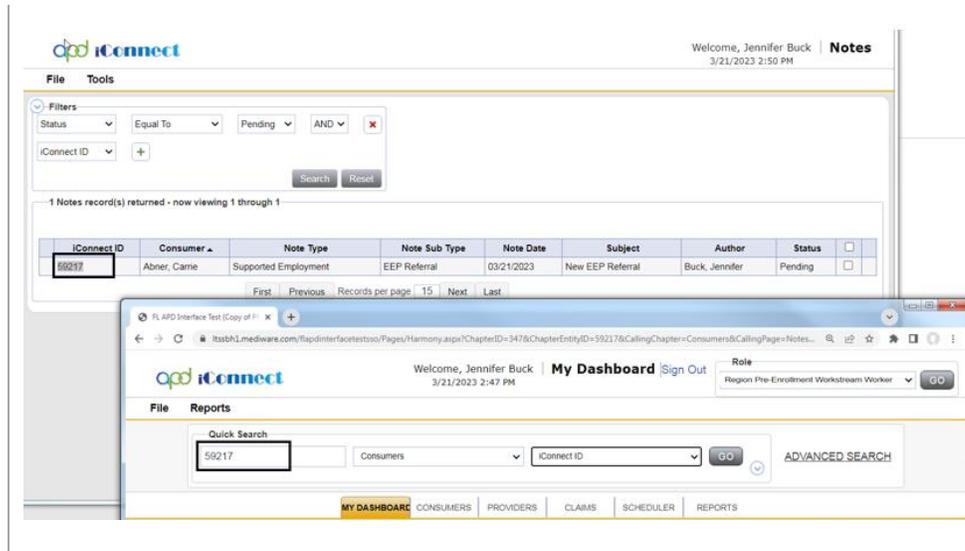
First Previous Records per page 15 Next Last



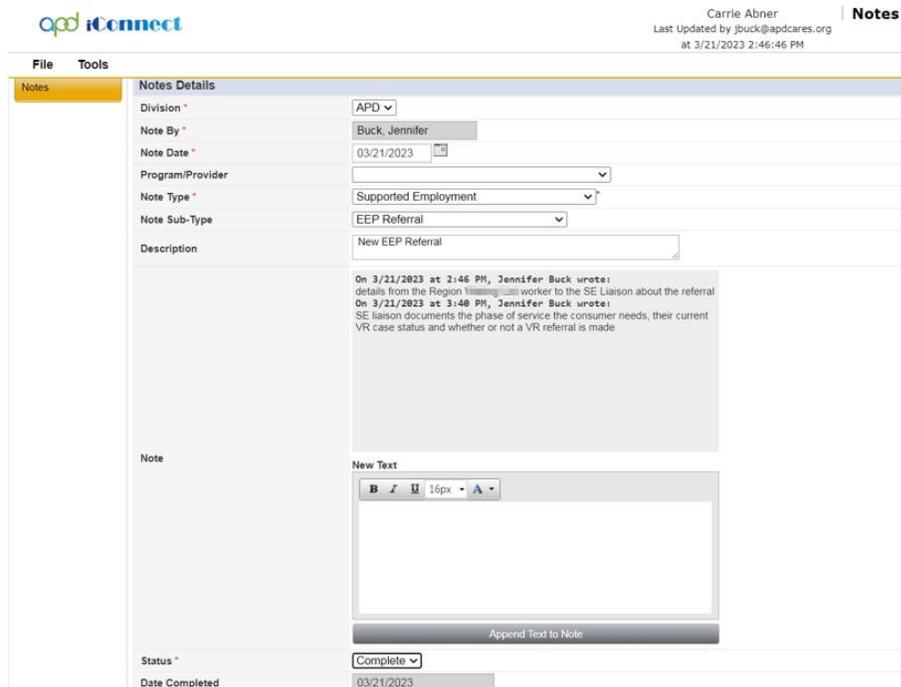
## Tip

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.

## Employment Services



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



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

## Employment Services

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	<input type="text"/>
3rd Party Health Insurance?	<input type="button" value="v"/>
Competitively Employed?	<input type="button" value="No v"/>
Sheltered Workshop Below Minimum Wage?	<input type="button" value="v"/>
Not Employed and Wants Competitive Employment?	<input type="button" value="Yes v"/>
Phase of Employment Service Needed	<input type="button" value="Phase 1 v"/>
Referred to VR?	<input type="button" value="Yes v"/>
Date of VR Referral	<input type="text" value="03/17/2023"/> <input type="button" value="📅"/>
VR Response	<input type="button" value="v"/>
WL EEP Services	<input type="button" value="v"/>
EEP Decision	<input type="button" value="v"/>

## Employment Services

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

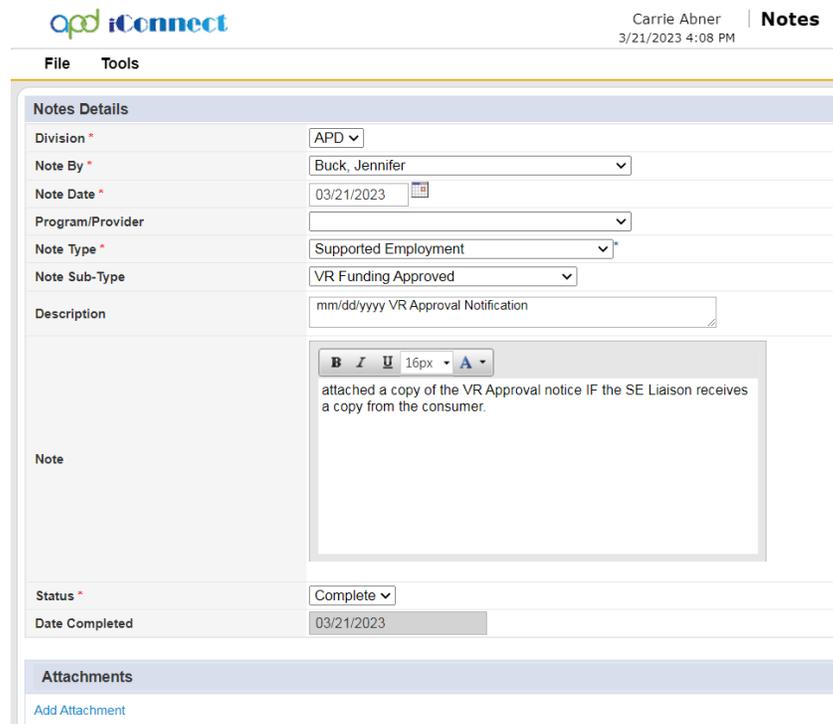
### Role: Region Pre-Enrollment Workstream Worker (SE Liaison)

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

## Employment Services

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.



The screenshot shows the iConnect interface for adding a note. The top navigation bar includes the iConnect logo, the user name 'Carrie Abner', the date '3/21/2023 4:08 PM', and the 'Notes' tab. Below the navigation bar are 'File' and 'Tools' menus. The main content area is titled 'Notes Details' and contains the following fields:

- Division \***: APD (dropdown)
- Note By \***: Buck, Jennifer (dropdown)
- Note Date \***: 03/21/2023 (calendar icon)
- Program/Provider**: (dropdown)
- Note Type \***: Supported Employment (dropdown)
- Note Sub-Type**: VR Funding Approved (dropdown)
- Description**: mm/dd/yyyy VR Approval Notification (text input)
- Note**: A rich text editor with a toolbar (Bold, Italic, Underline, 16px font size, Color) and the text: 'attached a copy of the VR Approval notice IF the SE Liaison receives a copy from the consumer.'
- Status \***: Complete (dropdown)
- Date Completed**: 03/21/2023 (text input)

At the bottom, there is an 'Attachments' section with an 'Add Attachment' link.

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 Services

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

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.**

## Employment Services

The screenshot shows the iConnect application interface. At the top left is the iConnect logo. At the top right, the user name 'Carrie Abner' and the date/time '3/21/2023 4:30 PM' are displayed. Below the header is a 'Notes' section. The main content area is titled 'Notes Details' and contains the following fields:

- Division \***: APD
- Note By \***: Buck, Jennifer
- Note Date \***: 03/21/2023
- Program/Provider**: (empty)
- Note Type \***: Supported Employment
- Note Sub-Type**: VR Funding Denied
- Description**: mm/dd/yyyy VR Denial Notification
- Note**: A rich text editor containing the text 'Attach the VR Denial Notice if received from the consumer'.
- Status \***: Complete
- Date Completed**: 03/21/2023

At the bottom of the form, there is an 'Attachments' section with a link to 'Add Attachment'.

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 Services

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

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.

## Employment Services

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

The screenshot shows the 'Notes' form in the iConnect system. The form is titled 'Notes Details' and includes the following fields:

- Division \***: APD
- Note By \***: Buck, Jennifer
- Note Date \***: 03/21/2023
- Program/Provider**: (empty)
- Note Type \***: Supported Employment
- Note Sub-Type**: Phase 1 Complete/Phase 2 Initiation
- Description**: (empty)
- Note**: Confirmed with VR Counselor that Phase 2 services should begin.
- Status \***: Complete
- Date Completed**: 03/21/2023

The form also includes an 'Attachments' section with an 'Add Attachment' link.

### 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

The screenshot shows the 'Notes Details' form in the iConnect system. The form is titled 'Notes Details' and includes the following fields:

- Division \***: APD
- Note By \***: Buck, Jennifer
- Note Date \***: 03/21/2023
- Program/Provider**: (empty)
- Note Type \***: Supported Employment
- Note Sub-Type**: Phase 1 Complete/Phase 2 Declined
- Description**: (empty)
- Note**: confirmation of employment from VR Counselor/consumer received. Ending EEP services.
- Status \***: Complete
- Date Completed**: 03/21/2023

At the bottom of the form, there is an **Attachments** section with a link to [Add Attachment](#).

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 Services

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

### Phase 2 Services Declined:

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

## Employment Services

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	▼

- 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)**

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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.

The screenshot shows the iConnect software interface. At the top, the user is identified as Carrie Abner, with the last updated timestamp of 3/21/2023 5:46:46 PM. The main menu includes File, Edit, Tools, Reports, Ticklers, and Word Merge. The Word Merge dropdown menu is open, showing a list of document templates, with 'IFS Request for Additional Information' highlighted. The Demographics page for Carrie R (59217) is visible, showing a table of personal information.

Demographics	
iConnect ID	59217
Salutation	
Last Name	Abner
First Name	Carrie
Consumer Photo	
Middle Name	R
Alias	
Date of Birth	7/12/1997
Date of Death	
Status	Active
SSN	XXX-XX-5987
Gender	Female

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.

**Notes Details**

Division \* APD ▾

Note By \* Buck, Jennifer ▾

Note Date \* 03/24/2023 📅

Program/Provider ▾

Note Type \* Supported Employment ▾\*

Note Sub-Type Additional Information Needed ▾

Description

Note

B I U 16px A

RAI sent to consumer. Need additional information before EEP eligibility can be determined.

Status \* Pending ▾

Date Completed

**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

**Note Recipients**

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	3/24/2023		Unread		<a href="#">Remove</a>

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.

## Employment Services

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

## Employment Services

- 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.

**Notes Details**

Division \* APD

Note By \* Buck, Jennifer

Note Date \* 03/22/2023

Program/Provider

Note Type \* Supported Employment

Note Sub-Type EEP Services Requested

Description FY2023 EEP Funding Requested

Note

Status \* Pending

Date Completed

**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
IFS Funding Request			<a href="#">Remove</a>

**Note Recipients**

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	3/22/2023		Unread		<a href="#">Remove</a>

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 Services

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

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

## Employment Services

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

The screenshot shows the iConnect Demographics page for Carrie Abner (ID 59217). The Word Merge toolbar is open, displaying a list of document templates. The 'Demographics' page contains the following information:

Demographics	
iConnect ID	59217
Salutation	
Last Name	Abner
First Name	Carrie
Consumer Photo	
Middle Name	R
Alias	
Date of Birth	7/12/1997
Date of Death	
Status	Active
SSN	XXX-XX-8987
Gender	Female
158978948	
25.6	
Caucasian	
USA	
Family Home	
English	
English	
0001025983	
2/4/2023	

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

## Employment Services

Division \*

Note By \*

Note Date \*

Program/Provider

Note Type \*

Note Sub-Type

Description

Note

On 3/21/2023 at 6:42 PM, Jennifer Buck wrote:  
 Notice of Determination of IFS

New Text

Append Text to Note

Status \*

Date Completed

**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
Notice of Determination of IFS Denial			<a href="#">Remove</a>

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

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

## Employment Services

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

The screenshot displays the iConnect interface for editing a note. The top navigation bar includes the iConnect logo, a user profile for Carrie Abner, and a 'Notes' tab. The main form contains the following fields:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 03/21/2023
- Program/Provider: [Dropdown]
- Note Type: Supported Employment
- Note Sub-Type: EEP IFS Denial
- Description: [Text area]
- Note: [Text area containing the text: "On 3/23/2023 at 7:48 PM, Jennifer Buck wrote: Notice of Agency Determination of Request for Individual and Family Support Services ready to be sent to consumer."]
- New Text: [Rich text editor with a toolbar]
- Status: Complete
- Date Completed: 03/21/2023

Below the form is an 'Attachments' section with an 'Add Attachment' link and a table with columns for Document, Description, Category, and Action. The table currently shows 'There are no attachments to display'.

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

## Employment Services

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.

The screenshot shows the iConnect system interface. At the top, the user is identified as Carrie Abner, last updated by j buck@apdcare.org at 3/21/2023 5:46:46 PM. The page title is 'Demographics'. The main content area shows the client's information for Carrie R. Abner (59217). The 'Demographics' section is expanded, showing fields such as iConnect ID (59217), Salutation (R), Last Name (Abner), First Name (Carrie), Date of Birth (7/12/1997), Status (Active), SSN (XXX-XX-8987), and Gender (Female). The 'Word Merge' toolbar is open, displaying a list of document types, with 'Notice of Agency Determination on Request for Individual and Family Support Services' highlighted.

Field	Value
iConnect ID	59217
Salutation	R
Last Name	Abner
First Name	Carrie
Date of Birth	7/12/1997
Status	Active
SSN	XXX-XX-8987
Gender	Female

## Employment Services

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.

# Employment Services

The screenshot shows the iConnect Notes interface. At the top, the logo 'iConnect' is on the left, and the user 'Carrie Abner' is on the right, with the last update time '3/22/2023 12:22:15 PM'. Below the logo is a 'File' menu and 'Tools' options. The main area is titled 'Notes Details' and contains the following fields:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 03/22/2023
- Program/Provider: (empty dropdown)
- Note Type: Supported Employment
- Note Sub-Type: EEP IFS Approval
- Description: FY2023 EEP Funding Approved

The 'Note' section contains two entries:

- On 3/22/2023 at 12:22 PM, Jennifer Buck wrote: List summary of communication with consumer, EEP provider selected, and date the IFS Request for funding was sent.
- On 3/22/2023 at 12:32 PM, Jennifer Buck wrote: RECEIVED email IFS Funding was approved. Sent Notice to consumer on 3/25/23. Sent IFS authorization form to EEP provider on 3/26/23.

Below the note is a 'New Text' editor with a toolbar (Bold, Italic, Underline, 16px font size, color picker) and an 'Append Text to Note' button.

The 'Status' is set to 'Complete' and the 'Date Completed' is 03/22/2023.

The 'Attachments' section includes a table with two entries:

Document	Description	Category	Action
<a href="#">IFS Funding Request</a>			<a href="#">Remove</a>
<a href="#">Notice of Determination of IFS</a>			<a href="#">Remove</a>

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 Services

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**.

The screenshot shows the iConnect software interface. At the top, there is a 'File' menu with options: 'Add New Demographics Search', 'Add Provider', and 'Print'. A mouse cursor is hovering over the 'Add Provider' option, which has a tooltip that says 'Add Provider'. To the right of the menu is a 'Quick Search' section with a text input field, a dropdown menu set to 'Consumers', and a 'Last Name' label. Below the menu is a navigation bar with 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', and 'CLAIMS'. The main content area is titled 'Abner, Carrie R (59217)' and has a tabbed interface with 'Provider Selections' selected. Below the tabs is a 'Filters' section with dropdown menus for 'Disposition' (set to 'Not Equal To'), 'Closed', and 'AND', along with a 'Selection Date' dropdown and a '+' button. At the bottom of the filters are 'Search' and 'Reset' buttons.

9. The Provider Details page displays. Update the following fields:

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

## Employment Services

Division *	APD
Selected By	Buck, Jennifer <span>...</span> <span>Clear</span> <span>Details</span>
Selection Date	03/23/2023 <span>...</span>
Provider *	EMPLOYU INC
Referral Type *	Supported Employment <span>▼</span>
Disposition *	Open <span>▼</span>
Disposition Date	03/23/2023 <span>...</span>
Comments	<div style="border: 1px solid #ccc; height: 20px;"></div>

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.*



**File**   **Reports**

### Workflow Wizard

[Close any duplicate referrals for this provider selection](#) ▶

## 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. Non-

## Employment Services

waiver 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 = **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 agency of the EEP Provider/Job Coach
  - h. Complete all sections of the form.

## Employment Services

**File**

Please Select Type: **Individual Plan for Employment (IPE)**

An asterisk (\*) indicates a required field

**Consumer Forms**

Review *	<input type="text" value="Initial"/>	Worker *	<input type="text" value="Baer, Sylvia"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/>
Review Date *	<input type="text" value="04/11/2024"/>	Status *	<input type="text" value="Draft"/>
Division *	<input type="text" value="APD"/>	Provider/Program	<input type="text"/>
Approved By	<input type="text"/>	Approved Date	<input type="text"/>

**Individual Plan for Employment (IPE)**

*Please note this form is for Consumers on Pre-Enrollment ONLY.*

Date of IPE Meeting:	<input type="text" value="MM/DD/YYYY"/>
Annual:	<input type="text"/>
IPE Status Change:	<input type="text"/>

**Provider/Support Coordinator/Employment Specialist Information**

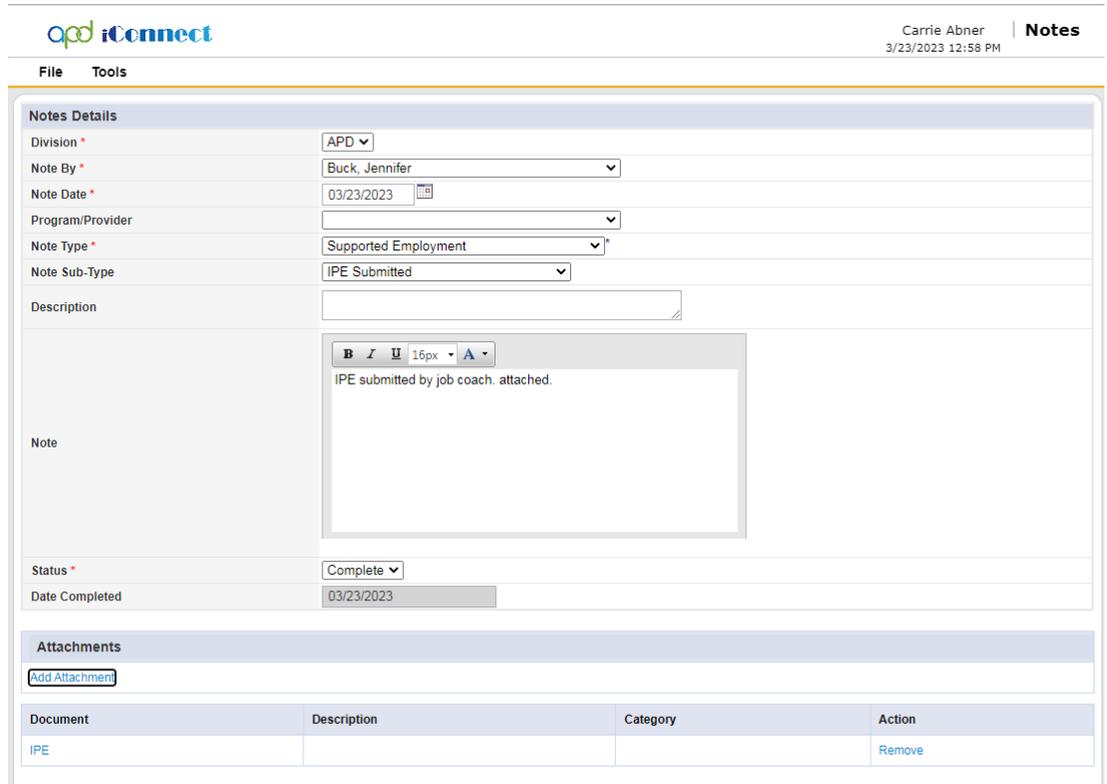
Provider Agency:	<input type="text"/>	50 characters remaining
Pre-Enrollment Coordinator (PEC) Name:	<input type="text"/>	50 characters remaining
PEC Phone:	<input type="text" value="x(xxx)xxx-xxxx"/>	
PEC Email:	<input type="text" value="Email Format @mail.com"/>	
Employment Specialist (ES) Name:	<input type="text"/>	50 characters remaining
ES Phone:	<input type="text" value="x(xxx)xxx-xxxx"/>	

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.

## Employment Services



**Notes Details**

Division \* APD ▾

Note By \* Buck, Jennifer ▾

Note Date \* 03/23/2023

Program/Provider ▾

Note Type \* Supported Employment ▾

Note Sub-Type IPE Submitted ▾

Description

Note

IPE submitted by job coach, attached.

Status \* Complete ▾

Date Completed 03/23/2023

**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
IPE			<a href="#">Remove</a>

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.

**Notes Details**

Division \* APD

Note By \* Buck, Jennifer

Note Date \* 03/23/2023

Program/Provider

Note Type \* Supported Employment

Note Sub-Type EEP Services Documentation

Description

Note

Status \* Pending

Date Completed

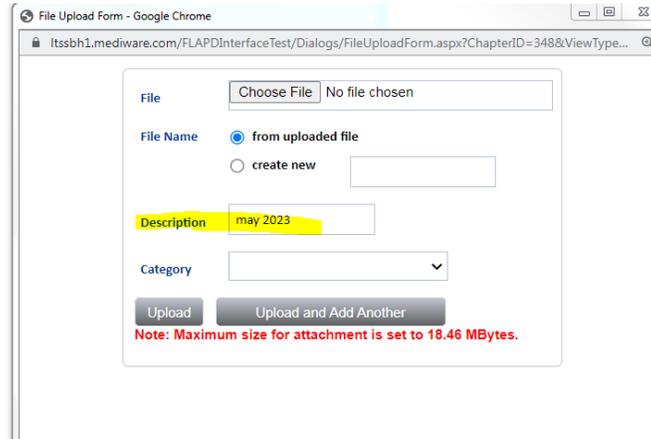
**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
<a href="#">documentation</a>	Feb 2023		<a href="#">Remove</a>

## Employment Services

- 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 Services

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

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

- Division \***: APD
- Note By \***: Buck, Jennifer
- Note Date \***: 03/23/2023
- Program/Provider**: (Empty)
- Note Type \***: Supported Employment
- Note Sub-Type**: Consumer Choice - EEP Discontinued
- Description**: Consumer no longer interested in employment
- Note**: (Empty text area with a rich text editor toolbar showing Bold, Italic, Underline, 16px font size, and a color picker)
- Status \***: Complete
- Date Completed**: 03/23/2023
- Attachments**: Add Attachment

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.

**Notes**

Carrie Abner  
Last Updated by jibuck@apdcares.org  
at 3/23/2023 1:05:57 PM

**File Tools**

**Notes Details**

Division \* APD ▾

Note By \* Buck, Jennifer

Note Date \* 03/23/2023 [calendar icon]

Program/Provider ▾

Note Type \* Supported Employment ▾\*

Note Sub-Type EEP Services Documentation ▾

Description

On 3/23/2023 at 1:05 PM, Jennifer Buck wrote:  
Received Feb. documentation  
On 3/23/2023 at 1:45 PM, Jennifer Buck wrote:  
Received march documentation

Note

New Text

**B** *I* U 16px ▾ **A** ▾

Append Text to Note

Status \* Complete ▾

Date Completed 03/23/2023

**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
<a href="#">documentation</a>	Feb 2023		<a href="#">Remove</a>
<a href="#">documentation</a>	March 2023		<a href="#">Remove</a>

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

## Employment Services

Employment	
Social Security Monthly Benefit Amount	<input type="text"/>
3rd Party Health Insurance?	<input type="button" value="v"/>
Competitively Employed? *	No <input type="button" value="v"/>
Sheltered Workshop Below Minimum Wage?	<input type="button" value="v"/>
Not Employed and Wants Competitive Employment? *	Yes <input type="button" value="v"/>
Phase of Employment Service Needed	<input type="button" value="v"/>
Referred to VR?	Yes <input type="button" value="v"/>
Date of VR Referral	03/13/2023 <input type="button" value="calendar"/>
VR Response	Approved <input type="button" value="v"/>
EEP Services	No <input type="button" value="v"/>
EEP Decision	<input type="button" value="v"/>

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

## Employment Services

The screenshot shows the 'Notes Details' form in the iConnect system. The form is titled 'Notes Details' and includes the following fields:

- Division \* (APD)
- Note By \* (Buck, Jennifer)
- Note Date \* (03/23/2023)
- Program/Provider
- Note Type \* (Supported Employment)
- Note Sub-Type (Consumer Employed)
- Description
- Note (Rich text editor with formatting options: Bold, Italic, Underline, 16px font size, and text color)
- Status \* (Complete)
- Date Completed (03/23/2023)

Below the form is an 'Attachments' section with a link to 'Add Attachment'.

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.

## Employment Services

- I. EEP Decision = Blank if not pursuing Phase 2 services. Keep as Approved if receiving Phase 2 services.

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

The screenshot shows the 'Notes' interface in iConnect. At the top right, it says 'Carrie Abner' and 'Last Updated by jrbuck@apdcares.org at 3/23/2023 1:05:57 PM'. The 'Notes' tab is selected. The 'Notes Details' form includes the following fields:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 03/23/2023
- Program/Provider: (empty)
- Note Type: Supported Employment
- Note Sub-Type: EEP Services Documentation
- Description: (empty)
- Note: (empty)
- Status: Complete
- Date Completed: 03/23/2023

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

Document	Description	Category	Action
documentation	Feb 2023		Remove
documentation	March 2023		Remove

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

## Employment Services

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

The screenshot displays the 'Notes Details' form in the iConnect system. The form is titled 'Notes Details' and includes the following fields:

- Division \***: APD
- Note By \***: Buck, Jennifer
- Note Date \***: 03/23/2023
- Program/Provider**: (empty)
- Note Type \***: Supported Employment
- Note Sub-Type**: Successful Phase 2 Completion
- Description**: (empty)
- Note**: Document that the Administrative Workstream has been notified outside of APD iConnect so the authorization can be ended
- Status \***: Complete
- Date Completed**: 03/23/2023

At the bottom of the form, there is an **Attachments** section with a link to [Add Attachment](#).

- 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.

**Notes Details**

Division \* APD

Note By \* Buck, Jennifer

Note Date \* 03/23/2023

Program/Provider

Note Type \* Supported Employment

Note Sub-Type EEP Services Documentation

Description

On 3/23/2023 at 1:05 PM, Jennifer Buck wrote:  
Received Feb. documentation

On 3/23/2023 at 1:45 PM, Jennifer Buck wrote:  
Received march documentation

Note

New Text

B I U 16px A

Append Text to Note

Status \* Complete

Date Completed 03/23/2023

**Attachments**

Add Attachment

Document	Description	Category	Action
<a href="#">documentation</a>	Feb 2023		<a href="#">Remove</a>
<a href="#">documentation</a>	March 2023		<a href="#">Remove</a>

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 Services

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

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

## Employment Services

### 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.

The screenshot shows a software interface with a navigation menu at the top containing tabs: Diagnosis, Eligibility, Medications, Auths, Provider Documentation, **Forms**, Appointments, and Plans. Below the menu is a search filter section with a dropdown menu set to 'Form', a search button, and a reset button. Below the search section, a table displays one record:

Form	Review	Review Date
Person Centered Support Plan	Initial	04/13/2018

An arrow points to the 'Person Centered Support Plan' record in the table. At the bottom of the table, there are navigation controls: '<< First', '< Previous', 'Retrieve 15 Records at a time', 'Next >', and 'Last >>'.

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 Services

Employment	
Job(s) I Have	
Job I Have (for those who choose not to work, state N/A)	N/A
Hire Date	<input type="text"/>
Type of Job	<input type="text"/>
Do you want to add a second job?	<input type="text"/>
I am interested in getting a job	Yes <input type="text"/>
I am interested in changing jobs	<input type="text"/>
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 <input type="text"/>
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	<input type="text"/>
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	<input type="text"/>

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**.

## Employment Services

- 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.

The screenshot shows the iConnect application interface. At the top right, it says "Carrie Abner" and "Last Updated by jBuck@apdcares.org at 3/22/2023 12:02:14 PM". The page title is "Demographics". A menu bar includes "File", "Edit", "Tools", "Reports", and "Word Merge". On the left, a "Workflow Wizard" sidebar has a button labeled "Update Employment Section in Consumer > Demographics". The main content area displays a table of demographic and contact information for a consumer.

Demographics			
iConnect ID	59217	Medicaid ID	158978948
Salutation		Age	25.6
Last Name	Abner	Race	Caucasian
First Name	Carrie	Ethnicity	USA
Consumer Photo		Marital Status	
Middle Name	R	Living Setting	Family Home
Alias		Written Language	English
Date of Birth	7/12/1997	Spoken Language	English
Date of Death		Legal County	
Status	Active	ABC PIN	0001025983
SSN	XXX-XX-8987	Demographics Verified On	2/4/2023
Gender	Female		
Contact Information			
Address Type	Residence Address	County	SAINT JOHNS
Address	891 Cameron Way	Field Office	04
Address 2		Main Phone	(904) 848-4897
City	Saint Johns	Business Phone	
State	FL	Cell Phone	
Region	Northeast	Email	
Zip Code	32259		

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

## Employment Services

Employment	
Social Security Monthly Benefit Amount	<input type="text"/>
3rd Party Health Insurance?	<input type="button" value="v"/>
Competitively Employed? *	No <input type="button" value="v"/>
Sheltered Workshop Below Minimum Wage?	<input type="button" value="v"/>
Not Employed and Wants Competitive Employment? *	Yes <input type="button" value="v"/>
Phase of Employment Service Needed	Phase 1 <input type="button" value="v"/>
Referred to VR?	Yes <input type="button" value="v"/>
Date of VR Referral	03/13/2023 <input type="button" value="calendar"/>
VR Response	<input type="button" value="v"/>
EEP Services	<input type="button" value="v"/>
EEP Decision	<input type="button" value="v"/>

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

Carrie Abner  
Last Updated by j.buck@apdcare.com  
at 4/2/2023 2:31:53 PM

**iConnect**

File Edit Tools Reports **Ticklers** Word Merge

Abner, Carrie R (59217)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User

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

Demographics			
iConnect ID	59217	Medicaid ID	158978948
Salutation		Age	25.7
Last Name	Abner	Race	Caucasian
First Name	Carrie	Ethnicity	USA
Consumer Photo		Marital Status	
Middle Name	R	Living Setting	Family Home

- Ticklers for this client are listed. Search and/or sort the list to locate the “Update Employment Section in Consumer > Demographics” tickler.
- From the **tickler flyout** menu, mark the tickler as **Complete**.

## Employment Services

The screenshot shows the iConnect software interface. At the top, there is a 'File' menu and a search filter section. The filter section includes dropdowns for 'Status', 'Equal To', and 'New', along with an 'AND' dropdown and a search button. Below the filter section, there is a table with 13 tickler records. The table has columns for 'Assigned To', 'Tickler Name', 'Date Due', 'Date Created', 'Date Completed', and 'Status'. A context menu is open over the table, showing options like 'Cancel', 'Edit', 'Reassign', and 'Complete'.

Assigned To	Tickler Name	Date Due	Date Created	Date Completed	Status
Buck, Jennifer	Update Employment Section in Consumer > Demographics	04/02/2023	04/02/2023		New
Buck, Jennifer	Send Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via Note.	03/24/2023	03/24/2023		New
Buck, Jennifer	End Date Planned Services, Authorizations, Plan & Budget	03/24/2023	03/24/2023		New
Buck, Jennifer	Update APD Waiver Program End Date	03/24/2023	03/24/2023		New

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.

The screenshot shows the 'Notes Details' form in the iConnect system. At the top right, it identifies the user as Carrie Abner and shows the last update by j buck@apdcares.org on 3/23/2023 at 4:39:53 PM. The form fields are as follows:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 03/21/2023
- Program/Provider: 1 CARE LLC
- Note Type: Supported Employment
- Note Sub-Type: VR Application
- Description: (Empty)
- Note: On 3/21/2023 at 3:56 PM, Jennifer Buck wrote: Referral packet includes: VR Referral form (available on VR site), any applicable assessments, WL SP Short Form/PCSP, any other employment related documents
- Status: Complete
- Date Completed: 03/23/2023

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

- 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

## Employment Services

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.

The screenshot shows the iConnect web application interface for adding a note. The top navigation bar includes the iConnect logo, the user name 'Carrie Abner', and the page title 'Notes'. Below the navigation bar are 'File' and 'Tools' menu options. The main content area is titled 'Notes Details' and contains a form with the following fields:

- Division: APD (dropdown)
- Note By: Buck, Jennifer (dropdown)
- Note Date: 03/23/2023 (calendar icon)
- Program/Provider: 1 CARE LLC (dropdown with 'Details' link)
- Note Type: Supported Employment (dropdown)
- Note Sub-Type: VR Funding Approved (dropdown)
- Description: mm/dd/yyyy VR Approval Notification (text input)
- Note: A rich text editor containing the text: 'attach Approval notice from VR if the WSC received a copy from the consumer.'
- Status: Complete (dropdown)
- Date Completed: 03/23/2023 (text input)

At the bottom of the form, there is an 'Attachments' section with an 'Add Attachment' link.

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 Services

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

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)**

## Employment Services

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.

**iConnect** Carrie Abner | Notes  
3/23/2023 4:41 PM

File Tools

**Notes Details**

Division \* APD

Note By \* Buck, Jennifer

Note Date \* 03/23/2023

Program/Provider \* 1 CARE LLC Details

Note Type \* Supported Employment

Note Sub-Type VR Funding Denied

Description mm/dd/yyyy VR Denial Notification

Note

attach Denial notice from VR if the WSC received a copy from the consumer. No attachments if note is created by SE Liaison.

Status \* Complete

Date Completed 03/23/2023

**Attachments**

[Add Attachment](#)

## Employment Services

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.

The screenshot displays the iConnect system interface. At the top left is the iConnect logo. At the top right, the user name 'Carrie Abner' and the time '3/21/2023 4:30 PM' are shown, along with a 'Notes' tab. Below the header is a navigation bar with 'File' and 'Tools' menus. The main content area is titled 'Notes Details' and contains a form with the following fields:

- Division: APD (dropdown)
- Note By: Buck, Jennifer (dropdown)
- Note Date: 03/21/2023 (calendar icon)
- Program/Provider: (empty dropdown)
- Note Type: Supported Employment (dropdown)
- Note Sub-Type: VR Funding Denied (dropdown)
- Description: mm/dd/yyyy VR Denial Notification (text field)
- Note: A rich text editor with a toolbar (Bold, Italic, Underline, 16px font size, Color) and the text 'Attach the VR Denial Notice if received from the consumer'.
- Status: Complete (dropdown)
- Date Completed: 03/21/2023 (text field)

At the bottom of the form is an 'Attachments' section with a blue 'Add Attachment' link.

## Employment Services

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	<input type="text"/>
3rd Party Health Insurance?	<input type="text" value="v"/>
Competitively Employed? *	<input type="text" value="No"/>
Sheltered Workshop Below Minimum Wage?	<input type="text" value="v"/>
Not Employed and Wants Competitive Employment? *	<input type="text" value="Yes"/>
Phase of Employment Service Needed	<input type="text" value="Phase 1"/>
Referred to VR?	<input type="text" value="Yes"/>
Date of VR Referral	<input type="text" value="03/13/2023"/>
VR Response	<input type="text" value="Denied"/>
EEP Services	<input type="text" value="v"/>
EEP Decision	<input type="text" value="v"/>

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.

## Employment Services

### (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

## Employment Services

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

The screenshot shows the 'Notes Details' form in the iConnect system. The form is titled 'Notes Details' and includes the following fields:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 04/02/2023
- Program/Provider: 1 CARE LLC
- Note Type: Supported Employment
- Note Sub-Type: Phase 1 Complete/Phase 2 Initiation
- Description: client is employed
- Note: Confirmed with VR Counselor that Phase 2 services will be pursued
- Status: Complete
- Date Completed: 04/02/2023

- 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 Services

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

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

The screenshot shows the 'Notes Details' form in the iConnect system. The form is titled 'Notes Details' and includes the following fields:

- Division \***: APD
- Note By \***: Buck, Jennifer
- Note Date \***: 04/02/2023
- Program/Provider**: 1 CARE LLC
- Note Type \***: Supported Employment
- Note Sub-Type**: Phase 1 Complete/Phase 2 Declined
- Description**: client is employed
- Note**: Confirmed with VR Counselor that Phase 2 services will NOT be pursued. Client declined.
- Status \***: Complete
- Date Completed**: 04/02/2023

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 Services

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

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.

## Employment Services

- 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.
- 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:
  - Provider = Search for and select the LSD 4 provider name
  - Referral Type = Other Waiver Services
  - Disposition = Open
  - Provider Worker = the name of the designee for the selected provider.

The screenshot shows the iConnect interface. At the top left is the iConnect logo. At the top right, it says 'Carrie Abner | Provider' and '3/23/2023 5:58 PM'. Below this is a 'File' menu. The main content area is a form titled 'Add Provider' with the following fields:

Division *	APD			
Selected By	Buck, Jennifer	...	Clear	Details
Selection Date	03/23/2023	...		
Provider *	EMPLOYMENT ENTERPRISES INC	...	Clear	
Referral Type *	Other Waiver Services	...		
Disposition *	Open	...		
Disposition Date	03/23/2023	...		
Provider Worker *	Buck, Jennifer	...	Clear	Details
eMAR Date (if applicable)	03/23/2023			
Comments				

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

- 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:
  - Form = Implementation Plan

## Employment Services

- 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.

The screenshot shows the iConnect interface for creating an Implementation Plan. The top navigation bar includes the iConnect logo, the user name 'Carrie Abner', and the date '3/23/2023 6:10 PM'. The 'File' menu is open, showing 'Please Select Type: Implementation Plan - PROD Version'. The 'Consumer Forms' section contains fields for Review (Initial), Review Date (03/23/2023), Division (APD), Worker (Buck, Jennifer), Status (Draft), and Provider/Program (EMPLOYMENT ENTERPRISES INC). Below this is the 'IMPLEMENTATION PLAN' section with fields for Date Created (04/01/2023), Effective Start Date (03/25/2023), and Effective End Date (03/31/2024). A green banner prompts the user to 'Identify individuals who participated in developing the implementation plan.' Below the banner are buttons for 'Add New Relation', 'Edit Relation', 'Search Existing Relations', and 'Clear', followed by a table for entering participant information.

- 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)

## Employment Services

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 Services

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

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:

## Employment Services

- 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.

The screenshot shows the 'iConnect' interface for a 'Provider' record. The 'File' menu is open, displaying a form with the following fields:

Division *	APD		
Selected By	Buck, Jennifer	Clear	Details
Selection Date	03/23/2023		
Provider *	EMPLOYU INC	Clear	
Referral Type *	Supported Employment		
Disposition *	Open		
Disposition Date	03/23/2023		
Provider Worker *	Buck, Jennifer	Clear	Details
eMAR Date (if applicable)	03/23/2023		
Comments			

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.

The screenshot shows the 'iConnect' interface for a 'Provider' record. The 'Provider' tab is selected in the left sidebar. The 'File' menu is open, displaying a form with the following fields:

Division *	APD		
Selected By	Buck, Jennifer	Clear	Details
Selection Date	03/23/2023		
Provider *	EMPLOYMENT ENTERPRISES INC		
Referral Type *	Other Waiver Services		
Close Reason			
Disposition *	Closed		
Disposition Date	03/23/2023		
eMAR Date (if applicable)	03/23/2023		
Comments			
Deactivated Date	03/23/2023		

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

## Employment Services

- 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

- 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:

- Form = Employment Stability Plan
- Review = As Needed
- Review Date = today
- Division = APD
- Worker = Self
- 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.
- Provider/Program = Select the name of the provider
- Complete all sections of the form.

Please Select Type:

An asterisk (\*) indicates a required field

Consumer Forms			
Review *	<input type="text" value="Initial"/>	Worker *	<input type="text" value="Baer, Sylvia"/> <a href="#">Lookup</a> <a href="#">Clear</a> <a href="#">Details</a>
Review Date *	<input type="text" value="04/11/2024"/>	Status *	<input type="text" value="Draft"/>
Division *	<input type="text" value="APD"/>	Provider/Program	<input type="text"/>
Approved By	<input type="text"/>	Approved Date	<input type="text"/>

GENERAL INFORMATION	
Emergency Contact Name:	<input type="text"/>
Emergency Contact Number:	<input type="text" value="x(xxx)xxx-xxxx"/>
Highest Level of Education: *	<input type="text"/>
Date Education Completed:	<input type="text" value="MM/DD/YYYY"/>

SUPPORTED EMPLOYMENT PROVIDER INFORMATION	
Provider Name:	<input type="text"/>
Provider Street Address:	<input type="text"/>
Provider City:	<input type="text"/>
Provider State:	<input type="text"/>

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

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

## Employment Services

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

## Employment Services

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

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.



Carrie Abner | **Provider**  
 Last Updated by j buck@apdcares.org  
 at 3/23/2023 6:01:29 PM

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**File**

<b>Provider</b>	Division *	APD
Provider Workers	Selected By	Buck, Jennifer <input type="button" value="..."/> <input type="button" value="Clear"/> <a href="#">Details</a>
Beds	Selection Date	<input type="text" value="03/23/2023"/> <input type="button" value="📅"/>
Events	Provider *	EMPLOYMENT ENTERPRISES INC
Track Disposition	Referral Type *	Other Waiver Services <input type="button" value="v"/>
	Close Reason	<input type="button" value="v"/>
	Disposition *	Closed <input type="button" value="v"/>
	Disposition Date	<input type="text" value="03/23/2023"/> <input type="button" value="📅"/>
	eMAR Date (if applicable)	<input type="text" value="03/23/2023"/>
	Comments	<input type="text"/>
	Deactivated Date	<input type="text" value="03/23/2023"/> <input type="button" value="📅"/>

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