

# State of Florida Agency for Persons with Disabilities

iConnect ICF Training Manual Version 3.2 05/09/2023

# ICF

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

# 1. ICF Admissions

The ICF Admission process includes the following steps:

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

# 1a. Complete ICF Admission Tasks

The WSC/PESC will complete the ICF Admission process.

# Role(s): Waiver Support Coordinator (WSC/CDC) or Region Pre-Enrollment Workstream Worker

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



- a. Provider/Program = select own WSC agency/provider record if applicable
- b. Note Type = ICF
- c. Sub-Type = ICF-IID Request
- d. Status = Pending
- e. Attachments = Add documentation from ICF Admission Tasks
- e. Recipients = Region Waiver Workstream Lead & Clinical Workstream Lead OR the Region Pre-Enrollment Workstream Lead & Clinical Workstream Lead when the client is not on the waiver.

oped iConnect				
File Tools				
Notes Details				
Division*	APD 🗸	1		
Note By *	Vogelei	Mandi 🗸		
Note Date *	03/24/2	023		
Program/Provider *	1 CAR	LLC V Details		
Note Type *	ICF	~ ⁺		
Note Sub-Type	ICF-IID	Request V		
Description			1	
Note				
Status *	Pendin	~		
Date Completed				
Attachments				
Add Attachment				
Document	Descriptio	n	Category	
There are no attachments to display			• •	
Note Recipients				
Add Note Recipient:		Clear		
Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	3/24/2023		Unread	

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

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



to ensure the waiver disenrollment process occurs for the client later in the workflow and ensure behavioral concerns are addressed if they exist. Select the **My Dashboard** > **Consumers** > **Pending** > **Notes** queue.

Opd (Connect			v	Ielcome, Mandi Vogeler 3/24/2023 10:00 AM	My Dashboard Sign Out	Role Region Cirical Workstream Lead
File Reports						
	Quick Search					
		Consumers V Connett 0 V		ANCED SEARCH		
	MY	DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER	REPORTS			
CONSUMERS		PROVIDERS			TASKS	
Division			1	inks		
Application Pended	1			iConnect eLearning Library		
Provider Selections	Ð			APD Help Desk		
Admitted	1		6	ily Management		
Notes				Current Active Cases		
Convolute	7	N		Enrolments		
Complete Cost		13		SAN Queue		
Dentire	2			Pending Assessments Queue		
- orderig	·			Pending Provider Assessmen	nts Queue	

- 6. Click on the note to review the details. Keep the note open.
- Review the client's record and most recent QSI to determine if there are any behavior concerns. If there are behavioral concerns, proceed to the <u>Behavioral Concerns</u> section. If there are no behavioral concerns, proceed to the <u>Complete the Residential</u> <u>Referral Form</u> section.

#### Тір

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.

Status V iConnect ID V	Equal To 🗸	Pending V AND V	eset					
1 Notes record(s) r	eturned - now viewir	g 1 through 1	Mate Sub Tune	Note Date	Subject	Author	Status	
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Pending	0
	③ FL APD Interface Test ← → C a Its	(Copy of PE x + sbh1.mediware.com/flapdinterfaceto	estsso/Pages/Harmony.aspx?Ch Welcome, Je	apterID=347&Chapte	erEntityID=59217&CallingCh	apter=Consumers&Calling	pPage=Notes (	Q (Å
	File Repor	ts	3/21/202	3 2:47 PM		Region Pre	e-Enrollment Workst	ream Work
	Qu	ick Search	Constitution		mert ID			ED SEA



#### 1b. Complete Residential Referral Form

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

#### Role: Region Clinical Workstream Worker (MCM)

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

Notes Details						
Division *	APO 🗸					
Note By *	Vogeler, Mandi					
Note Date *	03/24/2023					
Program/Provider	1 CARE LLC V Details					
Note Type *	ICF	v .				
Note Sub-Type	ICF-IID Request	~				
Description		li li				
Ra	New York	and to Name	Ç₂			
Status *	Pending V					
Date Completed						
Attachments						
Add Atlachment						
Document	Description		Category		Action	
There are no attachments to display						
Note Recipients						
Add Note Recipient		Cesr				
Name	Date Sent	Date Read	Status	Date Signed		
Vogeler, Mandi	03/24/2023		Unread			Remove
Buck, Jennifer	3/24/2023		Unread			Remove

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



		MY DASHBOARD	CONSUME
CONSUMERS			
Division	۲		
Application Pended	1		
Provider Selections	۲		
Admitted	1		
Notes	$\overline{\mathbf{O}}$		
Complete	1		
Pending	3		
Ticklers	۲		
Ticklers	9		
Alert Notes	$\odot$		
Unread Alert Notes	0		

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

opd (Connect							Welcome, Mandi Vogel 3/24/2023 11:30 AM	Note
File Tools								
Filters Filters Fault To Formed ID Filters  S Notes record(s) returned - now view	Pending     AND     AND     Second     ing 1 through 3	Reat						
iConnect ID	Consumer .	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
88504	Adams, Leah	Facility Placement	Residential Planning Request	03/22/2023		Vogeler, Mandi	Pending	D
88504	Adams, Leah	Facility Placement	Residential Planning Request	03/22/2023		Vogeler, Mandi	Pending	
88564	Adams, Leah	10F	ICF-ID Request	03/24/2023		Vogeler, Mandi	Pending	
		En	Previous Records per page 15 Next Last					

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



			Lash Scheme Forms
que iconneci			3/24/2023 11:41 AM
File			
Please Select Type: Residential R	leferral Form	v	
Consumer Forms			
Review*	Initial 🗸	Worker* Vogelet, Mandi Clear Details	
Review Date *	03/24/2023	Status* Pending V	
Division *	APD 🕶	ProvidenProgram	
Approved By		Approved Date	
		RESIDENTIAL REFERRAL FORM	
		This form should be used for group home and / or Intermediate Care Facility (ICF) requests	
Consumer withdraws referral rec	quest for placement.	V	
Placement Request For?			
		1 Worker record(s) returned - now viewing 1 through 1	
		Name ID	
ICF Coordinator:		Vogeler, Mandi 2800	
		Search	
Contract Cont Name		CONSUMER INFORMATION	
Consomer Pirst Name.			
Consumer Last Name:		Adams	
Consumer Middle Name:			
iConnect ID:			
Ref. Date:		3	
County:		PASCO V	
Region:		Cear	
Consumer DOB:		05/14/2008	
Gender:		Female V	
Please Check all that Apply:			

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

Notes Details					
Division *	2	APD 🗸			
Note By *	N	Vogeler, Mandi			
Note Date *	0	03/24/2023			
Program/Provider	1	1 CARE LLC 🗸 Details			
Note Type *	I	ICF	<b>v</b> *		
Note Sub-Type	l	ICF-IID Request	×		
Description			1		
Kole	0 6 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	an YAZAND at 113 A M, Hadd A bog Demonstrates and A	galar wate: galar wate: galar wate: splar wate:		2
Status *	F	Pending 💙			
Date Completed					
Attachments					
Attachments					
Add Attachment					
Document	De	escription		Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient:			Clear		
Name	Date Sent		Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023			Unread	
Vogeler, Mandi	03/24/2023			Unread	
Reed, Monica	3/24/2023			Unread	



Page 8

Notes Details					
Division *		APD 🗸			
Note By *		Vogeler, Mandi			
Note Date *		03/24/2023			
ProgramProvider		1 CARE LLC V Details			
Note Type *		ICF	~ '		
Note Sub-Type		ICF-IID Request	~		
Description			1		
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		B Z U Téps + A +	d to Note		
Status *		Pending V			
Date Completed					
Attachments					
Add Attachment					
Document		Description		Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient:			Clear		
Name	Date Sent		Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023			Unread	
Vogeler, Mandi	03/24/2023			Unread	
Reed, Monica	3/24/2023			Unread	

## 1c. Behavioral Concerns

ICF

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

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



	Notes Details						
Note of " Server Se	Division*	APD 🗸					
Notes Career Constraints   Notes Career Constraints <td>Note By *</td> <td>Vogeler, Mandi</td> <td></td> <td></td> <td></td> <td></td> <td></td>	Note By *	Vogeler, Mandi					
Analysis Control C	Note Date *	03/24/2023					
Not hyse' IC   Not hyse hyse IC   Not hyse IC	Program/Provider	1 CARE LLC V Det	is .				
Note Solving Def Ref Bagent   Secondain           Secondain <td>Note Type *</td> <td>ICF</td> <td>v .</td> <td></td> <td></td> <td></td> <td></td>	Note Type *	ICF	v .				
No       No         No       No <td>Note Sub-Type</td> <td>ICF-IID Request</td> <td>~</td> <td></td> <td></td> <td></td> <td></td>	Note Sub-Type	ICF-IID Request	~				
No.     No. Test       Image: Section of	Description		li				
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Date Completed         Intervention           Attachments	Status *	Pending V					
Alterhaneth       Calagory     Adton       Description     Adton       Rear and alterhaneths diright       Calagory       Calagory       Adton Magory       Calagory       Adton Magory       Adton Magory <tr< td=""><td>Date Completed</td><td></td><td></td><td></td><td></td><td></td><td></td></tr<>	Date Completed						
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Note Response         Contract	There are no attachments to display						
Interview         Data Sect         Data Sect <thdata sect<="" th=""> <thdata sect<="" th=""> <th< td=""><td>Note Recipients</td><td></td><td></td><td></td><td></td><td></td><td></td></th<></thdata></thdata>	Note Recipients						
Name         Data Sect         Data Sect <thdata sect<="" th=""> <thdata sect<="" th=""> <thdata s<="" td=""><td>Add Note Recipient</td><td></td><td> Cear</td><td></td><td></td><td></td><td></td></thdata></thdata></thdata>	Add Note Recipient		Cear				
Upgare Mad         D3240233         Dread         Renew           Box, Jem/er         324023         Dread         Renew	Name	Date Sent	Date Read	Status	Date Signed		
Busik Jennier 124/2023 Umwel Remote	Vogeler, Mandi	03/24/2023		Unwad		R	lamova
	Buck, Jennifer	3/24/2023		Unread		8	lemove

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



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



se Select Type: ICF/IID Behavior	I Rate Screening Tool	<b>v</b>				
onsumer Forms						
eview*	As Needed V			Worker *	Vogeler, Mandi Clear Details	
eview Date *	03/24/2023			Status *	Complete V	
vision *	APD V			Provider/Program	~ ·	
sproved By	Vogeler, Mandi Details			Approved Date	03/24/2023	
i i i i i i i i i i i i i i i i i i i		ICF/III	D Behavioral	Rate Screening Tool		
		1 Worker record(s) returned - now viewin	ng 1 through 1			
		Nama	ID			
ervice/Support Coordinator or Desi	gnee:	Vopeler, Mandi	2500			
		Search				
havioral Characteristics:	Must meet at least one within the las	t 6 months to be determined eligi	ible. Please check	all that apply		
ngaged in behavior that caused inju r other inpatient care from a physic	ry to self or others that required emergency room an or other health care professional					
ngaged in behavior that creates life drinking, vomiting, ruminating, ea vallowing excessive amounts of ai	threatening situations, such as, excessive eating ting non-nutritive substances, refusing to eat, and severe insomnia	8				
agaged in unauthorized fire setting		0				
ttempted suicide						
tentionally caused damage to prop cident	erty in excess of \$1,000 in value during one	0				
ngaged in behavior that was unable reessitated the use of restraints, ei crisis stabilization unit, three or m	to be controlled via less restrictive means and her mechanically, manually, or by commitment to re times in a 30 day period, or six times ac	0				
ngaged in behavior that resulted in	the recipient's arrest and/or confinement					
agaged in sexual behavior with any table to consent to such behavior, self or others requiring emergence	person who did not consent or is considered or engaged in sexual behavior that caused injury room or other in-patient care from a physician or	D				
the supervision and environment is	such that the recipient lacks opportunity for the behavior analyst providing services much	0				

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

apd iConnect		
File		
Spell Check Save Forms Save and Close Forms Copy From Previous Print Close Print Print	Rate Screening Tool As Needed O3/31/2023 APD Vogeler, Mandi	▼ Details
Service/Support Coordinator or Desi	gnee:	1 Worker record(s) retu Vogeler, Mandi Search
Behavioral Characteristics: Engaged in behavior that caused inju emergency room or other inpatient c care professional	Must meet at least one wi ary to self or others that required are from a physician or other health	thin the last 6 months to ☑
Engaged in behavior that creates life excessive eating or drinking, vomitin substances, refusing to eat, swallow severe insomnia	-threatening situations, such as, Ig, ruminating, eating non-nutritive Ing excessive amounts of air and	

- 8. From the File menu, select Close Forms
- 9. Navigate to the Notes tab and select the existing ICF-IID Request note. From the open note record, update the following fields:
  - a. Note = details of the addressed behavioral concerns
  - b. Status = Pending



- c. Attach any supporting documentation used to demonstrate eligibility must be included as an attachment in the note, regardless of where else the information may be found.
- d. Note Recipient = MCM
- 10. From the File menu, select Save and Close Notes.

Notes Details						
Division *		APD ¥				
Note By *		Vogeler, Mandi				
Note Date *		03/24/2023				
Program/Provider		1 CARE LLC V Details				
Note Type *		ICF	<b>~</b> '			
Note Sub-Type		ICF-IID Request	¥			
Description			le.			
Kn.		00 3/24/2022 at 11:10 40, Hold U Photomer states, and 240 h Hon And MCH in Next And MCH in Next Next Text New Text	galar wete: galar wete:			
Status *		Pending V				
Date Completed						
Attachments						
Add Attachment						
Document		Description		Category		
There are no attachments to display						
Note Recipients						
Add Note Respirent			Clear			
Name	Date Sent		Date Read	Status	Date Signed	
Vogeler, Mandi	03/24/2023			Urread		
Busk, Jennifer	3/24/2023			Urread		

11. MCM Receives updates and proceeds with <u>Complete Residential</u> <u>Referral Form</u> Section.

# 1d. State Office Tasks

#### **Role: State Office Worker**

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



	MY D/	SHBOARD	CONSUMERS
CONSUMER	s		
Division		۲	
APD Eligible - Waiver		1	j
My Enrollments		۲	
Closed		1	
Enrolled		1	
Provider Selections		۲	
Admitted		1	45
Notes		۲	
Complete		7	
Pending		1	
Ticklers		۲	

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





#### WSC/PESC Responds to request for additional information.

Role: Waiver Support Coordinator (WSC/CDC) or Region Pre-Enrollment Workstream Worker

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

	MY DASHBOARD	CONSUMERS
CONSUMERS		
Division	۲	
APD Eligible - Waiver	1	]
My Enrollments	۲	
Closed	1	
Enrolled	1	
Provider Selections	۲	
Admitted	1	) 45
Notes	۲	
Complete	7	
Pending	1	ļ
Ticklers	۲	

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

#### **Role: State Office Worker**



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

	MY DASHBOARD	CONSUMERS
CONSUMERS		
Division	۲	
APD Eligible - Waiver	1	]
My Enrollments	۲	
Closed	1	
Enrolled	1	
Provider Selections	۲	
Admitted	1	6
Notes	۲	
Complete	7	
Pending	1	ļ
Ticklers	۲	

- 9. Select the Pending ICF-IID Request Note from the **Notes** queue and review the details of the request.
- 10. Now that the documentation is complete, the note can be sent to the ICF Coordinator. Update the following fields:
  - a. Note = details that the packet is complete
  - b. Status = Pending
  - c. Note Recipient = ICF Coordinator.
- 11. From the **File** menu, select **Save and Close Notes**. Proceed to the <u>ICF</u> <u>Coordinator Tasks</u> section.

# 1e. ICF Coordinator Tasks

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



## Role: State Office Worker (ICF Coordinator)

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

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

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

a	od iConnect							Wel	come, Mandi Vogeler 3/24/2023 11:30 AM	Not	es
File	Tools										
Conne	Equal To Equal To # + es record(s) returned - now view	Pending      AND     AND     Coaron     ing 1 through 3	×								
	iConnect ID	Consumer .	Note Type	Note	sub Type	Note Date	Subject	Author	Status	0	
	8564	Adams, Leah	Facility Placement	Residential Planning Request		03/22/2023		Vogeler, Mandi	Pending	0	
	18564	Adams, Leah	Facility Placement	Residential Planning Request		03/22/2023		Vogeler, Mandi	Pending		
	8564	Adams, Leah	1CF	ICF-ID Request		03/24/2023		Vogeler, Mandi	Pending		
	Part Personal Records Persons 15 Text Last										

- The ICF Coordinator will ensure the ICF Admission tasks have been completed. If additional documentation is needed or corrections need to be made, the ICF Coordinator will communicate with the WSC/PESC or MCM through the ICF-IID note in iConnect to collect the additional information. Update the following fields:
  - a. Note = details of the missing information or corrections needed
  - b. Status = Pending
  - c. Note Recipient = WSC/PESC or MCM depending on the missing information.
- 4. From the File menu, select Save and Close Notes.
- 5. The WSC/PESC or MCM will monitor My Dashboard for incoming notes. The WSC/PESC or MCM will update the ICF-IID Note with the missing information and send back to the ICF Coordinator. Update the following fields:



- a. Note = details of the additional information provided, or corrections made
- b. Status = Pending
- c. Note Recipient = SO Residential Intake Specialist
- 6. From the File menu, select Save and Close Notes.
- 7. The SO Residential Intake Specialist will monitor My Dashboard for incoming notes. The SO Residential Intake Specialist will review the updates provided by the WSC/PESC or MCM and complete the note. Update the following fields:
  - a. Note = confirm all requested information has been received and packet is complete.
  - b. Status = Complete
- 8. If the admission tasks were completed and requests for additional information were not needed, the SO Residential Intake Specialist would have noted the completion and closed the note. Update the following fields:
  - a. Note = confirm the admission packet is complete
  - b. Status = Complete
- 9. From the File menu, select Save and Close Notes.
- 10. Once the admission packet has been reviewed and is complete, the ICF Coordinator will update the workers on the client's Division record. Navigate to the client's record and click on the **Division** tab. Select the existing division record. Update the following fields:
  - a. Disposition = APD Eligible ICF/IID
  - b. Primary Worker = ICF Coordinator
  - c. Secondary Worker = PESC (if on pre-enrollment list) or WSC (if on the waiver)
  - d. Interested in ICF/IID = Yes



ile Word Merge		
vision	Events	
vents	Divison *	APD
	Disposition *	APD Eligible - ICF/IID 🗸
ck Disposition	Disposition Date	03/24/2023
	Open Date	02/10/2023
	Data Entry Date	02/10/2023
	Primary Worker *	Vogeler, Mandi Clear Details
	Secondary Worker	Vogeler, Mandi Clear Details
	Application Received Date *	02/10/2023
	Interested in ICF/IID	Yes 🗸
	Age Category at Time of Application *	6 and Above 🗸
	Application Pended Due Date	05/01/2023
	Eligibility Documentation Complete Date	
	Referral Source	
	Referral Date	02/10/2023
	Referral Source *	Parent 🗸
	Referral Reason	~
	Court Order Date	02/10/2023
	Name	Hilceyth Abbott
	Title	Mother
	Agency	7650 Test Street Apt 8
	Address	
	City	PORT RICHEY Clear
	State	FL Clear
	Zip Code	34668 Clear
	Main Phone	(984)680-6199
	Business Phone	
	Cell Phone	
	Fax Number	

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

This tickler applies to new applicants only.

#### **WSC/PESC** receives ticklers

Role: Waiver Support Coordinator (WSC/CDC) or Regional Pre-Enrollment Workstream Worker

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



File File Filters Status v Equal To Connect ID v + Apply Alert Days Before Due -633 My Dashboard Ticklers rec	New	AND     X  Search Reset  viewing 1 through 15	hssflapdstage.wellsi Complete the waiver enr this is an existing consun this tickler.	ky.com says ollment process if this is a ne ner coming from the Pre-Enr	w applicant. If ollment, cancel		Welcome 4/11/20	2; Sylvia Baer Tio	klers
Consumer Name	iConnect ID	Tickler Nam	e	Date Created -	Date Due	Date Completed	Status	Assigned To	
Kasten, Martin	209732	Complete the waiver enrollment proces	35.	04/11/2024	04/11/2024		New	Baer, Sylvia	•

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

C	opd iConnect 🔉				Ci 4/3/	arrie Abner   Ti /2023 4:36 PM	icklers
File	•						
Statu	ers s Equal To v s v + ply Alert Days Before Due	New V AND V X					
							Edit
25	Ticklers record(s) returned - now viewin	ng 1 through 15					Reassign
	Assigned To	Tickler Name	Date Due	Date Created -	Date Completed	Status	Complete
	Buck, Jennifer	Complete the waiver enrollment process.	04/03/2023	04/03/2023		New	•

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

a	politicennect 🔉				C: 4/3/	arrie Abner   /2023 4:36 PM	Ticklers
 File							
Filte status status App 25 T	rs Equal To	Nee V AND V X					- <u>Cancel</u> Edit Reassign
	Assigned To	Tickler Name	Date Due	Date Created -	Date Completed	Status	Complete
	Buck, Jennifer	Complete the waiver enrollment process.	04/03/2023	04/03/2023		New	•

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

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

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

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



Notes Details	
Division *	APD V
Note By *	Buck, Jennifer
Note Date *	04/03/2023
Program/Provider	<b>~</b>
Note Type *	ICF •*
Note Sub-Type	ICF-IID Request
Description	LOR = 3
	On 4/3/2023 at 4:56 PM, Jennifer Buck wrote: ABAreview
Note	New Text       B     Image: Second sec
Status *	Pending V
Date Completed	
Date completed	

c. Note Recipient = Agency Senior Behavior Analyst or Designee

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





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



opd iConnect		
File Reports Word Mer	ge	
Residential Referral Form	N	
Consumer Forms	5	
Review*	As Needed 🗸	Worker* Voneler Mandi Clear Details
Review Date *	03/24/2023	Status * Complete V
Division *	APD 🗸	ProvideriProgram
Approved By	Vogeler, Mandi Details	Approved Date 03/24/2023
Note	2	
		RESIDENTIAL REFERRAL FORM
		This form should be used for group home and / or Intermediate Care Facility (ICF) requests
Consumer withdraws referral requi	est for placement.	v
Placement Request For?		
		1 Worker record(s) returned - now viewing 1 through 1
ICF Coordinator:		Name ID
		Vogee, warw
		Search
		CONSUMER INFORMATION
Consumer First Name:		Leah
Consumer Last Name:		Adams
Consumer Middle Name:		
iConnect ID:		
Ref. Date:		
County:		PASCO V
Region:		Clear
Consumer DOB:		05/14/2006
Gender:		Female 🗸

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





### LOR 3 Denied & MCM update necessary

### Role: Region Clinical Workstream Worker (MCM)

If the Agency Senior Behavior Analyst or Designee does approve the LOR 3, no MCM review is needed. Proceed to <u>Admission Packet Complete</u> section.

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

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

		MY DA SHBOARD	CONSUME
CONSUMERS			
Division	۲		
Application Pended	1		
Provider Selections	۲		
Admitted	1		
Notes	۲		
Complete	1	_	
Pending	3	1	
Ticklers	۲		
Ticklers	9		
Alert Notes	۲		
Unread Alert Notes	0		

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

opd (Connect							Welcome, Mandi Voge 3/24/2023 11:30 AM	eler <u>No</u>
e Tools								
The look Teach State v East's v Reding Mick K Connect V + State secold; shared reding 1 Brough 3								
Notes record(s) returned - now vie	Search wing 1 through 3	Reset						
Notes record(s) returned - now vie	Soarch Wing 1 through 3-	Read Note Type	Note Sub Type	Note Date	Subject	Author	Status	
Notes record(s) returned - now vis	Consumer . Adams, Leah	Note Type Facily Placement	Note Sub Type Residential Planning Request	Note Date 03/22/2023	Subject	Author Vogeler: Mandi	Status Pending	
Konnect ID 8004	Consumer - Adams, Leah Adams, Leah	Note Type Faolity Placement Faolity Placement	Note Sub Type Residential Planning Request Residential Planning Request	Note Date 03/22/2025 03/22/2025	Subject	Author Vogeler, Mandi Vogeler, Mandi	Status Pending Panding	

 The MCM must update the Residential Referral Form. Navigate to the clients record and select the **Forms** tab. Select the Pending "Residential Referral Form" from the list. The Form Details page displays. Update the following fields:



- a. Status = Complete
- b. Level of Reimbursement = change from 3 to 2 or 1.
- c. Signature = Search for and select the name of the MCM if not already populated.
- d. Date = Current Date

	APD State Office / MCM only:	
LEVEL OF REIMBURSEMENT:	3 ~	
Signature	0 record(s) returned	
	Search	
Date		

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

Notes Details							
Division *	A	PD 🗸					
Note By *	V	/ogeler, Mandi					
Note Date *	03/24/2023						
Program/Provider	1	CARE LLC V Details					
Note Type *	IC	[ICF v]					
Note Sub-Type	IC	ICF-IID Request					
Description			le le				
Note	OF FF O A A A A A A A A A A A A A A A A	ng 2442820 AT 1314 AP, André Al Ab Hone and Benharon Tasana, San Al Ab Hone 13 Ab Hone 13 Ab Hone 13 Ab Hone 14 Ab Hone	ogdar wrote: ogdar wrote: ogdar wrote:			\$	
Status *	P	lending 👻					
Date Completed							
Attachments							
Add Attrachment							
OW ONEVERIES							
Document	Des	scription			Category		
There are no attachments to display							
Note Recipients							
Add Note Recipient:			Clear				
Name	Date Sent		Date Read		Status	Date Signed	
Buck, Jennifer	03/24/2023				Unread		
Vogeler, Mandi	03/24/2023				Unread		
Reed, Monica	3/24/2023				Unread		



# **1g. Admission Packet Complete**

### Role: State Office Worker (ICF Coordinator)

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

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

		MY DA SHBOARD	CONSUME
CONSUMERS			
Division	۲		
Application Pended	1		
Provider Selections	۲		
Admitted	1		
Notes	۲		
Complete	1	_	
Pending	3		
Ticklers	۲	-	
Ticklers	9		
Alert Notes	۲		
Unread Alert Notes	0		

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





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

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

Notes Details							
Division *		APD 🗸					
Note By *		Vogeler, Mandi					
Note Date *		03/24/2023					
Program/Provider	1 CARE LLC V Details						
Note Type *	ICF	<b>v</b>					
Note Sub-Type		ICF-IID Request	v				
Description			li li				
Kete		On 12/47/2023 at 12134 M, Medi V To Elevano tasse of Adv Is loss the Beneform State of Adv Is loss Adv MM Is blas in 21/47/2023 at 121/83 PM, Read V On 37/24/2023 at 121/83 PM, Read Complete documentation New Text Description Adv PM Agenerit Text	opder work: geder work: geder work: L Vogeler work:			ß	
Status *		Complete V					
Date Completed		03/24/2023					
14							
Attacnments							
Add Attachment							
Document		Description			Category		
There are no attachments to display							
Note Recipients							
Add Note Recipient:			Clear				
Name	Date Sent		Date Read		Status	Date Signed	
Buck, Jennifer	03/24/2023				Unread		
Vogeler, Mandi	03/24/2023				Unread		
Reed, Monica	3/24/2023				Unread		

5. From the **File** menu, select **Save and Close Notes**. Proceed to the <u>Create ICF Program</u> section.

#### WSC/PESC/MCM Responds to request for additional information.

#### Role: Waiver Support Coordinator (WSC/CDC) Region Pre-Enrollment Workstream Worker, or Medical Case Manager (MCM)

6. If documents are not complete, the ICF Coordinator uses the existing ICF-IID Request note to request follow up from the PESC, WSC or



Page 26

MCM, depending on what documentation is missing. From the open note record, update the following fields:

- a. Note = Missing/Incorrect items
- b. Status = Pending
- c. Recipient = WSC/PESC or MCM (Depending on items that are missing or incorrect)

Notes Details						
Division *		APD V				
Note By *		Vogeler, Mandi				
Note Date *		03/24/2023				
Program/Provider		1 CARE LLC V Details				
Note Type *						
Note Sub-Type		ICF-IID Request				
Description						
Rea		Di Safaran at 1314 an, heat syngher weter: Di Safaran at 1314 an, heat syngher weter: Di Safaran at 1314 and heat di Safaran at 1314 and heat di Safaran at 1314 and heat di Safaran at 1314 and heat Mer field Mashiff in Internipties documentator] Agenti link ti taka				
Status *		Pending V				
Date Completed						
Attachments						
Add Attachment						
Add Attachment Document		Description	Category			
Add Attachment Document There are no attachments to display		Description	Category			
Add Attachment Document There are no attachments to display Note Recipients		Description	Category			
Add Attachment Document There are no attachments to display Note Recipients Add Hole Recipient:		Description	Califyory			
Add Attainment Document There are no attachments to display Note Recipients Add tole Recipient: Name	Date Sent	Description	Cringery Stakus Date Signed			
Add Attachment Document There are no attachments to display Note Recipients Add Note Recipient Note Bock armfer	Date Sent 03/24/0023	Description	Category Status Data Signed Unward			
Add Addmined Document There are no attachments to display Add tour Pacipant Add tour Pacipant Bock Jennin Ukapan. Mand	Date Sent 03240023 03240023	Description	Criegory Status Date Signed Unsat Unsat			

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

(	opd (Connect							W	alcome. Mandi Vogeler 3/24/2023 11:30 AM	Not	es
File	Tools										
Statu Statu IConr	Intersection of the section of the s	Pending      AND       AND       Bounds      fing 1 through 3	×								
	iConnect ID	Consumer .	Note Type	Not	te Sub Type	Note Date	Subject	Author	Status		
	88504	Adams, Leah	Facility Placement	Residential Planning Request		03/22/2023		Vogeler, Mandi	Pending		
	88504	Adams, Leah	Facility Placement	Residential Planning Request		03/22/2023		Vogeler, Mandi	Pending		
	88564	Adams, Leah	IOF	ICF-ID Request		03/24/2023		Vogeler, Mandi	Pending		
-			Finit	Previous Records per page	15 Next Last						

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



The ICF Coordinator will repeat the steps listed in the <u>1g. Admission</u> <u>Packet Complete</u> section until the packet/documents are completed.

# 1h. Create ICF Program Record

## Role: State Office Worker (ICF Coordinator)

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

opd iConnect		Leah Adams Program 3/24/2023 12:15 PM
File Tools		
Division *	APD V	
Referral Date		
Create Date *	03/24/2023	
Program *	ICF/IID V Details	
Disposition *	Open 🗸	
Disposition Date *	03/24/2023	
Enrollment Type	v	
Primary Worker *	Vogeler, Mandi Clear Details	
Program Begin Date *	b3/13/2023 III	
Expected Deactivated Date		
Comments		
LOC Completed Prior To Enrollment		
Deactivation Data		

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

#### 1i. ICF Referral Tracking form



#### Role: State Office Worker (ICF Coordinator)

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

° opd iConne	ect				3/24/2023 5:29 PM
File					
Please Select Type: ICF Ref	erral Tracking	~			
Consumer Forms					
Review*	Initial 🗸		Worker*	Buck, Jennifer	Clear Details
Review Date *	03/24/2023		Status *	Draft 🗸	
Division *	APD 🗸		Provider/Program		~
Approved By			Approved Date		
A new form will be needed ea Please add information for ea Hide Text ICF #1 Date Referral Sent To ICF # Date ICF #1 Responded	ich month to track all the ICFs ich ICF/IID facility that was ser	that a referral is sent to for this consumer. t a referral. This form should remain in Pendi ANN STORCK CENTER, INC. 03/22/2023	ng status for the month, to allow	users to update as ICF facilities respon	nd to the referral.
ICF #1 Response		<b>~</b>			
Other Reason for ICF #1					
Which Ann Storck Center?		1790 SW 43RD WAY, FTLAUDERDALE	, FL 33 🕶		
Add ICF #2?		0			
Add ICF #3?					

2. From the File menu, select Save and Close Forms.



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

C ad iCon	meet				3/24/2023 5:29 PM
File					
lease Select Type: IC	CF Referral Tracking		~		
Consumer Forms					
Review *	Initial 🗸		Worker*	Buck, Jennifer	Clear Details
Review Date *	03/24/2023		Status *	Draft 🗸	
Division *	APD 🗸		Provider/Program		*
Approved By			Approved Date		
ICF #1		ANN STORCK CENTER, INC	· · ·		
ICF #1		ANN STORCK CENTER, INC	. <b>v</b>		
Date Referral Sent To	DICF #1	03/22/2023			
Date ICF #1 Respond	led	03/29/2023			
ICF #1 Response		Accepted 🗸			
Other Reason for ICF	F #1				
Which App Storek C	ontor?	1790 SW 43PD WAY ET AL			<u> </u>
Which Ann Storck Co	enter?	1790 SW 43RD WAY, FTLAU	DERDALE, FL 33 🗸		

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



⊳opd i€on	mect				Forms
File					
Please Select Type: IC	CF Referral Tracking	~			
Consumer Forms					
Review *	Initial 🗸		Worker *	Buck, Jennifer	Clear Details
Review Date *	03/24/2023		Status *	Draft 🗸	
Division *	APD 🗸		Provider/Program		~
Approved By			Approved Date		
ICF #1		ANN STORCK CENTER, INC.	~		
ICF #1		ANN STORCK CENTER, INC.	~		
Date Referral Sent To	o ICF #1	03/22/2023			
Date ICF #1 Respond	led	03/29/2023			
ICF #1 Response		Declined 🗸			
Other Reason for ICE	+ #1				
Which Ann Storck Ce	enter?	1790 SW 43RD WAY, FTLAUDERDAL	E, FL 33 🗸		
Add ICF #2?					

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



oc iconnect					
File Tools					
Notes Details					
Division *		APD 🛩			
Note By *		Vogeler, Mandi	v		
Note Date *		03/24/2023			
Program/Provider		~			
Note Type *		ICF	~ *		
Note Sub-Type		ICF Response-Denied	~		
Description			<i>R</i>		
Note		B Z II 10px - A - Attach email from ICF			
Status *		Complete V			
Date Completed		03/24/2023			
Attachments					
Add Attachment					
Document		Description	2	Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient:			Clear		
Name	Date Sent	Date Rea	d	Status	Date Signed

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

#### 1j. QSI Validation

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

#### Role: State Office Worker (ICF Coordinator)

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



opd iConnect						
File Tools						
Notes Details						
Division *		APD V				
Note By *		Vogeler, Mandi	~			
Note Date *		03/24/2023				
Program/Provider		~				
Note Type *		QSI	✓ *			
Note Sub-Type		QSI Request	~			
Description			le la companya da companya			
Note		B Z U TOpt • A •	plete QS(			
Status *		Pending ¥				
Date Completed						
Attachments						
Add Attachment						
Document	6	Description			Category	
There are no attachments to display						
Note Recipients						
Add Note Recipient:			Clear			
Name	Date Sent		Date Read	Stat	tus	Date Signed
Vogeler, Mandi	3/24/2023			Unre	ad	

#### **Role: Clinical Workstream Lead**

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

oper iConnect		Welcome, Mandi Vogeler   My Dashboard 3/24/2023 10:00 AM
File Reports	Quick Search	Consumes V Connect 0 V COD
		MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS
CONSUMERS		PROVIDERS
Division		Links
Application Pended	1	iConnect eLearning Library
Provider Selections	0	APD Help Desk
Admitted	1	My Management
		Current Active Cases
Notes	0	Enrolments
Comprese	2	SAN Queue
Danding	2	Pending Assessments Queue
r uning	-	Pending Provider Assessments Queue

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



April 2024

Notes Details	63						
Division *		APD 🗸					
Note By *		Vogeler, Mandi					
Note Date *		03/24/2023					
Program/Provider							
Note Type *		QSI	~				
Note Sub-Type		QSI Bequest					
Description							
Note		on 3/2/2/23 at 22:27 PM, Rendi W Assign to OSI Assessor to complete OSI New Text D 2 U 1000 - A 1000 Complete OSI Append Text	io Noto				
Status *		Pending V					
Date Completed							
Attachments							
Add Attachment							
Document		Description		Category			
There are no attachments to display							
Note Recipients							
Add Note Recipient		(	Clear				
Name	Date Sent		Date Read	Status	Date Signed		
Vogeler, Mandi	03/24/2023			Unread			
Buck, Jennifer	3/24/2023			Unread			

#### Role: QSI Assessor

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

		MY DA SHBOARD	CONSUME
CONSUMERS			
Division	٥		
Application Pended	1		
Provider Selections	۲		
Admitted	1		
Notes	٥		
Complete	1	_	
Pending	3	1	
Ticklers	۲	-	
Ticklers	9		
Alert Notes	۲		
Unread Alert Notes	0		

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



- 10. The QSI Assessor will complete the QSI form in iConnect. Navigate to the **Forms** tab and from the **File** menu click **Add Forms** and select the **Questionnaire Situational Information** form. Update the following fields:
  - a. Review = select As Needed
  - b. Review Date = default to today's date
  - c. Division = defaults to APD
  - d. Worker = Self
  - e. Status = Complete
  - f. Complete the fields on the form

oped (Connect							Leah Adama Forms 3/24/2023 12:29 PM
File							
Bease Select Type: Questionnaire Situation	onal Information 🕶						
Consumer Forms							
Review*	As Needed 🗸			Worker*	Vogeler, Mandi	Clear Details	
Review Date *	03/24/2023			Status *	Complete 🗸		
Division*	APD 🗸			Provider/Program			
Approved By	Vogeler, Mandi Detalis			Approved Date	03/24/2023		
		F	QSI ADMINISTR	ATOR INFORMATI	ON		
1. FQSI Administrator (i.e. the name of the	e person administering this questionnaire)	Vogeler, Mandi					
2. Initiation Date (Select the date in which	the FQSI is initiated)*	03/24/2023					
3. Administration Date (Select the date in	which the FQSI is completed)*	03/24/2023					
FQSI Administrator's IDR: Clearly write the person completing this form.	e five-digit FQSI administrator number of the						
		CERTIFICATION OF SOL	IRCES OF INFORMA	TION USED IN PREPARI	NG THIS QUESTIONNAIRE		
As the administrator of this questioonaire. The	why partify that I relied on the sources of informat	on indicated balax in menarion this ques	formaine		to the goeshold and		
Interview with the individual	,,	0					
Interview with the family/guardian							
Interview with paid support							
Interview with other information				5			
Review of the individual's records							
	GENERAL INFORMATION						
de Name							
First Name		Leah					
		- Contraction of the Contraction					

- 11. From the File menu, select Save and Close Forms.
- 12. Once the QSI is completed the QSI Assessor will respond to the QSI Request Note. This note is still accessible from My Dashboard. Select the Consumers > Pending > Notes queue. Select the QSI Request Note from the Notes queue and update the following fields:
  - a. Note Sub-Type = QSI Status Complete
  - b. Note = acknowledge the QSI has been completed. If the QSI changes the pre-enrollment list category add in the Note "QSI has changed the pre-enrollment list category & needs to be updated"
  - c. Status = Complete
  - d. Recipient = ICF Coordinator as notification to proceed with the Authorization Letter and Clinical Workstream Lead as notification the assigned QSI was completed.



Notes Details							
Division &							
Note Du t	Veneles Mandi						
Note Date 1	02/24/2022						
Program/Provider	03/24/2023						
Note Ture t	OSI						
Note Sub-Type	OSI Request						
Description							
Note	0+1         2/4/282         341.232           Assign to CBI, Assissor to CBI, assister to CBI, as complete         212.22           CBI is complete         212.22         CBI is complete           New Text         III         10px + 7	My, Ruped Lear works: My, Ruped Lear My, Ruped Vogeler works: My, Ruped Vogeler works:					
Status *	Complete V						
Date Completed	03/24/2023						
Attachments							
Add Attachment							
Document	Description		Category				
There are no attachments to display							
Note Recipients							
Add Note Recipient:		Clear					
Name	Date Sent	Date Read	Status	Date Signed			
Buck, Jennifer	03/24/2023		Unread				
Vogeler, Mandi	03/24/2023		Uhread				

e. Recipient = Region Pre-Enrollment Workstream Lead if the QSI changes the pre-enrollment list category.

	On 3/24/2023 at 12:27 PM, Mandi Vogeler wrote: Assign to QSI Assessor to complete QSI On 3/24/2023 at 12:32 PM, Mandi Vogeler wrote: Complete QSI On 3/24/2023 at 12:32 PM, Mandi Vogeler wrote: QSI is complete
Note	New Text
	B I ∐ 10pt ▼ A ▼
	QSI has changed Pre-Enrollment Category. Please Update
	Append Text to Note
Status *	Complete 🗸
Date Completed	03/24/2023

13. From the **File** menu, select **Save and Close Notes**. If the Pre-Enrollment category does not change, proceed to the <u>ICF Authorization</u> <u>Letter</u> section.

#### Role: Region Pre-Enrollment Workstream Lead

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




15. Select the QSI Request Note from the **Notes** queue and review the details of pre-enrollment list category change. The Region Pre-Enrollment Workstream Lead will follow current practices to change the pre-enrollment list category.

### **1k. ICF Authorization Letter**

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

### Role: State Office Worker (ICF Coordinator)

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

File Edit	Tools	Reports	Ticklers	Word Merge					
				Annual Status Review Form					
			_ E	ICF Authorization Letter		1	Consumers		
				Upen and fill the word merge template ICF Authorization Lette	er				
				Notice of Agency Action		CON		000000	
				Notice of Agency Determination on Request for Individual and Family Support Services	BOARD	CON	SUMERS	PROVIDE	KS
Adams, Leah (88	3564)			Notice of Case Closure					
				Notice of Pending Termination of Waiver Services	Mod	ications	Autho	Provider Decu	
				Notice of Termination of Waiver Services		-	-		1
				Notice of Termination of Waiver Services for Non-Compliance	isions	Consun	ner Budgets	Programs	P
Demographics				Personal Disaster Plan					
iConnect ID				88564					
Salutation									
Last Name				Adams					
First Name				Leah					
Consumer Photo									
Middle Name									
Alias									
Date of Birth				5/14/2006					
Date of Death									
Status				Active					





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



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





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

Notes Details					
Division *		APD 🗸			
Note By *		Vogeler, Mandi			
Note Date *		03/24/2023			
Program/Provider		~			
Note Type *		ICF	<b>v</b> '		
Note Sub-Type		ICF Admission Pending	~		
Description			li.		
Note		09: JJA/2023 et 22:43 PP, Mendi V JA/19 Ber end On J/A/2023 et 22:43 PP, Mendi V O'F Admason Pending New Test 9: 2 II Téps + A + Append Tes	igaler wrote:		
Status *		Pending V			
Date Completed			3		
Attachments					
Add Attachment					
Document		Description		Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient:			Clear		
Name	Date Sent		Date Read	Status	Date Signed

17. From the **File** menu, select **Save and Close Notes**. Proceed to the <u>Client Admitted</u> section.

### **1I. Client Admitted**

Role: State Office Worker (ICF Coordinator)



- a. Primary worker = Receiving MCM
- b. Secondary worker = Receiving Clinical Workstream Lead

File Word Merge			Leah Adams D Last Updated by mooplier@apdcares.org at 3/24/2023 11:48:00 AM
Division	Events		
Events	Divison*	APD	
. (tro	Disposition *	APD Eligible - ICF/IID V	
noticon	Disposition Date	03/24/2023	
	Open Date	02/10/2023	
	Data Entry Date	02/10/2023	
	Primary Worker *	Vogeler, Mandi Clear Details	
	Temporary Primary Worker		
	Secondary Worker	Vogeler, Mandi Clear Details	
	Interested in ICF/IID	Yes 🕶	
	Application Received Date *	02/10/2023	
	Age Category at Time of Application *	6 and Above 🛩	
	Application Pended Due Date	05/01/2023	
	Eligibility Documentation Complete Date		
	Referral Source		
	Referral Date	02/10/2023	



# CAUTION

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

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





Notes Details				
Division *	APD V			
Note By *	Vogeler, Mandi			
Note Date *	03/24/2023			
Program/Provider	<b>~</b>			
Note Type *	ICF	<b>v</b>		
Note Sub-Type	ICF Admitted	×		
Description		A		
Note	on 1/2/2/2012 at 12:14 FM, Hond 1 An hear set the hear set the hear set the hear set the hear set the hear set Character Participation of the hear Character Participation Character Partitation Character Partitat	ingelier wrote: Ingelier wrote: Ingelier wrote:		
Status *	Complete V			
Date Completed	03/24/2023			
Attachments				
Add Attachment				
Document	Description		Category	
There are no attachments to display				
Note Recipients				
Add Note Recipient:		Clear		
Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	03/24/2023		Unread	

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

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

Click here to proceed to <u>Admission Review</u> section.

- b. The Clinical Workstream Lead receives the following ticklers that will be reassigned to the Region Waiver Workstream Lead:
  - Send the Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via a note.
  - End Date Planned Services, Authorizations, Plan and Budget.
  - Update APD Waiver Program End Date
  - Has WSC returned the client's physical file to the regional office?
  - Close the pre-enrollment record. Cancel if client is not on preenrollment.
  - Proceed to the <u>Disenrollment Complete</u> section.



ICF

# **1m. Admission Review**

## Role: Region Clinical Workstream Worker (MCM)

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

		MY DA SHBOARD	CONSU
CONSUMERS			
Division	۲		
APD Eligible - ICF/IID	1	]	
My Enrollments	۲		
Open	1	]	
Provider Selections	۲		
Admitted	1	]	
Notes	۲		
Complete	4		
Pending	3		
Ticklers	۲		
Ticklers	18		
Alert Notes	٥		
Unread Alert Notes	0	]	

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

File							Welcome 3/24/2	, Jennifer Buck   Tic 023 9:02 PM	kler		
Filters       Status       Status       Connectio       +       Apply Alert Days Before Doe       Baset       18 Ticklers record(s) returned - now viewing 1 through 15											
	Consumer Name	iConnect ID	Tickler Name	Date Created -	Date Due	Date Completed	Status	Assigned To			
	Abner, Carrie	59217	Initiate ICF Admission Review	03/24/2023	04/23/2023		New	Buck, Jennifer			
	Abner, Carrie	59217	Update Demographics (add residence address and make primary, living setting, etc.	03/24/2023	03/24/2023		New	Buck, Jennifer	•		

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



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

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

opd iConnect						Welcome 3/24/2	, Jennifer Buck   <b>Tic</b>	der		
File										
Theres Status V Equal To V New V AND V K Connect D V +  AND V K Sauce Final  Tr Tablers record(s) returned - now strengt 1 through 15 Consecuter Name Connect D Trablers record(s) returned - now strengt 15										
17 Ticklers record(s) returned - ne	w viewing 1 through 15	Tables News	Data Countral	Dette Dere	Data Completed	64×4××	Andread To	_		
Consumer Name	Connect ID	Tickier Name	Date Created +	Date Due	Date Completed	Status	Assigned to			
Abner, Carrie	59217	living setting, etc.	03/24/2023	03/24/2023		New	Cancel	٢.		
Abner, Carrie	59217	Complete Support Plan Short Form	03/24/2023	05/08/2023		New	5.0	٠		
Abner, Carrie	59217	Generate Notice of APD Eligbility/Ineligbility	03/24/2023	05/08/2023		New	Edit			
								•		
Abner, Carrie	59217	Verify Mental Health Diagnosis	03/24/2023	05/08/2023		New	Reassign	•		

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



opd (Connect							Leah Adams 3/24/2023 12:47 PM	Notes
File Tools								
worknow wizard	Notes Details							
Initiate ICE Admission	Division *		APD 🗸					
Review	Note By *		Vogeler, Mandi					
	Note Date *		03/24/2023					
	Program/Provider	v						
	Note Type *		ICF V					
	Note Sub-Type	Note Sub-Type ICE Admission Review V						
	Description			li.				
	Note		B Z B top - A ■ Enter the initial Admission details					
	Status *		Complete 🗸					
	Date Completed		03/24/2023					
	Attachments							
	Add Attachment							
	Document		Description	c	ategory	Action		
	There are no attachments to display							
	Note Recipients							
	Add Note Recipient:		- Cev					
	Name	Date Sent	Date Read	Stati	us	Date Signed		

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



opd (Connect				
File Tools				
Notes Details				
Division +	ADDate			
Note Duž	Vonelor Mandi			
Note Date 4	02/24/2022			
Program/Provider	×			
Note Type *				
Note Sub-Type Initial 30-day Review				
Description				
Note	Wendor will scan and atach Initial 30 day review documentation.			
Status *	Complete V			
Date Completed	03/24/2023			
Attachments				
Add Attachment				
Document	Description	Category		
There are no attachments to display				
Note Recipients				
Add Note Recipient:	Clear			
Name Date Sent	Date Read	Status	Date Signed	

# **1n. Disenrollment Complete**

# **Role: Region Clinical Workstream Lead**

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

		MY DASHBOARD	CONSU
CONSUMERS			
Division	۲		
APD Eligible - ICF/IID	1	]	
My Enrollments	۲		
Open	1	]	
Provider Selections	۲		
Admitted	1	]	
Notes	۲		
Complete	4		
Pending	3	J	
Ticklers	۲		
Ticklers	18		
Alert Notes	۲		
Unread Alert Notes	0	]	



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

( Fil	apod iConnect						Welcome 3/24/2	, Jennifer Buck   <b>Tic</b> 1023 9:02 PM	klers	
State	Filters         Status           Connet: ID        +          Apply Alert Days Before Due        Search       Reset          18 Ticklers record(s) returned - now viewing 1 through 15									
	Consumer Name	iConnect ID	Tickler Name	Date Created -	Date Due	Date Completed	Status	Assigned To		
	Abner, Carrie	59217	Send Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via Note	03/24/2023	03/24/2023		New	Buck, Jennifer	•	
	Abner, Carrie	59217	End Date Planned Services, Authorizations, Plan & Budget	03/24/2023	03/24/2023		New	Buck, Jennifer	•	
	Abner, Carrie	59217	Update APD Waiver Program End Date	03/24/2023	03/24/2023		New	Buck, Jennifer	•	
	Abner, Carrie	59217	Has WSC returned the consumers physical file to the regional office?	03/24/2023	03/24/2023		New	Buck, Jennifer	•	
	Abner, Carrie	59217	Close the pre-enrollment record. Cancel if client is not on pre-enrollment.	03/24/2023	03/24/2023		New	Buck, Jennifer	•	

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

	opd iConno	Welcome 3/24/	Nelcome, Jennifer Buck   3/24/2023 9:08 PM						
F	ile								
	ilters tus  Equ innect ID  + Apply Alert Days Before	Due	New  AND AND K Search Reset						
	Consumer Name	iConnect ID	Tickler Name	Date Created -	Date Due	Date Completed	Status	Assigned To	
	Abner, Carrie	59217	Send Waiver Disenrollment Notice and notify State Office of Waiver Disenrollment via Note.	03/24/2023	03/24/2023		Cancel		۰
	Abner, Carrie	59217	End Date Planned Services, Authorizations, Plan & Budget	03/24/2023	03/24/2023		N Esta		•
	Abner, Carrie	59217	Update APD Waiver Program End Date	03/24/2023	03/24/2023		N Edit		•
	Abner, Carrie	59217	Has WSC returned the consumers physical file to the regional office?	03/24/2023	03/24/2023		Reassig	<u>п</u>	۲
	Abner, Carrie	59217	Close the pre-enrollment record. Cancel if client is not on pre-enrollment.	03/24/2023	03/24/2023		N View Co	insumers Record	•

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

# **Role: Region Waiver Workstream Lead**



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

		MY DA SHBOARD	CONSU
CONSUMERS			
Division	٥		
APD Eligible - ICF/IID	1	]	
My Enrollments	۲		
Open	1	j	
Provider Selections	۲		
Admitted	1	]	
Notes	۲		
Complete	4		
Pending	3	ļ	
Ticklers	۲		
Ticklers	18		
Alert Notes	۲		
Unread Alert Notes	0	]	

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



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ters us V Equinect ID V + pply Alert Days Before	ual To 🗸	New  AND AND K Search Reset					
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Ticklers record(s) ret Consumer Name Abner, Carrie	urned - now viewi iConnect ID 59217	ng 1 through 15 Tickler Name Send Waiver Disentiment Notice and notify State Office of Waiver Disentiment via Note	Date Created - 03/24/2023	Date Due 03/24/2023	Date Completed	Status New	Assigned To Buck, Jennifer
Ticklers record(s) ret Consumer Name Abner, Carrie Abner, Carrie	iConnect ID 59217 59217	ng 1 through 15 Tickler Name Send Waiver Diserroliment Notice and notify State Office of Waiver Diserroliment via Note. End Date Planned Services, Authorizations, Plan & Budget	Date Created - 03/24/2023 03/24/2023	Date Due           03/24/2023           03/24/2023	Date Completed	Status New	Assigned To Buck, Jennifer
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- 10. The "Update APD Waiver Program End Date" tickler will be marked as complete when the Region Waiver Workstream Lead marks the tickler as complete from the tickler flyout menu.
- 11. The "Has WSC returned the client's physical file to the regional office?" tickler will be marked as complete when the Region Waiver Workstream Lead marks the tickler as complete from the tickler flyout menu.
- 12. The "Close the pre-enrollment record. Cancel if client is not on preenrollment" tickler will be marked as complete when the Region Waiver Workstream Lead marks the tickler as complete from the tickler flyout menu.



# 2. ICF Transition to Waiver

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

# 2a. Document of Choice

The MCM will complete the choice counseling process with the client.

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

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

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

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



Fie Tools   Division* APD •   Division* Vagetr   Note Bye* 1024/2023 •   Pogramminovider •   Pogramminovider •   Division* •   Note Syse* 100 •   Division* •   Division* •   Note Syse* 100 •   Division* •   Division* •   Note Syse* 100 •   Division* • <th>oct iConnect</th> <th></th> <th></th> <th></th> <th></th> <th></th>	oct iConnect						
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Vogeler, Mandl 3/242023 Unread	Name	Date Sent		Date Read	Status	Date Signed	
	Vogeler, Mandi	3/24/2023			Unread		

- 3. From the File menu, select Save and Close Note.
- 4. When the ICF > Document of Choice note is saved in Complete status, a Workflow Wizard triggers 2 ticklers for the Clinical Workstream Lead.
  - a. Verify QSI.
  - b. Complete the BASE.







5. From the tickler flyout menu of the "Verify QSI" tickler, the Clinical Workstream Lead will select Reassign. The Clinical Workstream Lead will search for and select the name of the MCM, who is responsible for assigning the task to a QSI Assessor. Proceed to <u>Verify QSI</u> section.

File Reports	
Workflow Wizard	
Verify QSI. If it is greater than 3 years old or does not reflect individual's current circumstance, reassign this tickler to QSI <u>Assessor</u> Complete the BASE, Reassign to the ABA.	Open Cancel Edit Reassign Com, te
	View Consumers Record

 From the tickler flyout menu of the "Complete the BASE" tickler, the Clinical Workstream Lead will select Reassign. The Clinical Workstream Lead will search for and select the name of the ABA who is responsible for completing the task. Proceed to <u>Complete the BASE</u> section.

opd iConnect		
File Reports		
Workflow Witzard	Search by: Las Name V Search Text: voge Search Text: voge Search Text: voge Search Text: Texts 1 records) infumed <u>MEMBERD Vogetor, Manda</u>	User ED Active Yes
📥 WellSky	April 2024	Page 51

 The ICF Coordinator is a recipient on the MCM's ICF > Document of Choice note. Proceed to <u>ICF Coordinator Tasks</u> section.

# 2b. Verify QSI

## Role: Region Clinical Workstream Lead

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

opd iConnect			Welcome, Mandi Vogeler X/25/2023 3:00 PM	1y Dashboard Sign Out Region Clinical Workstream Lead
File Reports	Quick Search Co	nsumers 🗸 🔽 Last Name	ADVANCED SE	ARCH
	MY DASHBOARD	CONSUMERS PROVIDERS CLAIMS	SCHEDULER REPORTS	
CONSUMERS		PROVIDERS		TASKS
Division	۲		Links	
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My Enroliments	D		APD Help Desk	
Open	1		My Management	
Provider Selections	0		Current Active Cas	ies
Admitted	1		Enroliments	
			SAN Queue	
Notes	۲		Pending Assessme	ents Queue
Complete	5		Pending Provider A	Assessments Queue
Pending	3		100000.000	
			Provider Credentia	Is Queue
Tiddaa			Pending Plans	
IKANIS	19	-	Administrative Acti	ons Queue

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

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e								
iters	ual To 🗸	New V AND V X						
pply Alert Days Before	Due	Search Reset						
Ticklers record(s) ret	urned - now viewi	ng 1 through 15						
Ticklers record(s) retr	urned - now viewi iConnect ID	ng 1 through 15 Tickler Name	Date Created -	Date Due	Date Completed	Status	Assigned To	
'Ticklers record(s) reti Consumer Name Abner, Carrie	iConnect ID 59217	ng 1 through 15 Tickler Name Send Waiver Disenvolment Notice and notify State Office of Waiver Disenvolment via Note.	Date Created - 03/24/2023	Date Due 03/24/2023	Date Completed	Status New	Assigned To Buck, Jennifer	
<sup>1</sup> Ticklers record(s) retr Consumer Name Abner, Carrie Abner, Carrie	iConnect ID 59217 59217	I through 15 Tickler Name Send Waiver Disenvolment Note and notify State Office of Waiver Disenvolment via Note. End Date Planned Services, Autorizations, Plan & Budget	Date Created - 03/24/2023 03/24/2023	Date Due 03/24/2023 03/24/2023	Date Completed	Status New	Assigned To Buck, Jennifer	
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3. From the client's record, select the **Notes** tab. From the **File** menu, select **Add Note.** Update the following fields. Send to assigned QSI Assessor with instruction to complete new QSI.





- a. Note Type = QSI
- b. Subtype = QSI Request
- c. Status = Pending
- d. Recipient = QSI Assessor

22 A					
Notes Details					
Division *		APD 🗸			
Note By *		Vogeler, Mandi			
Note Date *		03/24/2023			
Program/Provider		~			
Note Type *		QSI	× '		
Note Sub-Type		QSI Request V	]		
Description			11		
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Status*		Pending V			
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Attachments					
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There are no attachments to display					
Note Recipients					
Add Note Recipient:			Clear		
Name	Date Sent		Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023			Unread	
Vogeler, Mandi	03/24/2023			Unread	

- 4. From the File menu, select Save and Close Notes.
- 5. Navigate back to the Ticker list view. Reassign the tickler to QSI Assessor.

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Con	nect ID 🗸 🕂								
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21	Ticklers record(s) returned - now viewi	ing 1 through 15							
		- a - a - a - a - a - a - a - a - a - a							
	Consumer Name	iConnect ID	Tickler Name	Date Created -	Date Due	Date Completed	Status	Assigned To	
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	Consumer Name Adams, Leah Adams, Leah	iConnect ID 88564 88564	Tickler Name Complete the BASE. Reassign to the ABA. Verify GSL If it is greater than 3 years old or does not reflect individual's current circumstance, reassign this tickler to GSI Assessor	Date Created - 03/25/2023 03/25/2023	Date Due 03/25/2023 03/25/2023	Date Completed	Status New New	Assigned To Vogeler, Mandi Vox Cancel	•
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### **Role: QSI Assessor**

- 1. QSI Assessor monitors **My Dashboard** for incoming Notes AND Ticklers.
- 2. See section <u>1j. QSI Validation</u> to complete the QSI.
- 3. QSI Assessor responds to Pending note that QSI is completed.



- a. Note Type = QSI
- b. Subtype = QSI Request
- c. Status = Complete
- d. Recipient = Region Clinical Workstream Lead

Notes Details					
Division *		APD 🗸			
Note By *		Vogeler, Mandi			
Note Date *		03/24/2023			
Program/Provider		<b>~</b>			
Note Type *		QSI	~		
Note Sub-Type		QSI Request	]		
Description			11		
		On 3/24/2823 at 12:27 PM, Randi Vog Asagn to OSI Assessor to complete GSI	ler wrote:		
Note		New Text           B         X         If fight * (A *)           QSI Complete         (A *)	Note		
Status *		Complete V			
Date Completed		03/25/2023			
Attachments					
Add Attachment					
Document		Description		Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient			Clear		
Name	Date Sent		Date Read	Status	Date Signed
Buck, Jennifer	03/24/2023			Unread	
Vogeler, Mandi	03/24/2023			Unread	

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

opp iconnect						Wel	come, Mandi Vogeler   * 3/25/2023 3:10 PM	Tickler
le								
ilters								
tus 🗸 Equal To	✓ New ✓ Al							
nect ID 🗸 +								
apply Alert Days Before Due								
	Sear	ch Reset						
1 Ticklers record(s) returned - now v	viewing 1 through 15							
1 Ticklers record(s) returned - now Consumer Name	viewing 1 through 15 iConnect ID	Tickler Name	Date Created +	Date Due	Date Complete	Status	Assigned To	
1 Ticklers record(s) returned - now v Consumer Name Adams, Leah	icewing 1 through 15 iConnect ID 88564	Tickler Name Complete the BASE. Reassign to the ABA	Date Created + 03/25/2023	Date Due 03/25/2023	Date Complete	Status New	Assigned To Vogeler, Mandi	•
1 Ticklers record(s) returned - now v Consumer Name Adams, Leah Adams, Leah	viewing 1 through 15 IConnect ID 88564 88564	Tokker Name Complete the BASE. Reassign to the ABA. Verify 028. If it is greater than 3 years old or open not reflect individual's current concurrence, respectively. The 10281	Date Created - 03/25/2023 03/25/2023	Date Due 03/25/2023 03/25/2023	Date Completed	Status New	Assigned To Vogeler, Mandi Voc Cancel	•
1 Ticklers record(s) returned - now v Consumer Name Adams, Leah Adams, Leah Adams, Leah	viewing 1 through 15 iConnect ID 88564 88564 88564	Tickler Name Complete the BASE. Reassign to the ABA. Viverin Qial III is greather than 3 years oil or does not reflect individualis current contradance, reassign thes toole to QISI Assessor Complete the BASE. Reassign to the ABA	Date Created - 03/25/2023 03/25/2023 03/24/2023	Date Due           03/25/2023         03/25/2023           03/25/2023         03/24/2023	Date Complete	Status New New	Assigned To Vogeler, Mandi Voc Cancel Voc Edit	• • •
1 Ticklers record(s) returned - now v Consumer Name Adams, Leah Adams, Leah Adams, Leah Adams, Leah	viewing 1 through 15 iConnect ID 88564 88564 88564 88564	Takier Name Complete the BASE Reassign to the 408. Werky doi: if is greater than 3 yrans sid or dear not influed assessor Complete the BASE Reassign to the ABA Complete the BASE Reassign to the ABA	Date Created - 03/25/2023 03/25/2023 03/24/2023 03/24/2023	Date Due 03/25/2023 03/25/2023 03/24/2023 03/24/2023	Date Completed	Status New New New	Assigned To Vogeler, Mandi Voc Cancel Voc Edit Voc Bassian	) ) ) ) )
1 Ticklers record(s) returned - now v Consumer Name Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah	viewing 1 through 15 IConnect ID 88564 88564 88564 88564 88564	Tickler Name Complete the BASE. Reassign to the ABA. Verly QBI. If it is greater than 3 years old or does not reflect involvation and contracting, respectively the Token's Doll Complete the BASE. Reassign to the ABA. Complete the BASE. Reassign to the ABA.	Date Created - 03/25/2023 03/25/2023 03/24/2023 03/24/2023 03/24/2023	Date Due           03/25/2023           03/25/2023           03/25/2023           03/24/2023           03/24/2023           03/24/2023	Date Complete	Status New New New New	Assigned To Vogeler, Mand Voc Cancel Voc Edit Voc Reassign Voc	) ) ) ) ) ) )
1 Ticklers record(s) returned - now to Consumer Name Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah	viewing 1 through 15 iConnect ID 80564 80564 80564 80564 80564 80564	Tickler Name Complete the BASE Reasogn to the ABA Very GSI in Fig and the than 3 years of a does not reflect individual's carrier discussifiant, easily the tooler to GSI Assessor Complete the BASE. Reasogn to the ABA Complete the BASE. Reasogn to the ABA Complete the BASE Reasogn to the ABA Complete the CMase Reason to the ABA Complete the CMase Reason to the ABA Complete the CMase Reason to the ABA Complete the CMase Register to the ABA Complete the CMase Register to the ABA	Date Created - 03/25/2023 03/25/2023 03/24/2023 03/24/2023 03/24/2023 03/24/2023	Date Due           09/25/2023           09/25/2023           09/24/2023           09/24/2023           09/24/2023           09/24/2023           09/24/2023	Date Complete	Status New New New New New	Assigned To Vogeter, Mand Vo; Cancel Vo; Edt Vo; Reassign Vo; Committe	) ) ) ) ) ) ) )

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

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





		MY DA SHBOARD	CONS
CONSUMERS			
Division	٢		
APD Eligible - ICF/IID	1		
My Enrollments	٥		
Open	1		
Provider Selections	٥		
Admitted	1		
Notes	٥		
Complete	4		
Pending	3		
Ticklers	٥		
Tioklers	1	8	
Alert Notes	٥		
Unread Alert Notes	0		

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

- 12. The ABA will also complete the BASE. Navigate to the clients record and select the Forms tab. From the File menu, select Add Form. Select "LRC Chair Behavior analysis Services Eligibility R". The Form Details page displays. Update the following fields:
  - a. Review = select As Needed
  - b. Review Date = default to today
  - c. Division = defaults to APD
  - d. Worker = Self
  - e. Status = Complete
  - f. Complete the fields on the form

File						
ase Select Type: LRC C	hair Behavior Analysis Services Eligibil	ity R 🗸				
Consumer Forms						
Review *	As Needed 🗸 🗸		Worker*	Vogeler, Mandi	Clear Details	
eview Date *	03/25/2023		Status *	Complete 🗸		
Nvision *	APD 🛩		Provider/Program	×		
oproved By	Vogeler, Mandi	Details	Approved Date	03/25/2023		
			ATTACHMENT E			
		I PC Chair Paview of	Cabavior Analysis Sancions Elizibi	lity (BASE Form)		
		End onun nerren or	Citation Analysis Certices Engin	ing (DHOL Form)		
star. This is sub-					( a face)	
te: This is only a	recommendation of eligibility f	or behavioral services, not a determinati	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a onsumer Name:	recommendation of eligibility f	for behavioral services, not a determinati	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a onsumer Name: Irst Name	recommendation of eligibility f	or behavioral services, not a determinati	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a onsumer Name inst Name iddle Name	recommendation of eligibility f	for behavioral services, not a determinati	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a ionsumer Name: Irst Name Iddle Name ast Name	recommendation of eligibility f	Cor behavioral services, not a determinati	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a sonsumer Name: Inst Name Iddle Name Ist Name Ist Name	recommendation of eligibility f	Tor behavioral services, not a determinative services and a services and a services and a service serv	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a i onsumer Name: irst Name liddle Name ast Name utfix acteur Data*	recommendation of eligibility f	Leah	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a i consumer Name: linst Name liddle Name ast Name utflix eview Date:"	recommendation of eligibility f	Corbehavioral services, not a determinative control of the control	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a i ionsumer Name: Irst Name Biddle Name ast Name uffix iaview Date:"	recommendation of eligibility f	Corbehavioral services, not a determinative Lean Lean Asams Asams O O O O O O O O O O O O O O O O O O O	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
ote: This is only a i consumer Name: inst Name liddle Name ast Name utfix eview Date:" upport Goordinator:	recommendation of eligibility f	or behavioral services, not a determination of behavioral services, not a determination of the services of the	on of medical necessity or an approva	I for the rate, hours or cost	plan,	
ste: This is only a i onsumer Name: Irst Name Biddle Name ast Name utfix eview Date:" upport Coordinator:	recommendation of eligibility f	Cor behavioral services, not a determination	on of medical necessity or an approva	I for the rate, hours or cost	plan.	
lote: This is only a i Consumer Name: First Name Last Name Suffix Review Date:" Support Coordinator:	recommendation of eligibility f	for behavioral services, not a determination     Lean     Adams     Adams     O     Procript) returned     Execution     Execution	on of medical necessity or an approva	I for the rate, hours or cost	plan.	

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



- a. Note Type = ICF
- b. Subtype = ICF Transition Planning
- c. Description = BASE Completed
- d. Status = Complete
- e. Recipient = Region Clinical Workstream Lead

Notes Details					
Division *		APD 🗸			
Note By *		Vogeler, Mandi	~		
Note Date *		03/25/2023			
Program/Provider		~			
Note Type *		ICF	~ *		
Note Sub-Type		ICF Transition Planning	~		
Description		BASE Completed	li		
Note		<b>B</b> <i>I</i> <u>U</u> 16px • <b>A</b> •			
Status *		Complete 🗸			
Date Completed		03/25/2023			
Attachments					
Add Attachment					
Document	0	Description		Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient:			Clear		
Name	Date Sent		Date Read	Status	Date Signed
Vogeler, Mandi	3/25/2023			Unread	

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



# 2d. ICF Coordinator Tasks

Role: State Office Worker (ICF Coordinator)



April 2024

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

QCD (Connect				Welcon 3/2	ne, Mandi Vogeler <b>My Dashboa</b> r 4/2023 3:40 PM	Role Stats Office Worker
File Reports						
	Quick Search	oesumers 🗸	Connect ID	¥ 60	S ADVANCED SEARCH	
	MY DASHBOARD	CONSUMERS PROVIDERS	CLAIMS	SCHEDULER	REPORTS	
CONSUMERS		PROV	IDERS			TASKS
Division	۲				Links	
APD Eligible - ICF/IID	1				Connect eLearning Library	
My Enrollments	0				APD Help Desk	
Open	1				My Management	
					Current Active Cases	
Provider Selections					Enrolments	
Autores					SAN Queue	
Notes	۲				Pending Assessments Queue	
Complete	4				Pending Provider Assessments Queue	
Bapting					Manage 1 and	

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

						Welc	ome, Mandi Vogeler //24/2023 3:43 PH	Not
Fillers     Fillers     Status     Connect ID     +     -     S Notes record(s) returned - no	Complete V	AND V X						
iConnect ID	Consumer .	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
88564	Adams, Leah	Provider Facility Referral	I'm Interested	03/22/2023	Are you interested?	Vogeler, Mandi	Complete	0
88564	Adams, Leah	Forensic	Involuntary Commitment Order	03/22/2023		Vogeler, Mandi	Complete	
88564	Adams, Leah	ICF	ICF-IID Request	03/24/2023		Vogeler, Mandi	Complete	
00001	Adama Look	107	ICF Admitted	02/21/2022		Vegelar, Mand	Complete	-0
88564	Adams, Leah	ICF	Document of Choice	03/24/2023		Vogeler, Mandi	Complete	TP



# Тір

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



- ICF Coordinator updates the workers on the client's division record. from the client' record, select the Division tab. Select the APD Eligible – ICF-IID record. Update the following:
  - a. Primary Worker = ICF Coordinator



	ect		Leah Adams Last Updated by mivogeler@apdcures.org et 3/24/2023 15146100 AM
Pile Word Merge			
Division	Events		
Events	Divison *	APD	
Tool Discovery	Disposition *	APD Eligible - ICF/IID V	
Inack Disposition	Disposition Date	03/24/2023	
	Open Date	02/10/2023	
	Data Entry Data	02/10/2023	
	Primary Worker*	Vogeler, Mandi Gisar Details	
	Secondary Worker	Vogeler, Mandi Cicar Details	
	Application Received Date *	02/10/2022	
	Interested in ICF/IID	Yes 🗸	
	Age Category at Time of Application *	6 and Above 🛩	
	Application Pended Due Date	05/01/2023	
	Eligibility Documentation Complete Date		
	Referral Source		
	Referral Date	02/10/2023	
	Referral Source *	Parent	

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



An asterisk (*) indicates a r	equired field
Notes Details	
Division *	APD V
Note By *	Baer, Sylvia
Note Date *	04/11/2024
Program/Provider	<b>~</b>
Note Type *	ICF ✓
Note Sub-Type	ICF Transition Planning
Description	"ICF Transition to (indicate licensed home or other setting as noted on Documentation of Choice)"
Note	Based on consumer's choice of living setting, identify lead for monitoring transition (PE WS Lead or RPC)
Status *	Pending V
Date Completed	
Attachments	

- 5. From the File menu, select Save and Close Note.
- 6. The ICF Coordinator tasks resume in the <u>Client's Transition</u> section.

### **2e. WSC Selection Process**

# Role: Region Pre-Enrollment Workstream Lead or Clinical Workstream Worker (RPC)

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

opd iConnect			Welcome, Mandi Vogeler My Dashboard Sign 3/25/2023 3136 PM	Out Region Clinical Worksheam Worker
File Reports				
	Quick Search Consumers	V Connect ID		
	MY DASHBOARD CONSUMERS	PROVIDERS CLAIMS SCHE	DULER REPORTS	
CONSUMERS		PROVIDERS		TASKS
Division			Links	
APD Eligible - ICF/IID	1		iConnect eLearning Library	
My Enrollments	0		APD Help Desk	
<hr/> h)	1		My Management	
			Current Active Cases	
Provider Selections			Enroliments	
( Parting			SAN Queue	
Notes	٥		Pending Assessments Queue	
Complete	6		Pending Provider Assessments Queue	



Page 59

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

apd iConnect					
File Tools					
Notes Details					
Notes Details		400			
Divisio(72,		APD V			
Note By		Vogeler, Mandi	<b>~</b>		
Note Date -		03/25/2023			
Program/Provider		V000 0 - 1			
Note type -		WSC Selection	<u> </u>		
Note Sub-Type		Selection Form Sent	•		
Description			1		
Note		B I U 16px • A •			
Status *		Pending 🗸			
Date Completed					
Attachments					
Add Attachment					
Document		Description		Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient:			Clear		
Name	Date Sent		Date Read	Status	Date Signed
Vogeler, Mandi	3/25/2023			Unread	

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

٩	od iConnect							Welcome, Mandi Vogeler   3/25/2023 3:39 PH	Ticklers
File									
Filten Status     Konnec     Apph	Prines     Inter V     Ease Fb     Abb V       Round D     +       Cound D     +								
	Consumer Name	iConnect ID	Tickler Name	Date Created -	Date Due	Date Completed	Status	Assigned To	
Ē	kdams, Leah	88564	15 Day WSC Selection Reminder	03/25/2023	04/09/2023		New	Vogeler, Mandi	•
	Adams, Leah	88564	Attach Signed Document of Choice Counseling (Annual)	93/25/2023	03/24/2024		New	Vogeler, Mandi	•
1	Adams, Leah	88564	Complete the BASE. Reassign to the ABA.	03/25/2023	03/25/2023		Neur	Vogeler, Mandi	•
	kdams, Leah	88564	Attach Signed Document of Choice Counseling (Annual)	03/24/2023	03/23/2024		New	Vogeler, Mandi	•



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

Notes Details	
Division *	APD V
Note By *	Vogeler, Mandi
mNote Date *	03/25/2023
Program/Provider	<b>v</b>
Note Type *	WSC Selection
Note Sub-Type	Initial Assignment
Description	
Note	On 3/25/2023 at 3:44 PM, Mendi Vegeler wrote:         Attach completed selection form         New Text <b>I</b> 16px • A •          Attach completed selection form
Status *	Complete 🗸
Date Completed	03/25/2023
Attachments	
Add Attachment	

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



	Notes Details			
	Division *	APD ¥		
Note Oute**         ID02023           ProgramProvider         VCG Sected in V           Note Spars         VCG Sected in V           Description         ICF or SNP Transition Assignment         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transition Assignment           Note         VCG Sected in 15.         ICF or SNP Transite Assignment           N	Note By *	Vogeler, Mandi		
ProgramProvider         V           Note Sport ************************************	Note Date *	03/25/2023		
Note Type*         USG Statistion         Image: Statistion Assignment         Image: Statistion Assignment <td>Program/Provider</td> <td>~</td> <td></td> <td></td>	Program/Provider	~		
Note sko-Type   Description   Or::::::::::::::::::::::::::::::::::::	Note Type *	WSC Selection		
Description   Description   Observersion   Note   Net   Image:	Note Sub-Type	ICF or SNF Transition Assign	nment V	
Note     Note     Note Test       Image: States*     Image: States     Image: States	Description			
States*     Parting ~       States*     Parting ~       Date Completed     Parting ~       States     Parting ~       Add Attachments     Parting ~       Add Attachments     Category       Add Attachments to disploy     Category       There are no attachments to disploy     Category       Note Recipients     Category       Add Note Recipients     Category       Name     Date Sent       Name     Date Sent       Vegee: Mardi     0257023     Urread	Note	on 3/25/2823 at 3146 PM, 7 WGC not selected in 15.	tandi Vogeler wrote:	
States*     Panding        Date Completed	Ν	<b>B Z U</b> 56px • <b>A</b> •	pand Test to Note	
Date Completed     Category       Atschnents     Category       Add Atschnents     Category       Document     Description     Category       Note Recipients     Category       Add Note Recipients     Category       Name     Date Sent     Date Read       Name/     Date Sent     Unread	Status *	Pending 🗸		
Attachments       Add Attachment       Document     Description       Description     Category       There are no attachments to display       Note Recipients       Add Iolog Recipient.       Name     Date Sent       Opter Wardi     Date Sent       Upread	Date Completed			
Attachments       Actachments       Actachments       Document     Description     Category       There are no attachments to display       Note Recipients       Add Nore Recipients       Name     Date Sent       Date Read     Status       Yoger, Mardi     Date Sent     Unread				
Add Attachment     Description     Category       Document to display     Category       Note Recipients     Category       Add Note Recipients     Category       Name     Date Sent     Date Read     Status       Voger: Mardi     0025/003     Urread	Attachments			
Decomment         Description         Category           There are no attachments to display         Note Recipients         Status           Add Nore Recipients         Comment         Status           Name         Date Sent         Date Read         Status           Voges: Mardi         03025/0023         Unread         Unread	Add Attachment			
Three are no attachments to display       Note Recipients       Add Nore Recipient     Client       Name     Date Sent     Date Read     Status       Name     Date Sent     Date Read     Status       Vogee: Mardi     Date Sent     Urread	Document	Description		Category
Note Recipients         Clear           Add Note Recipient         Clear           Name         Date Sent         Date Read         Status           Vogee: Mardi         0025/023         Urread         Urread	There are no attachments to display			
Add Note Recipient:         Clear           Name         Date Sent         Date Read         Status           Vogee: Mardi         0025/023         Unread         Unread	Note Recipients			
Name         Date Sent         Date Read         Status           Vogee: Mardi         0025023         Unread         Unread	Add Note Recipient:		Clear	
Vogeler, Mandi 03/25/2023 Unread	Name	Date Sent	Date Read	Status
	Vogeler, Mandi	03/25/2023		Unread

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

## **Role: Region Waiver Workstream Lead**

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

		MY DA SHBOARD	CONSUME
CONSUMERS			
Division	۲		
Application Pended	1		
Provider Selections	۲		
Admitted	1		
Notes	۲		
Complete	1		
Pending	ε		
Ticklers	۲		
Ticklers	9		
Alert Notes	۲		
Unread Alert Notes	0		

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



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

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

Notes Details					
Division *	A	PD 🗸			
Note By *	N	/ogeler, Mandi			
Note Date *	C	3/25/2023			
Program/Provider		~			
Note Type *	V	VSC Selection	× '	10	
Note Sub-Type	I	CF or SNF Transition Assignment	~		
Description			11		
Note	N	w Tast B / U Tops + A + Consider Append Tast bi	NA		
Status *	C	iomplete 🗸			
Date Completed	0	3/20/20/23			
Attachments					
Add Attachment					
Document	Des	icription		Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient:		-	Clear		
Name	Date Sent		Date Read	Status	Date Signed
Vogeler, Mandi	03/25/2023			Unread	

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

# Role: Region Pre-Enrollment Workstream Lead or Clinical Workstream Worker (RPC)

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



- 11. The Region Pre-Enrollment Lead or the RPC will update the workers on the client's Division record. Navigate to the client's **Division** tab. Select the active Division record.
  - a. Disposition = APD Eligible ICF/SNF Transition
  - b. Disposition Date = Must be date of the client's signature on the WSC Selection form OR the date of auto-assignment of WSC (when client's fail to return a selection form)
  - c. Primary Worker: change from ICF Coordinator to WSC. Starts the 90 day transition clock.
  - d. Secondary Worker: remains PE WS Lead

opd iConn	ect	Leah Adams Divisio Lat Updated by mooplement apdrares.org at 124/2023 11:46:00 AM
File Word Merge		
Division	Events	
Events	Divison *	APD
	Disposition *	APD Eligible - ICF/SNF Transition V
Track Disposition	Disposition Date	03/25/2023
	Open Date	02/10/2023
	Data Entry Date	02/10/2023
	Primary Worker*	Vogeler, Mandi Details
	Temporary Primary Worker	
	Secondary Worker	Vogeler, Mandi Citari Detais
	Interested in ICF/IID	Yes 🗸
	Application Received Date *	02/10/2023
	Age Category at Time of Application *	6 and Above 🗸
	Application Pended Due Date	05/01/2023
	Eligibility Documentation Complete Date	
	Referral Source	
	Referral Date	02/10/2023
	Referral Source *	Parent

e. From the File menu, select Save and Close Division

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





# 2f. Waiver Enrollment

## **Role: State Office Enrollment**

- 1. The State Office Enrollment will complete the standard enrollment processes. In the clients record, select the Division tab, and update the Division record.
  - a. Disposition = APD Eligible Waiver

op iconnect		Leah Adams Division Last totated yn mogler Badcares org et 272/2022 i edd y Third State St
File Word Merge		
Division	Events	
Events	Divid.on *	APD
	Disposition *	APD Eligible - Waiver V
Track Disposition	Disposition Date	03/25/2023
	Open Date	02/10/2023
	Data Entry Date	02/10/2023
	Primary Worker*	Vogeler, Mandi Cicar Details
	Secondary Worker	Vogeler, Mandi Gisar Details
	Application Received Date *	03/24/2023
	Interested in ICF/IID	Yes v
	Age Category at Time of Application *	6 and Above 🗸
	Application Pended Due Date	05/01/2023
	Eligibility Documentation Complete Date	E .
	Referral Source	
	Referral Date	02/10/2023
	Referral Source *	Parent V
	Referral Reason	· · · ·
	Court Order Date	02/10/2023
	Name	Hilceyth Abbott
	Title	Mother

- b. From the File menu, select Save and Close Division
- 2. Saving the Division record triggers a tickler to Create "Enrolled" APD Waiver Program record.

File Reports	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Workflow Wizard	Create/Update the APD Waiver Program Record with Disposition = Enrolled.
Enroll in APD Waiver	
and the second of the second o	





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

opd iConnect	Leah Adams Program
File Tools	
Division *	
Referral Date	
Create Date *	03/25/2023
Program *	APD Waiver V Details
Disposition *	Enrolled V
Disposition Date *	0325/2023
Enrollment Type *	ICF/SNF Transition
Primary Worker*	Vogeler, Mandi Clear Details
Program Begin Date *	0325/2023
Expected Deactivated Date	
Comments	
LOC completed prior to enrollment	
Deactivation Data	

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

Division *     APD       Division *     APD       Create Date     I       Create Date *     IDS242023 II       Division *     IDS26000 IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII			Leah Adams Last Updated by mvogeler@apdcares.org at 3/24/2023 12:17:29 PM	Program
Division *     APD       Referal Date     Important Control Date       Control Date     Out Action Date       Disposition Date     Important Control Date       Enrollment     Out Action Date       Enrollment     Out Action Date       Comments     Important Control Date       Descrivated Date     Important Control Date       <	0			
Referral Date     Image: Constant of the Constant of	Division *	APD		
Create Date*     0242023       Program     DEFDID       Disposition *     0255022       Disposition Date*     0255022       Enrolment Type     Image: Comparison of the	Referral Date			
Program *     Drsb       Disposition *     Cosed       Disposition *     Cosed       Disposition *     Cosed       Encodement type        Program Begin Date     Cost *       Expected Date     Cost *       Comments     Comments       Disposition To to encodement     Cosed       Deactivation Date     Cost *       Deactivation Reason     Cost *	Create Date *	03/24/2023		
Dispetition     Doed       Dispetition Date     0325/2023       Exonament Separation     0325/2023       Commands     0       Commands     0       Deschwards To enrollment     0       Deschwards To to enrollmen	Program *	ICF/IID Details		
Dispation Date     00/25/2023       Enrollment Type     Image: Construction Date       Expected Deactivated Date     Image: Construction Date       Comments     Image: Construction Date       Deactivation Date     Image: Construction Date       Deactivation Reason     Image: Construction Reason	Disposition *	Closed V		
Evolution Reason Erochange	Disposition Date *	03/25/2023		
Program Bagin Oate     03/13/2023       Expected Deactivation Date     Image: Comments       Comments     Image: Comments       Deactivation Date     Image: Comments       Deactivated To     Image: Comments       Deact	Enrollment Type	×		
Expected Das  Comments  Comments Comments Comments  Comments  Comments Comments Comments Comments Comments Comments Comments Comments Comments Comments Comments Comments Commen	Program Begin Date	03/13/2023		
Comments	Expected Deactivated Date			
LOC completed prior to envolument Deactivated Data Deacti	Comments		li -	
Deactivition Data       Deactivitied Tot       Deactivitied Cote*       Deactivitied Cote*       Deactivitied Cote*       Deactivitied Reason	LOC completed prior to enrollment			
Deactivation Data       Deactivated To     Image: Comparison of the				
Deschvaled Date * Deschvaled Date * Deschvaled Date * Deschvaled Date * Deschvaled APD Water	Deactivation Data			
Deschuted Date * 02325/2023 *** Deschuted Date *** Perchuted Perch	Deactivated To			
Deactivated APD Water	Deactivated Date *	03/25/2023		
Desclivation Reason RAPD Valuer	Deactivated	<i>A</i>		
	Deactivation Reason	APD Walver	le.	





# Role: Region Pre-Enrollment Workstream Lead or Clinical Workstream Worker (RPC)

 The Region Pre-Enrollment Workstream Lead or RPC will run a monthly report to monitor transitions every 30, 60, 90 days.
 From the My Dashboard screen, use the Reports menu dropdown to select ICF Waiver Transition Report to retrieve a monthly report to monitor ICF Transition to the Waiver.

op	d iConnect	Welcome, Caroline Shorter 5/9/2023 8:52 PM	My Dashboard Sign O	ut Region Clinical Workstream Worker	GO
File	Reports				
F	393.11 Annual Tracking				
	916 Monthly Tracking	ners 🗸	Last Name	V GO ADVANCED SEARCH	H
	APD Service Authorizations				
	Assigned Psychologist Report				
_	Bed Availability	JARL CONSUMERS PROVIL	JERS CLAIMS SCHEDULER	REPORTS	
	ICF Waiver Transition Report		PROVIDERS	TASKS	
Divisior	Missing Provide Open ICF Waiver Transition	n Report		Links	$\mathbf{O}$
APD EI	Pending Notes - Consumers HAR	1		iConnect eLearning Library	
APD EI	Pending SANs	1		APD Help Desk	
Closed	Plan Report	4			
Ciosca				My Management	$\mathbf{>}$
-					

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

					Diagnosi	is Eli	gibility	Medications	Auths	Provider Docu	mentation	Contacts	Consu	mer Mod	ule User				>		
					Demogra	aphics	Division	s Consum	er Budgets	Programs	Provider	Selections	SAN	Notes	Forms	Appointments	Plans	Pre-Enrollment	Paye	er	
ters										_											
psition	~	Not Equal To	~	~	AND ¥	×															
am	~	+																			
am	~	+																			
ram	~	+			Search	Reset															
ram	~	+			Search	Reset															
ram Yograms n	v record(s	+	iewing 1	hrough 3	Search	Reset															
ram Trograms n	record(s	+	iewing 1	hrough 3	Search	Reset															
am rograms n	vecord(s	+	lewing 1	hrough 3	Search	Reset			csincer -		Lazoo				Creste	0.008		Enrol work			Deactivated Dat
am rograms n	vecord(s	+ ) returned - now v	riewing 1	hrough 3	Search	Reset		LASP	osiuon +	MAR	Uispot	ation Date		00.02	Create	Case	AE-DALE TA	Enros type			Deactivated Dat
am rograms n LW APD	record(s	+ ) returned - now v Pro APD Waiver	iewing 1	vogeler.	Search Worker Mandi	Reset	E	uisp	osiucii +	0325	Unsport 2023	antion Date:		03/25/	Create 2023	Conte	CF/SNF Tr	enrow type ansison			Deactivated Dat

2g. Client's Transition



### The 90-day transition was met.

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

# Role: Region Pre-Enrollment Workstream Lead or Clinical Workstream Worker (RPC)

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

Opd iConnect				
File Tools				
Notes Details				
Division *	APD 🗸			
Note By *	Vogeler, Mandi	~		
Note Date *	03/25/2023			
Program/Provider	~			
Note Type *	ICF	~*		
Note Sub-Type	ICF Transition Planning	~		
Description		li		
Note	Add ICF Coordinator			
Status *	Pending 🗸			
Date Completed				
Attachments				
Add Attachment				
Document	Description		Category	
There are no attachments to display				
Note Recipients				
Add Note Recipient:		Clear		
Name	Date Sent	Date Read	Status	Date Signed
Vogeler Mandi	3/25/2023		Unread	
rogene, manuf	0.20.2020		onidad	

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

# Role: State Office Worker (ICF Coordinator)

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



		MY DA SHBOARD	CONSUME
CONSUMERS			
Division	۲		
Application Pended	1		
Provider Selections	٥		
Admitted	1		
Notes	۲		
Complete	1		
Pending	3	1	
Ticklers	٢	-	
Ticklers	9		
Alert Notes	۲		
Unread Alert Notes	0		

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

Notes Details				
Division *		APD 🗸		
Note By *		Vogeler, Mandi		
Note Date *		03/25/2023		
Program/Provider		~		
Note Type *		ICF	<b>~</b> *	
Note Sub-Type		ICF Transition Planning	<b>~</b>	
Description			li	
Note		01 3/25/2823 at 4:20 PM, Randi Vegei Add ICF Coordinator 01 3/25/2822 at 4:32 PM, Randi Vegei Compieis New Text	ier wrote: ier wrote: ier wrote:	
Status *		Complete V		
Date Completed		03/25/2023		
Attachments				
Add Attachment				
Document	1	Description		Category
There are no attachments to display				
Note Recipients				
Add Note Recipient:			Clear	
Name	Date Sent		Date Read	Status
Vogeler, Mandi	03/25/2023			Unread





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

## The 90-day Transition was NOT met.

# Role: Region Pre-Enrollment Workstream Lead or Clinical Workstream Worker (RPC)

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

Opd iConnect					
File Tools					
Notes Details					
Division *		APD 🗸			
Note By *		Vogeler, Mandi	~		
Note Date *		03/25/2023			
Program/Provider		~			
Note Type *		ICF	× *		
Not ub-Type		Reason Timeline Unmet	~		
Description			11		
Note		Reason why Transition was	not met in 90 days.		
Status *		Pending 🗸			
Date Completed					
Attachments					
Add Attachment					
Document		Description		Category	
There are no attachments to display					
Note Recipients					
Add Note Recipient:			Clear		
Name	Date Sent		Date Read	Status	Date Signed
Vogeler, Mandi	3/25/2023			Unread	

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



opd (Connect							Welcome, Mandi Vogeler 3/25/2023 4:35 PH	Fickler
lie								
Itters tus tus tus tus tus tus tus tus tus tu	V New V	AND V (K) Sand Rear						
I0 Ticklers record(s) returned - now vie Consumer Name	iewing 1 through 15 iConnect ID	Tickler Name	Date Created +	Date Due	Date Completed	Status	Assigned To	
Adams, Leah	88564	Waiver Eligibility Worksheet Reminder	03/25/2023	03/24/2024		New	Vogeler, Mandi	•
Adams, Leah	88564	Annual Plan Review	03/25/2023	03/24/2024		New	Vogeler, Mandi	
	00004	Annual Directory in contract	63/04/00033	00040004			Manufac Manufi	
Adams, Lean	00204	Annual Fian Review (recently)	03/23/2023	03/24/2024		New	Vogeler, Inario	
Adams, Lean Adams, Leah	88564	Complete AIM	03/25/2023	04/24/2023		New	Vogeler, Mandi	
Adams, Lean Adams, Lean Adams, Lean	88564 88564	Complete Just Revenue (Secondary) Complete JMM	03/25/2023 03/25/2023	04/24/2023 03/25/2023		New New New	Vogeler, Mandi Vogeler, Mandi	- P
Adams, Lean Adams, Leah Adams, Leah Adams, Leah	88594 88594 88594 88594	Janimur Havine (securing) Complete AM Initiate Person Centered Support Plan Uplead Support Planning Docs	03/25/2023 03/25/2023 03/25/2023 03/25/2023	03/24/2024 04/24/2023 03/25/2023 03/25/2023		New New New New	Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi	, , ,
Adams, Lean Adams, Leah Adams, Leah Adams, Leah Adams, Leah	88554 88554 88554 88554 88554	Jonnan Freihren (Rocking) Complek AM Intlate Posso Centred Support Pan Ulyiked Support Panning Docs Complek Cost Plan	03/25/2023 03/25/2023 03/25/2023 03/25/2023 03/25/2023	0324/2024 04/24/2023 03/25/2023 03/25/2023 05/09/2023		New New New New	Vogeler, Nandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi	•
Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah	80504 80504 80504 80504 80504 80504	Annuar and Interven (yourning) Complex AM Initiale Person Centered Support Plan Uqued Rusport Phantong Decs Complete Carl Plan Initiale and the Updeth Int Cost Plan	03252023 03252023 03252023 03252023 03252023 03252023 03252023	0324/2024 04/24/2023 03/25/2023 03/25/2023 05/09/2023 03/25/2023		New New New New New New New New	Vogeler, Nanti Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi	• • • •
Adams, Lean Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah	88564 88564 88564 88564 88564 88564 88564	Annual area meteor (security) Complex AM Initiale Ferson Contend Support Plan Usand Support Plana Complexe Cost Plan Initiala and out (solida the Cost Plan Endal Area On Area	03/25/2023 03/25/2023 03/25/2023 03/25/2023 03/25/2023 03/25/2023 03/25/2023	01242024 04242023 03252023 03252023 05092023 03252023 03252023 03252023		New	Vogeler, kantal Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi State Office Enrollment	
Adams, Lean Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah	88554 88554 88554 88554 88554 88554 88554 88554	Ander Farl Reven Incoming Complex AU Initials Farlen Chines Stapport Pan Complex Careford Stapport Panel Complex Careford Panel Initial and trus Upplex Tan Colf Pan Exist and 240 Water Complex the CI-F Water Trustomen IND Days	03/25/2023 03/25/2023 03/25/2023 03/25/2023 03/25/2023 03/25/2023 03/25/2023	03242024 04242023 0325/2023 0325/2023 0509/2023 0325/2023 0325/2023 0325/2023 0325/2023		New	Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi State Othe Emsiltment Vogeler, Mandi	• • • • • •
Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah Adams, Leah	00004 00054 00554 00554 00554 00554 00554 00554	Complex Not Territorium Territ	0325/023 0325/023 0325/023 0325/023 0325/023 0325/023 0325/023 0325/023 0325/023 0325/023 0325/023	04242023 04242023 03252023 04252023 055062023 055062023 05252023 062242023 062242023 062242023		New	Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi Vogeler, Mandi State Once Ensiltment Vogeler, Mandi Gancel Vogeler, Mandi Gancel Can	) ) ) ) ) ) ) ) )
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Adams, Lean Adams, Lean	00554 00554 00554 00554 00554 00554 00554 00554 00554 00554 00554	Complex Res (In Proceedings) Complex Res (In Proceedings) Used Research Research Research Research Used Research Research Used R	0026/0023 00226/023 00226/023 00226/023 00226/023 00226/023 00226/023 00226/023 00226/023 00226/023 00256/023 00256/023 00256/023	04242023 04252023 05252023 05252023 055992023 05252023 05252023 06232023 06232023 06232023 06232023 04292023 04292023		New	Vogein: Mandi Vogein: Mandi Vogein: Mandi Vogein: Mandi Vogein: Mandi Stata Office Envolment Vogein: Mandi Cenedi Vogein: Mandi Edit Edit	 
Adams, Lean Adams, Lean	00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004 00004	Ander Zer Werter Instantig Complex AUX Initials Farent Training Clean Complex Caller Stageof Pan Complex Caller Aller Bord and Vor Update To Call Pan Initial and Vor Update To Call Pan Exel and Vor Vores' Complex Exel Call Pan Initial Autor Update To Caller Complex Exel Call Pan Initial Pan Pan Complex Exel Call Pan Initial Pan Complex Exel Caller To Caller Complex Development Caller Complex To Pan Autor Stageof To Mark Complex To Autor Autor Autor Stageof To Mark Complex To Hand Aux	90259023 90259023 90259023 90259023 90259023 90259023 90259023 90259023 90259023 90259023 90259023 90259023 90259023 90259023	0324/2024 0424/2023 0325/2023 0325/2023 05/042023 05/25/2023 05/25/2023 06/23/2023 06/23/2023 06/23/2023 06/23/2023 06/23/2023		New	Vogen: Mand Vogen: Mand Cancel Vogen: Mand Cancel Comment	+ + + + + + + + + + + + + + + + + + +

# **Role: Waiver Support Coordinator (WSC)**

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

		MY DA SHBOARD	CONSUM
CONSUMERS			
Division	$\odot$		
Application Pended	1		
Provider Selections	۲		
Admitted	1		
Notes	۲		
Complete	1		
Pending	3		
Ticklers	$\overline{\mathbf{a}}$		
Ticklers	9		
Alert Notes	۲		
Unread Alert Notes	0		

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



aped iConnect						
File Tools						
Notes Details						
Division *		APD 🗸				
Note By *	Voqeler, Mandi					
Note Date *	03/25/2023					
Program/Provider		~				
Note Type *		ICF	× *			
Note Sub-Type		Reason Timeline Unmet	~			
Description			11			
Note		B I U Teps • A • Reason why Transition was not r	met in 90 days.			
Status *		Pending 🗸				
Date Completed						
Attachments						
Add Attachment						
Document	0	Description			Category	
There are no attachments to display						
Note Recipients						
Add Note Recipient:			Clear			
Name	Date Sent	I	Date Read		Status	Date Signed
Vogeler, Mandi	3/25/2023				Unread	

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

## Client chooses to remain in ICF.

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




opd iConnect						
File Tools						
Notes Details						
Division *		APD 🗸				
Note By *		Vogeler, Mandi	~			
Note Date *		03/25/2023				
Program/Provider		~				
Note Type *		ICF	✓ *			
Note Sub-Type	~	Consumer Request	~			
Description		Chooses to remain in ICF	le			
Note		B I U 16px • A • Request MCM to redo Di Waiver Lead to initiate W	ocumentation of Choice and laiver disenrollment			
Status *		Complete 🗸				
Date Completed		03/25/2023				
Attachments Add Attachment						
Document		Description			Category	
There are no attachments to display						
Note Recipients						
Add Note Recipient:			Clear			
Name	Date Sent		Date Read	S	tatus	D
Vogeler, Mandi	3/25/2023			U	Inread	

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



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

Vivision * Iote By * ote Date *	APD V	
lote By * ote Date *		
ote Date *	Vogeler, Mandi	
	03/25/2023	
rogram/Provider	×	
lote Type *		
lote Sub-Type	ICF Transition Planning	
Jescription		
	GH 3/35/2632 H4 4/36 PM, Rendi Vogeler wrote: Add ICF Coordinator	
	Append Test to Note	
tatus *	Complete V	
ate Completed	03/25/2023	
N		
Attachments 4	2	
dd Attachment		
ocument	Description	Category
ere are no attachments to display		
Note Recipients		
dd Note Recipient:	Clear	
Jame Date Sent	Date Read	Status
ogeler, Mandi 03/25/2023		Unread

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

