Cost Plans Linked to the Budget

Typically, only one cost plan can be linked to the Consumer's budget for the same fiscal year, **_except_** in the scenarios in which someone transitions to/from Consumer Directed Care (CDC+) within the fiscal year.

It is imperative that all plans for the same fiscal year are linked to the budget for that fiscal year.

Example 1: Consumer is on iBudget Waiver 7/1/2020 and decides to transition to CDC+ effective 9/1/2020. <u>TWO</u> plans are linked to the budget.

- APD Waiver Plan – begin date 7/1/2020 and end date 8/31/2020 **(Both the Plan Services and the Plan Information page needs to be end dated in iConnect.)**
- CDC+ Plan – begin date 9/1/2020 and end date 6/30/2020

Example 2: Consumer is on CDC+ 7/1/2020 and decides to transition to iBudget Waiver effective 9/1/2020. <u>TWO</u> plans are linked to the budget.

- CDC+ Plan – begin date 7/1/2020 and end date 8/31/2020 **(Both the Plan Services and the Plan Information page needs to be end dated in iConnect.)**
- APD Waiver Plan – begin date 9/1/2020 and end date 6/30/2020

Example 3: Consumer is on CDC+ 7/1/2020 and decides to transition to iBudget Waiver effective 9/1/2020 but decides to return to CDC+ on 5/1/2021. <u>THREE</u> plans are linked to the budget.

- CDC+ Plan – begin date 7/1/2020 and end date 8/31/2020 **(Both the Plan Services and the Plan Information page needs to be end dated in iConnect.)**
- APD Waiver Plan – begin date 9/1/2020 and end date 4/30/2021 **(Both the Plan Services and the Plan Information page needs to be end dated in iConnect.)**
- CDC+ Plan – begin date 5/1/2021 and end date 6/30/2021

Example 4: Consumer is on iBudget Waiver 7/1/2020 and decides to transition to CDC+ effective 9/1/2020 but decides to return to iBudget Waiver on 5/1/2021. <u>THREE</u> plans are linked to the budget.

- APD Waiver Plan– begin date 7/1/2020 and end date 8/31/2020**(Both the Plan Services and the Plan Information page needs to be end dated in iConnect.)**

- CDC+ Plan – begin date 9/1/2020 and end date 4/30/2021 **(Both the Plan Services and the Plan Information page needs to be end dated in iConnect.)**

- APD Waiver Plan – begin date 5/1/2021 and end date 6/30/2021

CDC+ Enrollment | WSC Tasks

End APD Waiver Plan

When the CDC+ enrollment process is being initiated, the Waiver Support Coordinator (WSC) will need to prepare the cost plan and authorizations for transition from APD Waiver to CDC+.

1. Using the WSC Cost Plan Adjustment role in iConnect, navigate to the Plans tab of the
consumer's record and open the existing APD Waiver Plan.

2. **File > Reverse Status**

3. On the Plan Details page, change the Cost Plan End Date to be the last date the consumer will be on the iBudget Waiver (the date before the CDC+ Program record begin date).

Plan Details	
Division *	APD
Program *	APD Waiver ∨ Details
Worker	Mott, Sheila ... Clear Details
Cost Plan Creation Date *	04/22/2020 📅
Comments	training artifact
Review Request Date	📅
Status *	Draft ∨
Cost Plan Begin Date *	07/01/2020 📅
Cost Plan End Date *	→ 08/31/2020 ✕ 📅
Region or State Review	∨

4. Change role back to WSC/CDC and navigate to the Planned Services subpage of the APD Waiver plan.

5. Change the End Date of each planned service, to match the Cost Plan End Date. Adjust units as needed to ensure the providers are able to bill for services provided or scheduled to be provided by the end date.

6. Add/update the Authorization/Notes Comments field.

Begin Date	07/01/2020		
End Date	08/31/2020		
Index/SubObject Code *	IndexCode	Index Description	SubObject	SubObject
	SunCoast	SunCoast Region	Waiver	iBudget Waiver
Service Ratio			
Consumer County *	HILLSBOROUGH		
Geographic Differential *	Non-Geographic ∨		
Provider Rate Type *	Agency		
Service Code *	H2020:UC		
Service Description	(4014) Behavior Analysis Assessment		
Unit Type	Units		
Units Per *	1.00		
Units of Measure *	Quarter ∨		
Total No of Units	**Adjust total number of units to leave what has been used/will be used by the end date.** 0		
Annualized Units *	1		
Provider ID *	10927 Details		
Provider	A BEHAVIORAL APPROACH INC		
Rate *	$274.74		
Max Amount *	$0.00		
Amount Requested			
Authorization Notes/Comments *	Ending as a waiver service. Consumer transitioning to CDC+ effective 9/1/2020.		

7. Do not change the Planned Service Status field.

8. **File > Save and Close Planned Service**

9. Repeat for all Planned Services on the APD Waiver plan.

10. Navigate back to the Plan Details page, change the Plan Status to "No Review Required"

11. **File > Save and Validate Plan**

12. If the plan fails validation refer to the Plan Fails Validation section of Chapter 11.

13. Once the plan has passed validation, navigate back to the Planned Services subpage.

	Provider ▲	Service Code	Service Description	Unit Type	Rate	Max Amount	Total No of Units	Amount Requested	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County	☑
⊞	HOME LLC	S5130:UC	(4140) Personal Supports	15 mins	$4.30	$0.00	0.0000		07/01/2020	07/15/2020	Agency	1:1	HILLSBOROUGH	☑
⊞	A BEHAVIORAL APPROACH INC	H2020:UC	(4014) Behavior Analysis Assessment	Units	$274.74	$0.00	0.0000		07/01/2020	08/31/2020	Agency		HILLSBOROUGH	☑
⊞	A TEAM APPROACH SUPPORT COORDINATION INC	G9012:UC	(4270) Support Coordination	Month	$148.69	$0.00	0.0000		07/01/2020	06/30/2021	Agency		HILLSBOROUGH	☑
						$1,784.28	12.0000							

File   Tools   Reports
Create Authorization(s)
Print
Update Authorization(s)
Close Planned Services

14. Check the checkboxes for all planned services, then **File > Update Authorizations**. This will transmit the ended authorizations to FMMIS and once processed, will return the funds to the consumer's budget.

CDC+ Enrollment | State Office Tasks

1. Prior to adding the new CDC+ program record, State Office Enrollment will need to notify the WSC to give them notice to end the existing APD Waiver plan and update the APD Waiver authorizations.

   a. At least 24 hours is needed to allow time for the ended authorizations to be transmitted to/from FMMIS.

   b. Once State Office Enrollment has verified the APD Waiver plan and all associated authorizations have been updated, proceed to step 2.

2. To enroll a Consumer in the CDC+ Program in iConnect, the CDC+ Staff member will log in and set "Role" = State Office Enrollment. Click **Go.**
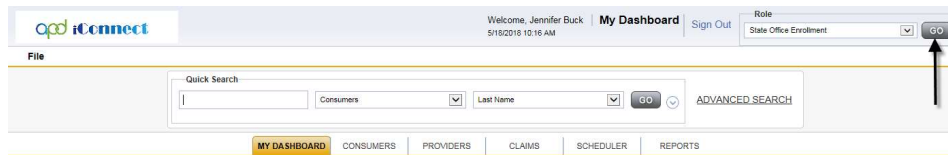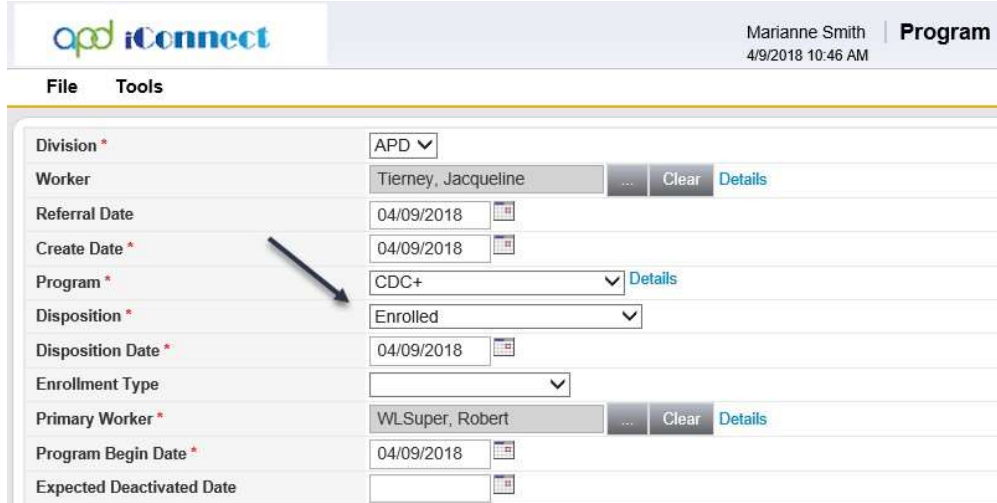
3. Navigate to the Consumer's record and click on **Programs > File > Add Program.**
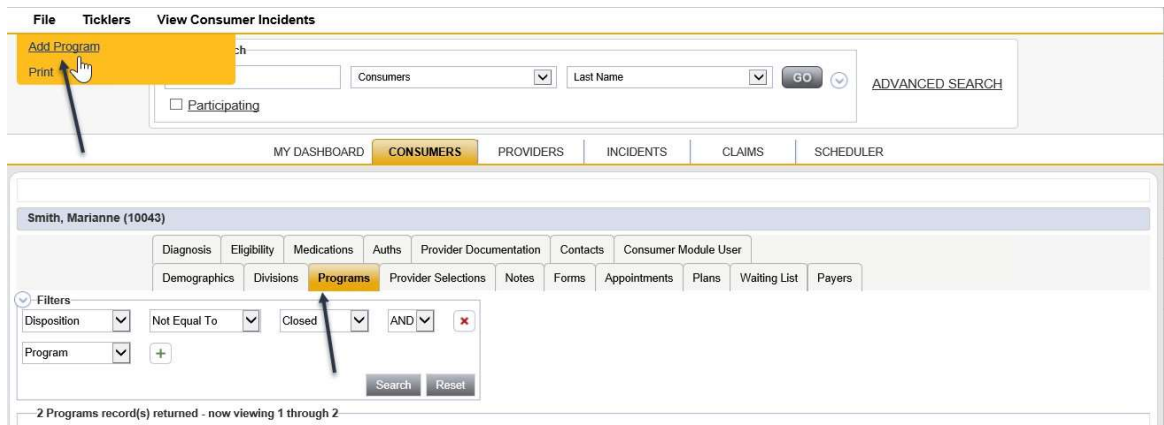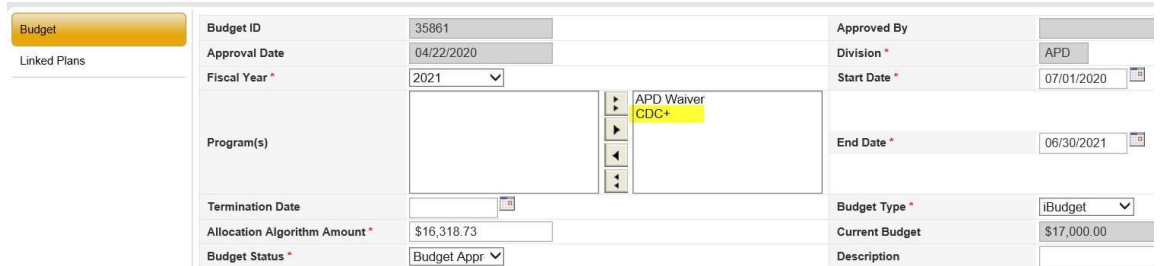
   a. In the new Program record, update the following fields:

      i. "Program" = CDC+

      ii. "Disposition" = Enrolled

      iii. "Referral Date" = Date that APD received notification of interest in CDC+

      iv. "Enrollment Type" = Enrolled in CDC

      v. "Primary Worker" = Waiver Support Coordinator (CDC+ Consultant)

      vi. Program Begin Date = enter date, required field.

b. When finished, click **File > Save and Close Programs.**

c. This consumer will now have **TWO** program records, an APD Waiver Program record and a CDC+ program record.

4. Navigate to the Consumer Budgets tab and open the budget record for the current fiscal year.

a. In the Programs field, move CDC+ to the right side of the multiselect field.

b. **File > Save and Close Budget**

5. Navigate to the Consumer's record and click on **Notes > File > Add Note:**

a. In the new Note record, update the following fields:

   i. "Division" = APD

   ii. "Program" = CDC+

   iii. "Note Type" = CDC+

   iv. "Note Subtype" = New Start

   v. "Status" = Pending

      vi. Route the Note record to the CDC+ Consultant by clicking the **Ellipsis**
button next to "Add Note Recipient." In the pop-up window, type in the
Worker's Last Name and click **Search**. In the Search results, click on
the matching Worker Name to route the note to that recipient.

    b. When finished, click **File > Save and Close Notes**
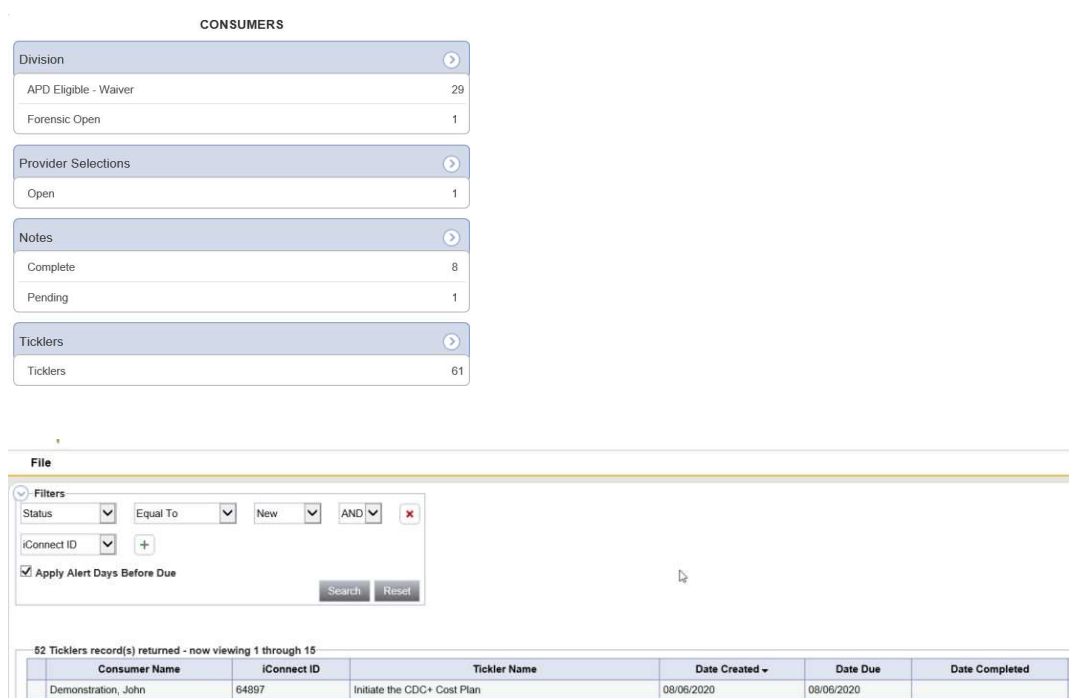
Notes Details	
Division *	APD
Note By *	Tierney, Jacqueline
Note Date *	04/09/2018
Program/Provider	CDC+ Details
Note Type *	CDC+
Note Sub-Type	New Start
Description	
Note	
Status *	Pending
Date Completed	

CDC+ Enrollment | Consultant Tasks

1. Using the WSC/CDC role, the CDC+ Consultant will monitor their **My Dashboard** for Note related to CDC+.
   a. On the **My Dashboard,** find the Consumers Section and scroll down to the Notes Panel. Click on the **Pending** link to open the Notes Queue.
   b. In the Notes Queue, open the Note record with "Note Type" = CDC+ and "Note Subtype" = New Start and review the contents of the Note.

Create CDC Cost Plan

1. Once the ended authorizations on the APD Waiver Plan have been processed by FMMIS, the Consultant will then open the Ticklers pane in the Consumers column of their My Dashboard and look for the tickler "Initiate the CDC+ Cost Plan."

2. Clicking on this tickler will take the Consultant to a new blank Plan record. This will enable the Consultant to create a new plan with the CDC+ services and the CDC+ Index/Sub Object (ISO) code.

3. Update all fields, ensuring that the Cost Plan begin date coincides with the begin date on the CDC+ Program record.
4. **File > Save Plan**
5. Navigate the Consumer Budget tab.
6. Open the budget record for the current fiscal year.
   a. Click on the Linked Plans subpage
   b. **File > Link to Plan**
   c. Select the new CDC+ Plan
   d. **Do not unlink** the APD Waiver Plan

   e. **File > Close Link to Plan**
   f. There are now two plans linked to the budget.

   g. **File > Close Budget**

7. Navigate back to Planned Services and proceed with adding the planned services for the CDC+ plan.
   a. Be sure to use the **Waiver-CDC ISO** for your region.
   b. For all services other than CDC Consultant, the provider will be "Generic CDC+ Provider"

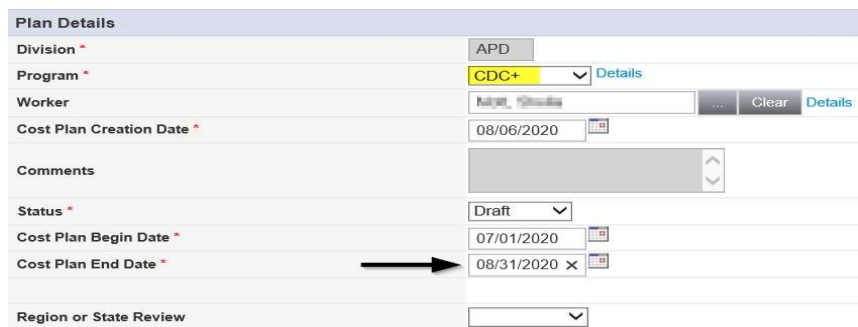| Begin Date	09/01/2020			
End Date	06/30/2021			
Index/SubObject Code *	... Clear			
	IndexCode	Index Description	SubObject	SubObject Description
	SunCoast	SunCoast Region	Waiver-CDC	iBudget Waiver CDC+
Service Ratio	1:1			
Consumer County *	HILLSBOROUGH			
Geographic Differential *	Non-Geographic			
Provider Rate Type *	Agency			
Service Code *	S5130:UC ...			
Service Description	(4140) Personal Supports			
Unit Type	15 mins			
Units Per *	940			
Units of Measure *	Quarter			
Total No of Units	3122			
Annualized Units *				
Provider ID *	10056 ... Details			
Provider	Generic CDC+ Provider			
Rate *	$3.86			
Max Amount *	$12,050.92			
Amount Requested				
Authorization Notes/Comments *	Consumer transitioning to CDC+ effective 9/1/2020.			

8. Once all the planned services have been added, navigate to the Plan Details and selected **File > Save and Validate Plan**.
9. If the plan fails validation refer to the Plan Fails Validation section of Chapter 11.
10. Once the plan has passed validation, navigate back to the Planned Services subpage.
11. Check the checkboxes for all planned services, then **File > Create Authorizations**.

CDC+ Disenrollment | Consultant Tasks

End CDC+ Cost Plan

When the CDC+ disenrollment process is being initiated, the Consultant will need to prepare the cost plan and authorizations for transition from CDC+ to APD Waiver.

1. Using the WSC Cost Plan Adjustment role, navigate to the Plans tab of the consumer's record and open the existing CDC+ Plan.

2. **File > Reverse Status**

3. On the Plan Details page change the Cost Plan End Date to be the last date the consumer will be on CDC+ (the Deactivation Date on the CDC+ Program record).

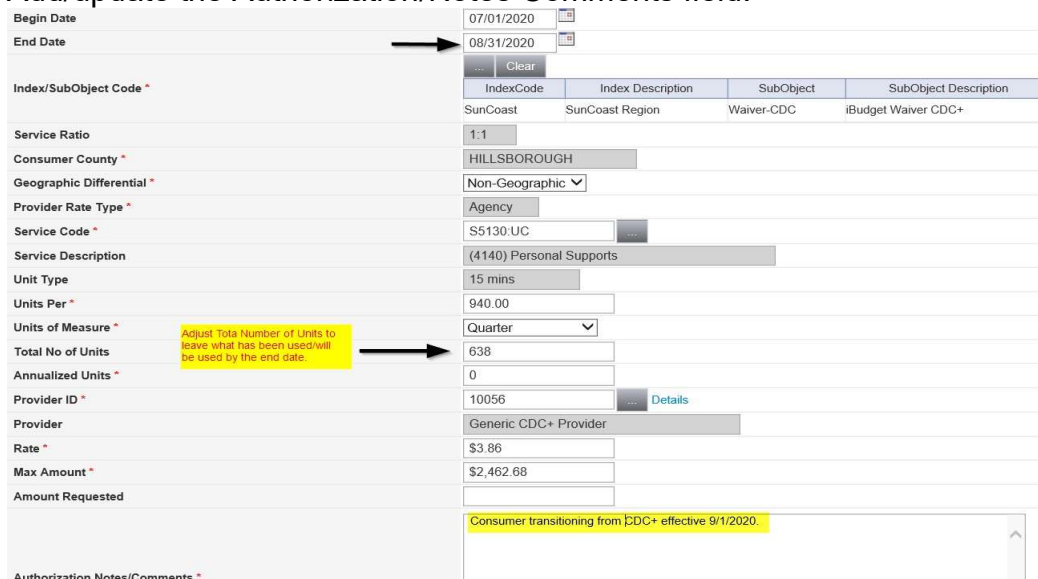| Plan Details	
Division *	APD
Program *	CDC+ ∨ Details
Worker	... Clear Details
Cost Plan Creation Date *	08/06/2020
Comments	
Status *	Draft ∨
Cost Plan Begin Date *	07/01/2020
Cost Plan End Date *	08/31/2020 ✕
Region or State Review	∨

4. Change role back to WSC/CDC and navigate to the Planned Services subpage of the CDC+ plan.

5. Change the End Date of each planned service to match the Cost Plan End Date. Adjust units as needed to ensure the providers are able to bill for services provided, or scheduled to be provided, by the end date.

6. Add/update the Authorization/Notes Comments field.

Begin Date	07/01/2020			
End Date	08/31/2020			
	... Clear			
Index/SubObject Code *	IndexCode	Index Description	SubObject	SubObject Description
	SunCoast	SunCoast Region	Waiver-CDC	iBudget Waiver CDC+
Service Ratio	1:1			
Consumer County *	HILLSBOROUGH			
Geographic Differential *	Non-Geographic ∨			
Provider Rate Type *	Agency			
Service Code *	S5130:UC ...			
Service Description	(4140) Personal Supports			
Unit Type	15 mins			
Units Per *	940.00			
Units of Measure *	Quarter ∨			
Total No of Units *	638			
Annualized Units *	0			
Provider ID *	10056 ... Details			
Provider	Generic CDC+ Provider			
Rate *	$3.86			
Max Amount *	$2,462.68			
Amount Requested				
Authorization Notes/Comments *	Consumer transitioning from CDC+ effective 9/1/2020.			

(highlighted note next to Units of Measure:) Adjust Tota Number of Units to leave what has been used/will be used by the end date.

7. Do not change the Planned Service Status field.

8. **File > Save and Close Planned Service**

9. Repeat for all Planned Services on the CDC+ plan.

10. Navigate back to the Plan Details page, change the Plan Status to "No Review Required".

11. **File > Save and Validate Plan**

12. If the plan fails validation refer to the Plan Fails Validation section of Chapter 11.

13. Once the plan has passed validation, navigate back to the Planned Services subpage.

14. Check the checkboxes for all planned services, then **File > Update Authorizations**. This will transmit the ended authorizations to FMMIS and once process, will return the funds to the consumer's budget.

The exiting Consultant will need to end the CDC+ Plan, planned services, and update associated authorizations before the CDC+ program record can be closed.

a. Following the steps outlined in Chapter 11 of the Case Management manual follow the steps to end planned services, update the cost plan end date on the Plan Details page, and validated the plan.

b. Once the plan has passed validation, navigate to the planned services subpage and update authorizations.
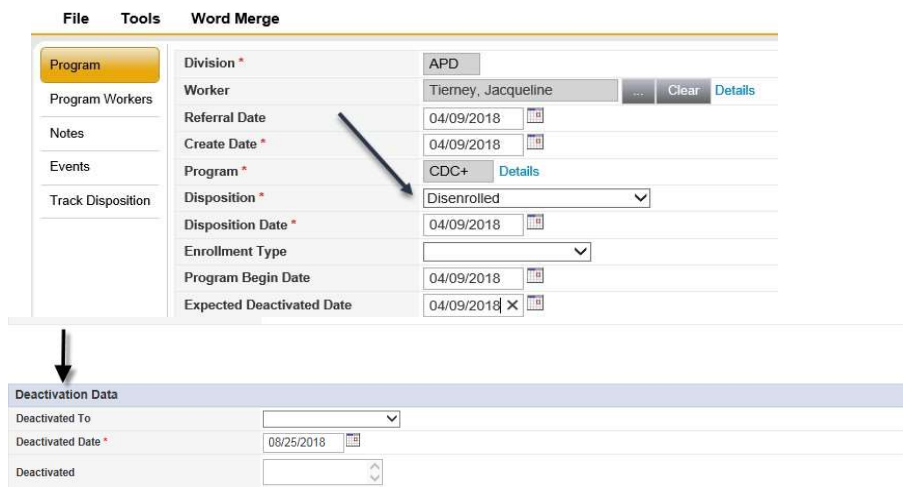
CDC+ Disenrollment | State Office Tasks

1. Prior to ending the CDC+ program record, State Office Enrollment will need to notify the Consultant to give them notice to end the existing CDC+ plan and update the CDC+ authorizations.

    a. At least 24 hours is needed to allow time for the ended authorizations to be transmitted to/from FMMIS.

    b. Once State Office Enrollment has verified the CDC+ plan and all associated authorizations have been updated, proceed to step 2.

2. Should a Consumer no longer need to participate in the CDC+ Program, the CDC+ Staff will log into APD iConnect and set "Role" = State Office Enrollment. Click **Go.**

3. Navigate to the Consumer's record and click on **Programs** tab > open the CDC+ Program Enrollment record.

    a. In the record, update the following fields:

        i. "Disposition" = Disenrolled

    b. The Deactivation Data section displays. Update the following fields:

        i. Deactivated To

        ii. Deactivated Date

        iii. Deactivated: enter notes

        iv. Deactivation Reason

    c. When finished, click **File > Save and Close Programs.**

4. Navigate to the Consumer Budgets tab and open the budget record for the current fiscal year.

   a. In the Programs field, move APD Waiver to the right side of the multiselect field. It is alright to leave CDC+ on the right side, as the CDC+ plan will still be linked to this budget.

Budget ID	2894		Approved By	
Approval Date	05/22/2020		Division *	APD
Fiscal Year *	2021		Start Date *	07/01/2020
Program(s)	APD Waiver / Non-Waiver	▶ ▶ ◀ ◀ CDC+	End Date *	06/30/2021
Termination Date			Budget Type *	iBudget
Allocation Algorithm Amount *	$8,724.39		Current Budget	$30,588.60
Budget Status *	Budget Appr		Description	

   b. **File > Save and Close Budget**

5. Navigate to the Consumer's record and click on **Notes > File > Add Note.**

   a. In the new Note record, update the following fields:
      i. "Division" = APD Waiver
      ii. "Note Type" = CDC+
      iii. "Note Subtype" = CDC+ Disenrollment
      iv. "Status" = Pending
      v. Route the Note record to the WSC (CDC+ Consultant)
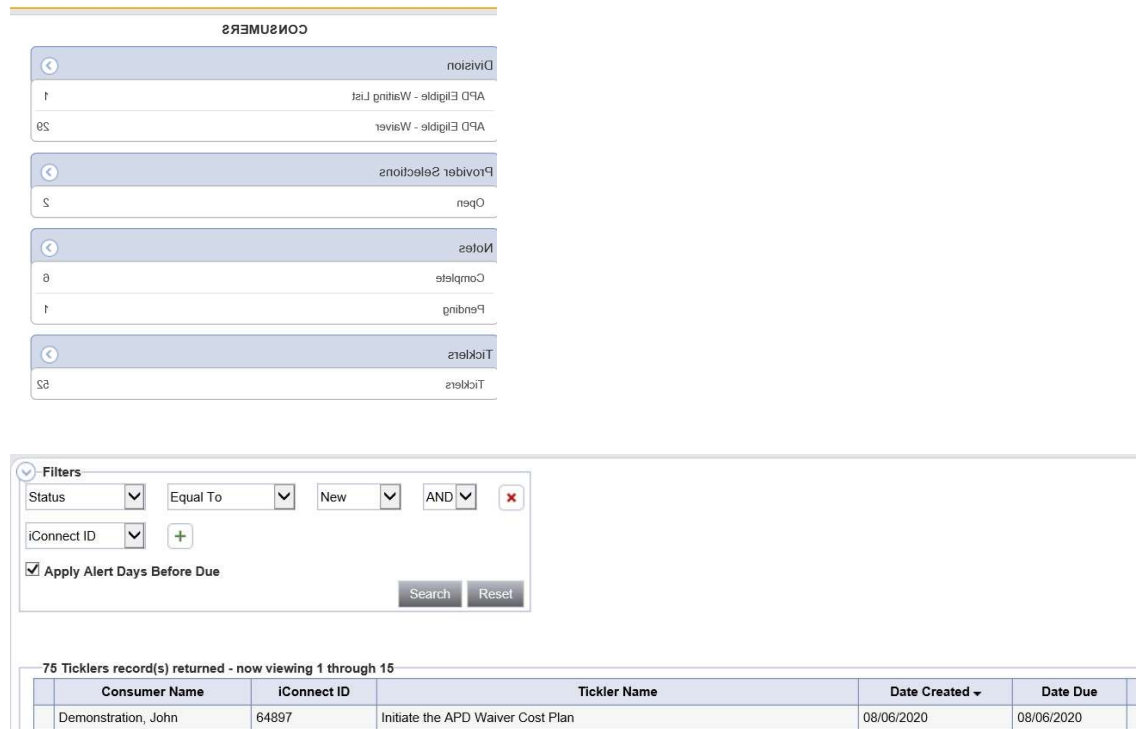
   b. When finished, click **File > Save and Close Note**

File   Tools

Notes Details

Division *	APD
Note By *	Tierney, Jacqueline
Note Date *	04/09/2018
Program/Provider	CDC+ Details
Note Type *	CDC+
Note Sub-Type	CDC+ Disenrollment
Description	
Note	-Please approve the decision to disenroll this Consumer from the CDC+ Program
Status *	Pending
Date Completed	

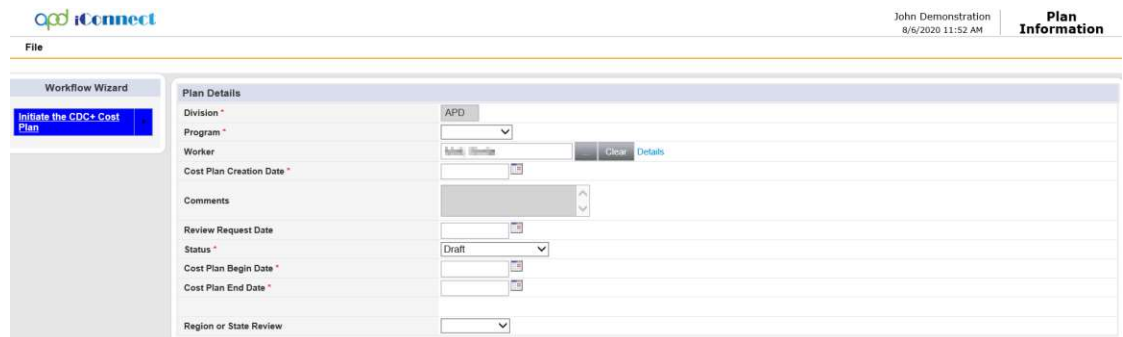# CDC+ Disenrollment | Support Coordinator Tasks

Create the APD Waiver Cost Plan

1. Once the ended authorizations on the CDC+ Plan have been processed by FMMIS, the Consultant will then open Ticklers pane in the Consumers column of their My Dashboard and look for the tickler "Initiate the APD Waiver Cost Plan."

2. Clicking on this tickler will take the Consultant to a new blank Plan record. This will enable the Waiver Support Coordinator to create a new plan with the APD Waiver services and the iBudget Waiver Index/Sub Object (ISO) code.

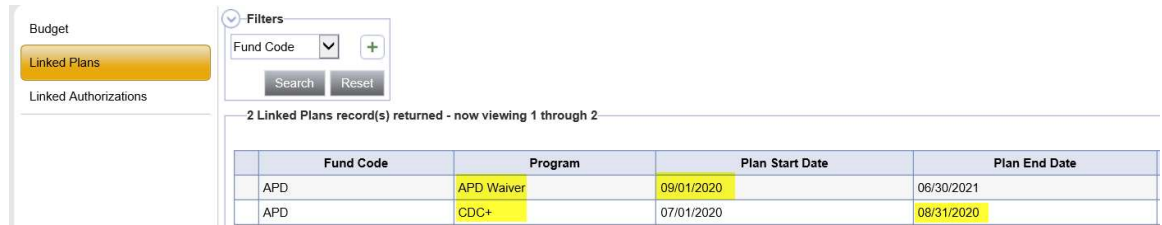3. Update all fields, ensuring that the Cost Plan begin date is the day after the

Deactivation Date on the CDC+ Program record.

4. Open the budget record for the current fiscal year.
   a. Click on the Linked Plans subpage
   b. **File > Link to Plan**
   c. Select the new APD Waiver
   d. **Do not unlink** the CDC+ Waiver Plan

   e. **File > Close Link to Plan**
   f. There are now two plans linked to the budget.

   g. **File > Close Budget**

5. Proceed with adding the planned services for the APD Waiver plan.
   a. Be sure to use the **iBudget Waiver ISO** for your region.

6. Once all the planned services have been added, navigate to the Plan Details and selected **File > Save and Validate Plan**.

7. If the plan fails validation refer to the Plan Fails Validation section of Chapter 11.

8. Once the plan has passed validation, navigate back to the Planned Services subpage.

9. Check the checkboxes for all planned services, then **File > Create Authorizations**.