



State of Florida
Agency for Persons with Disabilities

Harmony for APD iConnect
New Licensing Facility Application Request Training Manual

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Chapter 3 | Online Application Request

Introduction

New Prospective Applicants seeking licensure of residential facilities will contact APD by phone, email or in person and will be directed to the link for the Online Application Request form. The Prospective applicant will also be instructed to do a background screening. The Online Application Request will be used for all interested new prospective applicants.

Submit Online Application Request

1. Access the Online Application Request via the URL:
<https://floridaapd.wellsky.com/assessments/?WebIntake=DE588ADD-286E-47FA-A5FF-06494042E9D8>

Online Application Request for New Providers

This questionnaire will help APD assess individuals who are interested in becoming an APD provider to determine whether the potential applicant is eligible to move forward. Please note: This is not a provider application and does not warrant either expressly or by implication that an individual is permitted to render services. This tool can be used by:

- Individuals or Parties wishing to open a licensed Residential facility
- Individuals or Parties wishing to apply to become an APD Medicaid Waiver provider
- Individuals or Parties wishing to contract with APD to provide services to APD clients

Required questions are marked with a red **required** label.

2. Complete all required fields on the Online Application Request Form

Prospective Applicant Information Section

Provider Business Name **required**

First and Last Name if a Solo Provider

Enter response...

Provider Business Number **required**

Enter response...

Provider Email Address **required**

Enter response...

Provider EIN/SSN **required**

Include dashes

Enter response...

Provider Region

☒ Unanswered ☐ Central ☐ Northeast ☐ Northwest ☐ Suncoast ☐ Southeast ☐ Southern

3. When finished with all sections, click the Submit button and then the Success Message will be displayed.

Thank you for completing the Online Application Request for New Providers. Click "Submit" to submit your request. Once APD reviews the request, you will be contacted by an APD staff member either by phone or email.

Please note: Your request will not be processed until you click "Submit" and receive a "Success" message.



Success!

Thank you for completing the APD Online Application Request for New Providers. Please keep this reference number for your records. An APD staff member will be contacting you within 30 calendar days.

Please keep this reference number for your records: 10084

[Return to APDCARES](#)

[Print](#)

4. If the application request needs to be cancelled, click the Cancel button and then click Yes.

Cancel Submission

Are you **sure** you want to cancel without submitting the information?

*Please note: If you cancel the submission, your request will **not** be submitted for processing and it will **not** be saved. You will need to complete a brand new Online Application request.*



No

Yes

Assign Worker

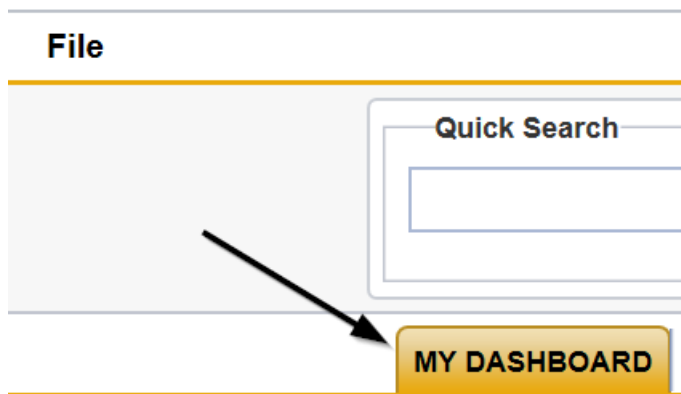


Once the Online Application Request has been submitted by the Provider applicant, the Region will monitor the Prospective Applicant Queue via the My Dashboard > My Management area of iConnect. They will assign a licensing specialist if appropriate. Some regions may need to assign a different worker than the one who works the queue. If so, they will add a note and add the assigned worker as the note recipient.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role
Region QA Workstream Worker ▼ GO

2. The user can access the Prospective Applicant Queue via **My Dashboard**.
 - a. Go to **My Dashboard > Tasks** and scroll down to the My Management Panel. Click on the **Prospective Applicant Queue** link to open the Queue:



My Management

Current Active Cases

Enrollments

Pending Assessments Queue

Pending Provider Assessments Queue

Waiting List

Provider Credentials Queue

Pending Plans

Administrative Actions Queue

Prospective Applicant Queue

Provider Management Queue

Event Ticklers

Alert Notes

Ticklers Due

Print Queue

3. **Select** the Prospective applicant record via the hyperlink via the Applicant's record.

Filters

Disposition

Equal To

Pending

AND

×

Provider Name

Contains

AND

×

Disposition

+

Search

Reset

3 My Dashboard Prospective Applicant Queue record(s) returned - now viewing 1 through 3

	Disposition	Online Application Date	Provider Name	Provider Region
	Pending	06/29/2023	Test Provider	NORTHEAST
	Pending	09/18/2023	Test Region Provider	Northeast
	Pending	09/20/2023	Test Provider	Northeast

4. The Applicant's record will display. Navigate to the **Providers > Notes** tab

File Reports

Quick Search

Providers

Provider Name

MY DASHBOARD

CONSUMERS

PROVIDERS

INCIDENTS

CLAIMS

SCHE

A TEST Provider (10002)

Workers

Services

Provider ID Numbers

Contracts

Benefits

Linked Providers

Aliases

Conditions

Providers

Divisions

Forms

Enrollments

Authorizations

Notes

Credentials

EVV Scheduling

Filters

Note Type

Equal To

AND

×

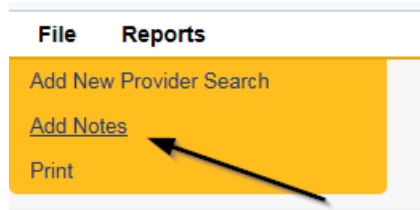
Note Date

+

Search

Reset

5. Click **File > Add Notes**

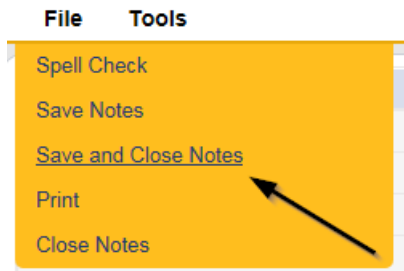


6. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Associated Form ID#" = Enter Form ID# if applicable
- c. "Note Type" = Application Request
- d. "Note Subtype" = Assign Worker
- e. "Description" = Assign Worker
- f. "Note" = Enter notes
- g. "Status" = Complete
- h. Click the ellipsis on the "Add Note Recipient" to add the *QA Workstream Worker or other as applicable* as the Note Recipient
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

A screenshot of a 'Notes Details' form. The form has several fields with arrows pointing to them: 'Division' (set to APD), 'Note By' (set to Reed, Monica), 'Note Date' (set to 09/24/2023), 'Associated Form ID#' (set to 352), 'Note Type' (set to Application Request), 'Note Sub-Type' (set to Assign Worker), 'Description' (set to Assign Worker), 'Note' (a large text area), 'Status' (set to Complete), and 'Date Completed' (set to 09/24/2023). Below the form is an 'Attachments' section with a link 'Add Attachment'. At the bottom is a 'Note Recipients' section with a text input field, a search button (represented by a small square with a magnifying glass icon), and a 'Clear' button. An arrow points to the search button.

7. When finished click **File > Save and Close Notes**



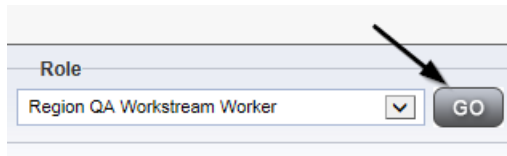
Access Prospective Applicant Queue



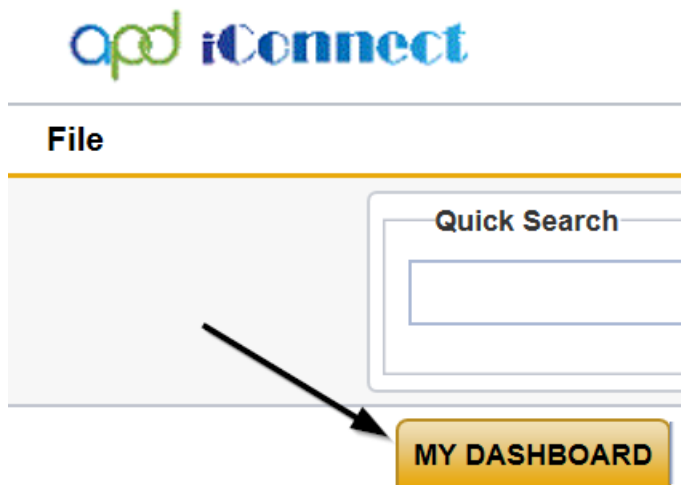
Once the Online Application Request has been submitted by the prospective applicant or someone has been assigned to work the new applicant record, they will pick up the phone and talk to the prospective applicant.

NOTE: There will be no visual indicator on My Dashboard > Prospective Applicant Queue that there has been an assignment.

1. Set "Role" = Region QA Workstream Worker then click **Go**.



2. The user can access the Prospective Applicant Queue via **My Dashboard**.
 - a. Go to **My Dashboard > Tasks** and scroll down to the My Management Panel. Click on the **Prospective Applicant Queue** link to open the Queue:



My Management

- Current Active Cases
- Enrollments
- Pending Assessments Queue
- Pending Provider Assessments Queue
- Waiting List
- Provider Credentials Queue
- Pending Plans
- Administrative Actions Queue
- Prospective Applicant Queue
- Provider Management Queue
- Event Ticklers
- Alert Notes
- Ticklers Due
- Print Queue

3. Use the multi variable search to narrow down the results in the Queue. Click **Search** to view all submitted Online Application requests. **Select** the Prospective applicant record via the checkbox at the end of the Applicant's record.

Filters

Provider Name Equal To APD Test Provider AND

Disposition

2 Online Provider Application Queue record(s) returned - now viewing 1 through 2

Disposition	Online Application Date	Provider Name	Provider Region	<input type="checkbox"/>
Pending	06/12/2018	APD Test Provider		<input checked="" type="checkbox"/>
Pending	04/17/2017	APD Test Provider	Central	<input type="checkbox"/>

If the Prospective Applicant does not have a current or active APD licensed residential facility and/or MWSA, please validate the following:



- Valid photo ID
- Meeting with applicant – Face-to-Face or Zoom/Teams
- Ask if applicant has begun process of obtaining a Medicaid Provider Number
- Explain the application and enrollment steps for licensure and MWSA
- Inquire if they have completed Background screening process
- Ask about qualifications and experience

Provider Search and Promote



When the QA Workstream Worker has the information needed from the Prospective Applicant record and can proceed with initiating the provision process, they will "promote" the record from the Prospective Applicant Queue to a non-active provider record.

1. Select the prospective applicant's record in the Prospective Applicant queue by selecting the checkbox at the end of the record

Disposition	Online Application Date	Provider Name	Provider Region	
Pending	06/29/2023	Test Provider	NORTHEAST	<input type="checkbox"/>
Pending	09/18/2023	Test Region Provider	Northeast	<input checked="" type="checkbox"/>
Pending	09/20/2023	Test Provider	Northeast	<input type="checkbox"/>

2. Select **File > Provider Search and Promote** to search to see if a Provider record already exists for that Service Provider

File

- Provider Search and Promote
- Reject Provider
- Print
- Close Online Provider Application Queue

3. On the Provider Search screen, Click **Search**. The search will either return no matching records or a list view grid of matching records. The user will be able to click on the matching records to see more details and determine if the existing Provider record matches the New Online Application Request.

Provider ID	Provider Name	EIN/SSN	City	State
21347	Test Provider	123456	Jacksonville	FL
21351	Prospective Applicant	123456		

4. If the displayed results , don't match the prospective applicant's record the Select **File > Promote to Provider**

File **Tools**

Promote to Provider

Print

Close Provider Search

5. The Select Fund Code pop-up box will appear. Select the Fund Code as **APD** and then Click **OK**

Select FundCode to promote Provider



Cvcvc

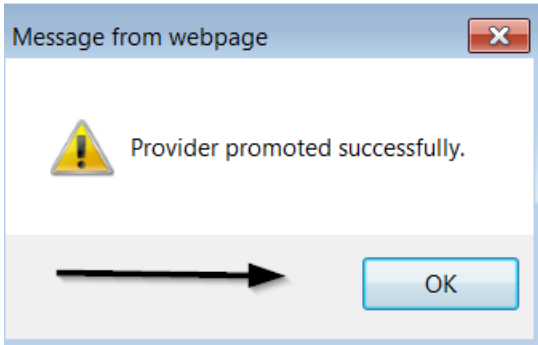
Fund Code

APD

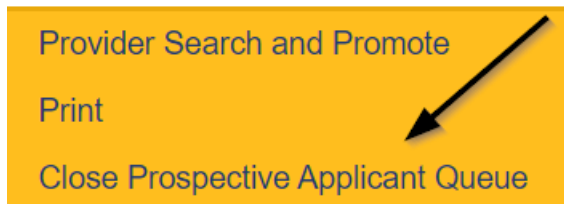
OK

CANCEL

6. Click **OK** on the pop-up message box and then **File > Close Prospective Applicant Queue**



File



- The Service Provider Division will be changed to “Submitted Online,” which will function like a Status of “Open.”

Cvcvc (10087)

Workers	Services	Provider ID Numbers	Contracts	Beds	Linked Providers	Aliases	Conditions
Providers	Divisions	Forms	Enrollments	Authorizations	Notes	Credentials	EVV Scheduling

Filters

Division +

Search Reset

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

Division	Disposition	Open Date
APD	Submitted Online	12/31/2018

- The Prospective Applicant will be active and available for selection in any drop-down lists, so the **Exclude from Selection field** on the Provider demographics details page needs have the checkbox enabled until the application process has been completed.

NOTE: Group Homes/Fosters Home and Residential Rehab Providers would always have the “Exclude from Selection” field enabled AFTER they are approved. They do need to be visible for adding as a Provider for selection when a consumer moves into a Group Home/Foster Home/Res Hab. The Licensed Facility needs to be selected and this selection would be included in any reporting.

Test Provider (21354)

Workers
Providers

Basic Information

Provider Name	Test Provider
DBA (if applicable)/Facility Name	
Licensed Home licensed for capacity	
Active	Yes
WSC QO	
External	Yes
Exclude from Selection	Yes
Specialist/Liaison	

9. Navigate to the **Provider > Demographics** tab, Select **File > Edit Provider**

opd iConnect A Test Provider Last Updated by mreed@apdcares.org at 7/12/2022 9:22:41 AM **Providers** Sign Out Role Region QA Workstream Worker GO

File **Edit** Reports Word Merge
Edit Provider

Providers Provider Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS **PROVIDERS** CLAIMS SCHEDULER REPORTS

A Test Provider (18830)

Workers Services Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions
Providers Divisions EVV Activities Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments

Basic Information

Provider Name	A Test Provider	Residential Monitor	Reed, Monica
DBA (if applicable)/Facility Name		Licensing Specialist	Reed, Monica
Licensed Home licensed for capacity		Area Behavior Analyst	Reed, Monica
Active	Yes	Licensed Home/ADT # of workers	
WSC QO		Licensed Facility	Yes
External	Yes	Medicaid Provider ID	XXXXX
Exclude from Selection	No	Provider EIN	XXXXX

10. Update Provider demographics so that the APD Vendor No. field value is the same as the Provider iConnect ID. *Copy/paste the Provider iConnect ID into the APD Vendor No. field and then also enable the "Exclude from Selection" field* and then Select **File > Save and Close Provider**

APD Vendor No field - Note: User can request that the Region QA Vendor Num Edit role make any updates/changes as this field becomes read only after the initial save.

Test Region Provider (21362) ←

FL APD Interface Test (Copy of PROD 3/10/23) - Work - Microsoft Edge

https://ltssbh1.mediware.com/FLAPDInterfaceTest/Pages/Harmony.aspx?ChapterID=325&ViewType

oqd iConnect

File Edit

Provider	Basic Information
Addresses	Provider Name * Test Region Provider
Telephone Number(s)	DBA (if applicable)/Facility Name
	APD Vendor Number 21362 ←
	WSC QO
	Active * <input checked="" type="checkbox"/>
	Provider Type 1 ←
	Exclude from Selection <input checked="" type="checkbox"/>

NOTE: Adding the APD Vendor No initiates the ID PASS access program which will automatically get the Provider access to iConnect.

The following scenarios may exist for a prospective applicant:

- If existing Provider – would already have IDPASS access
- If Waiver Provider – already have group homes and want to open new group home – Needs new Provider record linked to Parent Provider
- If abandoned Provider, would need to get new IDPASS access



The Prospective Applicant will need to complete the ID PASS process and get access to iConnect.

The Region will need to follow the background screening/Clearing House process which is outside of iConnect

As Needed: Reject Provider



The users will be able to search on Provider Name, EIN/SSN, and Region. If a matching Provider record is found and the user decides to create a new record, they should be presented with a dialog box stating:

“Warning. A Provider record with a matching name and/or EIN/Tax ID Number already exists. Are you sure you want to continue?” If they click the “Yes” button, create the new Provider record. If they click the “No” button, the creation of the Provider record shall be canceled.

1. If the prospective applicant needs to be rejected due to an existing record, the Licensing Specialist will select the record via the checkbox at the end of the record and then Click **File > Reject Provider**

Disposition	Online Application Date	Provider Name	Provider Region	
Pending	06/29/2023	Test Provider	NORTHEAST	<input type="checkbox"/>
Pending	09/18/2023	Test Region Provider	Northeast	<input type="checkbox"/>
Pending	09/20/2023	Test Provider	Northeast	<input type="checkbox"/>

2. The Licensing Specialist will be presented with a pop-up message box for a termination reason selection. Select one of the Online App reasons as appropriate and then Click **OK**
3. The following pop-up message box will display. Click **OK**

Itssbh1.mediware.com says

Provider(s) rejected successfully.

OK

Termination Reason

Other Reason for Termination

OK CANCEL

3 My Dashboard Prospective Applicant Queue

Disposition
Pending
Pending
Pending

Abandoned
Application Denied
Application Submitted
Expansion Denied
Expansion Request Submitted
Further Documentation Required
In Legal
Licensing Application Approved
MWSA Non-Renewal
Non-Renewal
Online App - Applicant refused meeting
Online App - Currently in iConnect
Online App - Duplicate Submission
Online App - Incorrect Agency
Online App - No proposed facility location
Online App - No response to meeting request
Online App - No valid photo ID
Revocation
Termination Approved

4. The record will be changed to have a disposition of "Rejected".

File

Filters

Disposition Equal To Rejected AND

Provider Name Contains AND

Disposition +

Search Reset

2 My Dashboard Prospective Applicant Queue record(s) returned - now viewing 1 through 2

Disposition	Online Application Date	Provider Name	Provider Region	
Rejected	09/24/2023	Test Provider	NORTHEAST	
Rejected	09/13/2023	Prospective Applicant		

5. If finished with the record, Select **File > Close Prospective Applicant Queue**

File

Provider Search and Promote

Reject Provider

Print

Close Prospective Applicant Queue

New Licensed Facility Application

Introduction

The Prospective Applicant will complete the application process by logging in to APD iConnect and updating their Provider record. Additional documentation will need to be provided for review of the application request.

Complete Facility Application Form



The Prospective Applicant will need to complete a new Facility Application. Once complete, they will need to print, sign, initial and notarize the form. They will then scan and save an electronic copy of the notarized form to their device.

1. Set “Role” = Service Provider then click **Go**

Role

Service Provider

GO

2. Navigate to the Prospective Applicant’s Facility home record then click the **Providers > Forms** tab

APD iConnect

File Word Merge

Quick Search: Providers

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts Beds Linked F
Providers Divisions Forms Enrollments Authorizations Notes

Filters: Status Equal To Draft AND

Division +

Search Reset

31 Forms record(s) returned - now viewing 1 through 15

Division	Form Name
APD	Group Home Facility Checklist
APD	Group Home Personnel Record Review
APD	Provider Enrollment Application

3. Click **File > Add Forms**

File Word Merge

Add New Provider Search

Add Forms

Print

4. Select "Please Select Type" as "Facility Application Form" from the drop-down list

File

Test Provider Forms
9/25/2023 6:19 PM

Please Select Type: Facility Application Form (APD 2014-01)

Provider Assessment

Division * APD

Review * Initial

Review Date * 09/25/2023

Approved Date

Worker * Reed, Monica

Status * Pending

Approved By

FACILITY APPLICATION FORM (APD 2014-01)

Instructions: Please ensure that all applicable parts of this form are completed legibly and in their entirety. If you have questions regarding this form or the application process, please contact your area APD office for assistance.

5. Update the following Header fields:
- "Division" = APD
 - "Review" = Initial
 - "Review Date" = Defaults to today's date
 - Complete all fields on the Facility Application Form
 - "Status" = Pending

6. When finished, click **File > Save and Close Forms**

File

Spell Check

Save Forms

Save and Add Another Forms

Save and Close Forms

Copy From Previous

Print

Close Forms

7. Select **Word Merge > Facility Application Form**

File Reports Word Merge

Test Provider Forms
Last Updated by mireed@apdcares.org
at 9/18/2023 6:26:58 PM

Facility Application Form (APD 2014-01)

Provider Assessment

Division * APD

Review * Annual

Review Date * 09/12/2023

Approved Date

Worker * Reed, Monica

Status * Pending

Approved By

FACILITY APPLICATION FORM (APD 2014-01)

8. Select **File > Print** to print the Word Merge



agency for persons with disabilities
State of Florida

FACILITY APPLICATION FORM (APD 2014-01)

Instructions: Please ensure that all applicable parts of this form are completed legibly and in their entirety. If you have questions regarding this form or the application process, please contact your area APD office for assistance.

Indicate in the space below whether this an application for an initial license or an application for renewal of an existing license.

☒ Initial ☐ Renewal



The Prospective Applicant will need to sign, initial and notarize the form. They will then scan and save an electronic copy of the notarized form to their device.

Complete Licensed Capacity Form



The Prospective Applicant will complete the Licensed Capacity form and the QA Workstream Worker will validate the information during the site visit.

1. Set "Role" = Service Provider then click **Go**

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click go.

The screenshot shows the iConnect homepage. At the top, there is a 'File' menu and a 'Quick Search' bar. Below the search bar is a navigation menu with tabs: MY DASHBOARD, CONSUMERS, PROVIDERS, INCIDENTS, CLAIMS, and SCHEDULER. An arrow points to the 'PROVIDERS' tab.

3. Navigate to the Providers > Forms tab

The screenshot shows the 'Providers' page in iConnect. The 'Forms' sub-tab is selected, and an arrow points to it. Below the sub-tabs, there are filters for Status, Division, and Draft, and a table of forms.

Division	Form Name
APD	Group Home Facility Checklist
APD	Group Home Personnel Record Review
APD	Provider Enrollment Application

4. Click File > Add Forms

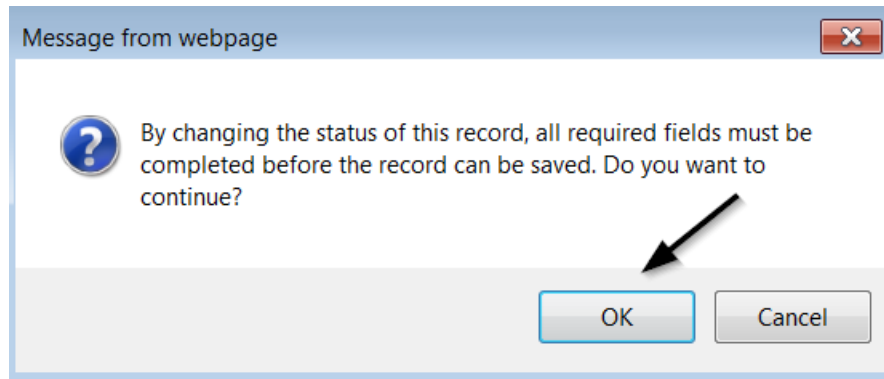
The screenshot shows the 'File' menu with options: Add New Provider Search, Add Forms, and Print. An arrow points to the 'Add Forms' option.

5. Select "Please Select Type" as "Use for after 2014 - Calculation of License Capacity" Form from the drop-down list

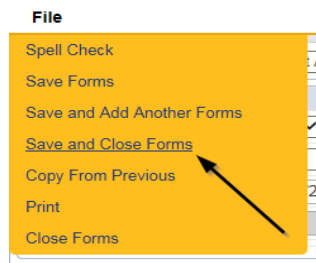
The screenshot shows the 'Provider Assessment' form. The 'Please Select Type' dropdown menu is set to 'Use for after 2014 - Calculation of License Capacity'. An arrow points to the dropdown menu.

Use for after 2014 - CALCULATION OF LICENSED CAPACITY
For New License Applications as of July 1, 2014

6. Update the following Header fields:
 - a. "Division" = APD
 - b. "Review" = Initial
 - c. Complete all fields on the Licensed Capacity Application Form
 - d. "Status" = Pending



7. When finished, click **File > Save and Close Forms**

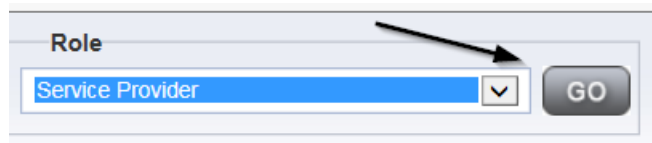


Add Other Qualifying Documentation



The Prospective Applicant will add a note if there are any other qualifying documents that are required.

1. Set "Role" = Service Provider then click **Go**



2. Navigate to the **Providers > Notes** tab

3. Click **File > Add Notes**

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

- a. "Division" = APD
- b. "Note Type" = Initial Application
- c. "Note Subtype" = Select a category below
 - i. *Background Screening (which could be one or more of the following)*
 1. Attestation of Good Moral Character
 2. Background Results
 3. Background Screening
 4. Law Check Form
 5. Level II Background Screening
 - ii. *Business Information (which could be one or more of the following)*
 1. Articles of Incorporation
 2. Financial Ability
 3. Promo Materials
 4. Current Board Members Names/Phone Numbers
 5. Names of all controlling Entities
 - iii. *Facility (which could be one or more of the following)*
 1. Facility Floor Plan
 2. Fire Inspection
 3. Signed Lease
 4. Vehicle Registration/Insurance
 5. Zoning Variance

iv. Personnel Information (which could be one or more of the following)

1. Driver's License
2. Education
3. Operator Experience
4. References
5. Resume
6. SSN

v. Policies and Procedures (which could be one or more of the following)

1. Admin Policies
2. Emergency Mgmt Plan
3. Professional Liability Insurance
4. Sexual Activity Policy

- d. "Description" = Same as subtype
- e. "Note" = Enter notes to include list of documents
- f. "Status" = Complete
- g. Click "Add Attachment" and search for the copy of the document on the user's computer. Click Upload
NOTE: Each attachment can be up to 18mb in size
- h. Click the ellipsis on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 09/25/2023 📅

Note Type * Initial Application ▾*

Note Sub-Type Background Screening ▾*

Description Background Screening

Note

Status * Complete ▾

Date Completed 09/25/2023

Attachments

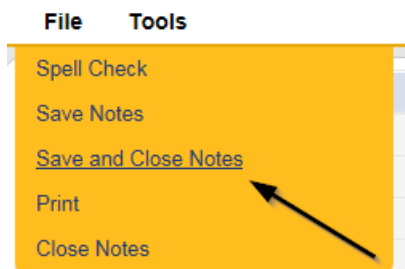
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ... Clear

5. When finished click **File > Save and Close Notes**



Application Submitted Note



The Prospective Applicant will add a note indicating the submittal of the Facility Application Form, Licensed Capacity form and all supporting documentation.

1. Set "Role" = Service Provider then click **Go**

Role

Service Provider

GO

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click go.

File

Quick Search

A Test Provider X Providers Provider Name GO

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER

Filters

3. The Provider's record will display. Navigate to the **Providers > Notes** tab

File Reports

Quick Search

A TEST PROVIDER (10002)

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHE

Workers Services Provider ID Numbers Contracts Ben Linked Providers Aliases Conditions

Providers Divisions Forms Enrollments Authorizations Notes Credentials EVI Scheduling

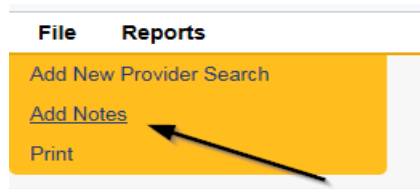
Filters

Note Type Equal To

Note Date +

Search Reset

4. Click **File > Add Notes**

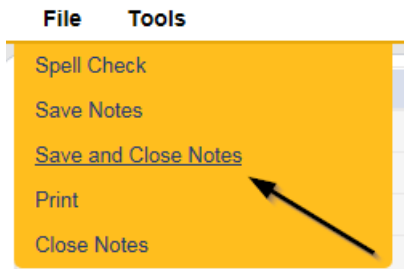


5. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Initial Application
- c. "Note Subtype" = Application Submitted
- d. "Description" = Application Submitted
- e. "Note" = Enter notes
- f. "Status" = Pending
- g. Click the ellipsis on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

A screenshot of a 'Notes Details' form. The form has several fields with arrows pointing to them: 'Division' (set to APD), 'Note By' (set to Reed, Monica), 'Note Date' (set to 09/25/2023), 'Note Type' (set to Initial Application), 'Note Sub-Type' (set to Application Submitted), 'Description' (set to Application Submitted), 'Note' (a large text area), and 'Status' (set to Pending). Below the form is an 'Attachments' section with a link 'Add Attachment'. Below that is a table with columns 'Document' and 'Description', containing the text 'There are no attachments to display'. At the bottom is a 'Note Recipients' section with a text input field, an ellipsis button, and a 'Clear' button. An arrow points to the ellipsis button.

- When finished click **File > Save and Close Notes**



Access Ticklers

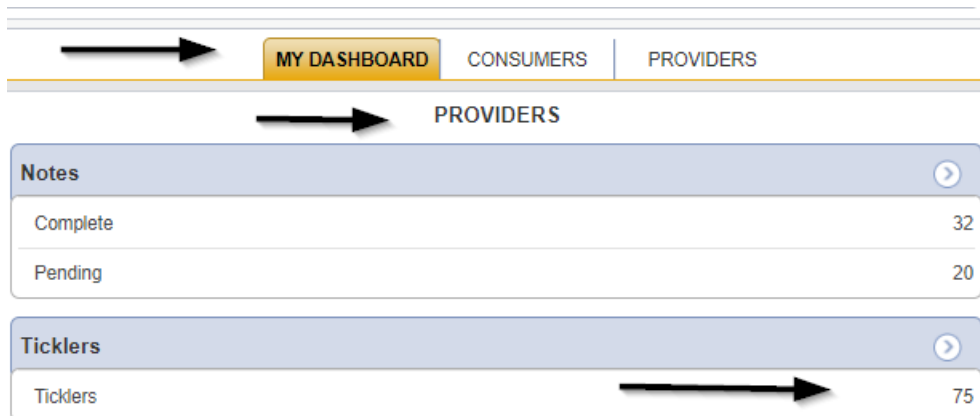


The QA Workstream Worker will login to the application and navigate to the **My Dashboard > Provider > Ticklers** in order to reassign and review any new ticklers.

- Set "Role" = Region QA Workstream Worker then click **Go**.

A screenshot of a web form. It has a label 'Role' above a dropdown menu. The dropdown menu shows 'Region QA Workstream Worker' with a small downward arrow. To the right of the dropdown is a grey button labeled 'GO'. A black arrow points to the 'GO' button.

- Navigate to **My Dashboard > Provider > Ticklers** and click on the hyperlink for the Ticklers



- Change the Sort Order on the Date Created column by clicking the column name once so that the most recent ticklers are displayed first.

Filters

Status

Equal To

New

AND

✕

Status

+

☒ Apply Alert Days Before Due

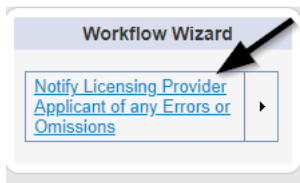
Search

Reset

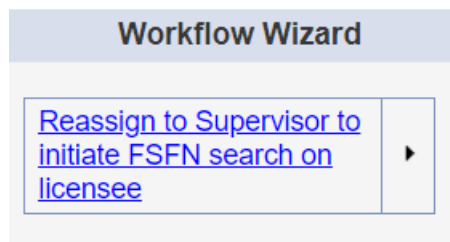
75 My Dashboard Ticklers record(s) returned - now viewing 1 through 15

Tickler Name	Provider Name	Date Created	Date Due	Date Completed	Status
Reassign to Supervisor to initiate FSFN search on licensee	Test Provider	10/18/2023	10/18/2023		New
Notify Licensing Provider Applicant of any Errors or Omissions	Test Provider	09/27/2023	10/27/2023		New

4. When the Initial Application/Application Submitted note was saved, a Workflow Wizard was triggered to remind the QA Workstream Worker to notify the Prospective Applicant of any errors or omissions within 30 calendar days



- a. Tickler – “Notify Licensing Provider Applicant of any errors or omissions”
 - b. Assigned to Monitor 3 (Licensing Specialist)
 - c. Due on the **30th** calendar day from the “Initial Application/Application Submitted” completed note
5. Additionally, a second tickler was triggered that needs to be reassigned to a QA Workstream Lead.



- a. Tickler – “Reassign to Supervisor to Initiate FSFN search on licensee”
 - b. Assigned to the Licensing Specialist (Monitor 3) who will reassign the tickler to the QA Workstream Lead.
 - c. Due immediately.

- Click the tickler flyout menu on the “Reassign to Supervisor to Initiate FSFN search on the licensee” tickler and select Reassign.

75 My Dashboard Ticklers record(s) returned - now viewing 1 through 15

Tickler Name	Provider Name	Date Created	Date Due	Date Completed	Status
Reassign to Supervisor to Initiate FSFN search on licensee	Test Provider	10/18/2023	10/18/2023		New → Reassign
Notify Licensing Provider Applicant of any Errors or Omissions	Test Provider	09/27/2023	10/27/2023		New

- Search for and select the Supervisor. Once the supervisor’s name has been selected, the tickler has been reassigned and will disappear from the QA Workstream Workers tickler list view. The QA Workstream Lead will retrieve the tickler from their My Dashboard > Provider > Ticklers when they log in to the application.

75 My Dashboard Ticklers record(s) returned - now viewing 1 through 15

Tickler Name	Provider Name	Date Created	Date Due
Reassign to Supervisor to Initiate FSFN search on licensee	Test Provider	10/18/2023	10/18/2023
Notify Licensing Provider Applicant of any Errors or Omissions	Test Provider	09/27/2023	10/27/2023
Notify Licensing Provider Applicant of any Errors or Omissions	Test Provider	09/27/2023	10/27/2023
Review Licensing Renewal application for error or omissions	Test Provider	09/26/2023	10/26/2023
Corrective Action Plan is due in 5 days	Test Provider	09/23/2023	10/08/2023
Review Provider Record for Corrective Action Plan - Monthly Monitoring	Test Provider	09/23/2023	10/08/2023

Search by: Last Name Search Text: buck Search Cancel

7 record(s) returned

MEMBERID	Worker	Title	User ID Active
2486	Buck, Jennifer		Yes
1230	Buck, Sarah	Support Coordinator	Yes
15942	Buck, Timothy		Yes
15347	Buckley, Silvia		Yes
21332	BUCKNER, LAVANYA		Yes
21809	Buckner, Shambray		Yes
24156	BUCKNOR, SEAN		Yes

Complete Application



The Licensing Specialist will review the Licensing Application and all notes and attachments. If the application is complete, the Licensing Specialist will update the Facility Application and Licensed Capacity forms to complete, then update the existing pending note.

- Set “Role” = Region QA Workstream Worker then click **Go**.

Role

Region QA Workstream Worker

GO

2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click go.

The screenshot shows the iConnect interface. At the top, there's a 'File' tab and a 'Quick Search' section. The 'Quick Search' section has a text input with 'A Test Provider', a dropdown menu with 'Providers' selected, and a 'GO' button. Below this is a navigation bar with tabs: MY DASHBOARD, CONSUMERS, PROVIDERS (highlighted), INCIDENTS, CLAIMS, and SCHEDULER. An arrow points to the 'PROVIDERS' tab.

3. Navigate to the **Providers > Forms** tab

The screenshot shows the iConnect interface. At the top, there's a 'File' tab and a 'Word Merge' section. The 'Word Merge' section has a 'Quick Search' section with a text input and a dropdown menu. Below this is a navigation bar with tabs: MY DASHBOARD, CONSUMERS, PROVIDERS (highlighted), INCIDENTS. Below the navigation bar, there's a section for 'A TEST Provider (10002)' with a 'Forms' tab selected. An arrow points to the 'Forms' tab.

4. Enter the Search criteria as **Form Name = Use for after 2014 – Calculation of License Capacity** then Click **Search** and select the form via the hyperlink on the record

The screenshot shows the iConnect interface. At the top, there's a 'MY DASHBOARD' tab and a 'CONSUMERS' tab. The 'CONSUMERS' tab is selected. Below this is a navigation bar with tabs: MY DASHBOARD, CONSUMERS, PROVIDERS (highlighted), REPORTS. Below the navigation bar, there's a section for 'Test Provider (21347)' with a 'Forms' tab selected. Below the 'Forms' tab, there's a search criteria section with 'Form Name' set to 'Use for after 2014 – Calculation of License Capacity' and 'Search' button. An arrow points to the 'Search' button.

Division	Form ID	Form Name	Review	Review Date
APD	503	Use for after 2014-Calculation of License Capacity	Initial	09/25/2023

5. Update the Status to **“Complete”** on the Form Header and Click **“OK”** on the popup message box

Use for after 2014-Calculation of License Capacity

Provider Assessment

Division * APD

Review * Initial

Review Date * 09/25/2023

Approved Date 09/25/2023

Worker * Reed, Monica

Status * Complete

Approved By Reed, Monica

Use for after 2014 - CALCULATION OF LICENSED CAPACITY

For New License Applications as of July 1, 2014

Message from webpage

By changing the status of this record, all required fields must be completed before the record can be saved. Do you want to

OK Cancel

6. When finished, Select **File > Save and Close Forms**

File Reports

History

Duplicate Forms

Save Forms

Save and Add Another Forms

Save and Close Forms

7. Enter the Search criteria as **Form Name = Facility Application Form (APD 2014-01)** then Click **Search** and select the form via the hyperlink on the record

MY DASHBOARD CONSUMERS PROVIDERS REPORTS

Test Provider (21347)

Workers Services Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions Facility Management

Providers Divisions EVV Activities **Forms** Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments

Filters

Form Name Equal To Facility Application Form (APD 2014-01) AND

Division

Search Reset

2 Providers Forms record(s) returned - now viewing 1 through 2

Division	Form ID	Form Name	Review	Review Date
APD	504	Facility Application Form (APD 2014-01)	Initial	09/25/2023

8. Update the Status to **“Complete”** on the Form Header and Click **“OK”** on the popup message box

Facility Application Form (APD 2014-01)

Provider Assessment		Worker	
Division *	APD	Worker *	Reed, Monica
Review *	Initial	Status *	Complete
Review Date *	09/25/2023	Approved By	Reed, Monica
Approved Date	09/25/2023		

FACILITY APPLICATION FORM (APD 2014-01)

Message from webpage



By changing the status of this record, all required fields must be completed before the record can be saved. Do you want to



OK

Cancel

9. When finished, Select **File > Save and Close Forms**

File Reports

- History
- Duplicate Forms
- Save Forms
- Save and Add Another Forms
- Save and Close Forms

10. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS **INCIDENTS** **PROVIDERS**

Notes 0 Inquiry Alert Notes List 0 Notes 3

Unread Alert Notes 0 Complete 11

Pending

11. Select the **Note Type = Initial Application** and **Description = Application Submitted** and select the pending record via the hyperlink.

Filters

Status Equal To Pending AND

Note Type +

Search Reset

30 My Dashboard Notes record(s) returned - now viewing 1 through 15

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Initial Application	09/25/2023	Application Submitted	Reed, Monica	Pending

12. In the existing Note record, update the following fields:

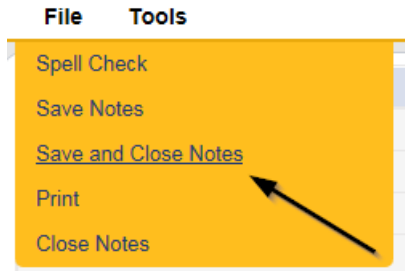
- a. "Division" = APD
- b. "Note Type" = Leave as Initial Application
- c. "Note Subtype" = Update to Application Form Review Complete
- d. "Description" = Update to Application Form Review Complete
- e. "Note" = Enter notes
- f. "Status" = Update to Complete
- g. Click the ellipsis on the "Add Note Recipient" to add the *Prospective Applicant* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	09/25/2023
Associated Form ID#	
Note Type *	Initial Application ▼
Note Sub-Type	Application Form Review Complete ▼
Description	Application Form Review Complete
Note	<div> <div> B <i>I</i> <u>U</u> 16px ▼ A ▼ </div> <div></div> </div>
Status *	Complete ▼
Date Completed	09/25/2023

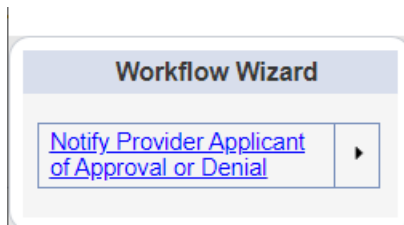
Attachments	
Add Attachment	
Document	Description
There are no attachments to display	

Note Recipients	
Add Note Recipient:	<input type="text"/> ... Clear

13. When finished click **File > Save and Close Notes**.



14. Upon saving the note, a Workflow Wizard triggered the reminder tickler that is due in 90 calendar days



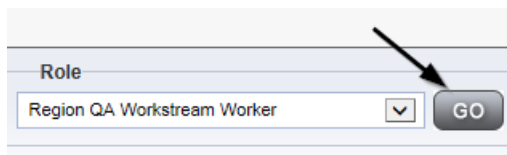
- a. Tickler - "Notify Provider Applicant of Approval or Denial"
- b. Assigned to Self (Licensing Specialist)
- c. Due on the **90th** calendar day from the "Initial Application/Application Form Review Complete" completed note

Schedule Site Visit

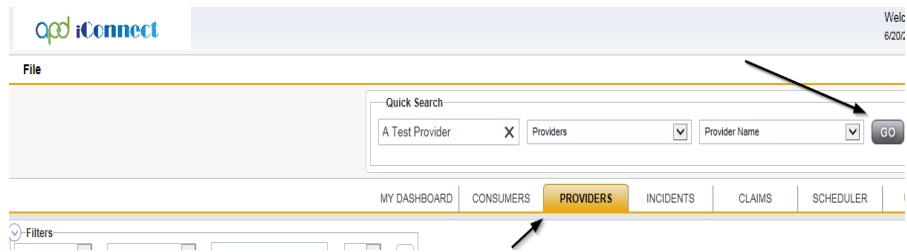


The Licensing Specialist will call the Prospective Applicant to schedule a site visit and then enter the appointment information in iConnect

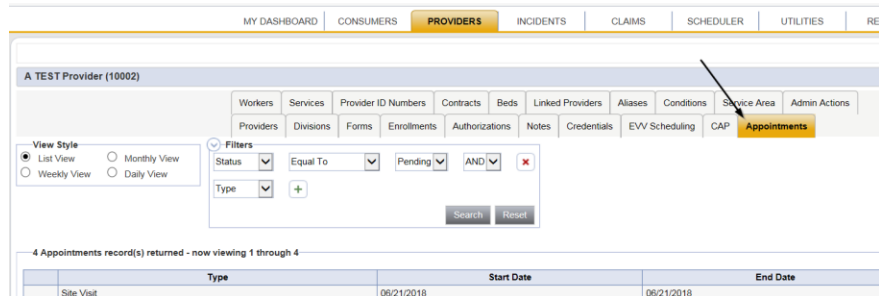
1. Set "Role" = Region QA Workstream Worker then click **Go**.



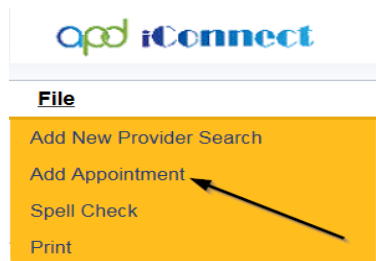
2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click go.



3. The Provider's record will display. Navigate to the **Providers > Appointments** tab.



4. Click **File > Add Appointment**

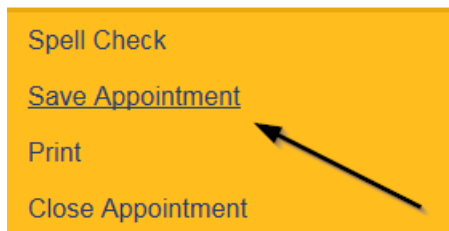


5. Update the following fields on the Appointment Details page
- "Division" = APD
 - "Appointment Date" = Update date
 - "Start Time" = Update time
 - "Appointment End Date" = Update date
 - "End Time" = Update time
 - "Type" = Site Visit
 - "Subject" = Enter subject description
 - "Appt Summary" = Enter summary
 - "Appt Details" = Enter details
 - "Status" = Scheduled

Appointments	
Division	APD ▼
Appointment Date *	09/25/2023
Start Time	11 ▼ 00 ▼ AM ▼
Appointment End Date	09/25/2023
End Time	11 ▼ 30 ▼ AM ▼
Type *	Site Visit ▼
Subject	
Status *	Scheduled ▼

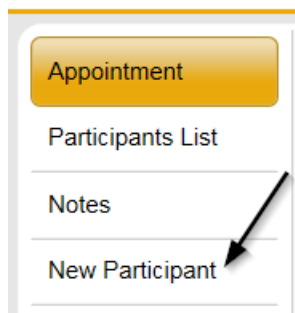
6. When finished select **File > Save Appointment**

File

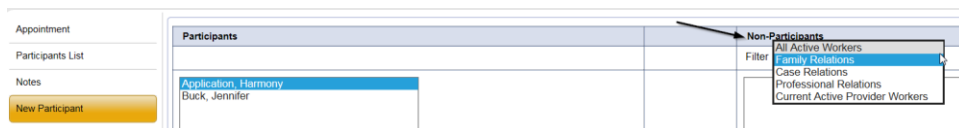


7. Click **New Participant** on the left-hand navigation menu

File



8. Set the **Non-Participants filter** list to the appropriate value in order to select the appointment participants



9. Select the appropriate Licensing Specialist and Service Provider Worker names by holding the control key down and clicking on the names and then **Click < Add**

Non-Participants	
	Filter <input type="text" value="Current Active Provider Workers"/>
	<div> <div>Application, Harmony</div> <div>Buck, Jennifer</div> <div>Provider, Service</div> <div>Reed, Monica</div> <div>ReferralMgr, Osa</div> <div>Ritchie, Lesli</div> <div>Tarzwell, Dawn</div> <div>Tierney, Jacqueline</div> <div>Vogeler, Mandi</div> <div>Worker1, Elizabeth</div> </div>
<div>< Add</div> <div><< Add All</div> <div>Remove ></div> <div>Remove All >></div>	

10. When finished, Select **File > Save and Close New Participant**

File

Save

Save and Close New Participant

Print

Close New Participant

As Needed: Reschedule Site Visit Appointment



If the site visit was scheduled and needs to be done on a different date/time, the QA Workstream Worker will need to reschedule the existing appointment. This will ensure the appointment information is accurate for reporting.

1. Set "Role" = Region QA Workstream Worker then click **Go**.

Role	<input type="text" value="Region QA Workstream Worker"/> <input type="button" value="GO"/>
------	--

2. Navigate to the **Providers** chapter and enter the Provider's Licensed Facility home name in the Quick Search filter and click go.


3. The Provider's record will display. Navigate to the **Providers > Appointments** tab.

Type	Start Date	End Date
Site Visit	06/21/2018	06/21/2018

4. Select the appointment record that needs to be updated via the hyperlink in the list view

Appointment Date	Start Time	End Time	Type	Subject	Status
06/01/2022	3:00:00 PM	4:00:00 PM	Site Visit	Appointment Scheduled for monthly site visit	Scheduled
01/20/2022	9:00:00 PM	6:00:00 PM	Site Visit	Monthly visit	Scheduled
06/02/2020	10:20:00 AM	10:50:00 PM	General	test	Scheduled
07/06/2018	3:15:00 PM	3:45:00 PM	Site Visit	Site Visit Licensure Renewal	Scheduled

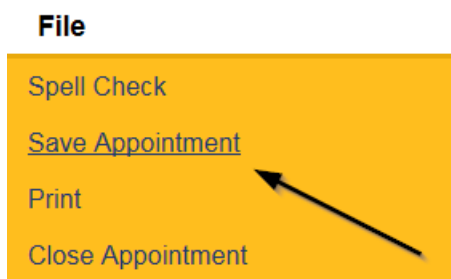
5. Update the following field on the Appointment Details page
 - a. "Status" = Update to Rescheduled


A Test Provider
Last Updated by mreed@apdcanes.org
at 6/9/2022 5:14:27 PM
Appointment

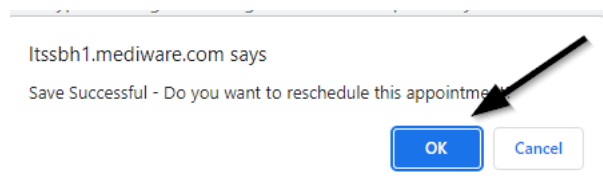
File

Appointment	Appointments	
Participants List	Division	APD
Notes	Appointment Date *	01/20/2022
New Participant	Start Time	05:00 PM
	Appointment End Date	01/20/2022
	End Time	06:00 PM
	Type *	Site Visit
	Subject	Monthly visit
	Appt. Summary (non-HIPAA Data)	summary
	Appt. Details (HIPAA Data)	details
	Status *	Rescheduled

6. When finished select **File > Save Appointment**



7. A prompt will appear that asks, “Do you want to reschedule this appointment?”



8. Click OK to reschedule the appointment. The appointment page opens, showing some data from the previous appointment.

9. Update the Appointment date and time information for the new appointment.

10. Update the status from Pending to Scheduled, if appropriate.

File

Appointment

Participants List

Notes

New Participant

Appointments

Division APD

Appointment Date * 08/24/2023 07/19/2023

Start Time 03:00 PM

Appointment End Date 08/24/2023 07/19/2023

End Time 04:00 PM

Type * Site Visit

Subject Site Visit for Service Level Designation
Had to reschedule due to conflict with appointment time

Appt. Summary (non-HIPAA Data)

Appt. Details(HIPAA Data)

Status * Scheduled

11. Click **File > Save Appointment**. Both the original and reschedule appointments are listed in the Appointments tab detail view.

12. The rescheduled appointments detail page will now show the date of the original appointment next to the new Appointment Date and Appointment End date fields.

apd iConnect

A Test Provider
Last Updated by mreed@apdcares.org
at 6/23/2022 4:20:58 PM

Appointment

File

Appointment

Participants List

Notes

New Participant

Appointments

Division APD

Appointment Date * 06/24/2022 01/20/2022

Start Time 02:00 PM

Appointment End Date 06/24/2022 01/20/2022

End Time 03:15 PM

Type * Site Visit

Subject had to reschedule to to conflict with appointment time

Appt. Summary (non-HIPAA Data) summary

Appt. Details(HIPAA Data) details

Status * Pending

Complete Site Visit



The Licensing Specialist can print out the applicable checklists prior to the site visit if they do not have a laptop/tablet. If they have a laptop/tablet, the forms can be completed in iConnect while conducting the site visit.

The list of applicable checklists are as follows:

Foster Care Facility Checklist

Foster Care Facility Client Checklist

Foster Care Facility Personnel Record Review

Group Home Client Checklist

Group Home Facility Checklist
Group Home Personnel Record Review
Res. Hab. Center Checklist
Res. Hab. Client Checklist
Res. Hab. Personnel Record Review

Complete Appointment



The QA Workstream Worker will update the appointment in APD iConnect after the site visit is completed.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click go.

3. The Provider’s record will display. Navigate to the **Providers > Appointments** tab.

Appointment Date	Start Time	End Time	Type	Subject	Status
09/14/2023	2:00:00 PM	3:00:00 PM	Site Visit	Description of Site Visit	Scheduled

4. Select the appointment record that needs to be updated via the hyperlink in the list view

A Test Provider (18830)

Workers Services Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions
Providers Divisions EVV Activities Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP **Appointments**

View Style: ☒ List View ☐ Monthly View ☐ Weekly View ☐ Daily View

Filters: Appointment Date [v] +
Search Reset

4 Appointments record(s) returned - now viewing 1 through 4

Appointment Date	Start Time	End Time	Type	Subject	Status
06/01/2022	3:00:00 PM	4:00:00 PM	Site Visit	Appointment Scheduled for monthly site visit	Scheduled
01/20/2022	5:00:00 PM	6:00:00 PM	Site Visit	Monthly visit	Scheduled
06/02/2020	10:20:00 AM	10:50:00 PM	General	test	Scheduled
07/06/2018	3:15:00 PM	3:45:00 PM	Site Visit	Site Visit Licensure Renewal	Scheduled

5. Update the following field on the Appointment Details page

a. "Status" =

- Update to Completed if the site visit was completed.
- Update to Cancelled if the site visit was cancelled but not rescheduled.
- Update to No Show if the Licensing Specialist attempted to make the site visit but the contact person was not available. A new site visit will need to be scheduled.

apd iConnect

Test Provider: Last Updated by shelia.mott@apdcares.org at 5/2/2023 1:41:36 PM

Appointment

File

Appointment

Participants List

New Participant

Appointments

Division: APD

Appointment Date: 06/05/2023

Start Time: 01:00 PM

Appointment End Date: 06/05/2023

End Time: 03:00 PM

Type: Site Visit

Subject:

Status: Scheduled

Cancelled
Completed
No Show
Pending
Scheduled
Rescheduled

6. When finished select **File > Save Appointment**

File

Spell Check

Save Appointment

Print

Close Appointment

7. From the **File** menu, select **Close Appointment**.

Complete Checklists



If the site visit checklists were documented manually, the Licensing Specialist will need to enter the checklists into iConnect.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role
Region QA Workstream Worker [v] GO

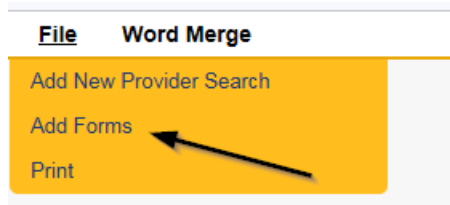
2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click **Go**.

iConnect
File
Quick Search
A Test Provider X Providers [v] Provider Name [v] GO
MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER
Filters

3. The Provider’s record will display. Navigate to the **Providers > Forms** tab

iConnect
File Word Merge
Quick Search
MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS
A TEST Provider (10002)
Workers Services Provider ID Numbers Contracts Beds Linked F
Providers Divisions Forms Enrollments Authorizations Notes
Filters
Status [v] Equal To [v] Draft [v] AND [v] X
Division [v] +
Search Reset
31 Forms record(s) returned - now viewing 1 through 15
Table with 2 columns: Division, Form Name
Table content:
APD	Group Home Facility Checklist
APD	Group Home Personnel Record Review
APD	Provider Enrollment Application

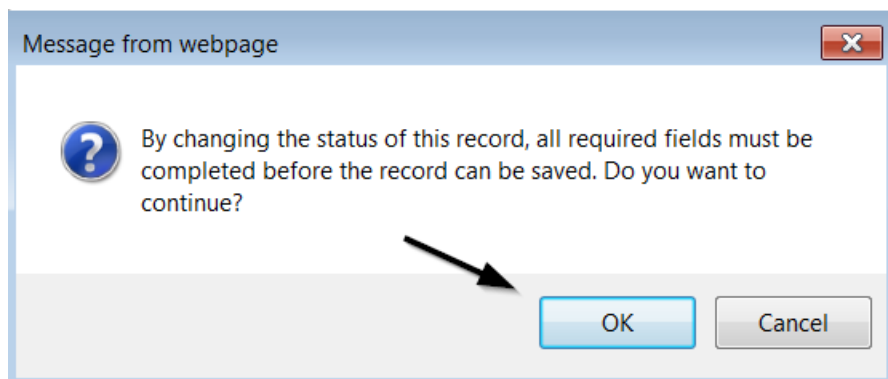
4. Click **File > Add Forms**



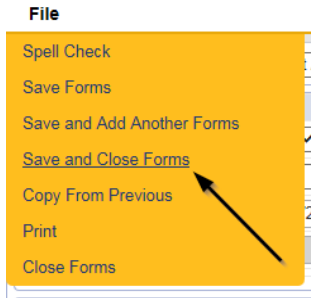
5. Select the appropriate checklist from the drop-down list

6. Update the following Header fields:

- "Division" = APD
- "Review" = select as appropriate
- Complete all fields on the Checklist Form
- "Status" = Complete (only set to complete once all information has been entered and won't need to be changed)
- Select **OK** on the pop-up message box confirming the complete status



f. When finished, click **File > Save and Close Forms**



Repeat all steps as necessary for each checklist

Complete Application Package Checklist



The Licensing Specialist will generate the Application Package Checklist and proceed with the Approval Process.

1. Set "Role" = Region QA Workstream Worker then click **Go**.

 A screenshot of a web form. It shows a 'Role' dropdown menu with 'Region QA Workstream Worker' selected. To the right of the dropdown is a grey button labeled 'GO'. An arrow points to the 'GO' button.

2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click **GO**

 A screenshot of the iConnect application interface. The top navigation bar shows 'iConnect' and a user profile. Below it, a 'File' menu is visible. The main content area has a 'Quick Search' filter with a text input containing 'A Test Provider', a dropdown menu set to 'Providers', and a 'Provider Name' dropdown. A 'GO' button is to the right. Below the search bar is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (highlighted), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. An arrow points to the 'GO' button, and another arrow points to the 'PROVIDERS' tab.

3. Navigate to the **Providers > Forms** tab

File Word Merge

Quick Search

Providers

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts Beds Linked F

Providers Divisions **Forms** Enrollments Authorizations Notes

Filters

Status Equal To Draft AND

Division

Search Reset

31 Forms record(s) returned - now viewing 1 through 15

Division	Form Name
APD	Group Home Facility Checklist
APD	Group Home Personnel Record Review
APD	Provider Enrollment Application

4. Click **File > Add Forms**

File Word Merge

Add New Provider Search

Add Forms

Print

5. Select "Please Select Type" as "Application Package Checklist" from the drop-down list

Please Select Type: Application Package Checklist

Provider Assessment

Division * APD

Worker * Reed, Monica

Review * Initial

Status * Complete

Review Date * 09/25/2023

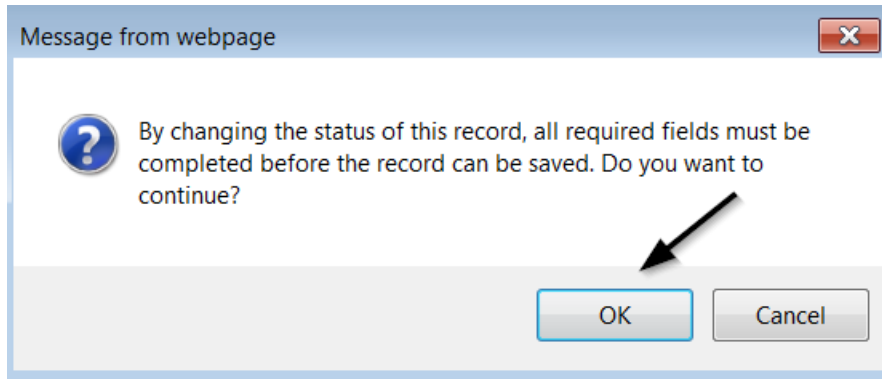
Approved By Reed, Monica

Approved Date 09/25/2023

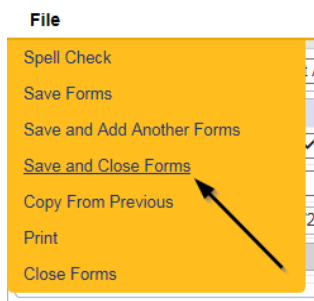
Application Package Checklist

6. Update the following Header fields:

- "Division" = APD
- "Review" = Initial
- Complete all fields on the Application Package Checklist Form
- "Status" = Complete (click **OK** on the pop-up message)



7. When finished, click **File > Save and Close Forms**

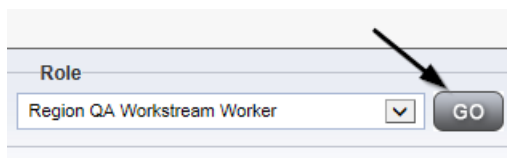


Site Visit No Violations Note

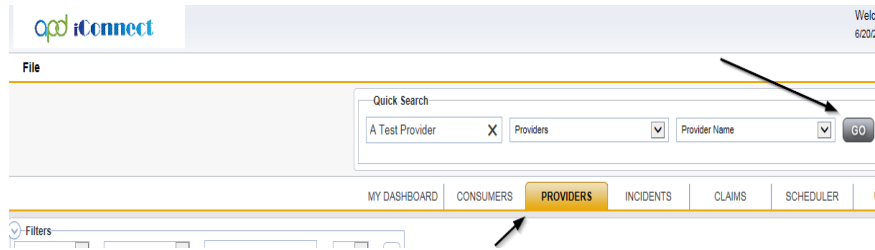


The Licensing Specialist will enter a Site Visit Note when the site visit is complete with no issues or deficiencies. Proceed to [Site Visit Complete Note – Issues](#) if violations have been identified.

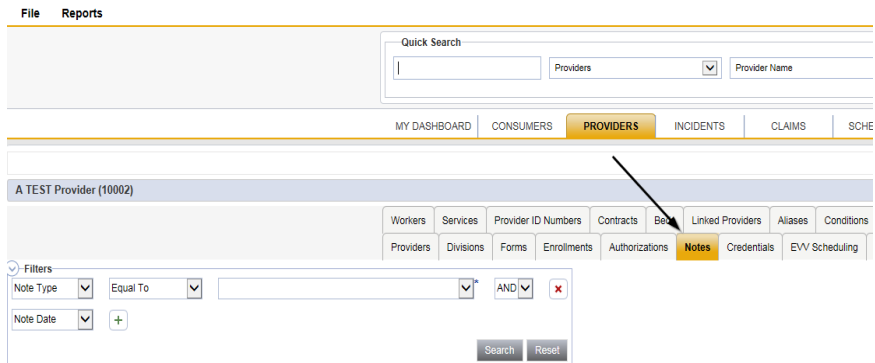
1. Set “Role” = Region QA Workstream Worker then click **Go**.



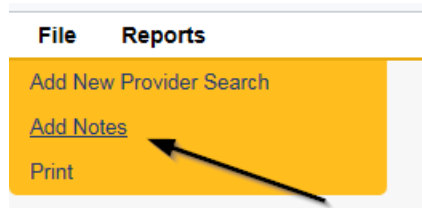
2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click **GO**



3. The Provider's record will display. Navigate to the **Providers > Notes** tab



4. Click **File > Add Notes**



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

- "Division" = APD
- "Note Type" = Initial Application
- "Note Subtype" = Site Visit Complete with no issues or deficiencies
- "Description" = Site Visit Complete with no issues or deficiencies
- "Note" = Enter notes
- "Status" = Complete
- Click the ellipsis on the "Add Note Recipient" to add the *Prospective Applicant* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 09/25/2023

Associated Form ID#

Note Type * Initial Application

Note Sub-Type * Site Visit Complete with no issues or deficiencies

Description Site Visit Complete with no issues or deficiencies

Note

Status * Complete

Date Completed 09/25/2023

Attachments

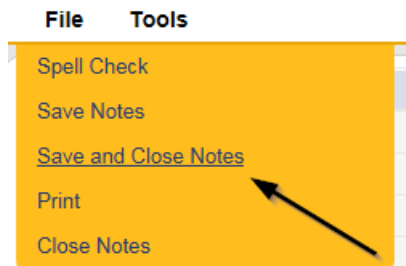
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ...

6. When finished click **File > Save and Close Notes**



Supervisor Review



The Licensing Specialist will send a note to the Licensing Supervisor to advise them to do a review of the checklists and any other documentation.

1. Set "Role" = Region QA Workstream Worker then click **Go**.

Role

Region QA Workstream Worker

2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click **GO**

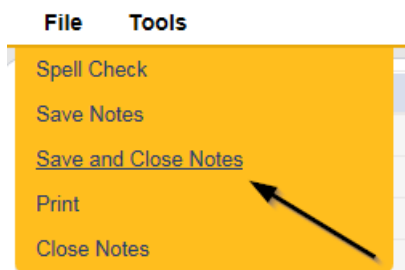
3. The Provider's record will display. Navigate to the **Providers > Notes** tab

4. Click **File > Add Notes**

5. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Initial Application/Supervisor Review
 - c. "Description" = Enter description if applicable
 - d. "Note" = Enter notes
 - e. "Status" = Pending
 - f. Click the ellipsis on the "Add Note Recipient" to add the *Licensing Supervisor* as the Note Recipient
 - g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	09/25/2023
Associated Form ID#	<input type="text"/>
Note Type *	Initial Application/Supervisor Review ▼
Note Sub-Type	▼
Description	<input type="text"/>
Note	<div> <div> B <i>I</i> <u>U</u> 16px ▼ A </div> <div></div> </div>
Status *	Pending ▼
Date Completed	<input type="text"/>
Attachments	
Add Attachment	
Document	Description
There are no attachments to display	
Note Recipients	
Add Note Recipient:	<input type="text"/> ... Clear

6. When finished click **File > Save and Close Notes**



Supervisor Approval



The Licensing Supervisor will review the application, add a note for the approval and send to the ROM for review. If additional actions are needed, proceed to [Further Documentation Required](#) or [Supervisor Denial](#).

1. Set "Role" = Region QA Workstream Worker/Lead then click **Go**.

Role

Region QA Workstream Lead

GO

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Notes 0

Inquiry Alert Notes List 0

Unread Alert Notes 0

Notes 3

Pending 11

3. Select the **Note Type = Initial Application/Supervisor Review** and select the pending record via the hyperlink.

Filters

Status Equal To Pending AND X

NoteType +

Search Reset

30 My Dashboard Notes record(s) returned - now viewing 1 through 15

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Initial Application/Supervisor Review	09/25/2023		Reed, Monica	Pending

4. In the existing Note record, update the following fields:
 - a. "Associated Form ID#" = Enter Form ID# if applicable
 - b. "Note Type" = Update to Initial Application/Supervisor Approval
 - c. "Description" = Enter description
 - d. "Note" = Enter Notes
 - e. "Status" = Update to Complete
 - f. Click the ellipsis on the "Add Note Recipient" to add the **Licensing Specialist** as the Note Recipient
 - g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.
 - h. Click the ellipsis on the "Add Note Recipient" to add the **ROM** as the Note Recipient
 - i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.

Notes Details

Division *	APD ▼
Note By *	Reed, Monica
Note Date *	09/25/2023
Associated Form ID#	
Note Type *	Initial Application/Supervisor Approval ▼*
Note Sub-Type	▼*
Description	

Note

New Text

B I U 16px A ▼

Enter approval notes

Append Text to Note

Status *	Complete ▼
Date Completed	09/25/2023

Attachments

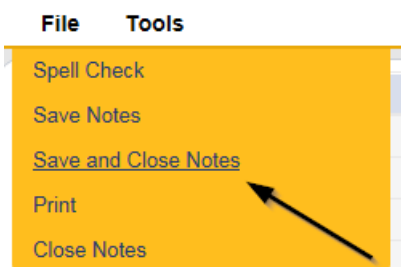
[Add Attachment](#)

Document	Description
There are no attachments to display	

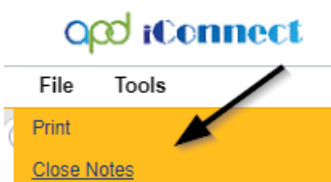
Note Recipients

Add Note Recipient: ... Clear

5. When finished click **File > Save and Close Notes**



6. Select **File > Close Notes**



Add License Information



The Licensing Specialist will be notified of the Supervisor Approval from the Initial Application/Supervisor Approval note on My Dashboard > Provider > Notes. This note serves as notification to add the license information to the provider record. The license information needs to be added before the ROM Review begins.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role
Region QA Workstream Worker [v] GO

2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **Go**.

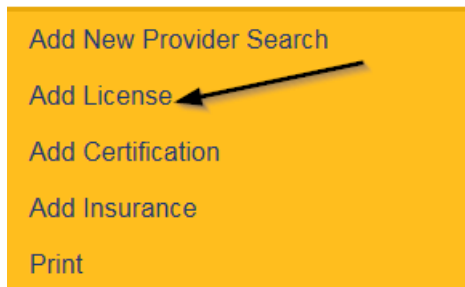
iConnect Welc 6/29/2020
File
Quick Search
A Test Provider X Providers Provider Name GO
MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER
Filters

3. The Provider’s record will display. Navigate to the **Providers > Credentials** tab

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS
A TEST Provider (10002)
Workers Services Provider ID Numbers Contracts Beds Linked Providers Aliases
Providers Divisions Forms Enrollments Authorizations Notes CREDENTIALS EVV

4. Select **File > Add License**

File Word Merge

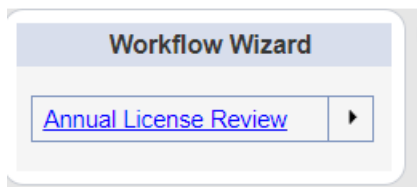


5. Update the following fields:

- a. "License Type" = select as appropriate
 - i. Foster Home
 - ii. Group Home
 - iii. Residential Habilitation Center
- b. License Number = Enter information – *Please note that each region has their own system for assigning license numbers*
- c. "Original Date of Issuance" = Enter Date
- d. "Effective Date" = Enter Date
- e. "Expiration Date" = Enter Date
- f. "Comment" = Enter comments if applicable
- g. "Status" = Active
- h. "Reason" = Initial
- i. "QA Workstream Worker" = Click ellipsis on the field to add the *Licensing Specialist*.
- j. Enter the Last Name and Click Search and then select the Name

License Details	
Credential Type *	License
License Type *	Foster Home
License Number *	FH123456
Original Date of Issuance *	09/01/2023
Date of Renewal/Subsequent License	
Effective Date *	09/01/2023
Expiration Date *	09/30/2024
Less than One Year	<input type="checkbox"/>
Comment	
Status	Active
Reason	Initial
QA Workstream Worker	Reed, Monica

6. When finished, click **File > Save and Close License Details**
7. Upon saving the license record, a Workflow Wizard triggered the reminder tickler that is due in 365 calendar days. It will be retrieved from My Dashboard > Provider > Ticklers.



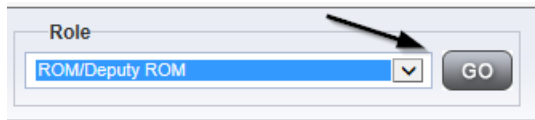
- a. Tickler - "Annual License Review"
- b. Assigned to Self
- c. Due on the **90th** calendar day before the License expiration date for license types of Foster Home, Group Home, Residential Habilitation Center

ROM Review



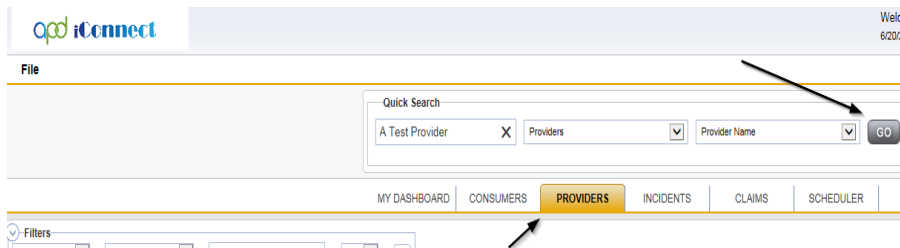
The ROM/Designee will receive notification of the Supervisor Approval or the Supervisor Denial via a note on My Dashboard. The ROM will need to review all checklists and notes. If approving, they will then print out the License Certificate. The Licensing Specialist will have added the license information to the provider record before the ROM prints the License Certificate.

1. Set “Role” = ROM/Deputy ROM then click **Go**.



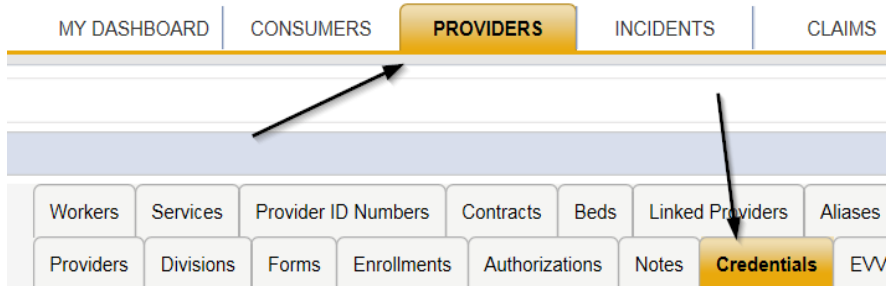
A screenshot of a web form with a label "Role". Below the label is a dropdown menu showing "ROM/Deputy ROM" with a downward arrow icon. To the right of the dropdown is a grey button labeled "GO". An arrow points from the text "ROM/Deputy ROM" in the instructions to the dropdown menu.

2. Navigate to the **Providers** chapter and enter the Provider’s Facility home name in the Quick Search filter and click **Go**.



A screenshot of the QoD Connect web application. The top navigation bar includes the "QoD Connect" logo and a "Welcome" message. Below the logo is a "File" section. The main content area features a "Quick Search" filter with a text input containing "A Test Provider", a dropdown menu set to "Providers", and a "Provider Name" dropdown. A "GO" button is to the right. Below the search bar is a horizontal menu with tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULER". The "PROVIDERS" tab is highlighted. An arrow points from the text "Providers" in the instructions to the "PROVIDERS" tab.


3. The Provider’s record will display. Navigate to the **Providers > Credentials** tab



A screenshot of a provider's record page. The top navigation bar includes tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", and "CLAIMS". The "PROVIDERS" tab is highlighted. Below the tabs is a grid of buttons for various provider information: "Workers", "Services", "Provider ID Numbers", "Contracts", "Beds", "Linked Providers", "Aliases", "Providers", "Divisions", "Forms", "Enrollments", "Authorizations", "Notes", "Credentials", and "EVS". The "Credentials" button is highlighted. An arrow points from the text "Providers > Credentials" in the instructions to the "Credentials" button.

4. Select **Word Merge > License Certificate Automated**

Word Merge



A screenshot of a "Word Merge" document selection screen. It displays a list of documents: "Confirm BF.IB Designation Attachment L", "Cover Letter with Certificate of Service", "License Certificate Automated", and "Provider Status BF.IB Attachment M". The "License Certificate Automated" document is highlighted. An arrow points from the text "License Certificate Automated" in the instructions to the highlighted document.

5. Select **Open Document** to open the Word Merge document for editing and complete the

File

Generate Merge Document

Click the "Open Document" button to open the Merge Document for editing.

Open Document

6. Save the Word Merge Document to the device by clicking the **Save** button and then **Open**

apd
agency for persons with disabilities
State of Florida

CERTIFICATE OF LICENSE

Ron DeSantis
Governor

Taylor Hatch
Director

State Office
4030 Esplanade Way
Suite 380
Tallahassee, FL 32399-0950

Northwest Region
4030 Esplanade Way
Suite 280
Tallahassee, FL 32399-2949

License No. 586974

Date of Issue: 9/1/2024 12:00:00 AM

Expiration Date*: 9/30/2024 12:00:00 AM

Agency for Persons with Disabilities
Maximum Resident Capacity:
Facility Type: Group Home

Licensee: Test Provider

The WM_P249_License-Certificate-Automated_ADA.v4.docx download has completed.

Open Open folder View downloads

7. **Edit** the Word Merge Document as necessary
8. When finished, Click **File > Print** to print the updated Word Merge and then **File > Save, File > Close**
9. Select **File > Close** to close the Word Merge in APD iConnect

File

Print

Close



The ROM/Designee will then sign, scan and save the License Certificate to their device.

ROM Approval



The ROM will attach the hardcopy of the License Certificate into a new note. If additional actions are needed proceed to [Further Documentation Required](#) or [ROM Denial](#).

NOTE: An electronic signature will not be accepted on the License Certificate. The ROM will need to sign the hard copy and send it via interoffice mail to the Licensing Specialist.

1. Set “Role” = ROM/Deputy ROM then click **Go**

A screenshot of a web form. It features a dropdown menu labeled 'Role' with 'ROM/Deputy ROM' selected. To the right of the dropdown is a 'GO' button. An arrow points to the dropdown menu.

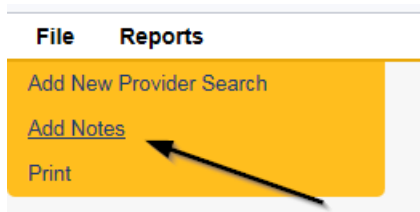
2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click **Go**.

A screenshot of the 'Providers' chapter interface. At the top, there is a 'Quick Search' filter with a text input containing 'A Test Provider', a dropdown menu set to 'Providers', and a 'GO' button. Below this is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (highlighted), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. An arrow points to the 'GO' button, and another arrow points to the 'PROVIDERS' tab.

3. The Provider’s record will display. Navigate to the **Providers > Notes** tab

A screenshot of the Provider's record page for 'A TEST Provider (10002)'. The page has a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (highlighted), 'INCIDENTS', 'CLAIMS', and 'SCHE'. Below this is a sub-navigation bar with tabs: 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Boards', 'Linked Providers', 'Aliases', 'Conditions', 'Providers', 'Divisions', 'Forms', 'Enrollments', 'Authorizations', 'Notes' (highlighted), 'Credentials', and 'EVV Scheduling'. An arrow points to the 'Notes' tab. Below the tabs is a 'Filters' section with dropdown menus for 'Note Type' and 'Note Date', and a 'Search' button.

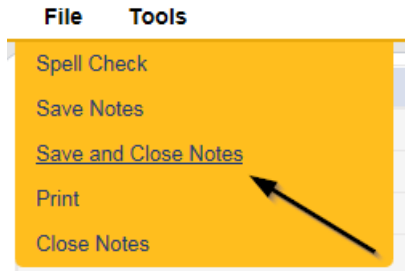
4. Click **File > Add Notes**



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

- a. "Division" = APD
- b. "Associated Form ID#" – Enter Form ID if applicable
- c. "Note Type" = Initial Application/ROM Approval
- d. "Description" = Initial Application/ROM Approval
- e. "Note" = Enter notes
- f. "Status" = Complete
- g. Click "Add Attachment" and search for the copy of the signed License Certificate on the user's device. Click Upload
- h. Click the ellipsis on the "Add Note Recipient" to add the [Licensing Specialist](#) as the Note Recipient
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

6. When finished click **File > Save and Close Notes**



Signed License Certificate Note



The Licensing Specialist will receive notification of the ROM Approval note on My Dashboard. They will also receive the signed hard copy of the License Certificate from the ROM/Designee. They will then generate and print the Cover Letter and add a new note to advise the Service Provider and Agency Clerk.

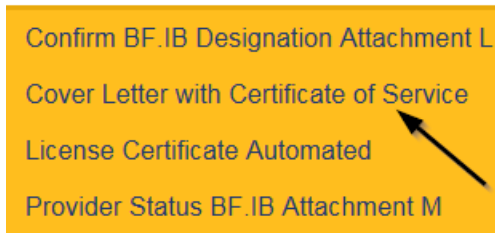
1. Set "Role" = Region QA Workstream Worker then click **Go**.

2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click **Go**.

3. The Provider's record will display. Navigate to the **Providers > Credentials** tab

4. Select **Word Merge > Cover Letter with Certificate of Service**

Word Merge



5. When finished, Click **File > Print** to print the updated Word Merge and then **File > Save, File > Close**
6. In APD iConnect, Click **Upload and Save to Note** after saving the word document
7. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Associated Form ID#" = Enter Form ID# if applicable
 - c. "Note Type" = Initial Application
 - d. "Note Subtype" = Signed License Certificate
 - e. "Description" = Signed License Certificate
 - f. "Note" = Enter notes
 - g. "Status" = Complete
 - h. Click "Add Attachment" and search for the copy of the signed License Certificate and the Cover Letter on the user's device. Click Upload
 - i. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note
 - k. Click the ellipsis on the "Add Note Recipient" to add the *Agency Clerk* as the Note Recipient
 - l. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	09/25/2023
Associated Form ID#	
Note Type *	Initial Application ▼*
Note Sub-Type	Signed License Certificate ▼*
Description	Signed License Certificate
Note	<div> <div>B I U 16px A</div> <div></div> </div>
Status *	Complete ▼
Date Completed	09/25/2023

Attachments

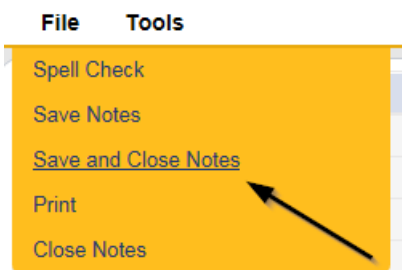
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ...

8. When finished click **File > Save and Close Notes**



The Licensing Specialist will then mail the hardcopy signed Original License Certificate along with the Cover Letter to the Service Provider.

As Needed: Site Visit Violations Note



The Licensing Specialist will enter a Facility Site Visit Note when the site visit is complete with issues or deficiencies.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role
Region QA Workstream Worker [v] GO

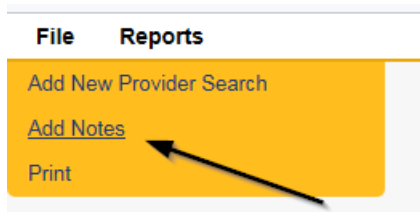
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **GO**

iConnect Welc 6/20/2020
File
Quick Search
A Test Provider X Providers [v] Provider Name [v] GO
MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER
Filters

3. The Provider’s record will display. Navigate to the **Providers > Notes** tab

File Reports
Quick Search
Providers [v] Provider Name
MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHE
A TEST Provider (10002)
Workers Services Provider ID Numbers Contracts Benefits Linked Providers Aliases Conditions
Providers Divisions Forms Enrollments Authorizations Notes Credentials EVV Scheduling
Filters
Note Type [v] Equal To [v] [v] AND [v] X
Note Date [v] +
Search Reset

4. Click **File > Add Notes**

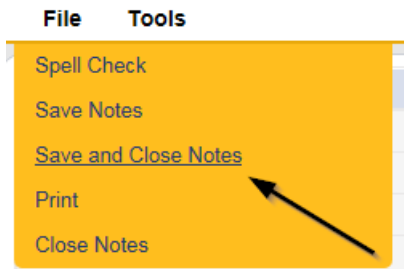


5. In the new Note record, update the following fields:

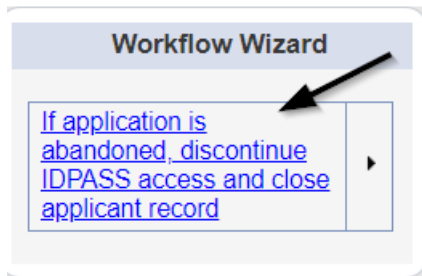
- "Note Type" = Initial Application
- "Note Subtype" = Site Visit Complete with issues or deficiencies
- "Description" = Site Visit Complete with issues or deficiencies
- "Note" = Enter notes for all deficiencies/issues
- "Status" = Pending
- Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	10/19/2023
Associated Form ID#	352
Note Type *	Initial Application ▼
Note Sub-Type	Site Visit Complete with issues or deficiencies ▼
Description	Site Visit Complete with issues or deficiencies
Note	<div> <div>B I U 16px A</div> <div></div> </div>
Status *	Pending ▼
Date Completed	
Attachments	
Add Attachment	
Document	Description
There are no attachments to display	
Note Recipients	
Add Note Recipient:	<input type="text"/> <input type="button" value="Clear"/>

6. When finished click **File > Save and Close Notes**



7. Upon saving the initial application record, a Workflow Wizards is triggered



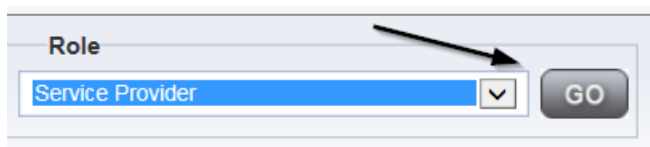
- a. Tickler - "If application is abandoned, discontinue ID PASS access and close applicant record"
- b. Assigned to *Self*
- c. Due in 120 calendar days

As Needed: Corrective Actions Update



The Service Provider will update the existing note to advise the Licensing Specialist (Region QA Workstream Worker) of the corrective actions taken for the unmet items. This process will be repeated until all items and documentation have been updated.

1. Set "Role" = Service Provider then click **Go**



2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD	CONSUMERS	PROVIDERS	INCIDENTS	CLAIMS	SCHEDULE
CONSUMERS	INCIDENTS		PROVIDERS		
Notes	Inquiry Alert Notes List		Notes		
0	Unread Alert Notes		Complete		
			Pending		
			3		
			11		

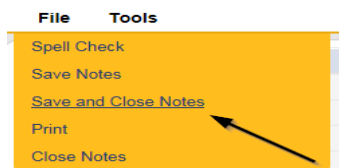
3. Select the **Note Type = Initial Application** with a **Description = Site Visit Complete with issues or deficiencies** and select the pending record via the hyperlink.

Filters							
Status	Equal To	Pending	AND				
Status	+						
Search Reset							
22 My Dashboard Notes record(s) returned - now viewing 1 through 15							
Provider	Note Type	Note Date	Description	Author	Status		
Test Provider	Initial Application	10/22/2023	Site Visit Complete with issues or deficiencies	Raeed, Monica	Pending		

4. In the existing Note record, update the following fields:
 - a. "Append Text to Note" = Enter notes with corrective action for Unmet items
 - b. "Status" = Leave as Pending
 - c. Click "Add Attachment" and search for the copy of supporting documents on the user's device (if applicable). Click Upload
 - d. Click the ellipsis on the "Add Note Recipient" to add the [Licensing Specialist\(Region QA Workstream Worker\)](#) as the Note Recipient
 - e. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica
Note Date *	10/22/2023
Note Type *	Initial Application ▼*
Note Sub-Type	Site Visit Complete with issues or deficiencies ▼*
Description	Site Visit Complete with issues or deficiencies
<div> <div> <div>Note</div> <div> <div>New Text</div> <div> <div> <div>B</div> <div>I</div> <div>U</div> <div>10pt</div> <div>A ▼</div> </div> <div>Enter notes with corrective action for Unmet <u>items</u></div> <div> </div> </div> <div>Append Text to Note</div> </div> </div> </div>	
Status *	Pending ▼
Date Completed	
<div>Attachments</div> <div> Add Attachment </div>	
Document	Description
There are no attachments to display	
<div>Note Recipients</div> <div> Add Note Recipient: <input type="text"/> ... <input type="button" value="Clear"/> </div>	

5. When finished click **File > Save and Close Notes**





The Licensing Specialist and Service Provider will leave the note in a Pending Status until all issues/deficiencies have been resolved. This process can be repeated multiple times.

As Needed: Add Appointment for CMS Compliance Site Visit



The CMS Compliance Specialist will schedule the site visit to initiate compliance monitoring and add the appointment information into APD iConnect. If the Site visit needs to be edited or rescheduled proceed to [Reschedule Site Visit Appointment](#)

1. Set "Role" = Region QA Workstream Worker then click **Go**.

Role
Region QA Workstream Worker [v] GO

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click go.

APD iConnect Welc 6/20/2018

File

Quick Search
A Test Provider X Providers [v] Provider Name [v] GO

MY DASHBOARD CONSUMERS **PROVIDERS** INCIDENTS CLAIMS SCHEDULER

Filters

3. The Provider's record will display. Navigate to the **Providers > Appointments** tab.

MY DASHBOARD CONSUMERS **PROVIDERS** INCIDENTS CLAIMS SCHEDULER UTILITIES REI

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts Beds Linked Providers Aliases Conditions Service Area Admin Actions

Providers Divisions Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP **Appointments**

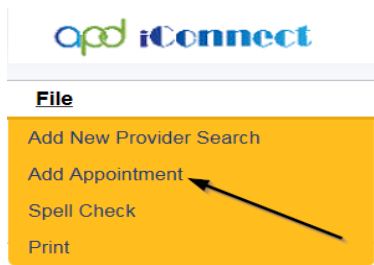
View Style
☒ List View ☐ Monthly View
☐ Weekly View ☐ Daily View

Filters
Status [v] Equal To [v] Pending [v] AND [v] X
Type [v] +
Search Reset

4 Appointments record(s) returned - now viewing 1 through 4

Type	Start Date	End Date
Site Visit	06/21/2018	06/21/2018

4. Click **File > Add Appointment**

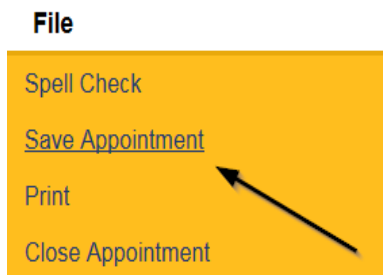


5. Update the following fields on the Appointment Details page

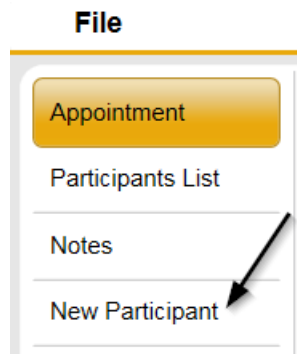
- a. "Division" = APD
- b. "Appointment Start Date" = Update date
- c. "Start Time" = Update time
- d. "Appointment End Date" = Update date
- e. "End Time" = Update time
- f. "Type" = Site Visit
- g. "Description" = Enter description
- h. "Status" = Scheduled

Appointments	
Division	APD ▼
Appointment Date *	09/25/2023
Start Time	11 ▼ 00 ▼ AM ▼
Appointment End Date	09/25/2023
End Time	11 ▼ 30 ▼ AM ▼
Type *	Site Visit ▼
Subject	
Status *	Scheduled ▼

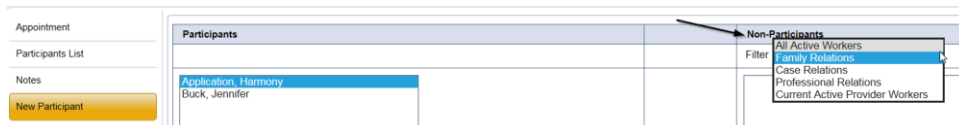
6. When finished select **File > Save Appointment**



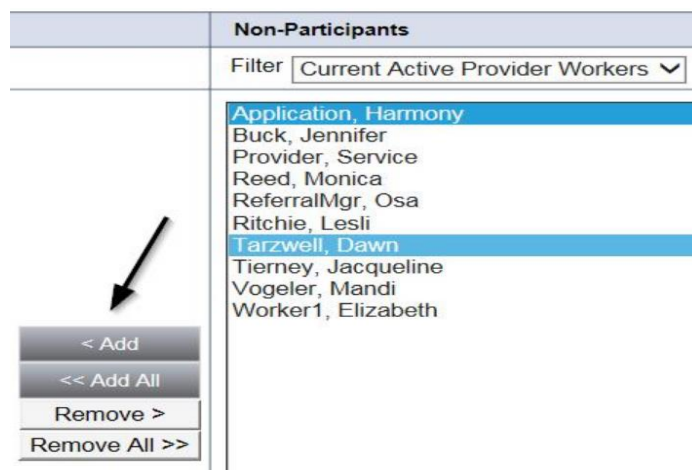
- Click **New Participant** on the left-hand navigation menu



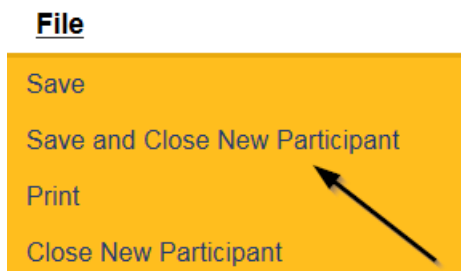
- Set the **Non-Participants filter** list to the appropriate value in order to select the appointment participants



- Select the appropriate Licensing Specialist and Service Provider Worker names by holding the control key down and clicking on the names and then **Click < Add**



- When finished, Select **File > Save and Close New Participant**



As Needed: CMS Compliance Site Visit Complete Note – No Issues



The CMS Compliance Specialist will enter a Site Visit Note when the site visit is complete and update the CMS Compliance License record. They will complete the CMS Residential Monitoring Tool outside of iConnect. It will be attached to this note.

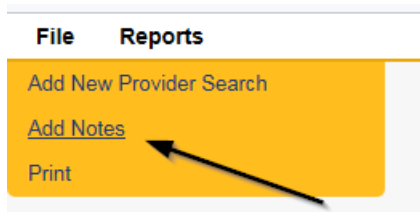
NOTE: If the CMS Compliance Specialist identifies issues/deficiencies, they will proceed with a Plan of Remediation outside of iConnect.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **GO**

3. The Provider’s record will display. Navigate to the **Providers > Notes** tab

4. Click **File > Add Notes**



5. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Facility Site Visit
 - c. "Note Subtype" = CMS Site Visit Complete with no deficiencies
 - d. "Description" = CMS Site Visit Complete with no deficiencies
 - e. "Note" = Enter notes
 - f. "Status" = Complete
 - g. Click "Add Attachment" and search for the copy of the CMS Residential Monitoring Tool on the user's computer. Click Upload
 - h. *NOTE: Each attachment can be up to 18mb in size*
 - i. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *

Note By *

Note Date *

Associated Form ID#

Note Type *

Note Sub-Type

Description

Note

Status *

Date Completed

Attachments

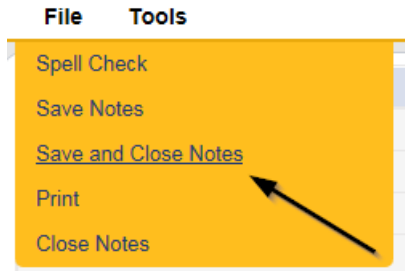
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ...

6. When finished click **File > Save and Close Notes**



Proceed to [Complete Appointment](#)

As Needed: CMS Compliance Site Visit Complete Note – Issues



The CMS Compliance Specialist will enter a Site Visit Note when the site visit is complete.

NOTE: If the CMS Compliance Specialist identifies issues/deficiencies, they will proceed with a Plan of Remediation outside of iConnect after adding the note.

1. Set "Role" = Region QA Workstream Worker then click **Go**.

 A screenshot of a web form. It shows a 'Role' dropdown menu with 'Region QA Workstream Worker' selected. To the right of the dropdown is a 'GO' button. An arrow points to the 'GO' button.

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **GO**

 A screenshot of the iConnect application interface. The 'Providers' tab is selected in the bottom navigation bar. In the 'Quick Search' filter, 'A Test Provider' is entered in the search box, and 'Providers' is selected in the dropdown. The 'GO' button is highlighted by an arrow.

3. The Provider's record will display. Navigate to the **Providers > Notes** tab

File Reports

Quick Search

Providers Provider Name

MY DASHBOARD CONSUMERS **PROVIDERS** INCIDENTS CLAIMS SCHE

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts BEN Linked Providers Aliases Conditions

Providers Divisions Forms Enrollments Authorizations **Notes** Credentials EVV Scheduling

Filters

Note Type Equal To

Note Date +

Search Reset

4. Click **File > Add Notes**

File Reports

Add New Provider Search

Add Notes

Print


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


- "Division" = APD
- "Note Type" = Facility Site Visit
- "Note Subtype" = CMS Site Visit Complete with deficiencies
- "Description" = CMS Site Visit Complete with deficiencies
- "Note" = Enter notes
- "Status" = Complete
- Click "Add Attachment" and search for the copy of the CMS Residential Monitoring Tool on the user's computer. Click Upload
- NOTE: Each attachment can be up to 18mb in size*
- Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note


Notes Details

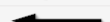
Division * APD ▾


Note By * Reed, Monica ▾


Note Date * 09/29/2023 


Associated Form ID# 

Note Type *  Facility Site Visit ▾

Note Sub-Type  CMS Site Visit Complete with deficiencies ▾*

Description  CMS Site Visit Complete with deficiencies

Note 

Status *  Complete ▾

Date Completed 09/29/2023

Attachments

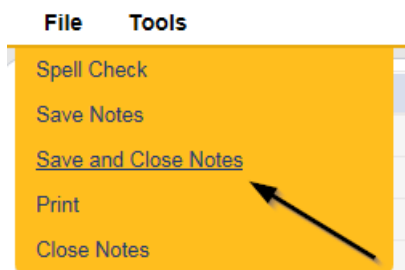
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ...

6. When finished click **File > Save and Close Notes**



As Needed: Add CMS Compliance License Information



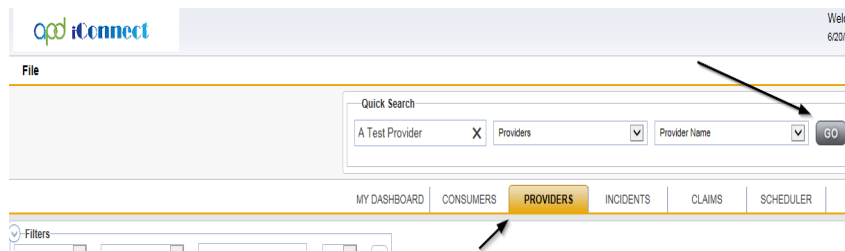
The Licensing Specialist will add the CMS Compliance License Information

1. Set "Role" = Region QA Workstream Worker then click **Go**.

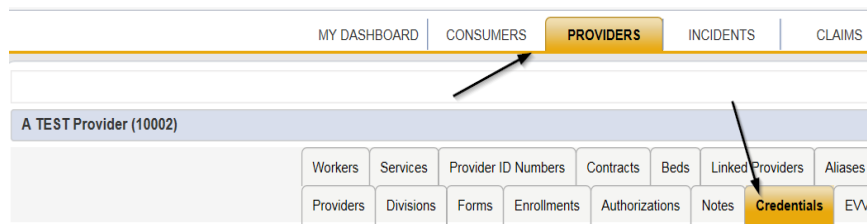
Role

Region QA Workstream Worker ▾

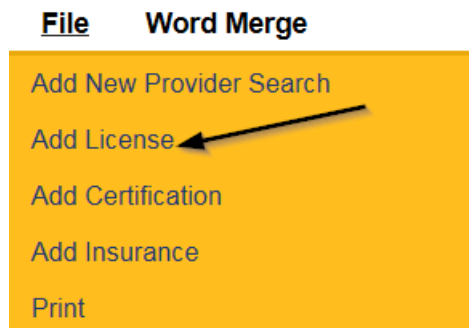
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.



3. The Provider's record will display. Navigate to the **Providers > Credentials** tab



4. Select **File > Add License**



5. Update the following fields:
 - a. "License Type" = CMS Compliance
 - b. "Effective Date" = Enter Date
 - c. "Comment" = Enter comments if applicable
 - d. "Status" = CMS Compliance Monitoring Required
 - e. "QA Workstream Worker" = Click ellipsis on the field to Add the [CMS Compliance Specialist](#). Enter the Last Name and Click Search and then select the Name

License Details	
Credential Type *	License
License Type *	CMS Compliance
Date of Renewal/Subsequent License	
Effective Date *	09/01/2023
Less than One Year	<input type="checkbox"/>
Comment	Initiate Compliance Monitoring - newly licensed home
Status	CMS Compliance Monitoring Required
QA Workstream Worker	Reed, Monica <input type="button" value="Clear"/> Details

6. When finished, click **File > Save and Close License Details**

File



Proceed with Plan of Remediation outside of iConnect

As Needed: Link Child Provider



If a Parent Provider record exists for the new Provider – the Licensing Specialist will need to link the new facility to the Parent Provider

1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role	
Region QA Workstream Worker	<input type="button" value="GO"/>

2. Navigate to the **Providers** chapter and enter the **PARENT** Provider's name in the Quick Search filter and click **Go**.

The screenshot shows the top navigation bar of the opd iConnect system. The 'Providers' tab is highlighted in the main navigation menu. In the 'Quick Search' section, the text 'A Test Provider' is entered into the search field, and the 'Providers' dropdown menu is selected. An arrow points to the 'GO' button. Another arrow points to the 'PROVIDERS' tab in the main navigation menu.

3. Navigate to the **Providers > Linked Providers** tab

The screenshot shows the 'Providers' chapter selected in the main navigation menu. Below it, the 'Linked Providers' tab is highlighted in the sub-navigation menu. The page title is 'Test Provider (21347)'. Below the tabs, there is a grid of various links and options, including 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Bets', 'Linked Providers', 'Conditions', 'Service Area', 'Admin Actions', and 'Facility Management'.

4. Select **File > Link to a Vendor**

The screenshot shows the 'File' and 'Tools' tabs. The 'Link to a Vendor' option is highlighted in the 'File' tab. An arrow points to the 'Link to a Vendor' option.

5. Update the following fields:
 - a. Relationship = Subsidiary
 - b. Linked Provider = Click ellipsis and search for Child Provider record
 - c. Start Date = Enter Date

The screenshot shows the 'Update' form for the 'Linked Provider' section. The 'Relationship' dropdown is set to 'Subsidiary'. The 'Linked Provider' field contains 'Test Provider' and has an ellipsis button next to it. The 'Start Date' field is set to '09/01/2023'. The 'End Date' field is empty. The 'Disclaimer' text at the bottom states: 'The details of the facility are per Provider, it is up to the WSC and the Consumer to validate.'

Search By: Search Text:

4 record(s) returned

NAME	PROVIDER ID	CITY	STREET	MEDICAID ID	PROVIDER NO	PROVIDER ID NUMBER TYPE	PROVIDER ID NUMBER IDENTIFIER
Test Provider	21347	Jacksonville	9125 Branchwater Ct	FL545454	21347	SenderID	21347_Test
Test9 QO Support	21359				F1234567890001	SenderID	21359_TEST9
Test9 WSC	21358	TALLAHASSEE	1234 street	234567890		Treating Provider	234567890
Tester 1 Level 1	17216			123531234		SenderID	17216_TESTE

6. When finished, Select **File > Save and Close**

[Save and Close](#)

[Save Link a Provider](#)

[Save and Add Another](#)

[Print](#)

[Close Link a Provider](#)

7. Navigate back to the Child record and validate that the Linked Provider tab shows the Corporate Parent record

Test Provider (21347)

Workers Services Provider ID Numbers Contracts Beds **Linked Providers** Conditions Service Area Admin Actions Facility Manager

Providers Divisions EVV Activities Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments

Filters
Linked As

1 Providers Linked Providers record(s) returned - now viewing 1 through 1

Linked As	Provider	Street	City	State	Zip Code	Status
Corporate	Active

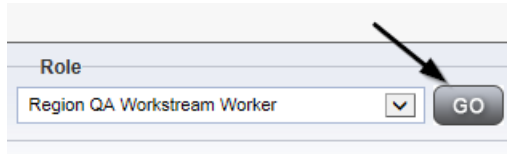
As Needed: Initial Application with Errors



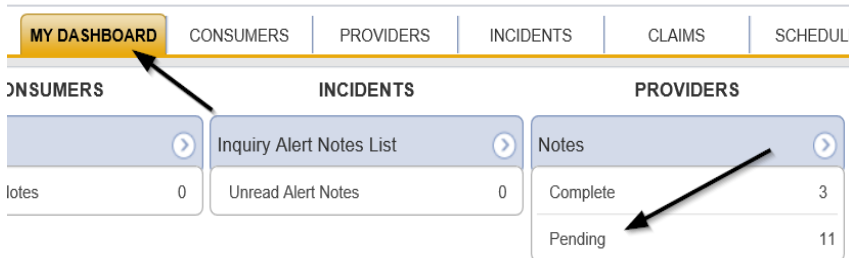
The Licensing Specialist will review the Licensing Application and all notes and attachments. If there are errors/omissions, the Licensing Specialist will inform the Prospective Applicant by updating the pending note. Once all errors/omissions are resolved, reviewed and

approved, the Licensing Specialist will update the note to complete

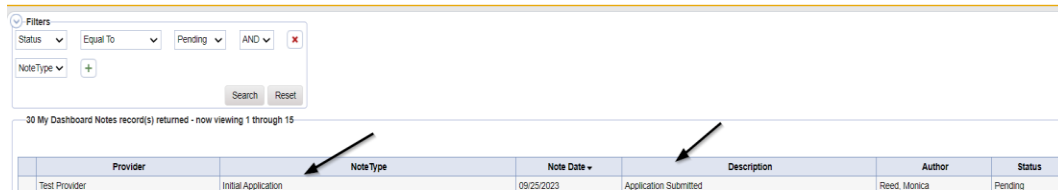
1. Set "Role" = Region QA Workstream Worker then click **Go**.



2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



3. Select the **Note Type = Initial Application** and **Description = Application Submitted** and select the pending record via the hyperlink.



Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Initial Application	09/25/2023	Application Submitted	Reed, Monica	Pending

4. In the existing Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Leave as Initial Application
 - c. "Note Subtype" = Update to Errors/Omissions
 - d. "Description" = Errors/Omissions
 - e. "Note" = Enter notes specific to the outstanding errors/omissions
 - f. "Status" = Pending (if there are errors or omissions)



The Service Provider will need to respond with the appropriate documentation if there are errors or omissions and attach it back to this note. ***The Status will***

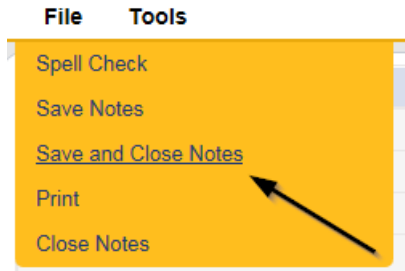
be updated to complete by the Licensing Specialist when there are NO errors or omissions.

- g. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

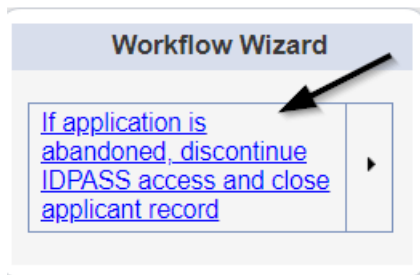
The screenshot shows the 'Notes Details' form with the following fields and annotations:

- Division ***: APD (dropdown)
- Note By ***: Reed, Monica (text)
- Note Date ***: 09/25/2023 (calendar icon)
- Associated Form ID#**: (empty text field)
- Note Type ***: Initial Application (dropdown) - **Arrow points here**
- Note Sub-Type**: Errors/Omissions (dropdown) - **Arrow points here**
- Description**: Errors/Omissions (text field) - **Arrow points here**
- Note**: A text area containing the message: "On 9/25/2023 at 7:35 PM, Monica Reed wrote: Enter notes specific to the outstanding errors/omissions". Below this is a "New Text" editor with a toolbar (B, I, U, 16px, A) and an "Append Text to Note" button. **Arrow points to the text area**.
- Status ***: Pending (dropdown) - **Arrow points here**
- Date Completed**: (empty text field)
- Attachments**: A section with an "Add Attachment" link and a table with headers "Document" and "Description". The table is empty, with the text "There are no attachments to display" below it. **Arrow points to the table area**.
- Note Recipients**: A section with an "Add Note Recipient:" label, a text input field, an ellipsis button, and a "Clear" button. **Arrow points to the ellipsis button**.

5. When finished click **File > Save and Close Notes**.



8. Upon saving the initial application record, a Workflow Wizards is triggered



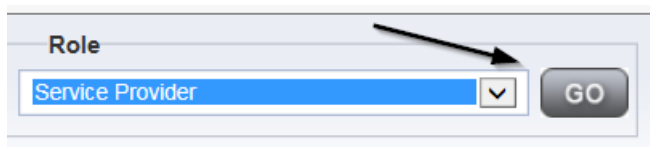
- d. Tickler - "If application is abandoned, discontinue ID PASS access and close applicant record"
- e. Assigned to *Self*
- f. Due in 120 calendar days

As Needed: Update Application



The Prospective Applicant will get notified of the pending note via My Dashboard and will review the errors/omissions provided by the Licensing Specialist. The Prospective Applicant will then respond to the pending note with the requested corrections and leave it in pending status until no additional corrections are needed.

1. Set "Role" = Service Provider then click **Go**



2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Notes 0 Inquiry Alert Notes List 0 Notes 3 Complete 11 Pending

3. Select the **Note Type = Initial Application** and **Description = Errors/Omissions** and select the pending record via the hyperlink.

Filters

Status Equal To Pending AND

Note Type +

Search Reset

31 My Dashboard Notes record(s) returned - now viewing 1 through 15

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Initial Application	09/26/2023	Errors/Omissions	Reed, Monica	Pending

4. In the existing Note record, update the following fields:
 - a. "Note" = Enter Notes as to what corrections have been made
 - b. "Status" = Leave Status as Pending.
 - c. Click the ellipsis on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
 - d. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 09/26/2023

Note Type * Initial Application

Note Sub-Type Errors/Omissions

Description Errors/Omissions

On 9/26/2023 at 10:51 PM, Monica Reed wrote:
Enter Notes as to what corrections have been made

Note

New Text

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document

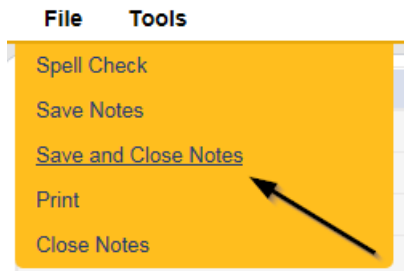
Description

There are no attachments to display

Note Recipients

Add Note Recipient:

- When finished, click **File > Save and Close Notes**



The Licensing Specialist and Service Provider will leave the note in a Pending Status until all errors/omissions have been resolved. This process can be repeated multiple times.

As Needed: Further Documentation Required

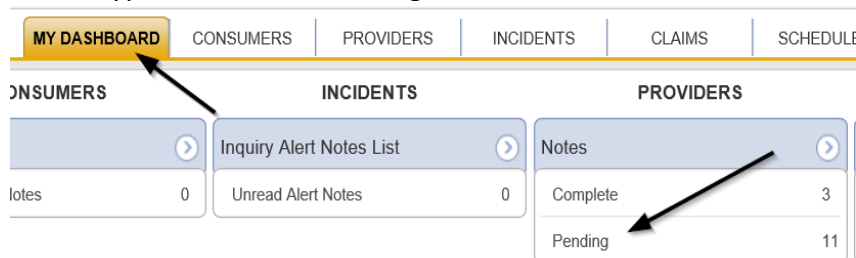


If further documentation is required, the Licensing Supervisor will update the existing Initial Application/Supervisor Review note to the Licensing Specialist. If the ROM is requesting Further documentation, they will add a new note. Proceed to

- Set "Role" = QA Workstream Worker/Lead then click **Go**

 A screenshot of a web form. It shows a dropdown menu labeled 'Role' with 'Region QA Workstream Lead' selected. To the right of the dropdown is a grey button labeled 'GO'. An arrow points from the text 'click Go' in the instruction to the 'GO' button.

- If **Supervisor** is requesting Further Documentation:
 - Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



- Select the **Note Type = Initial Application/Supervisor Review** and select the pending record via the hyperlink.

Filters

Status Equal To Pending AND

NoteType +

Search Reset

31 My Dashboard Notes record(s) returned - now viewing 1 through 15

Provider	NoteType	Note Date	Description	Author	Status
Test Provider	Initial Application/Supervisor Review	09/26/2023		Reed, Monica	Pending

4. If **Supervisor** is requesting further documentation:

- In the existing Initial Application/Supervisor Review Note record, update the following fields:
 - "Associated Form ID#" = Enter Form ID# if applicable
 - "Note Subtype" = Update to Further Documentation Required
 - "Description" = Update to Further Documentation Required
 - "Note" = Enter Notes as to what information is needed
 - "Status" = Complete
 - Click the ellipsis on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
 - Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.

Notes Details

Division APD

Note By Reed, Monica

Note Date 09/26/2023

Associated Form ID#

Note Type Initial Application/Supervisor Review

Note Sub-Type Further Documentation Required

Description Further Documentation Required

Note

Status Complete

Date Completed 09/26/2023

Attachments

Add Attachment

Document Description

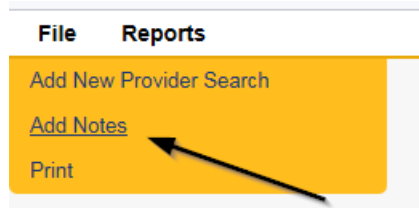
There are no attachments to display

Note Recipients

Add Note Recipient: ... Clear

5. If ROM is requesting further documentation:

a. Click **File > Add Notes**

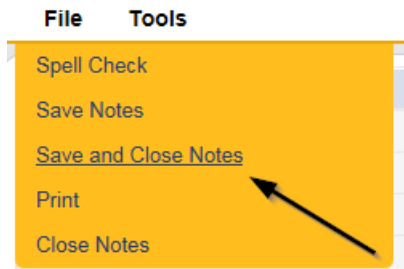


b. In the new Note record, update the following fields:

- i. "Associated Form ID#" = Enter Form ID# if applicable
- ii. "Note Type" = Initial Application/ROM Approval
- iii. "Note Subtype" = Further Documentation Required
- iv. "Description" = Further Documentation Required
- v. "Note" = Enter Notes as to what information is needed
- vi. "Status" = Complete
- vii. Click the ellipsis on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- viii. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.

A screenshot of a 'Notes Details' form. The form has several fields with arrows pointing to them: 'Associated Form ID#' (text input), 'Note Type' (dropdown menu), 'Note Sub-Type' (dropdown menu), 'Description' (text input), 'Note' (large text area), and 'Status' (dropdown menu). Below the form fields is an 'Attachments' section with a link 'Add Attachment'. At the bottom is a 'Note Recipients' section with a text input 'Add Note Recipient:', a search button with an ellipsis, and a 'Clear' button. An arrow points to the search button.

- When finished click **File > Save and Close Notes**

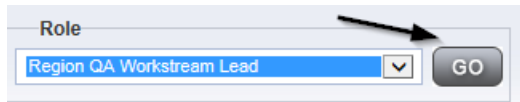


As Needed: Requested Information

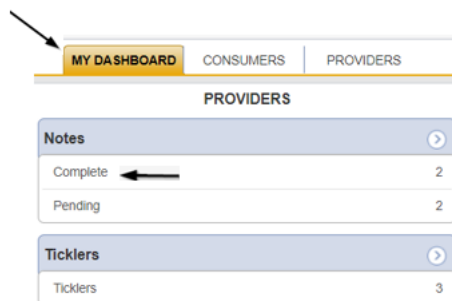


The Licensing Specialist will be notified of the Further Documentation note via My Dashboard. They will request information from the Prospective Applicant via a new note.

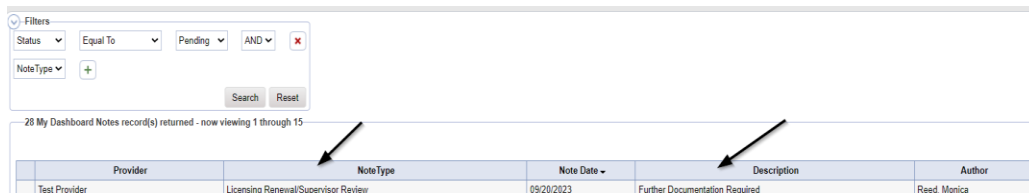
- Set "Role" = QA Workstream Worker or Lead then click **Go**



- Navigate to the **My Dashboard > Providers > Notes > Complete** and click the hyperlink for the Pending notes.

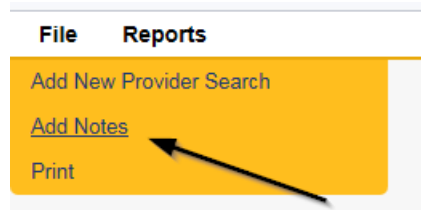


- Select the **Note Type = Initial Application/Supervisor Review** and **Subtype = Further Documentation Required** and select the record via the hyperlink.



- Review the note for the requested documentation then close the note.

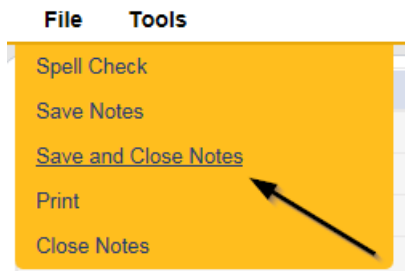
5. The Licensing Specialist will create a new note to communicate with the Provider. Navigate to the **Provider > Notes tab**. Click **File > Add Notes**



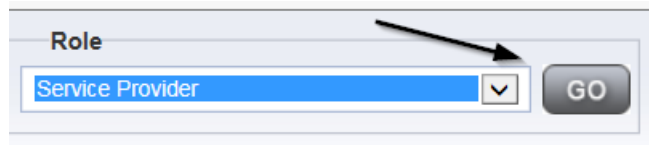
6. In the new Note record, update the following fields:
- "Division" = APD
 - "Associated Form ID#" = Enter Form ID# if applicable
 - "Note Type" = Initial Application
 - "Note Subtype" = Further Documentation Required
 - "Description" = Further Documentation Required
 - "Note" = Enter notes as to what is being requested
 - "Status" = Pending
 - Click the ellipsis on the "Add Note Recipient" to add the *Prospective Applicant* as the Note Recipient
 - Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

A screenshot of a 'Notes Details' form. The form has several fields with arrows pointing to them: 'Division' (set to APD), 'Note By' (Reed, Monica), 'Note Date' (09/26/2023), 'Associated Form ID#' (352), 'Note Type' (Initial Application), 'Note Sub-Type' (Further Documentation Required), 'Description' (Further Documentation Required), 'Note' (a large text area with the placeholder text 'Enter notes as to what is being requested'), and 'Status' (Pending). Below the form is an 'Attachments' section with a link 'Add Attachment'. At the bottom is a 'Note Recipients' section with a text input field, an ellipsis button, and a 'Clear' button. An arrow points to the ellipsis button.

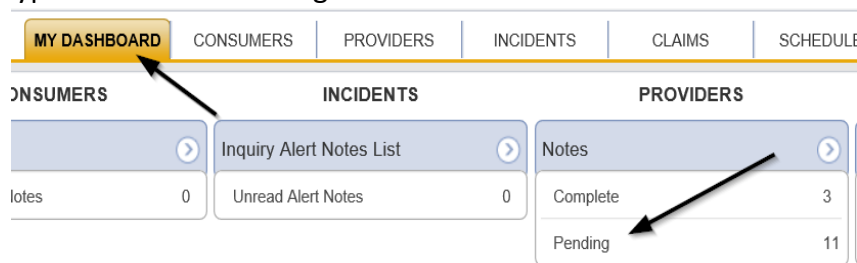
7. When finished click **File > Save and Close Notes**



8. Set "Role" = Service Provider



9. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



10. Select the **Note Type = Initial Application** and **Subtype = Further Documentation Required** and select the pending record via the hyperlink.



11. Review the note, then add the requested information to the existing note. Update the following fields:

- "Note Subtype" = Leave as to Further Documentation Required
- "Description" = Leave as Further Documentation Required
- "Note" = Enter notes as to what attachments have been provided
- "Status" = Leave as Pending
- Click "Add Attachment" and search for the copy of supporting documents on the user's device. Click Upload

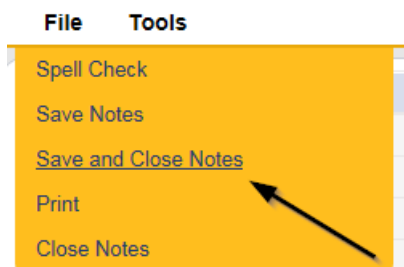
- f. Click the ellipsis on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

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

- Division: APD
- Note By: Reed, Monica
- Note Date: 09/26/2023
- Note Type: Initial Application
- Note Sub-Type: Further Documentation Required
- Description: Further Documentation Required
- Status: Pending
- Date Completed: (empty)

Arrows point to the following fields: Note Type, Note Sub-Type, Description, Status, and the 'Add Attachment' link. A 'New Text' pop-up is open, showing the text: 'Enter notes as to what corrections/revisions have been made and what attachments have been provided'. The 'Append Text to Note' button is visible at the bottom of the pop-up.

12. When finished click **File > Save and Close Notes**



13. Set "Role" = QA Workstream Worker or Lead then click **Go**

14. The Licensing Specialist will review the note submitted by the Service Provider to ensure all requested information/documentation was provided.

15. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

16. Select the **Note Type = Initial Application** and **Subtype = Further Documentation Required** and select the pending record via the hyperlink.

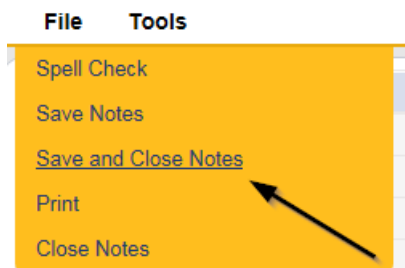
Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Initial Application	09/26/2023	Further Documentation Required	Reed, Monica	Pending

17. Review the contents of the note. Update the following fields to forward the note to the Licensing Supervisor or ROM.

- "Note Type" = Update to Initial Application/Supervisor Review
- "Sub Type" = Update to Further Documentation Provided
- "Description" = Update to Further Documentation Provided
- "Notes" = add any additional details for the Supervisor or ROM regarding the requested documentation that was provided by the Service Provider.
- "Status" = Leave as Pending
- Click the ellipsis on the "Add Note Recipient" to add the [Licensing Supervisor or ROM](#) as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details					
Division *	APD ▼				
Note By *	Reed, Monica				
Note Date *	09/28/2023				
Note Type *	Initial Application/Supervisor Review ▼ *				
Note Sub-Type	Further Documentation Provided ▼ *				
Description	Further Documentation Provided				
Note	<p>On 9/26/2023 at 10:14 PM, Monica Reed wrote: Enter notes as to what is being requested</p> <p>On 9/26/2023 at 10:22 PM, Monica Reed wrote: Enter notes as to what corrections/revisions have been made and what attachments have been provided</p> <p>On 9/26/2023 at 10:37 PM, Monica Reed wrote: add any additional details for the Supervisor or ROM regarding the requested documentation that was provided by the Service Provider</p>				
Status *	Pending ▼				
Date Completed					
<div>Attachments</div> <div>Add Attachment</div> <table border="1"> <thead> <tr> <th>Document</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td colspan="2">There are no attachments to display</td> </tr> </tbody> </table>		Document	Description	There are no attachments to display	
Document	Description				
There are no attachments to display					
<div>Note Recipients</div> <div>Add Note Recipient:</div> <div> <input type="text"/> <input type="button" value="..."/> <input type="button" value="Clear"/> </div>					

18. When finished click **File > Save and Close Notes**





Proceed to [Supervisor Approval](#). Even if the ROM requested the documentation, the Supervisor must approve it first.

As Needed: Abandoned Application



If the reminder tickler is received after 120 calendar days, or if the Prospective Applicant stops working on the application for more than 90 days, the application will be deemed abandoned by the Licensing Specialist. The Licensing Specialist will need to discontinue ID PASS access and close the prospective applicant record. The Prospective Applicant must reapply.

1. Set “Role” = Region QA Workstream Worker/Lead then click **Go**.

Role
Region QA Workstream Lead GO

2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **Go**.

Quick Search: A Test Provider X Providers Provider Name GO

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER

3. The Provider’s record will be displayed. Navigate to the **Providers > Divisions** tab.

Test Provider (21347)

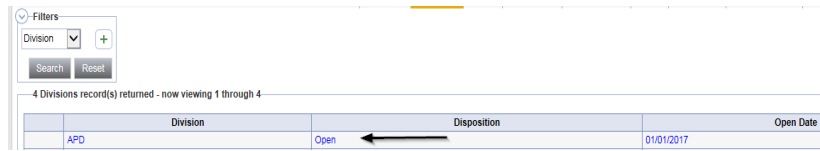
Workers Services Provider ID Numbers Contracts Beds Li
Providers Divisions EVV Activities Forms Enrollments Aut

Filters
Disposition Not Equal To Closed AND X
Division +
Search Reset

1 Providers Divisions record(s) returned - now viewing 1 through 1

Division	Disposition
APD	Open

4. Select the "Open" APD Division record via the hyperlink for that row.



Filters
Division [v] +
Search Reset

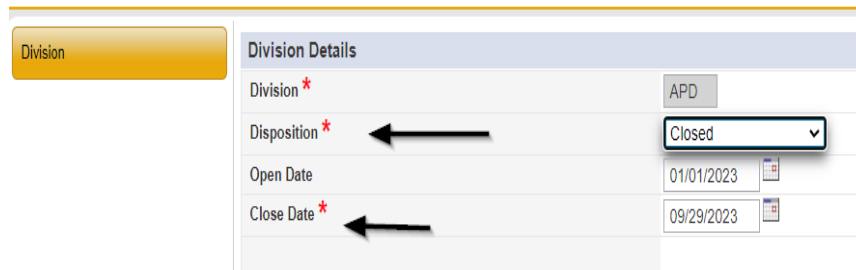
4 Divisions record(s) returned - now viewing 1 through 4

Division	Disposition	Open Date
APD	Open	01/01/2017

5. Update the following fields on the Division Detail screen.

a. "Disposition" = Closed

b. "Close Date" = Enter Date (defaults to today)



Division

Division Details

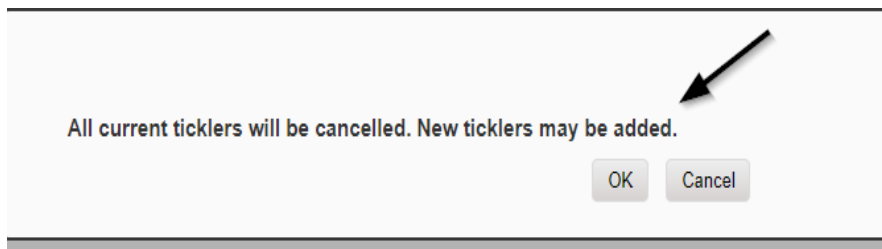
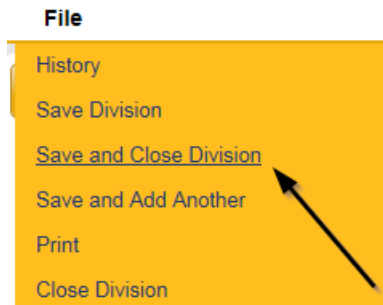
Division * APD

Disposition * Closed

Open Date 01/01/2023

Close Date * 09/29/2023

6. When finished, Select **File > Save and Close Division**. Click **OK** on the pop-up message box.



As Needed: Supervisor Denial



The Licensing Supervisor will review the application and add a note if denying the application. They will then send to the ROM for review. If additional actions are needed, proceed to [Further Documentation Required](#).

1. Set "Role" = Region QA Workstream Worker/Lead then click **Go**.

Role
Region QA Workstream Lead GO

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Notes 11

3. Select the **Note Type = Initial Application/Supervisor Review** and select the pending record via the hyperlink.

Filters
Status Equal To Pending AND
NoteType +
Search Reset

38 My Dashboard Notes record(s) returned - now viewing 1 through 15

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Initial Application/Supervisor Review	10/19/2023		Reed, Monica	Pending

4. In the pending Note record, update the following fields:
 - a. "Associated Form ID#" = Enter Form ID# if applicable
 - b. "Note Type" = Update to Initial Application/Supervisor Denial
 - c. "Description" = Enter description if applicable
 - d. "Append Text to Note" = Enter notes
 - e. "Status" = Complete
 - f. Click the ellipsis on the "Add Note Recipient" to add the [Licensing Specialist](#) as the Note Recipient
 - g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

- h. Click the ellipsis on the "Add Note Recipient" to add an additional recipient – *ROM/Deputy ROM*
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD ▼

Note By * Reed, Monica ▼

Note Date * 09/29/2023

Associated Form ID# 352

Note Type * Initial Application/Supervisor Denial ▼

Note Sub-Type ▼

Description

Note

Status * Complete ▼

Date Completed 09/29/2023

Attachments

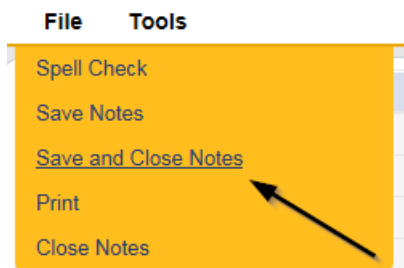
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ... Clear

5. When finished click **File > Save and Close Notes**



Proceed to Chapter 13 to initiate the PAARF process

As Needed: ROM Denial



The ROM will review the application, add a new note for the denial. If additional actions are needed, proceed to [Further Documentation Required](#).

1. Set "Role" = ROM/Deputy then click **Go**.

Role
ROM/Deputy ROM [v] GO

2. Navigate to the **Providers > Notes** tab

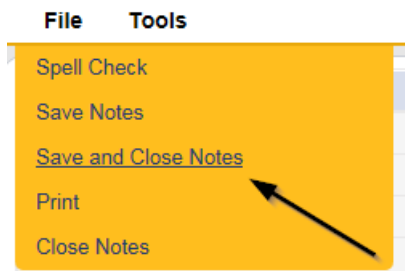
File Reports
Quick Search: [] Providers [v] Provider Name []
MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHE
A TEST Provider (10002)
Workers Services Provider ID Numbers Contracts [v] Linked Providers Aliases Conditions
Providers Divisions Forms Enrollments Authorizations **Notes** Credentials EVV Scheduling
Filters
Note Type [v] Equal To [v] [] AND [v] [x]
Note Date [v] [+]
Search Reset

3. Click **File > Add Notes**

File Reports
Add New Provider Search
Add Notes
Print

4. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Initial Application/ROM Denial
 - c. "Description" = Enter description if applicable
 - d. "Note" = Enter notes
 - e. "Status" = Complete
 - f. Click the ellipsis on the "Add Note Recipient" to add the [Licensing Specialist/Supervisor](#) as the Note Recipient
 - g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

5. When finished click **File > Save and Close Notes**



The Licensing Specialist will be notified of the ROM Denial via this note. The Licensing Specialist will close the license record and will then proceed to Chapter 13 to initiate the PAARF process.

6. Set "Role" = Region QA Workstream Worker then click **Go**.

7. After reviewing the note accessed from **My Dashboard > Providers > Notes > Complete** navigate to the **Providers > Credentials** tab

8. Select the license added in the [Add License Information](#) section from the list.

9. Update the following fields:

- a. "Original Date of Issuance" = Change to date that ROM denied
- b. "Date of Renewal" = Leave blank
- c. "Effective Date" = Change to date that ROM denied
- d. "Expiration Date" = Change to date that ROM denied
- e. "Less than One Year" = Leave blank
- f. "License Duration" = Won't be populated
- g. "Comment" = ROM Denied Initial License – Date of Denial
- h. "Status" = Closed
- i. "QA Workstream Worker" = Does not need to be changed

License Details	
Credential Type *	License
License Type *	Group Home
License Number *	586974
Original Date of Issuance *	10/20/2023
Date of Renewal/Subsequent License	
Effective Date *	10/20/2023
Expiration Date *	10/20/2023
Less than One Year	<input type="checkbox"/>
Comment	ROM Denied Initial License - 10/20/23
Status	Closed
Reason	Initial
QA Workstream Worker	Reed, Monica
<input type="button" value="Clear"/>	

10. When finished, click **File > Save and Close License Details**.



The Licensing Specialist will proceed to Chapter 13 to initiate the PAARF process.