State of Florida
Agency for Persons with Disabilities

Harmony for APD iConnect
Behavior Service Level Designation for Licensed Homes Training Manual

Table of Contents

Chapter 8 | Behavior Service Level Designation for Licensed Homes

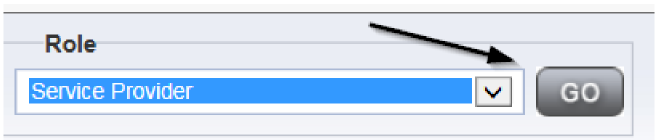
Introduction

A facility may request an additional credential (“designation”) that allows them to serve special populations of consumers once they have been deemed eligible to enroll as a Residential Provider. Currently, APD allows providers to apply to receive Behavior Focused, Intensive Behavior, Enhanced Intensive Behavior and Enhanced Medical Intensive Behavior designations. Though licensing staff can recommend against the placement of a consumer in one of the identified populations to be placed in a facility that does not have the appropriate designation, it is the responsibility of the Provider Enrollment Specialists to review and issue or deny the provider requests to provide the service. Because of the specialized knowledge required to evaluate facilities for each designation, the review and recommendation for approval/denial of the designation is “delegated” out to the region behavior analysts.

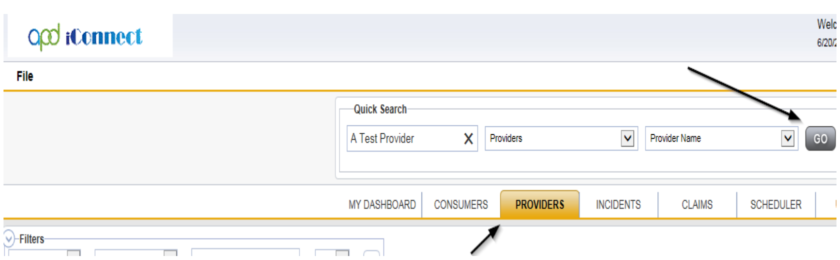
Apply for Behavior Service Level Designation

The Service Provider will add a note to notify the Licensing Specialist of their intent to request a Behavior Service Level Designation for a specific licensed facility home. *This would need to be completed individually for each home within the Licensed Home record.*

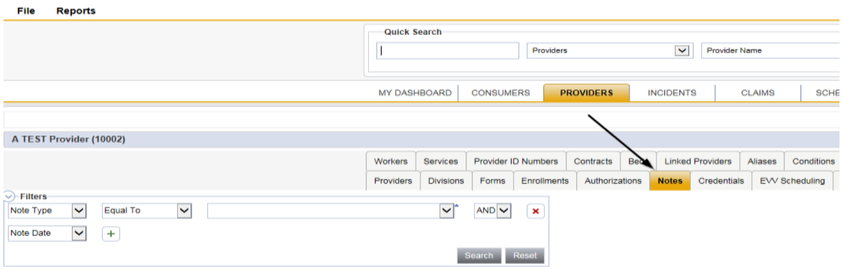
1. Set “Role” = Service Provider then click **Go**



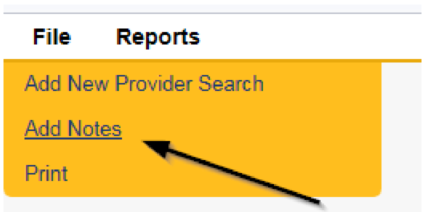
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **Go**.



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



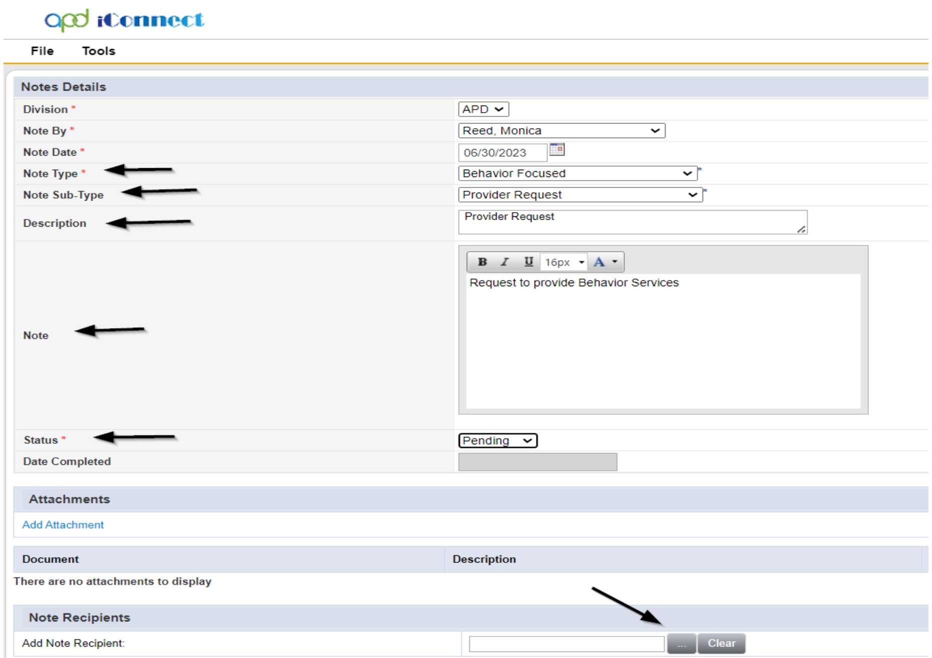
4. Click **File > Add Notes**



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

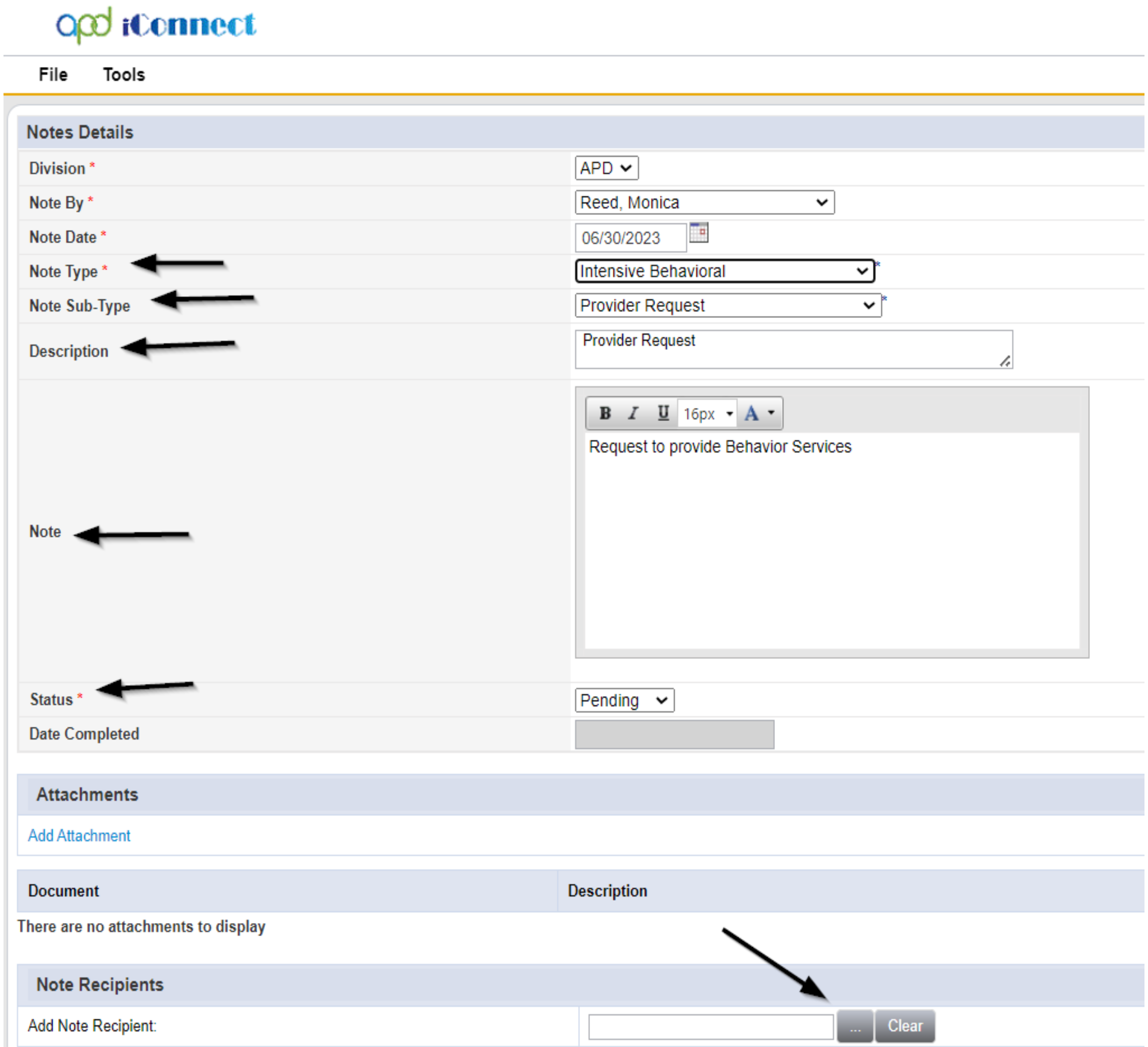
   If **Behavior Focused** is selected as the Note Type:

   a. "Note Type" = **Behavior Focused**
   b. "Note Subtype" = Provider Request
   c. "Description" = Provider Request
   d. "Note" = Document in the Note field the request to provide Behavior services
   e. "Status" = Pending
   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.



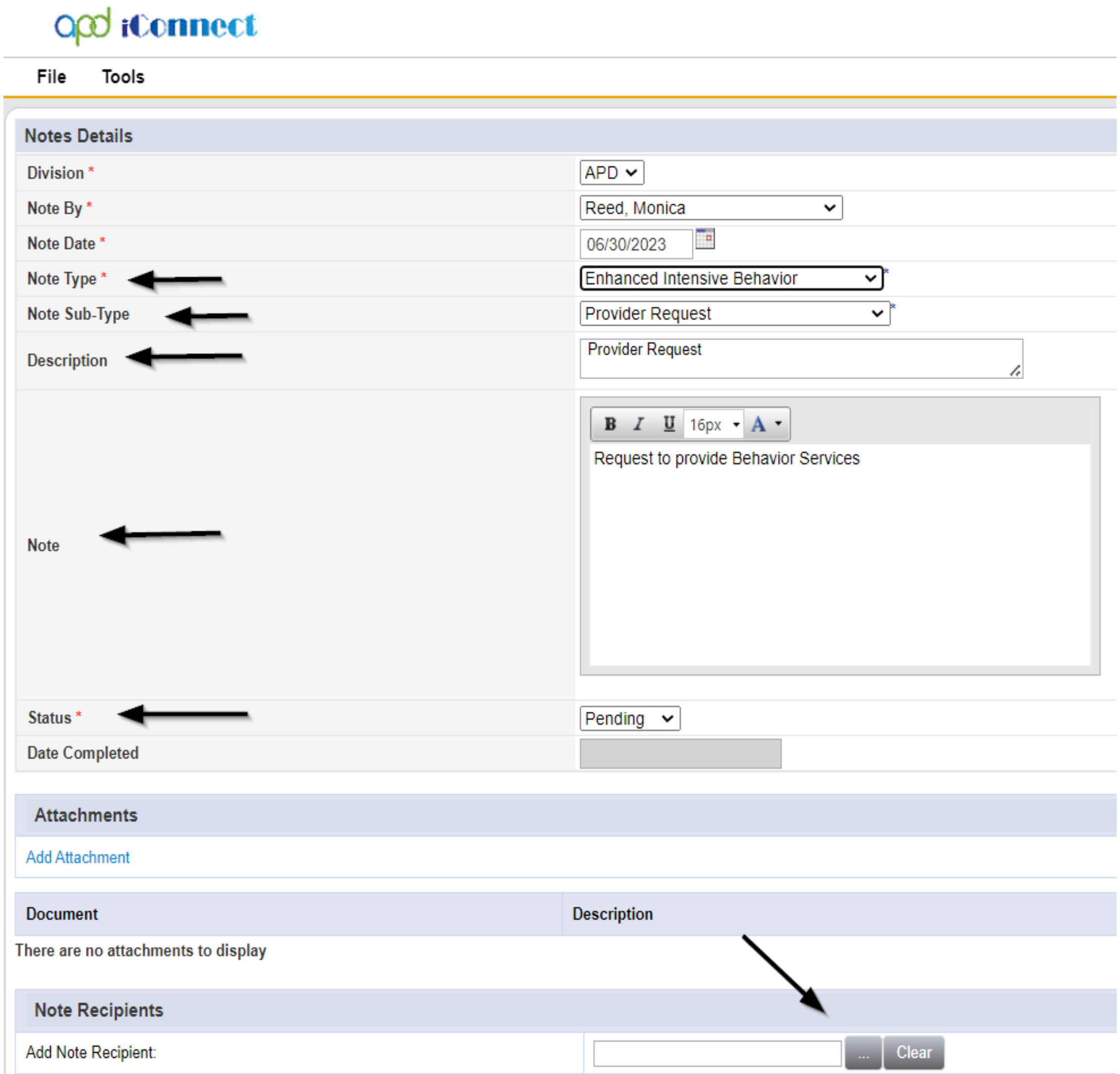
If **Intensive Behavioral** is selected as the Note Type:

a. "Note Type" = **Intensive Behavioral**
b. "Note Subtype" = Provider Request
c. "Description" = Provider Request
d. "Note" = Document in the Note field the request to provide Behavior services
e. "Status" = Pending
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



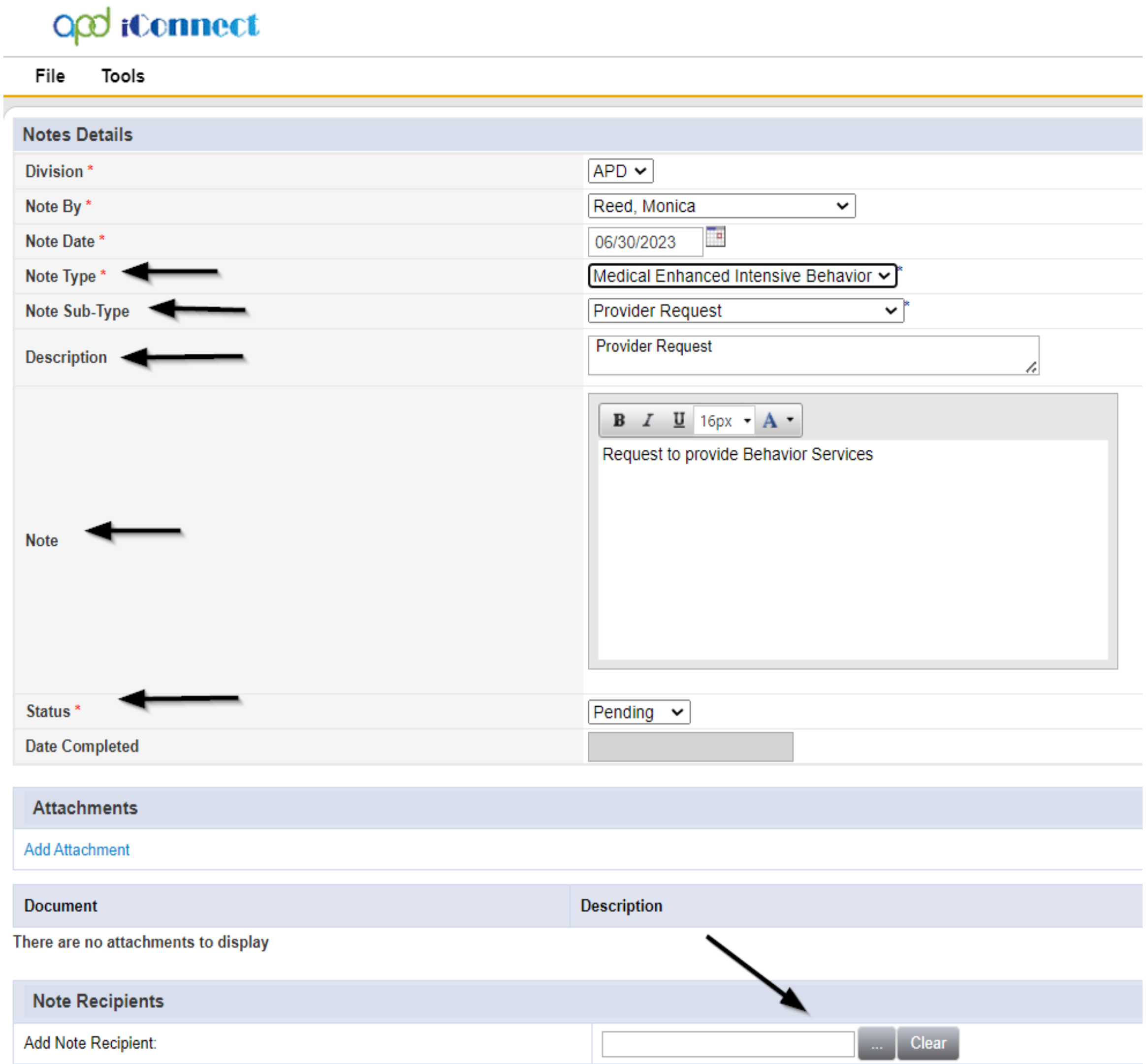
If **Enhanced Intensive Behavior** is selected as the Note Type:

a. "Note Type" = **Enhanced Intensive Behavior**
b. "Note Subtype" = Provider Request
c. "Description" = Provider Request
d. "Note" = Document in the Note field the request to provide Behavior services
e. "Status" = Pending
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.

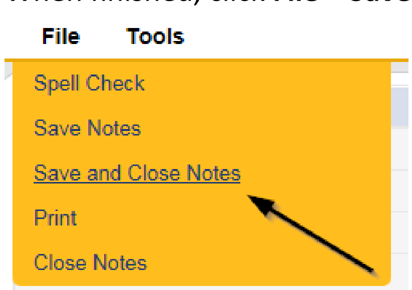


If **Medical Enhanced Intensive Behavior** is selected as the Note Type:

a. "Note Type" = **Medical Enhanced Intensive Behavior**
b. "Note Subtype" = Provider Request
c. "Description" = Provider Request
d. "Note" = Document in the Note field the request to provide Behavior services
e. "Status" = Pending
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



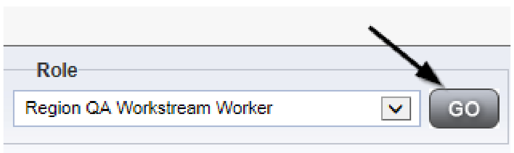
6. When finished, click **File > Save and Close Notes**



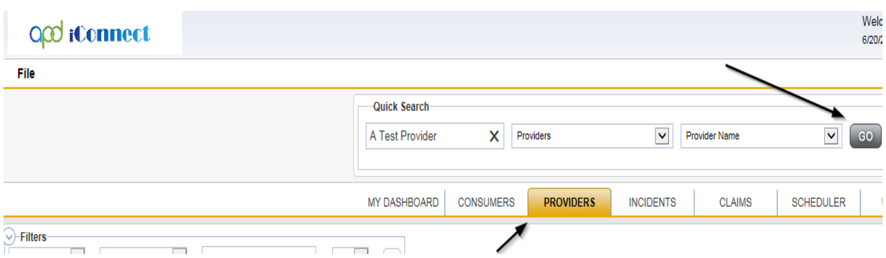
Check Parent Company

The Licensing Specialist will check to see if the Service Provider's parent company is already enrolled to provide the Behavioral services. *Note: If the provider already operates at least one licensed home with the same service level designation this step can be skipped.*

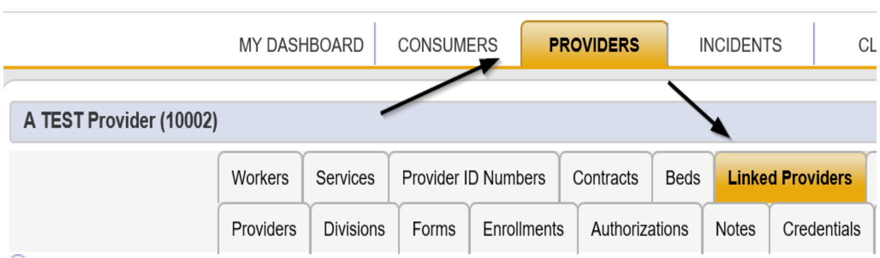
1. Set "Role" = Region QA Workstream Worker then click **Go.**



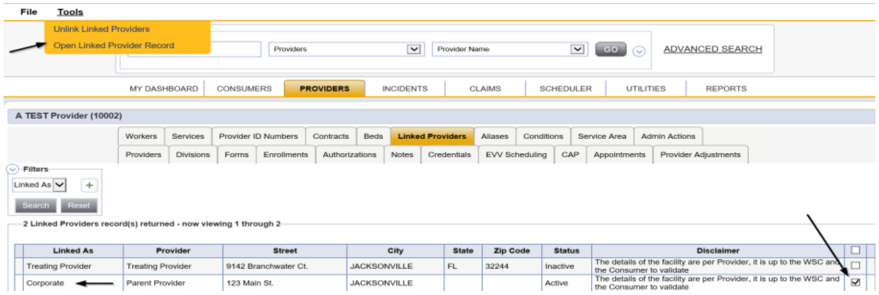
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.



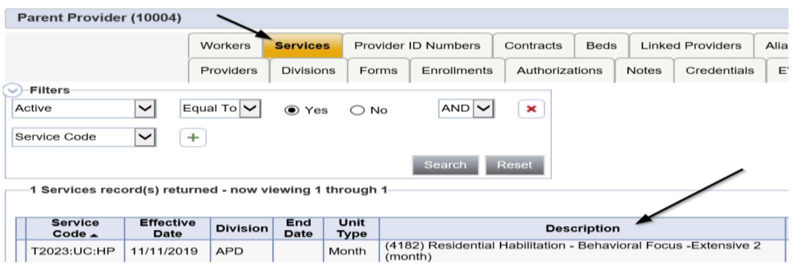
3. The Provider's record will display. Navigate to the **Providers > Linked Providers** tab



4. Select the Parent "Corporate" Provider record via the caret at the end of the row, then select **Tools > Open Linked Provider Record**



5. Navigate to the Services tab to identify if the Provider is enrolled in the appropriate service specific to the requested new designation.
    a. Residential Habilitation – Behavioral Focus
    b. Residential Habilitation – Intensive Behavior
    c. Residential Habilitation – Enhanced Intensive Behavior
    d. Residential Habilitation – Medical Enhanced Intensive Behavior



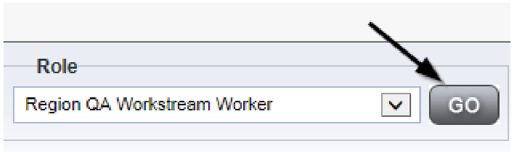
If the Service Provider's parent company is not enrolled to provide the Behavioral services, proceed to Advise Provider to Request an Expansion

If the Service Provider's parent company is enrolled to provide the Behavioral services, proceed to Submit Supporting Documentation

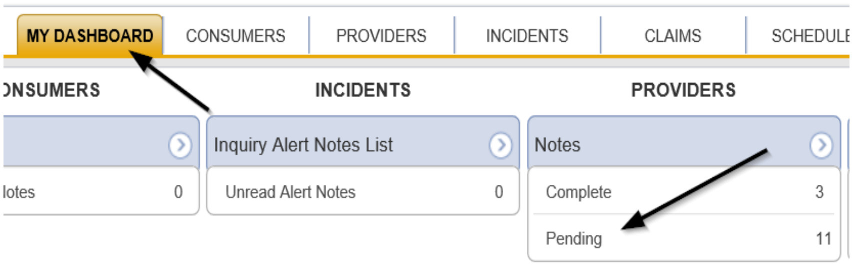
As Needed: Advise Provider to Request an Expansion

The Licensing Specialist will receive notification on My Dashboard of the Provider's request for Service Level Designation. They will review the Service Provider's record and if the provider is not enrolled to provide the appropriate service, the Licensing Specialist will update the existing note. They will advise the Provider to contact Provider Enrollment and to proceed with completing the Provider Request for Expansion form.

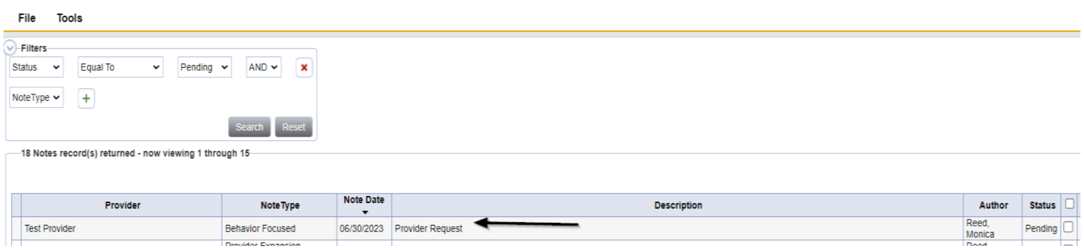
1. Set “Role” = Region QA Workstream Worker then click **Go.**



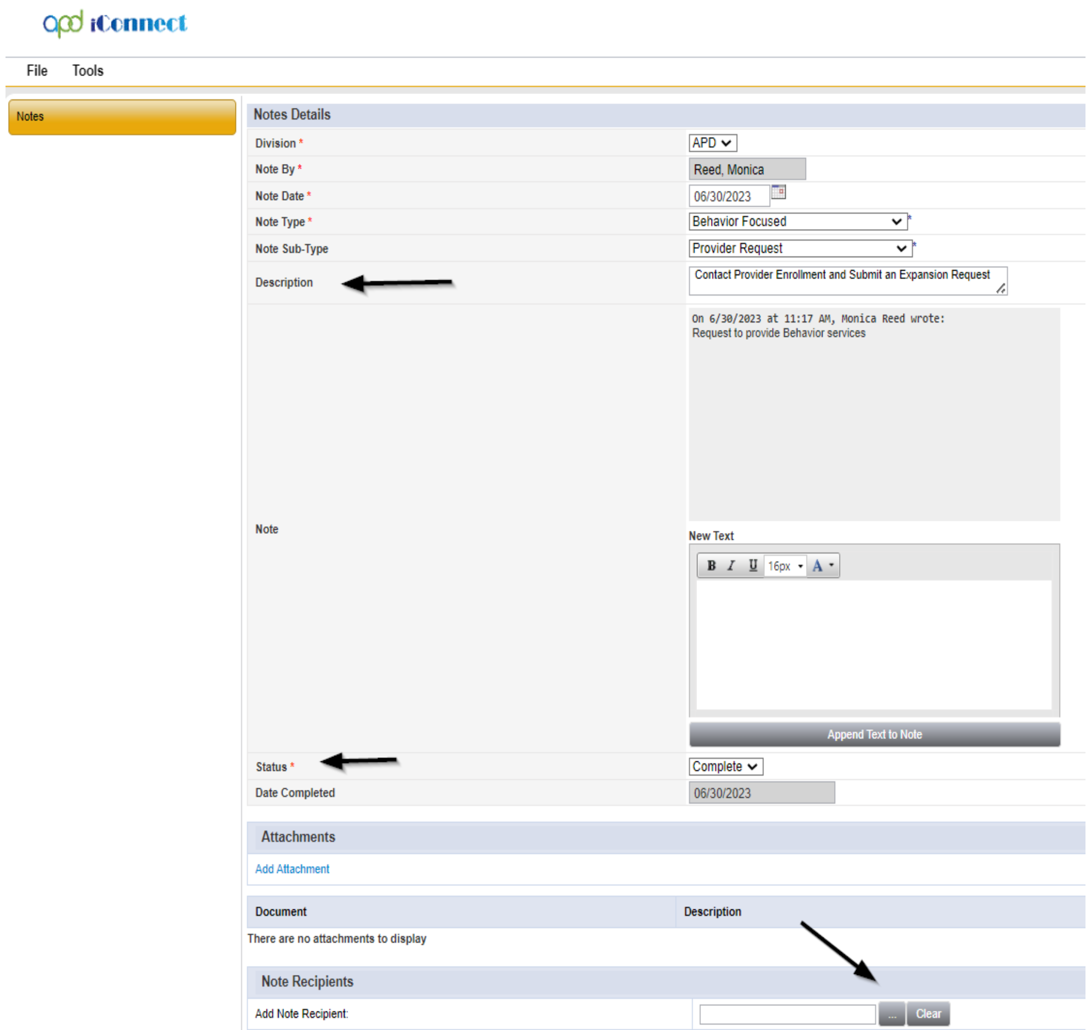
2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



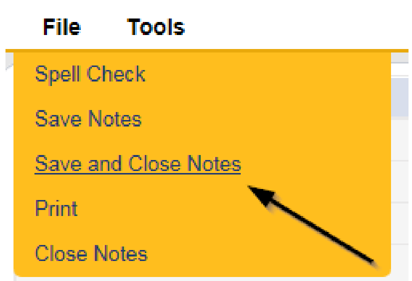
3. Select the **Note Type = BF/IB/EIB/MEIB** and **Description = Provider Request** and select the pending record via the hyperlink.



4. In the existing Note record, update the following fields:
    a. "Description" = Contact Provider Enrollment and Submit an Expansion Request
    b. "Note" = Enter Notes “Received”
    c. "Status" = Update to Complete
    d. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* 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.
    f. Click the ellipsis on the "Add Note Recipient" to add the *Provider Enrollment* (if not known, send to 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**

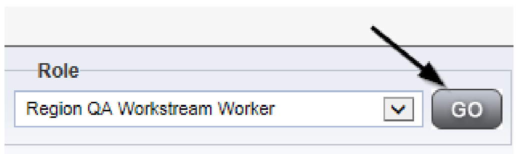


NOTE: The Service Provider will need to submit an expansion request form and follow that process which is covered in Chapter 11 Expansions – New Services.

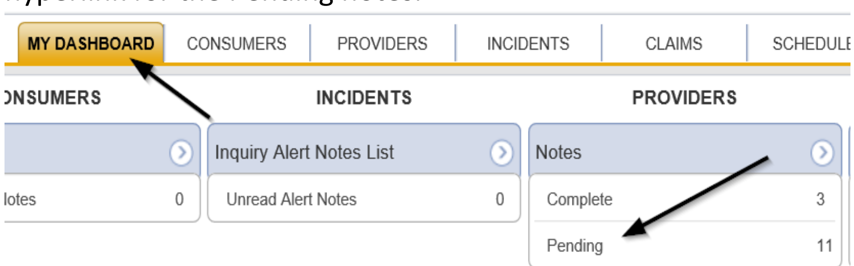
Service Provider Enrolled

The Region QA Workstream worker will receive notification on My Dashboard of the Provider’s request for Service Level Designation. They will review the provider record for the parent corporation, and if the Service Provider is enrolled to provide the behavioral services, they will update the exiting note.

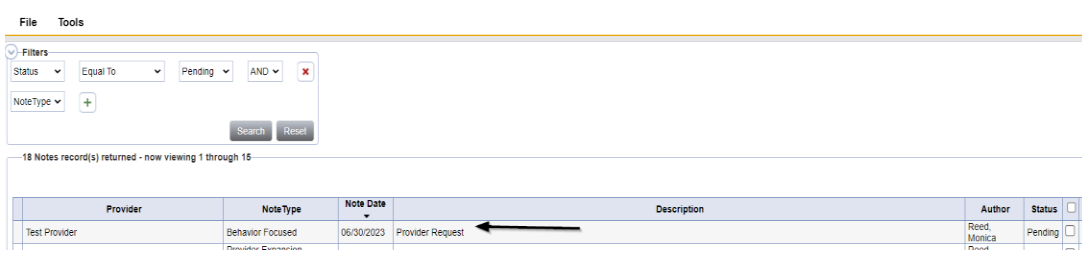
1. Set “Role” = Region QA Workstream Worker then click **Go.**



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

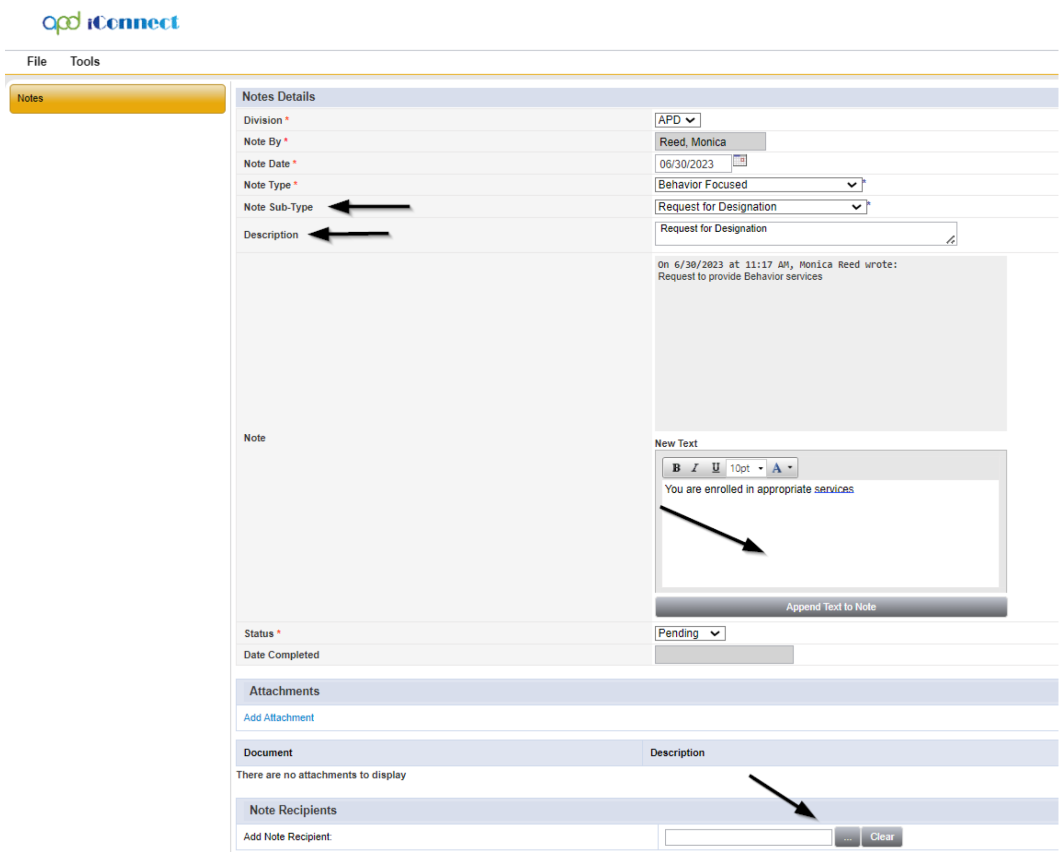


3. Select the **Note Type = BF/IB/EIB/MEIB** and **Description = Provider Request** and select the pending record via the hyperlink.

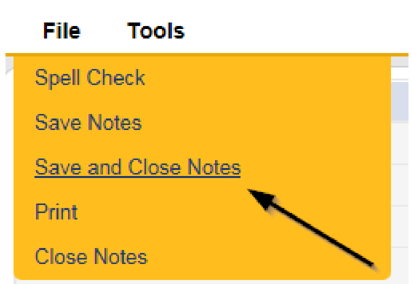


4. In the existing Note record, update the following fields:
    a. “Note Subtype" = Update to Request for Designation
    b. "Description" = Request for Designation
    c. "Note" = Notify Provider that they are enrolled in the appropriate services
    d. "Status" = Leave as Pending

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



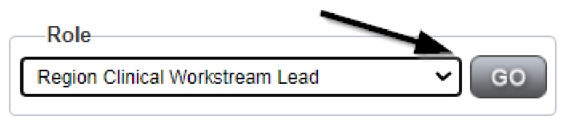
5. When finished, click **File > Save and Close Notes**



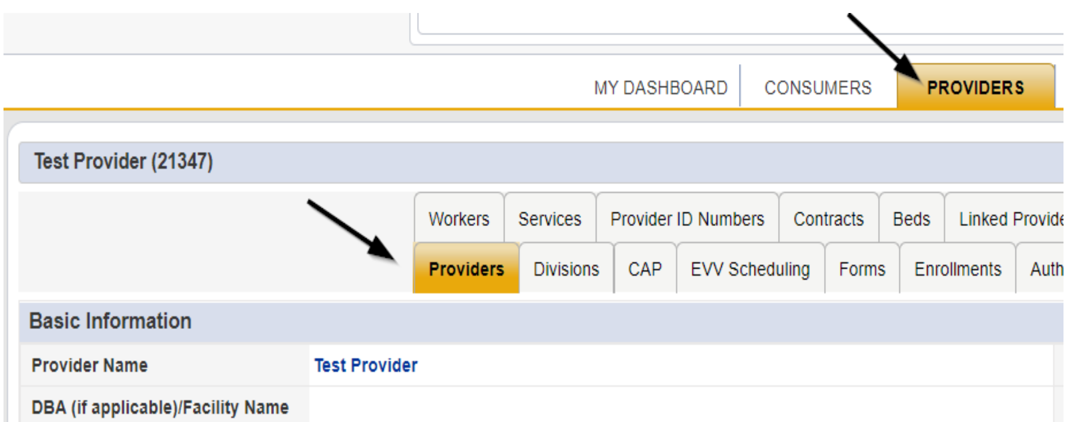
Assign Regional Senior Behavior Analyst

The Region Clinical Workstream Lead will receive notification on My Dashboard of the Provider's request for Service Level Designation. The Region Clinical Workstream Lead will add the Regional Senior Behavior Analyst to the Provider's record and update the existing note to advise the Regional Senior Behavior Analyst that they have been assigned.

1. Set "Role" = Region Clinical Workstream Lead then click **Go**

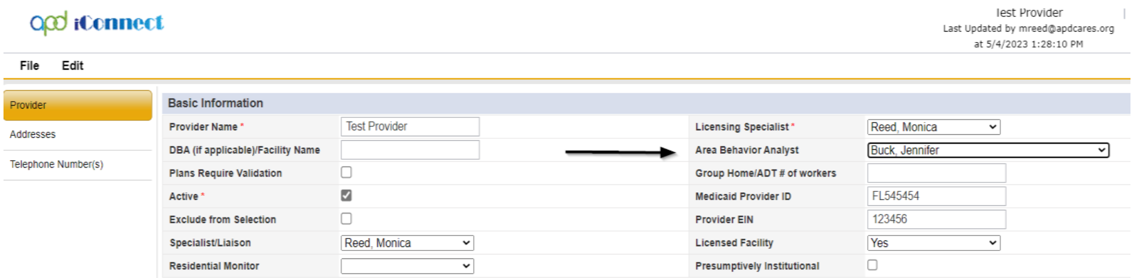


2. Navigate to the Providers > Providers tab

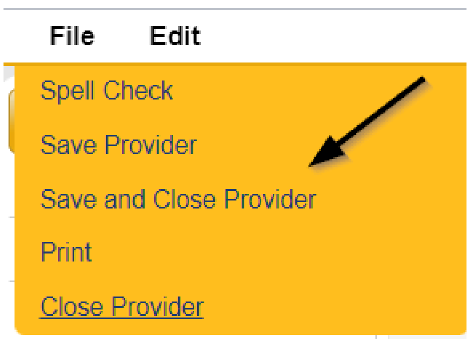


3. Select **Edit > Edit Provider**

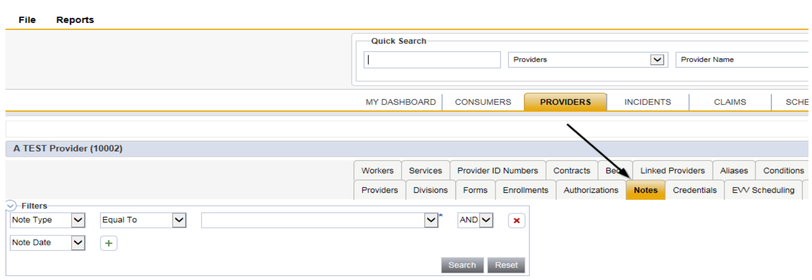
4. Select the Regional Senior Behavior Analyst name from the drop-down list for that field in order to assign them to the Provider's record.



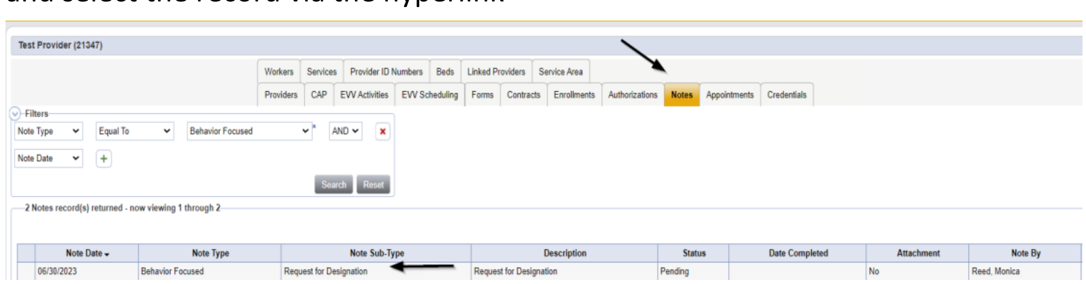
5. When finished, Select **File > Save and Close Provider**



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

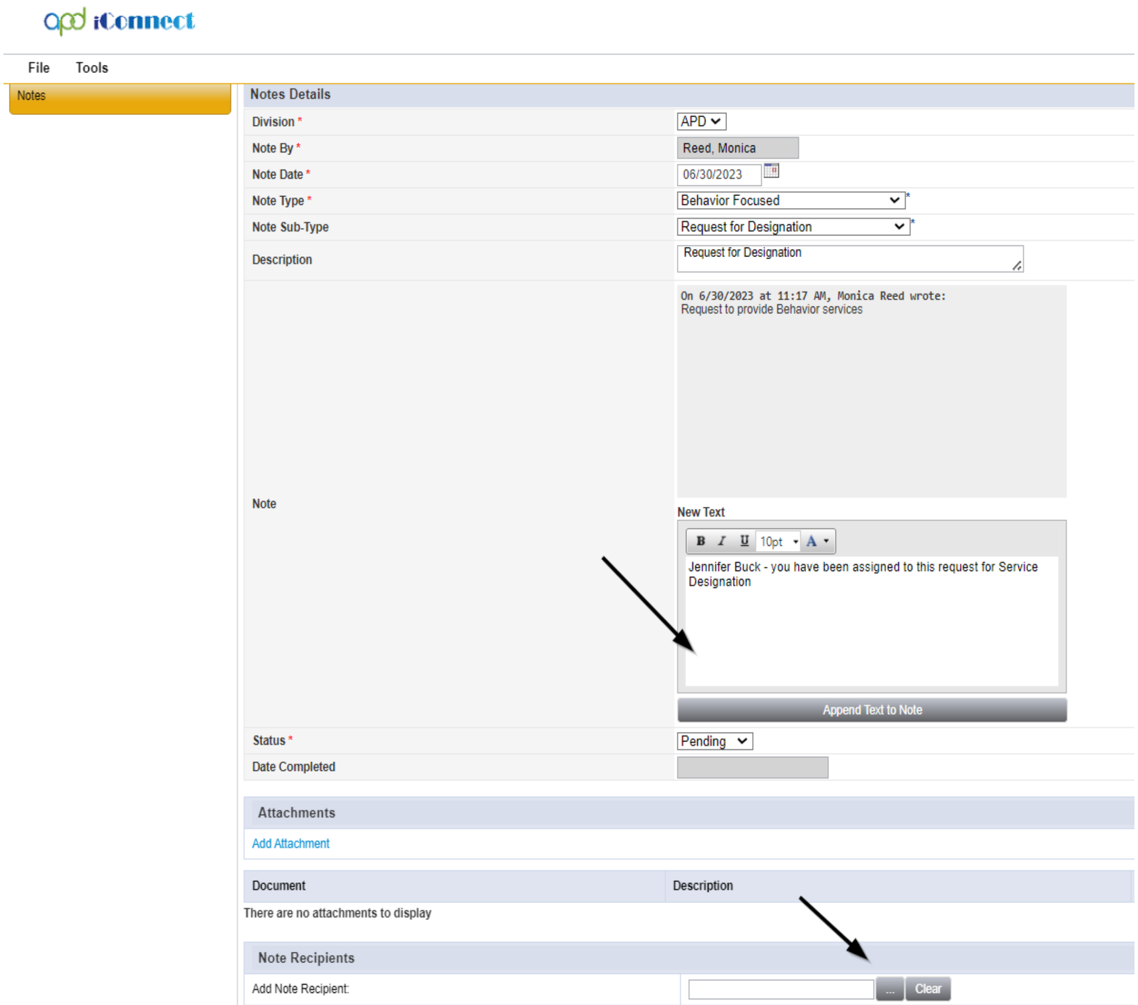


7. Select the **Note Type = BF/IB/EIB/MEIB and Description = Request for Designation** and select the record via the hyperlink

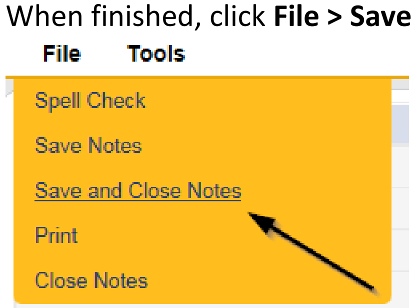


8. In the existing Note record, update the following fields:
   a. "Note Subtype" = Leave as "Request for Designation"

b. "Description" = Leave as Request for Designation
c. "Note" = Append text to Advise Region Clinical Workstream Worker (ABA) that they have been assigned to this request for Service Designation
d. "Status" = Leave as Pending
e. Click the ellipsis on the "Add Note Recipient" to add the *Clinical Workstream Worker* as the Note Recipient
f. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.



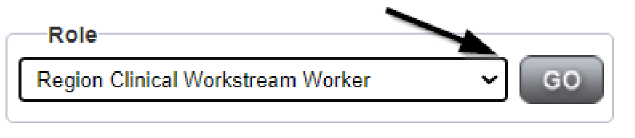
9. When finished, click **File > Save and Close Notes**



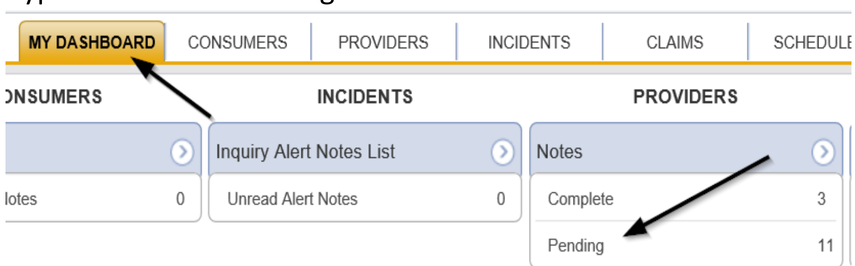
Request for Designation

The Region Clinical Workstream Worker will get notification of the pending note on My Dashboard. They will then update the existing note to advise the Service Provider of the next steps.

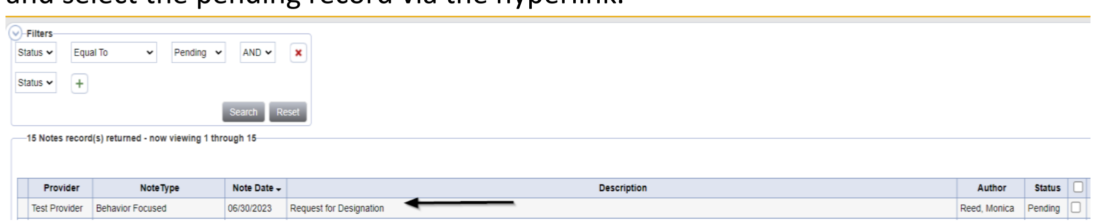
1. Set “Role” = Region Clinical Workstream Worker then click **Go**



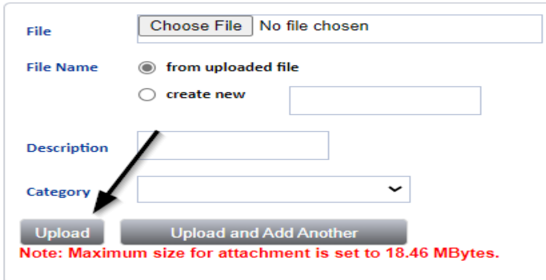
2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



3. Select the **Note Type = BF/IB/EIB/MEIB** and **Description = Request for Designation** and select the pending record via the hyperlink.

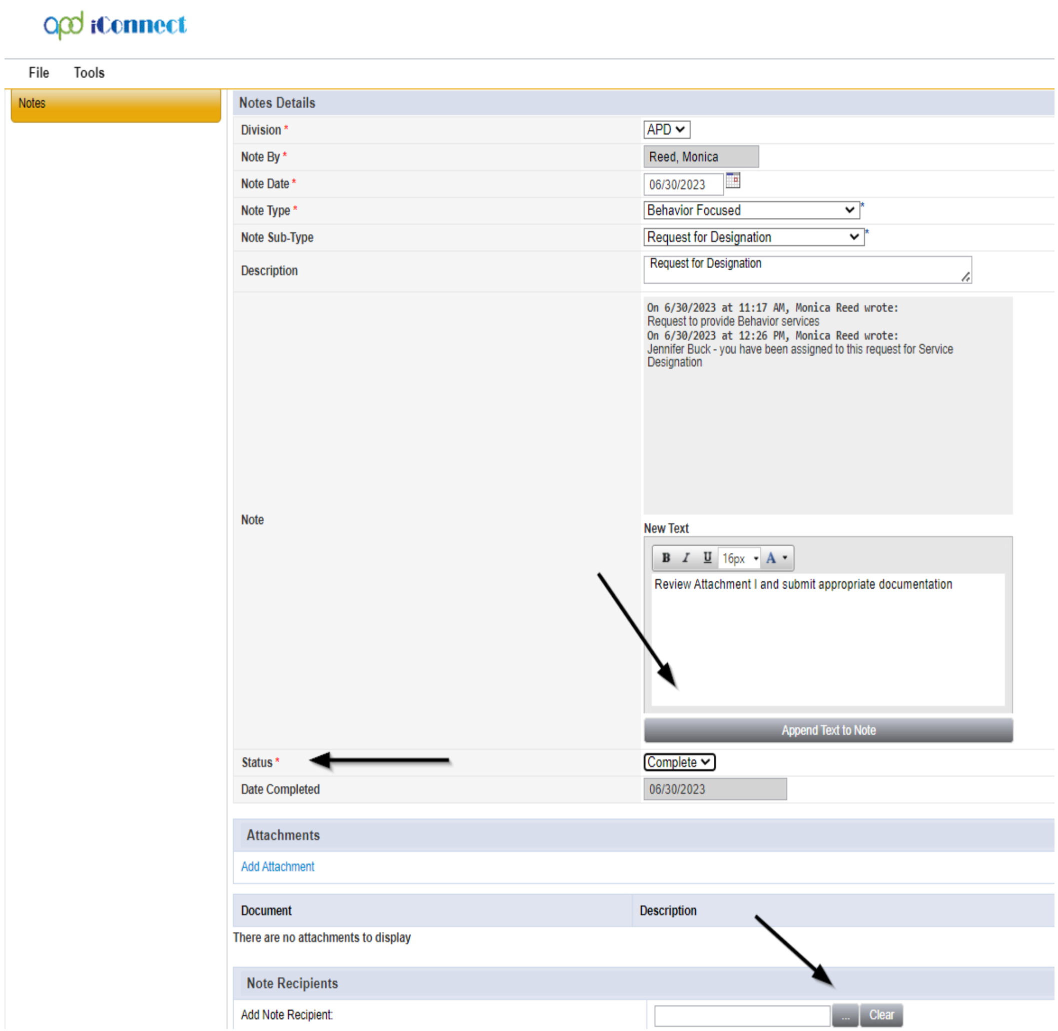


4. In the existing Note record, update the following fields:
    a. "Note" = Review Attachment I and submit appropriate documentation
    b. "Status" = Update to Complete
    c. Click "Add Attachment" and search for the copy of Attachment I. Click Upload

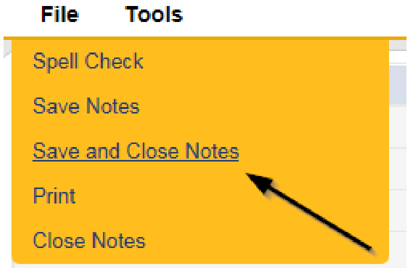


d. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient

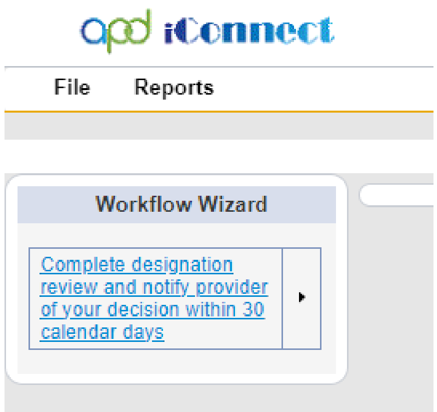
e. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.



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



6. Upon saving the note, a Workflow Wizard triggered the reminder that is due in 30 calendar days.

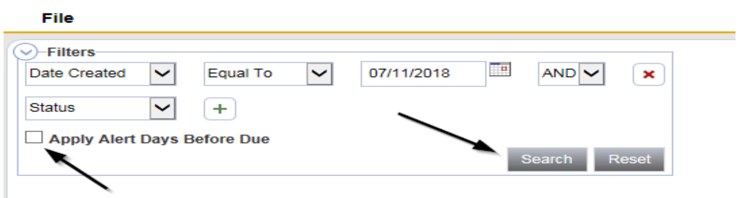


   a. Tickler - "Complete designation review and notify Provider of your decision within 30 calendar days"
   b. Assigned to Self
   c. Due on the ***30th*** calendar day from the "Request for Designation" completed note

If it has been more than 30 calendar days with no response from the Service Provider, the Region Clinical Workstream Worker will add a new note to advise the Service Provider of designation closure. Proceed to As Needed: Designation Request Closed

7. The user can access Ticklers via **My Dashboard**.
   a. Go to **My Dashboard > Providers** and scroll down to the Ticklers Panel. Click on the **Tickler**s link to open the Tickler Queue:

8. Use the multi variable search to narrow down the results in the Tickler Queue. Click **Search.**



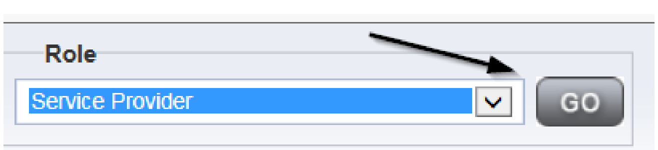
Tip

When searching for a future Tickler, remember to clear the check box next to Apply Alert Days Before Due prior to clicking **Search**.

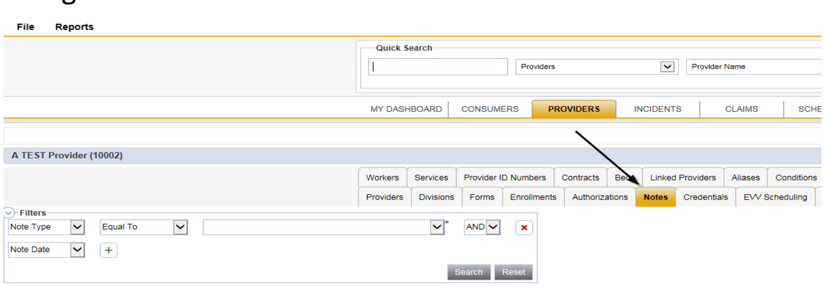
Submit Supporting Documentation

The Service Provider will receive notification on My Dashboard and review Attachment I which defines what documents are needed. They will then save a copy of each supporting document and upload each one as a single attachment to an individual note with the corresponding subtype.

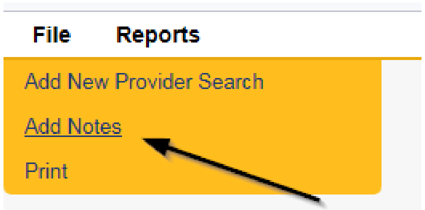
1. Set "Role" = Service Provider then click **Go**



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

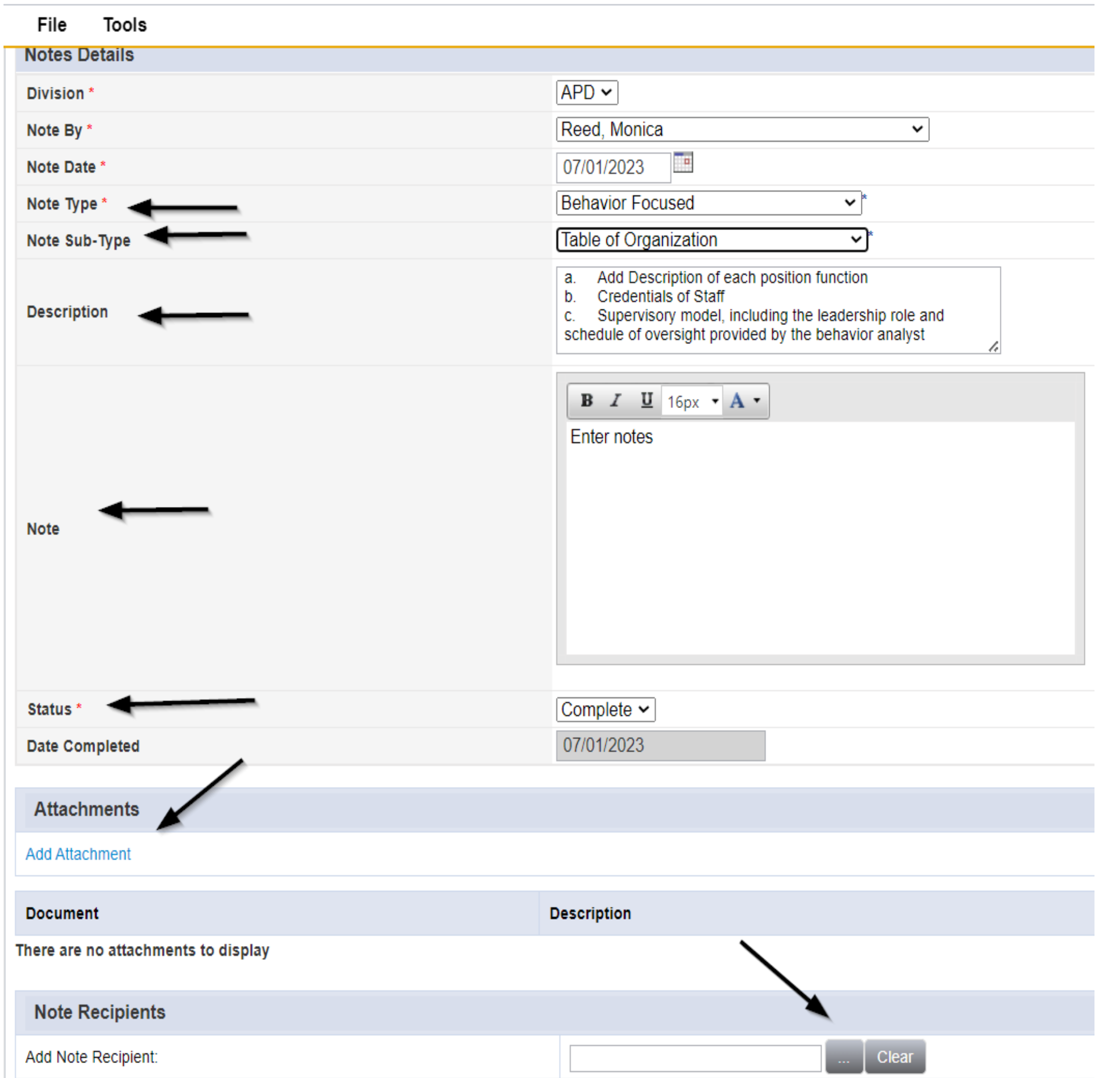


3. Click **File > Add Notes**

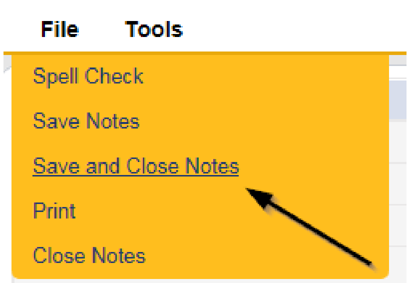


4. In the new Note record, update the following fields:
    a. "Note Type" = **BF/IB/EIB/MEIB**
    b. "Note Subtype" = select as appropriate from the following
        i. Approaches to Assessment
        ii. Basic ABA Curriculum
        iii. Behavioral Emergency Procedure – *Include the following information in the description field*
            a. Curriculum staff are/will be trained in
            b. Policy for medical rule-out
            c. Policy for use
        iv. Behavioral Experience
        v. Behavioral Monitoring System – *Include the following information in the description field*
            a. Schedule of checks
            b. Monitoring tolls for behavioral program fidelity and ongoing staff behavioral competence
            c. How staff will comply with Rule 65G-4, F.A.C. related to the practice of behavior analysis, including the application of restrictive procedures.
            d. Description of data collection and record keeping practices.
        vi. Clinical Director Experience
        vii. Clinical Services
        viii. Consumer Admission Characteristics
        ix. Description of Service Delivery Style
        x. Internal Quality Assurance Procedures
        xi. Staff Development/Training Activities
        xii. Table of Organization – *Include the following information in the description field*
            a. Add Description of each position function
            b. Credentials of Staff
            c. Supervisory model, including the leadership role and schedule of oversight provided by the behavior analyst
    c. "Description" = Enter description as same as Subtype OR add the additional information as requested in the above table
    d. "Note" = Enter Notes
    e. "Status" = Complete

f. Click "Add Attachment" and search for the copy of the supporting documentation on the user's computer. Click Upload
g. Click the ellipsis on the "Add Note Recipient" to add the *Clinical Workstream Worker* 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.



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



6. Repeat steps 3 – 5 as necessary to attach each individual document. Add one note per document.

Note

Each attachment must be under 5.76 MB. A note can have up to 10 attachments.

CAUTION

File names can only include letters, numbers, hyphens, underscores, and spaces. File Names cannot include special characters. You will not be able to open it and view the file.

Note

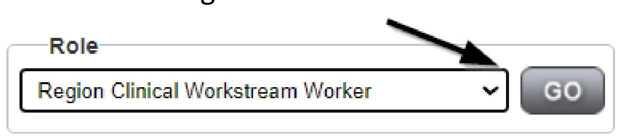
The accepted file types include:

- Images: bmp, dot, gif, jpg, jpeg, pict, png, tif, tiff and xps
- Documents: doc, docx, txt, ppt, pptx, and pdf
- Spreadsheet: xls, xlsx
- Sound: wav

Initial Review

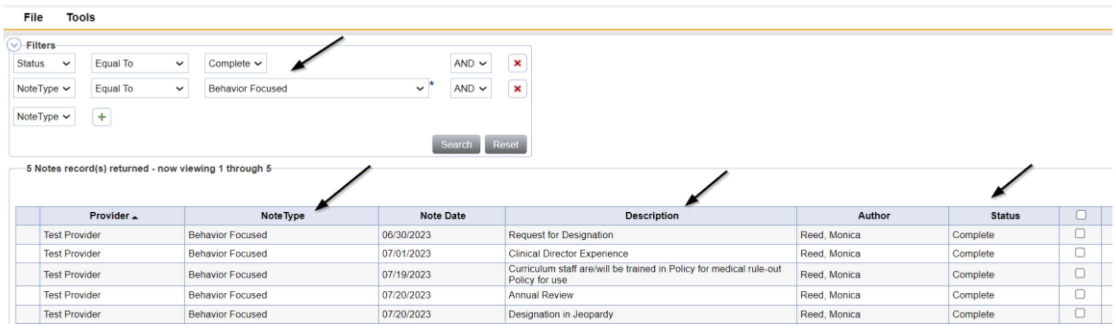
The Region Clinical Workstream Worker will receive notification on My Dashboard with all the supporting documentation. They will review each note and begin their initial review.

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



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

3. Select the Note Type filter as specific to the service level designation (e.g., **BF/IB/EIB/MEIB**) and then click the Search button. Select the supporting documentation notes records via the hyperlink.

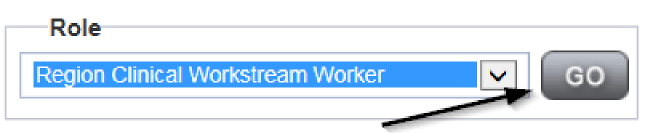


4. Review all supporting documentation and determine if the packet is complete.

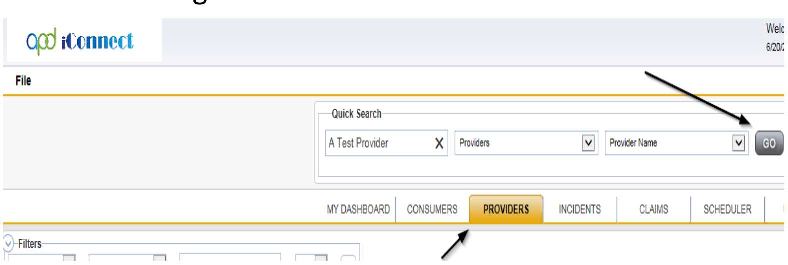
Schedule Site Visit

The Region Clinical Workstream Worker will call the Service Provider to set the Site Visit appointment date/time. They will then enter the site visit appointment into iConnect.

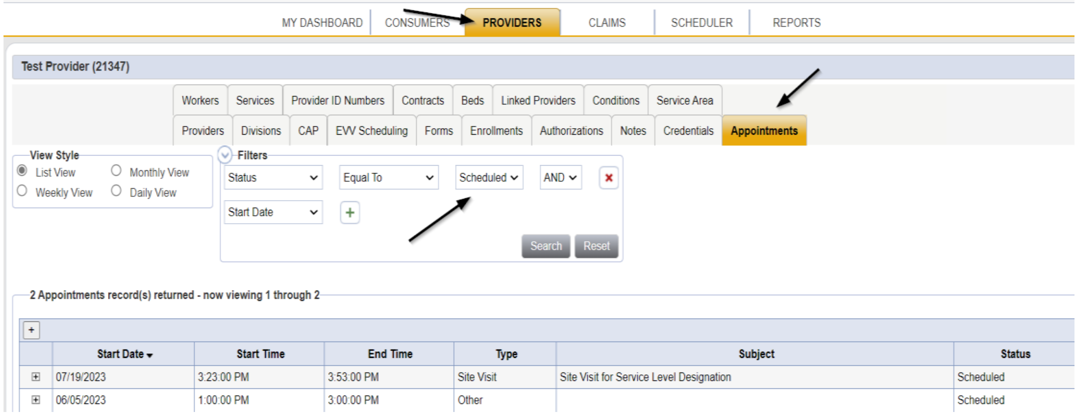
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



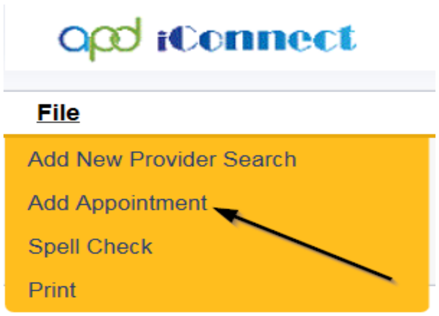
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click go.



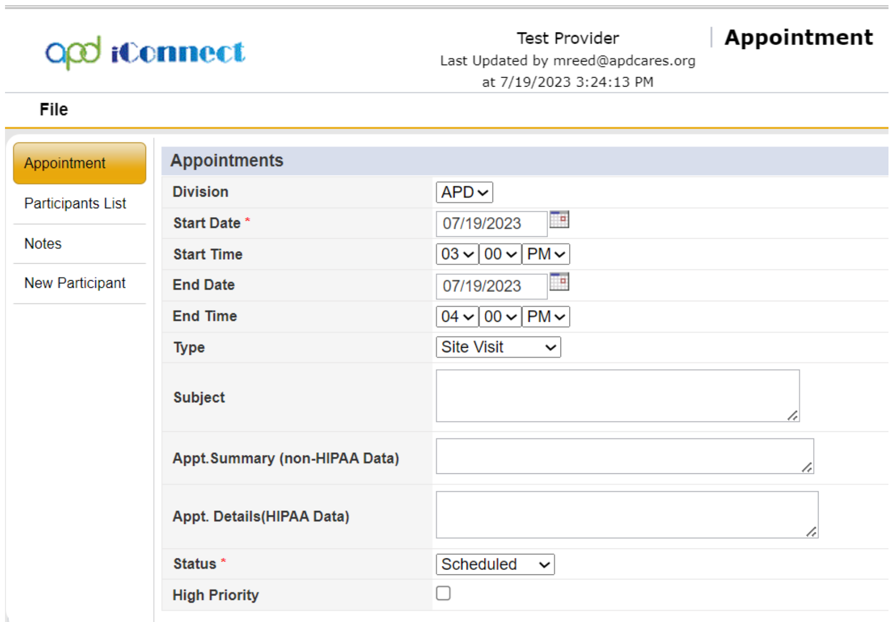
3. The Provider’s record will display. Navigate to the **Providers > Appointments** tab.



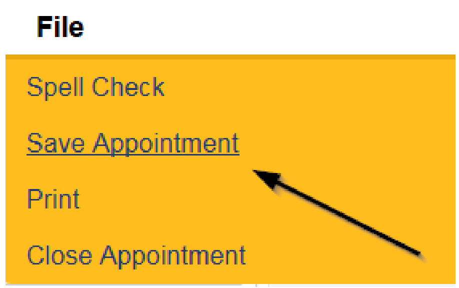
4. Click **File > Add Appointment**



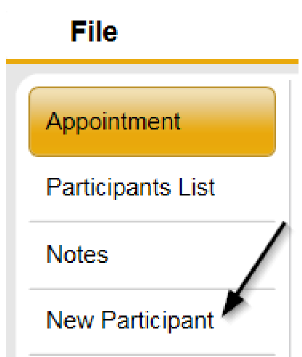
5. Enter the following fields on the Appointment Details page
   a. "Division" = APD
   b. "Start Date" = Enter date
   c. "Start Time" = Enter time
   d. "End Date" = Enter end date
   e. "End Time" = Enter end time
   f. "Type" = Site Visit
   g. "Subject" = Enter description
   h. "Appt Summary" = Enter summary
   i. "Appt Details" = Enter details
   j. "Status" = Scheduled



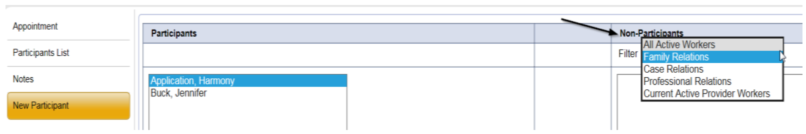
6. When finished select **File > Save Appointment**



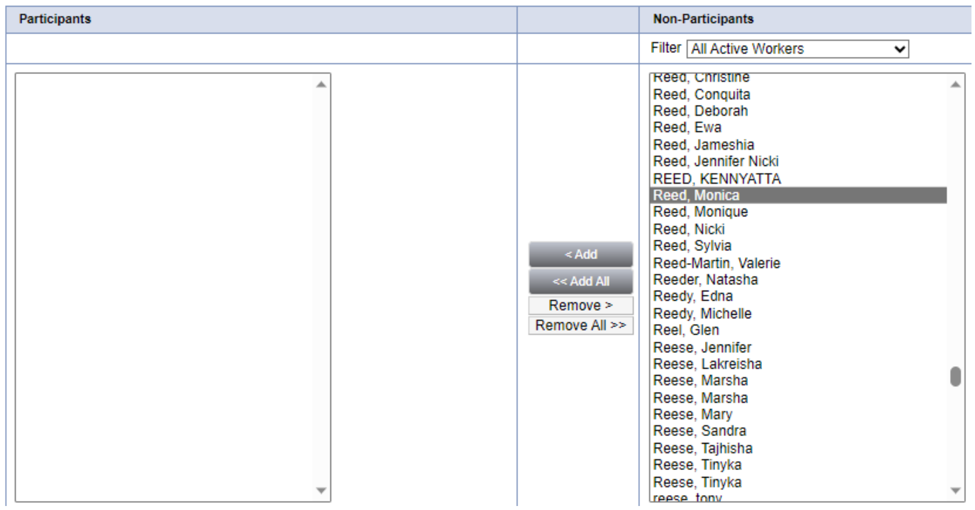
7. Click **New Participant** on the left-hand navigation menu



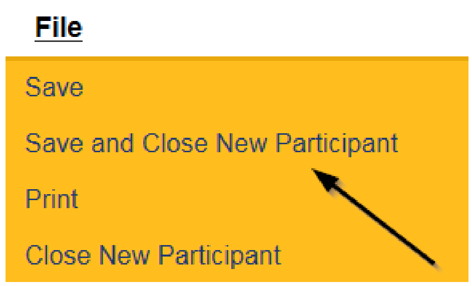
8. Set the **Non-Participants filter** list to the appropriate value in order to select the appointment participants. Select Current Active Provider Workers to list the names of the workers on that provider’s Workers tab. Workers are listed under the parent corporation. Select All Active Workers to list all workers in APD iConnect.



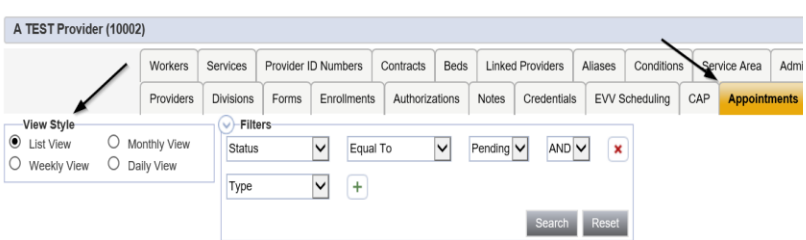
9. Select the appropriate Region Clinical Workstream Worker and Service Provider Worker names by holding the control key down and clicking on the names and then **Click < Add**



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



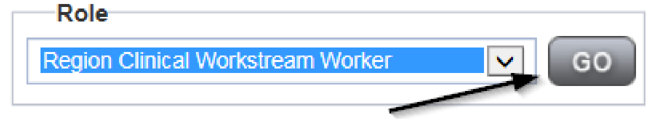
11. The Provider can view all scheduled/announced appointments on the **Providers > Appointments tab** by managing the view via the View Style filter or in the Scheduler chapter to view all appointments.



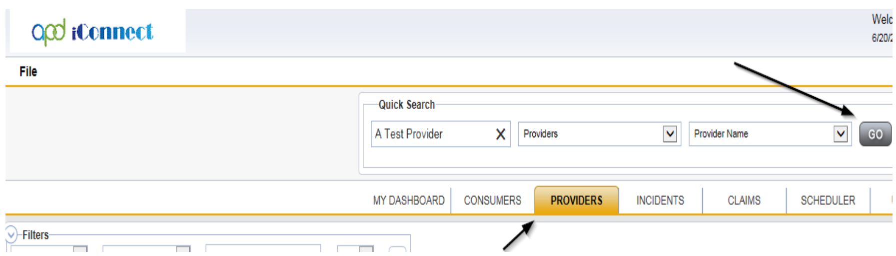
Packet Complete

After review by the Region Clinical Workstream Worker, If the Behavior Service Level Designation documentation is complete, the Region Clinical Workstream Worker will send a note to the Service Provider. If not complete, proceed to [As Needed: Further Documentation Required.](#)

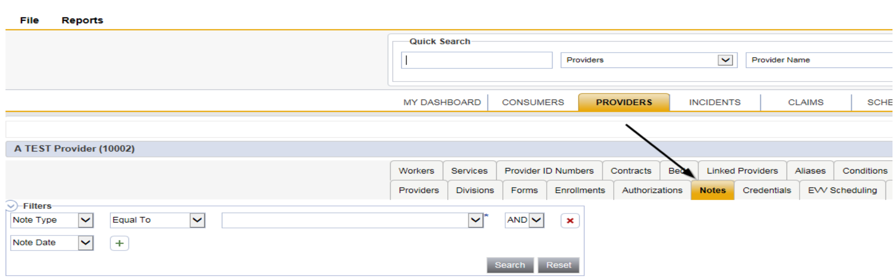
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



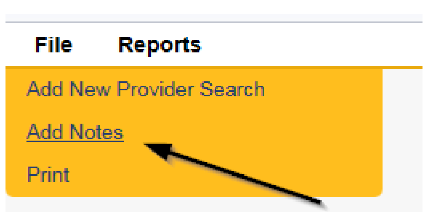
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **Go**.



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

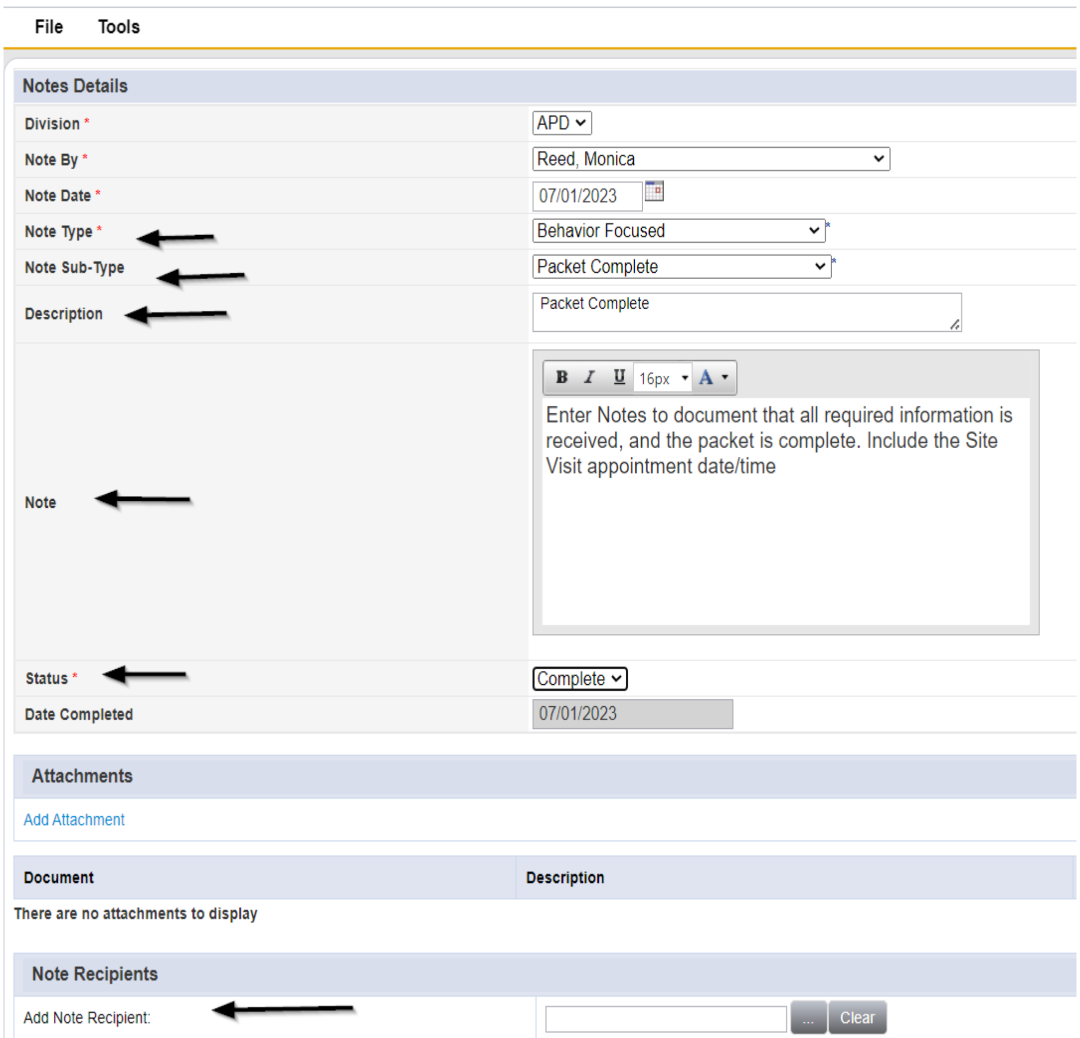


4. Click **File > Add Notes**

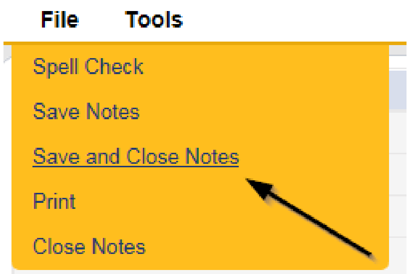


5. In the new Note record, update the following fields:

a. "Note Type" = BF/IB/EIB/MEIB
b. "Note Subtype" = Packet Complete
c. "Description" = Packet Complete
d. "Note" = Enter Notes to document that all required information is received, and the packet is complete. Include the Site Visit appointment date/time
e. "Status" = Complete
f. 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.



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

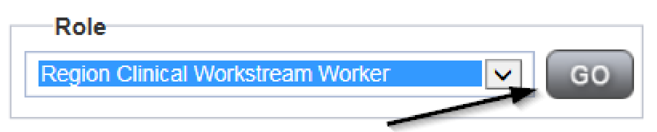


Conduct Site Visit

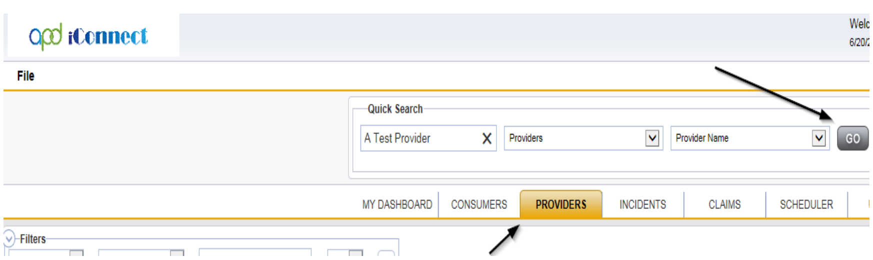
The Region Clinical Workstream Worker will print the appropriate Initial Eligibility worksheet from MS Word (not in iConnect) prior to the site visit. They will then conduct the site visit and manually document all findings on the hard copy checklist. Upon returning to the office, they will then complete the online form in iConnect and add a note. If the Region Clinical Workstream Worker recommends a denial proceed to As Needed: Recommendation for Denial

Complete Behavior Initial Eligibility Forms

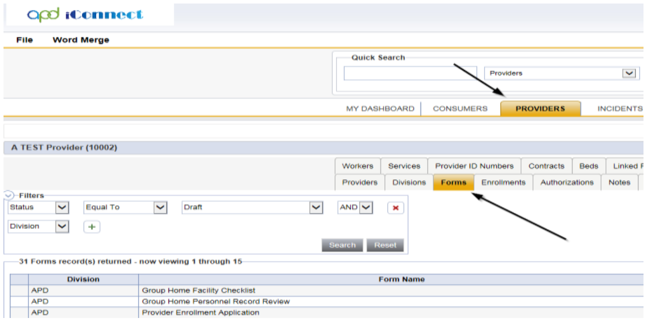
1. Set "Role" = Region Clinical Workstream Worker then click **Go.**



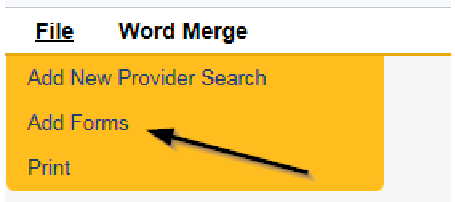
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.



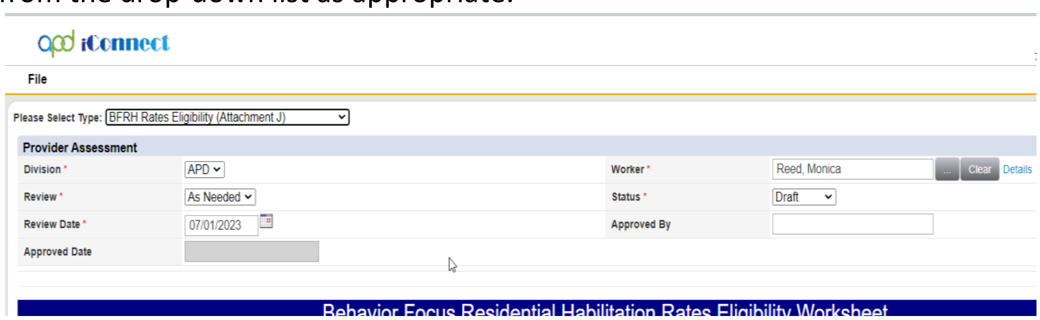
3. The Provider's record will display. Navigate to the **Providers > Forms** tab



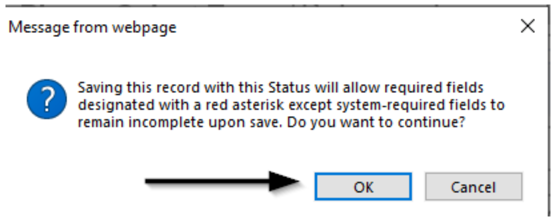
4. Click **File > Add Forms**



5. Select “BFRH Rates Eligibility (Attachment J) or IBRH Rate Eligibility (Attachment K)” from the drop-down list as appropriate.

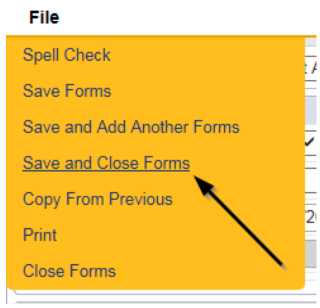


6. Update the following Header fields:
   a. "Division" = APD
   b. "Review" = As Needed
   c. "Status" = Draft for Initial Save then Complete
   d. Click “OK” on the pop-up message box



   e. Complete all fields on the Form

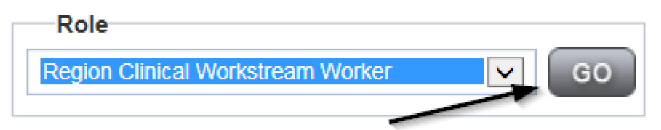
7. When finished, click **File > Save and Close Forms**



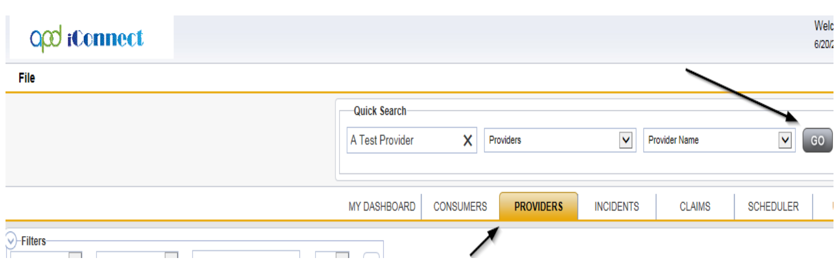
Generate Approval Letter

The Region Clinical Workstream Worker will generate the approval letter Attachment L confirming the requested designation and attach to an existing note

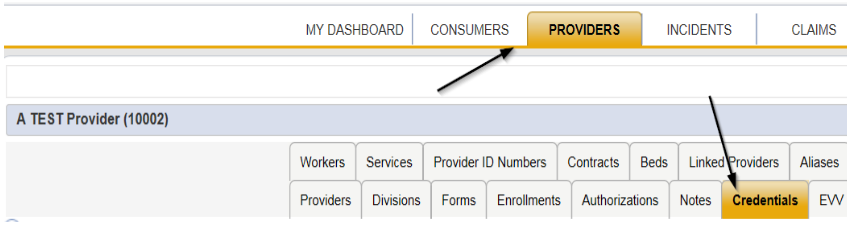
1. Set "Role" = Region Clinical Workstream Worker then click **Go.**



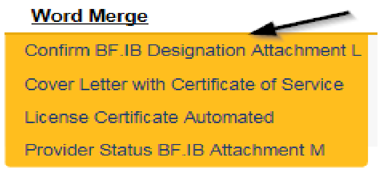
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.



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



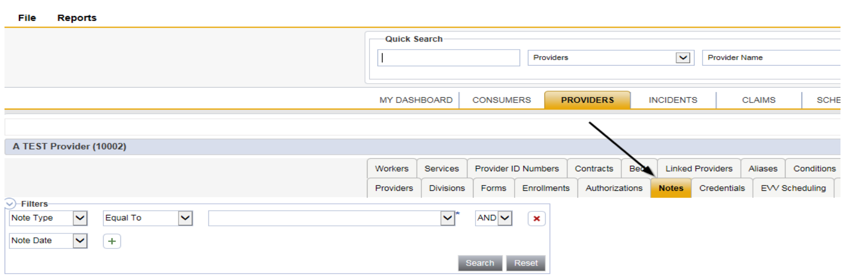
4. Select **Word Merge > Confirm BF.IB Designation Attachment L**



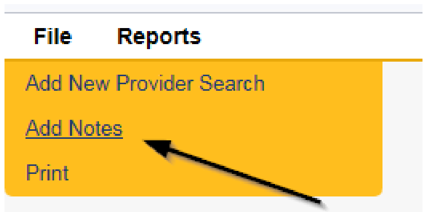
5. **Edit** the Word Merge Document as necessary.

6. When finished with editing the Word Merge Document, click **File > Save as** to save the updated Word Merge to a specified folder on the user's device.

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

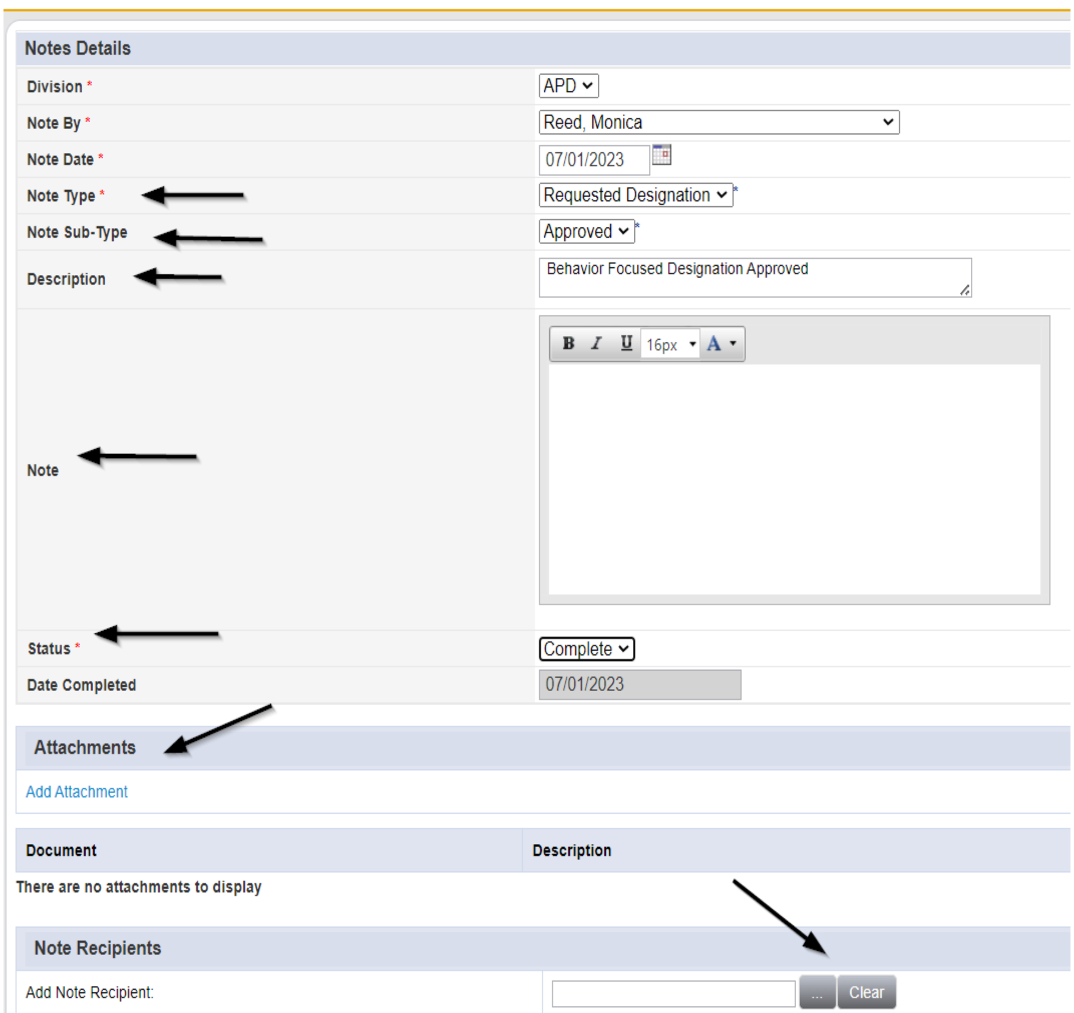


8. Click **File > Add Notes**

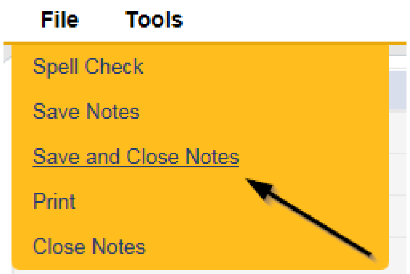


9. In the new Note record, update the following fields:
    a. "Note Type" = Requested Designation
    b. "Note Subtype" = Approved
    c. "Description" = Specify which designation is approved (e.g., *Behavior Focused Designation Approved*)
    d. "Note" = Enter notes
    e. "Status" = Complete

f. Click "Add Attachment" and search for the Confirm BF IB Designation Attachment L document on the user's computer. Click Upload
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
i. Click the ellipsis on the "Add Note Recipient" to add an additional recipient – *Region Clinical Workstream Lead*
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 an additional recipient – *Provider Enrollment*
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



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

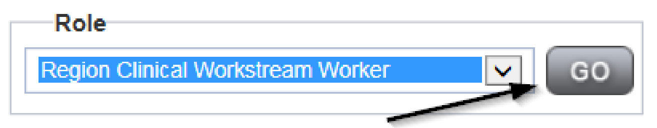


11. For more detailed general Word Merge instruction, see the As Needed: Word Merges section.

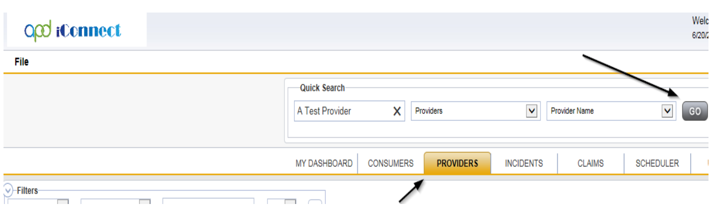
If there was a service expansion request that was approved for new services for this behavior service level designation, Provider Enrollment will need to update the BF/IB/EIB/MEIB services to "active" and confirm and update the services active date. See Chapter 11 Expansions – New Services training manual

Add License Information

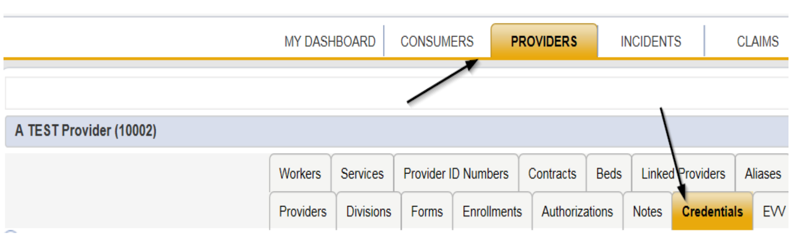
1. Set "Role" = Region Clinical Workstream Worker then click **Go.**



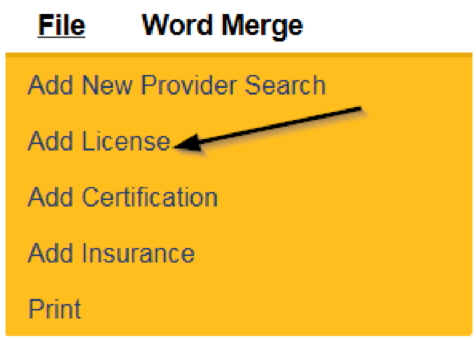
2. Navigate to the **Providers** chapter and enter the Provider's name (licensed facility) in the Quick Search filter and click **Go**.



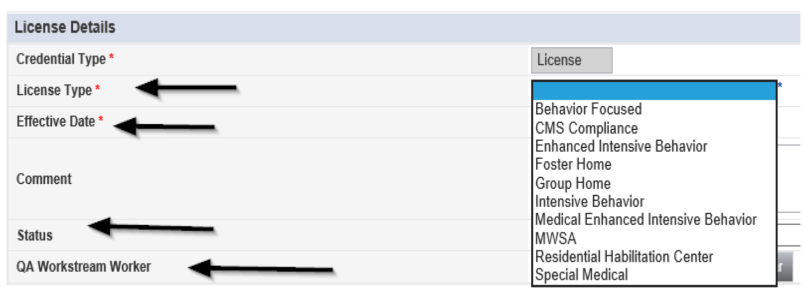
3. The Provider's record will display. Navigate to the **Providers > Credentials** tab



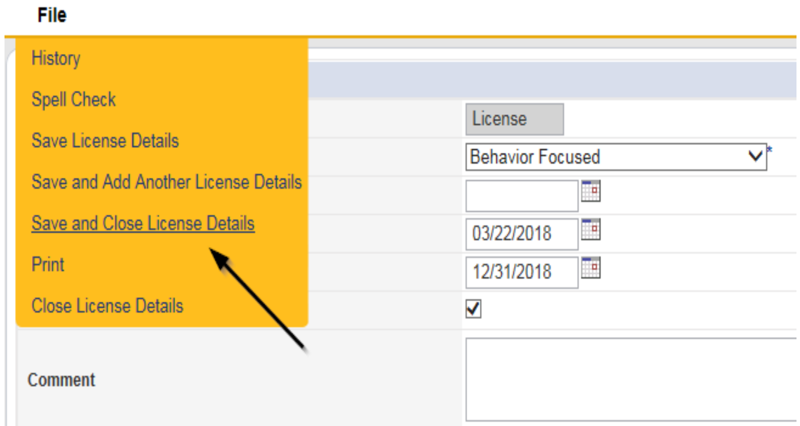
4. Select **File > Add License**



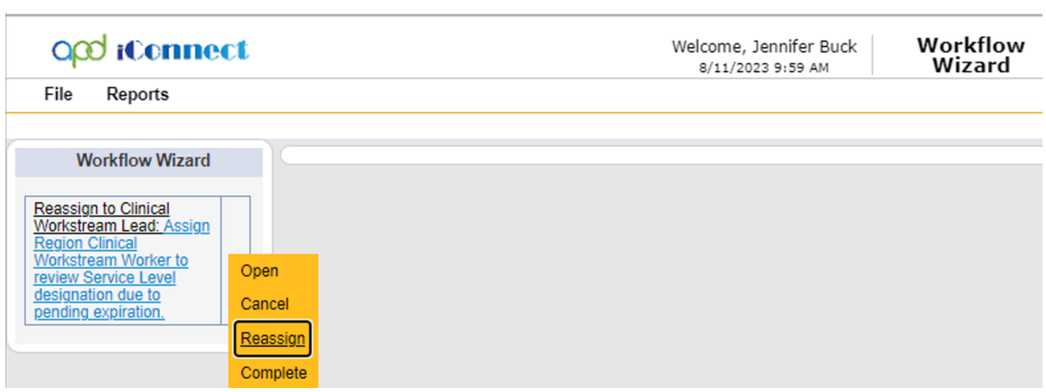
5. Update the following fields:
    a. "License Type" = Select as appropriate
        i. Behavior Focused
        ii. Intensive Behavior
        iii. Enhanced Intensive Behavior
        iv. Medical Enhanced Intensive Behavior
    b. "Effective Date" = Enter Date that the designation was approved
    c. "Expiration Date" = Enter Date as the last day of the month in which it expires which is typically for a year, unless there are unmet conditions or performance concerns. (designation must be renewed annually)
    d. "Comment" = Enter comments if applicable
    e. "Status" = Active
    f. "Reason" = Initial
    g. "QA Workstream Worker" = Click ellipses on the field to Add the Licensing Specialist. Enter the Last Name and Click Search and then select the Name

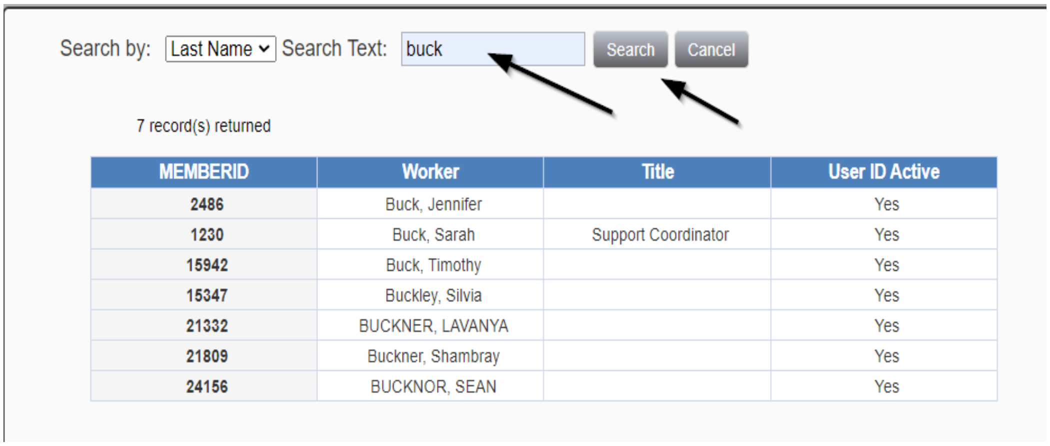


6. When finished, click **File > Save and Close License Details**



7. Upon saving the license record, a Workflow Wizard triggered a reminder tickler that is due in 365 calendar days. The Region Clinical Workstream Worker will reassign this tickler to the Region Clinical Workstream Lead immediately, but the Region Clinical Workstream Lead won't address it until 90 days before the designation expiration date.
    a. Tickler "Assign Region Clinical Workstream Worker to review Service Level designation due to pending expiration."
    b. Assigned to Region Clinical Workstream Worker who will reassign to the Region Clinical Workstream Lead.
    c. Alerted on the ***90th*** calendar day before the Designation expiration date (365 days from originally entered expiration date)
    d. Select Reassign and then enter the Region Clinical Workstream Leads last name in the pop-up box and click Search. Select the name via the hyperlink. The tickler has been reassigned.

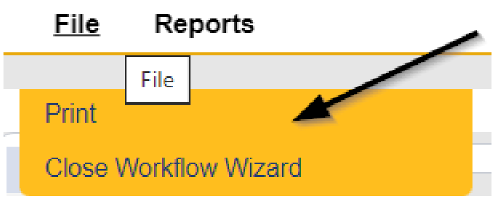



Search by: Last Name Search Text: buck Search Cancel

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

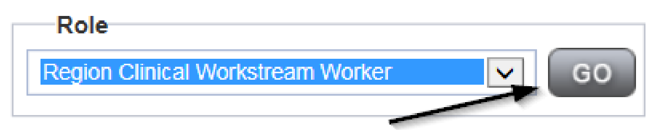
e. Select **File > Close Workflow Wizard**



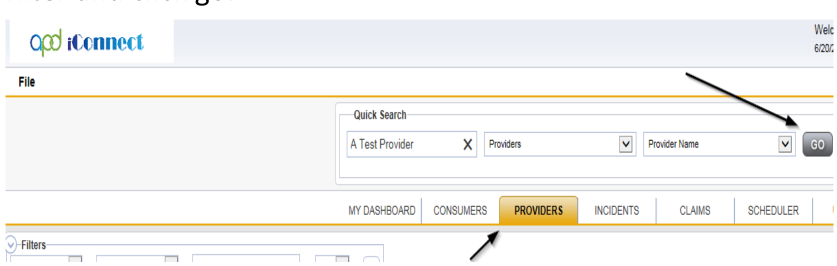
As Needed: Further Documentation Required

If the Region Clinical Workstream Worker determines that the packet is not complete and further documentation is required, they will add a note for the Service Provider.

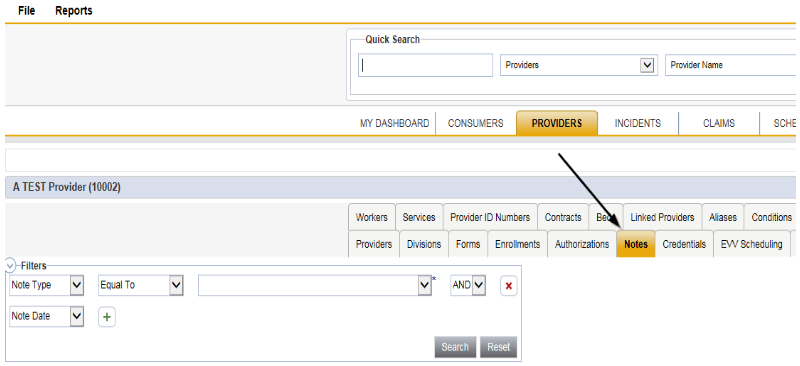
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



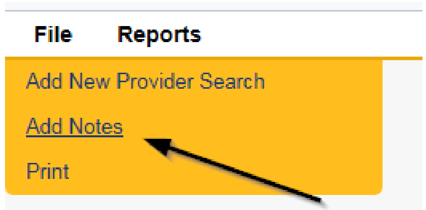
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click go.



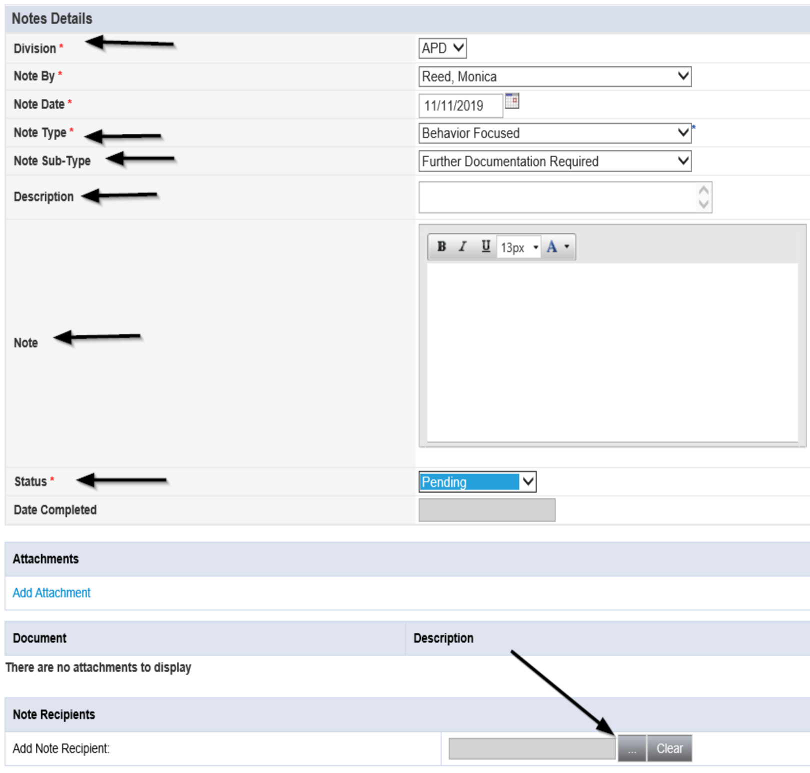
3. The Provider's record will display. Navigate to the **Providers > Notes** tab



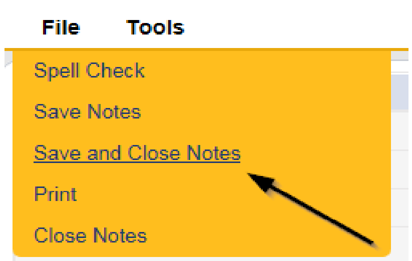
4. Click **File > Add Notes**



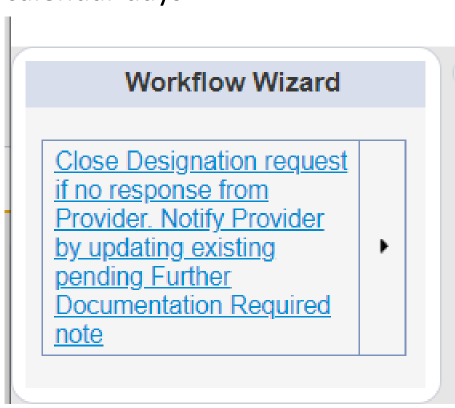
5. In the new Note record, update the following fields:
   a. "Note Type" = BF/IB/EIB/MEIB
   b. "Note Subtype" = Further Documentation Required
   c. "Description" = List names of missing documents
   d. "Note" = Enter notes and list the missing or incomplete documents
   e. "Status" = Pending
   f. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* 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



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



7. Upon saving the note, a Workflow Wizard triggered the reminder that is due in 30 calendar days



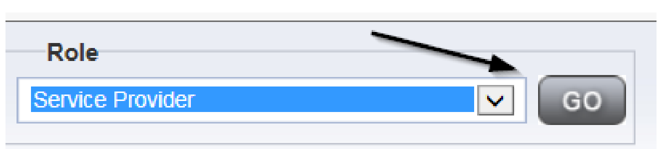
d. Tickler - "Close designation request if no response from Provider. Notify Provider by updating existing pending Further Documentation Required note"
e. Assigned to Self
f. Due on the ***30th*** calendar day from the "Further Documentation Required" pending note

The Region Clinical Workstream Worker will proceed to <u>As Needed: Designation Request Closed</u>

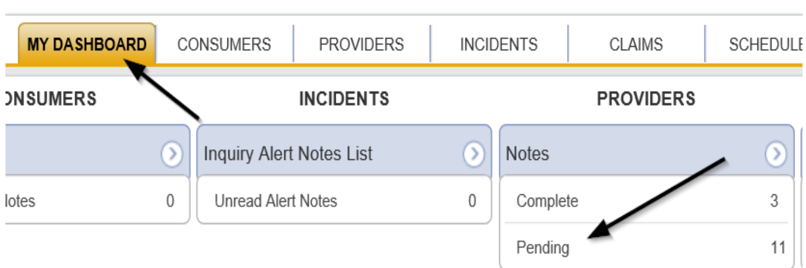
As Needed: Additional Documentation

The Service Provider will scan and save a copy of any requested documentation to their desktop and attach it to the pending note. They will upload each document as an attachment to the existing note and then send it to the Region Clinical Workstream Worker. The Region Clinical Workstream Worker will then review the packet for completeness.

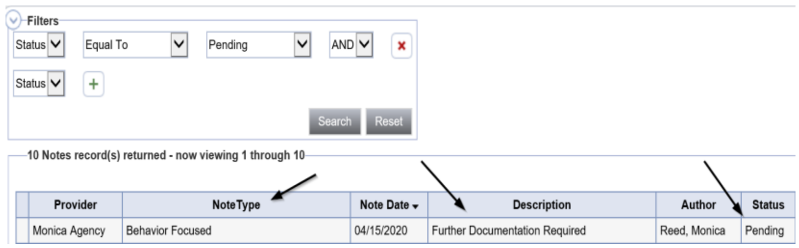
1. Set "Role" = Service Provider then click **Go**



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



3. Select the **Note Type = BF/IB/EIB/MEIB and Description = Further Documentation Required** and select the record via the hyperlink



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

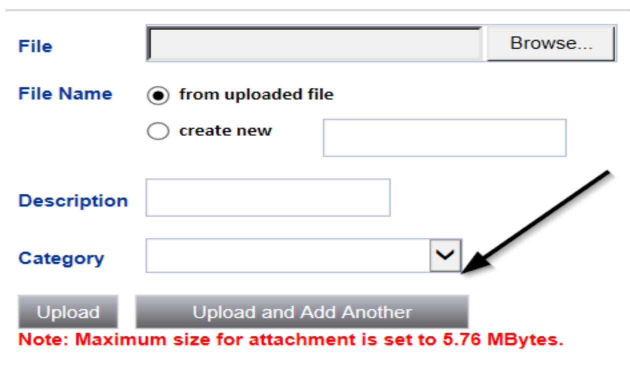
   a. "Note Subtype" = Leave as Further Documentation Required

   b. "Description" = List documents

   c. "Click Append Text to Note" = Enter notes

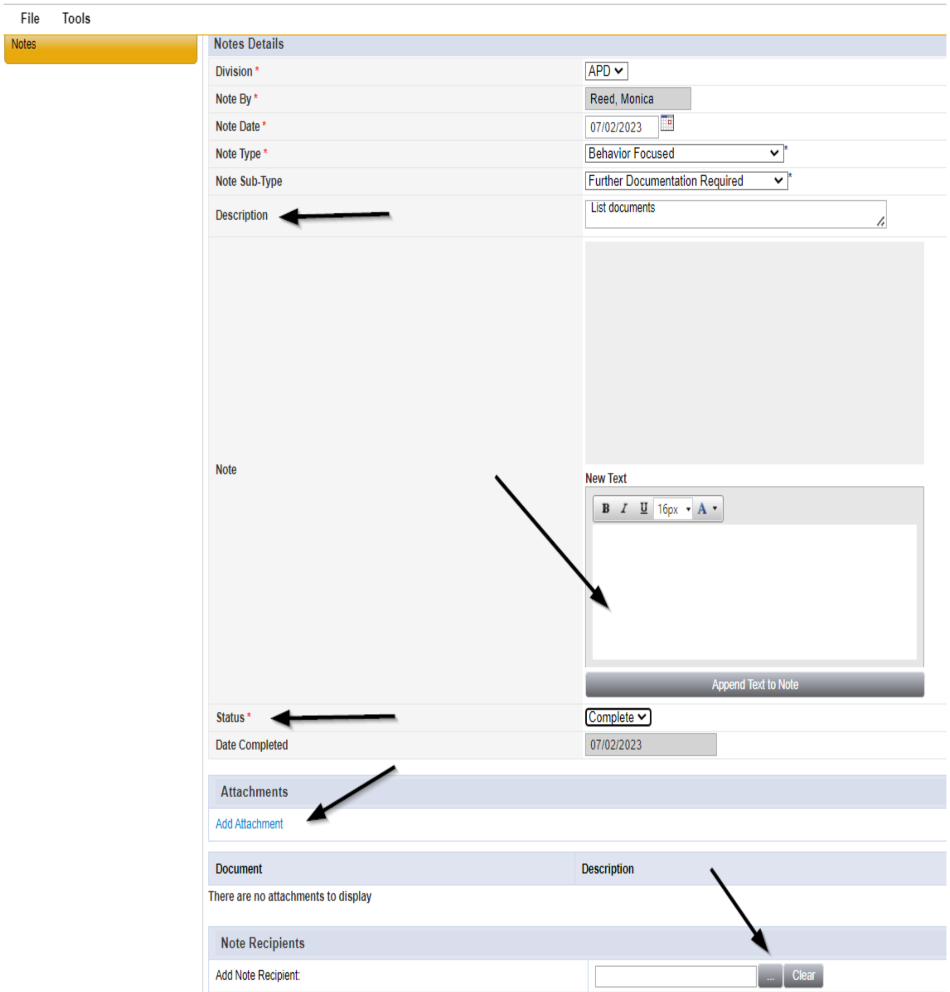
   d. "Status" = Leave as Pending until all attachments are added then update to Complete

   e. Click "Add Attachment" and search for the copy of the requested documentation on the user's computer. Click Upload and Add Another until finished

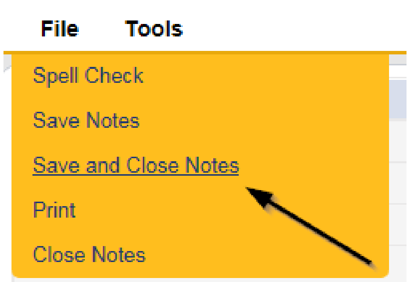


   f. Click the ellipsis on the "Add Note Recipient" to add the *Region Clinical Workstream Worker* as the Note Recipient

   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**

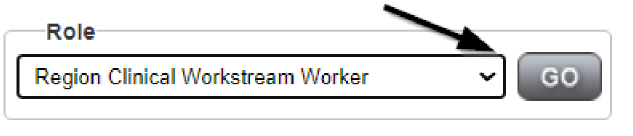


The Region Clinical Workstream Worker will receive the note on My Dashboard and review the packet for completeness. If complete, proceed to Packet Complete. If still not complete, proceed to As Needed: Further Documentation Required

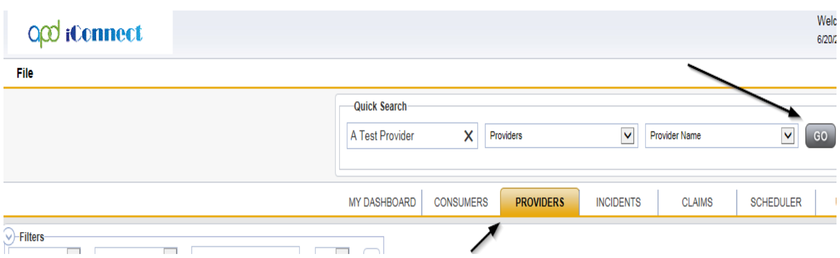
As Needed: Designation Request Closed

The Region Clinical Workstream Worker will add a new note to advise the Service Provider of designation closure if the Provider submits no documentation within 30 calendar days.

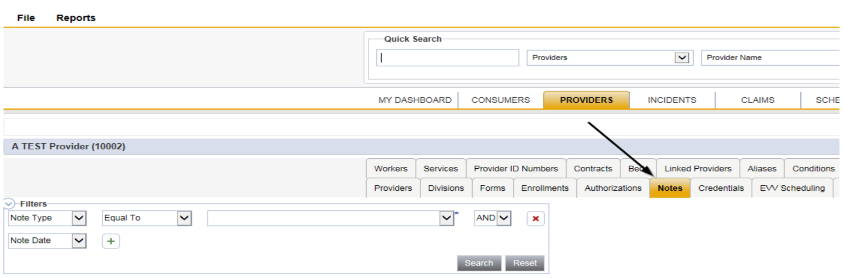
1. Set “Role” = Region Clinical Workstream Worker then click **Go**



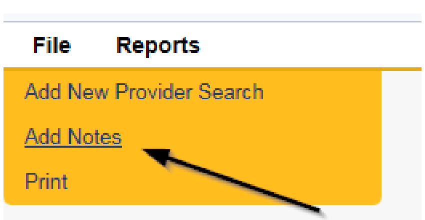
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **Go**.



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. "Note Type" = **BF/IB/EIB/MEIB**
    b. "Note Subtype" = Designation Request Closed

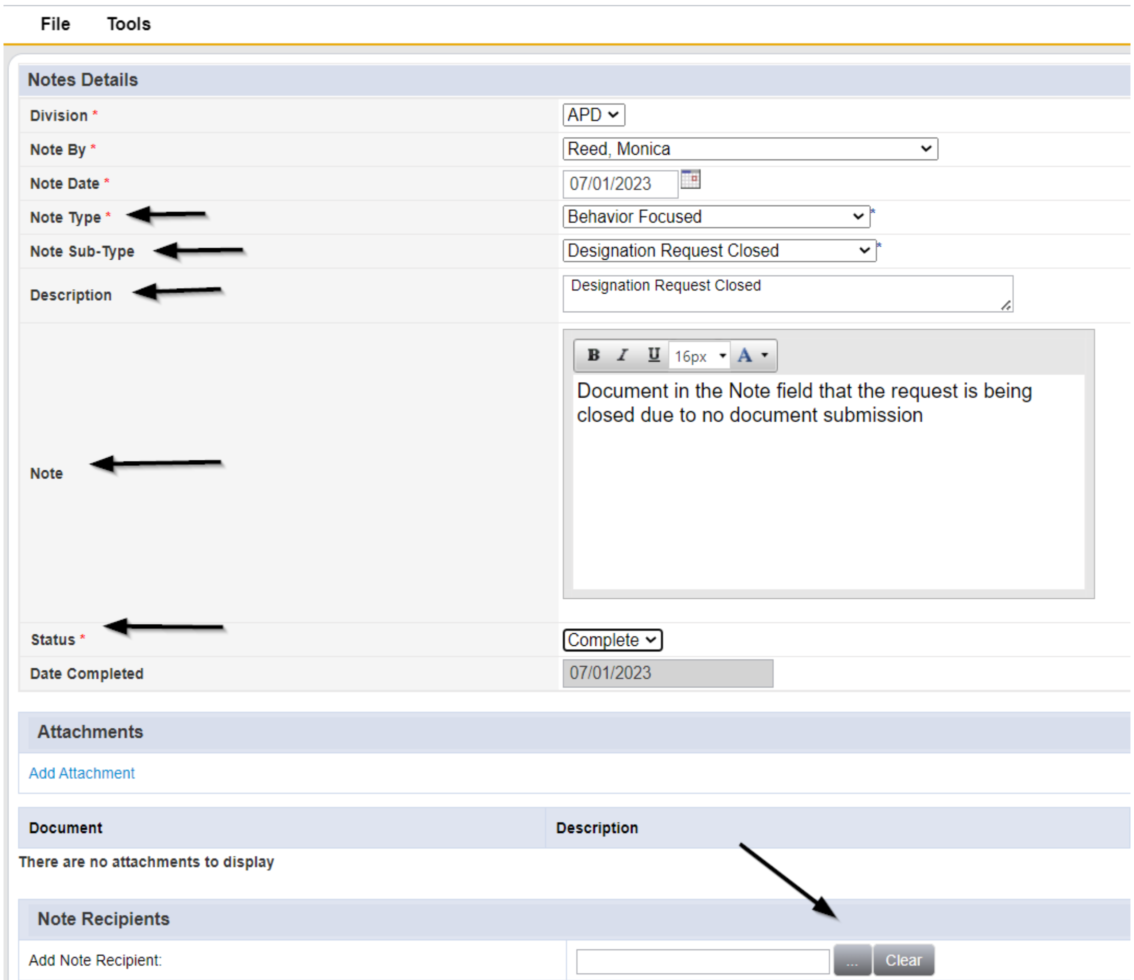
c. "Description" = Designation Request Closed

d. "Note" = Document in the Note field that the request is being closed due to no document submission and to reapply at any time.

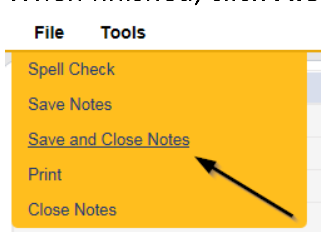
e. "Status" = Complete

f. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* 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



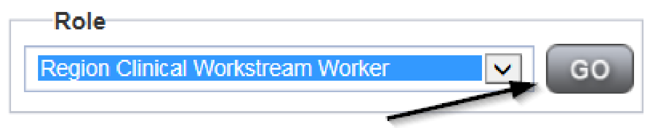
6. When finished, click **File > Save and Close Notes**



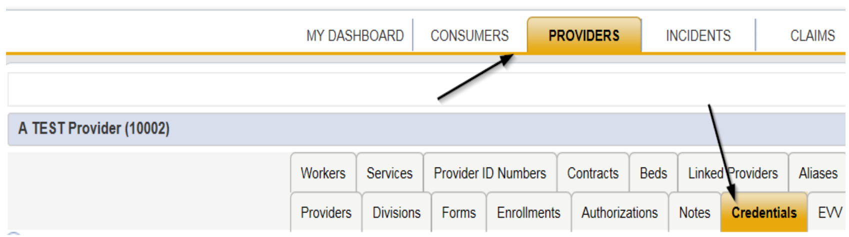
As Needed: Recommendation for Denial

If the Region Clinical Workstream Worker is recommending a denial, they will generate the Designation in Jeopardy Attachment M word merge and attach it to a new note.

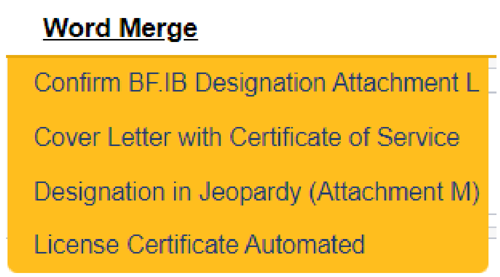
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



2. Navigate to the **Provider** record for the licensed home. Select the **Credentials** tab



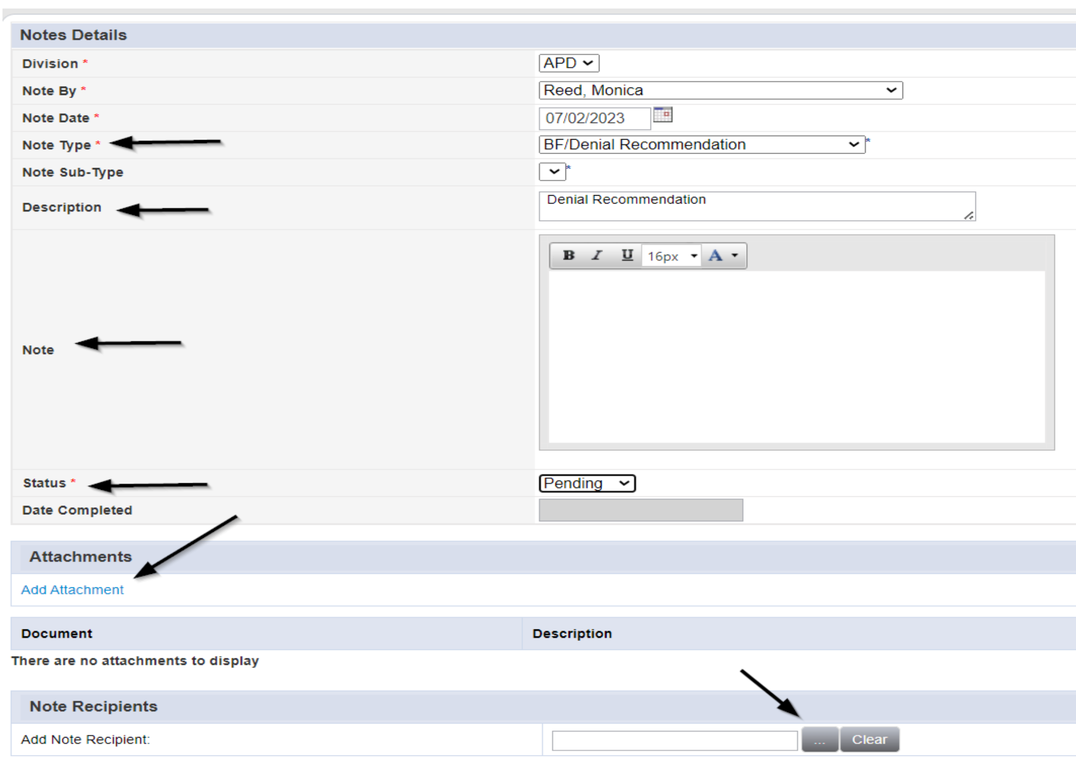
3. Select **Word Merge > Designation in Jeopardy (Attachment M)** and save it to a note



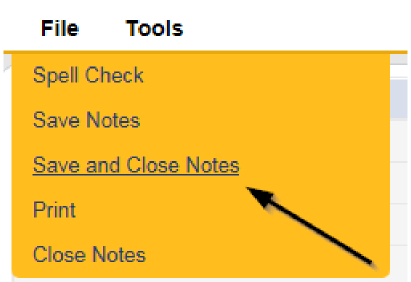
4. The Word Merge preview window displays. Select **Save to Note.**

5. In the new Note record, update the following fields:
    a. "Note Type" = BF/IB/EIB/MEIB/Denial Recommendation
    b. "Description" = Denial Recommendation
    c. "Note" = Enter Notes to document the recommendation for denial and enter all deficiencies
    d. "Status" = Pending
    e. Attach = Designation in Jeopardy (Attachment M) Word Merge
    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 – *Licensing Supervisor*
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
j. Click the ellipsis on the "Add Note Recipient" to add an additional recipient – *ROM/Deputy ROM*
k. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note
l. Click the ellipsis on the "Add Note Recipient" to add an additional recipient – *Region Clinical Workstream Lead*
m. 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.**

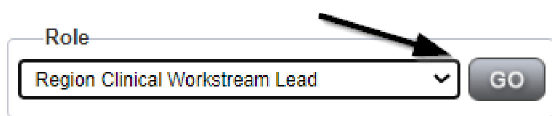


6. For more detailed general Word Merge instruction, see the [As Needed: Word Merges] section.

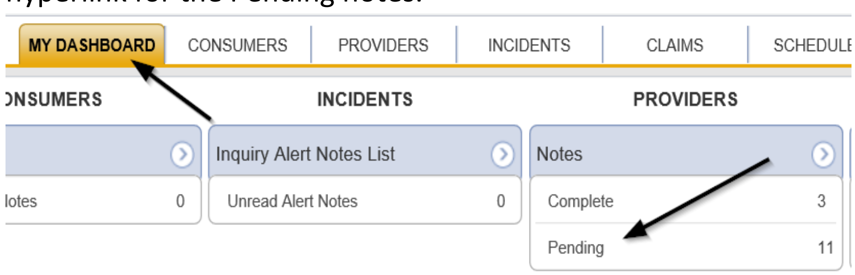
As Needed: Denial Meeting Determination

The Licensing Specialist, Licensing Supervisor, ROM/DROM and Region Clinical Workstream Lead will then meet to review the denial recommendation. The outcome of the meeting will be documented in the existing pending note.

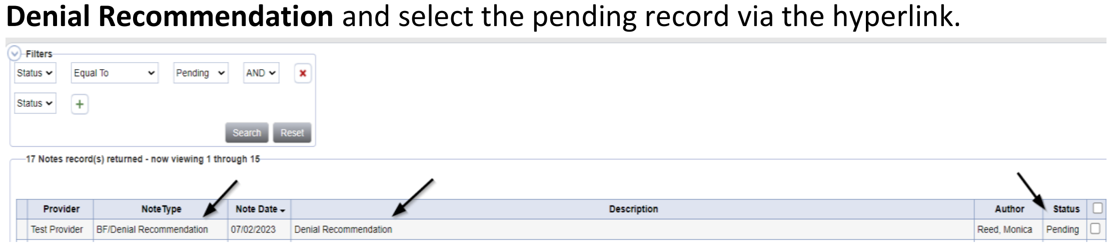
1. Set “Role” = Region Clinical Workstream Lead or any of the roles assigned to the Denial Recommendation note and then click **Go**



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

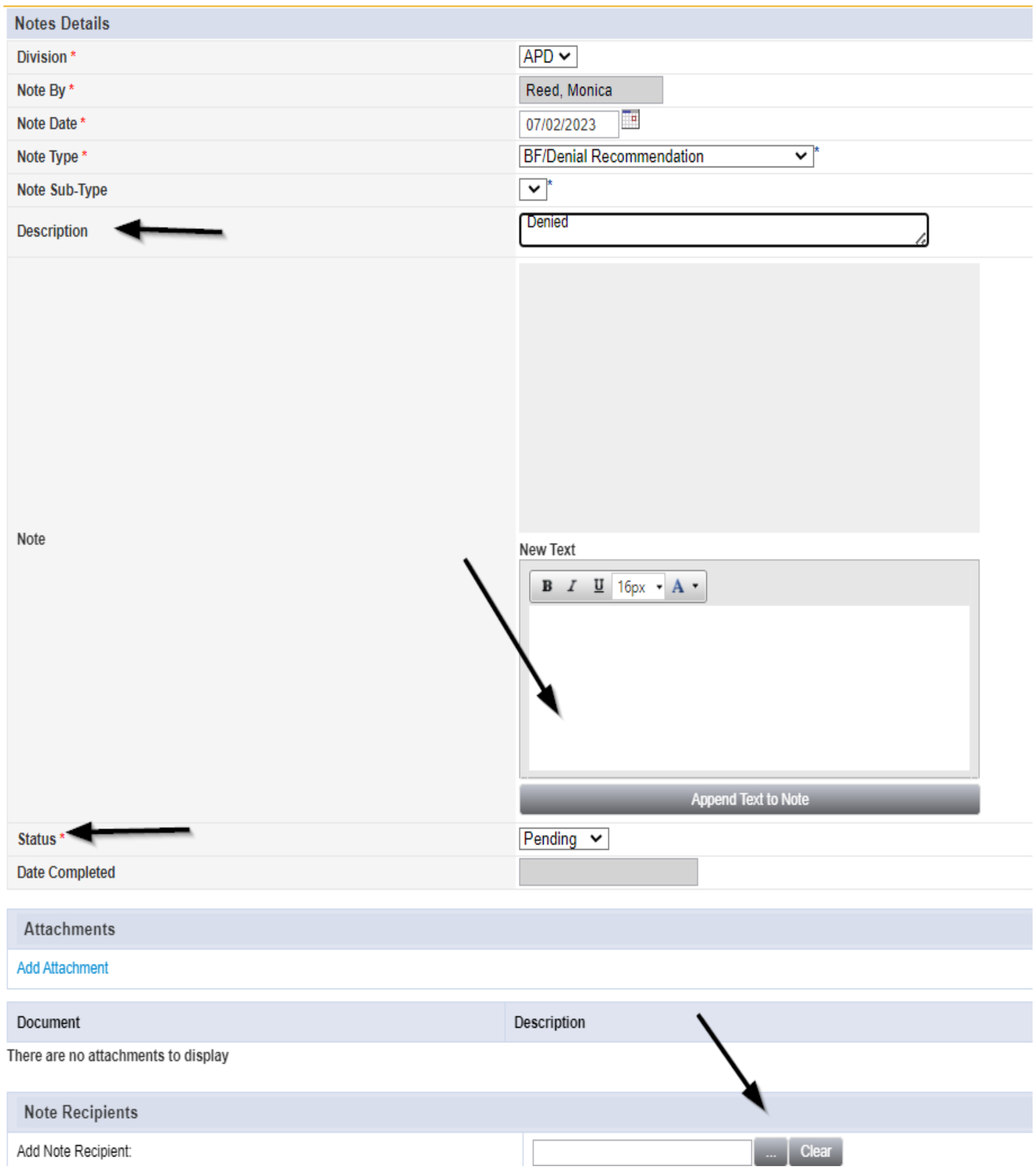


3. Select the **Note Type = BF/IB/EIB/MEIB/Denial Recommendation** and **Description = Denial Recommendation** and select the pending record via the hyperlink.

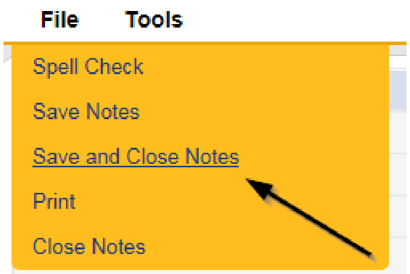


4. In the existing Note record, update the following fields:
    a. "Note Type" = Leave as BF/IB/EIB/MEIB/Denial Recommendation
    b. “Description” = Denied or Approved

c. "Append Text to Note" = Document outcome of denial recommendation meeting
d. "Status" = Leave as Pending
e. Click the ellipsis on the "Add Note Recipient" to add the *Region Clinical Workstream Worker* as the Note Recipient
f. 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**

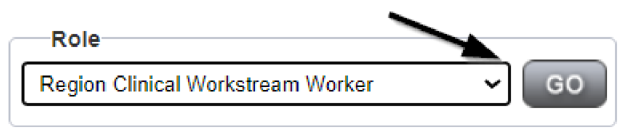


If designation is "approved" proceed to [Generate Approval Letter](#), if denied proceed to [As Needed: Designation Denied](#)

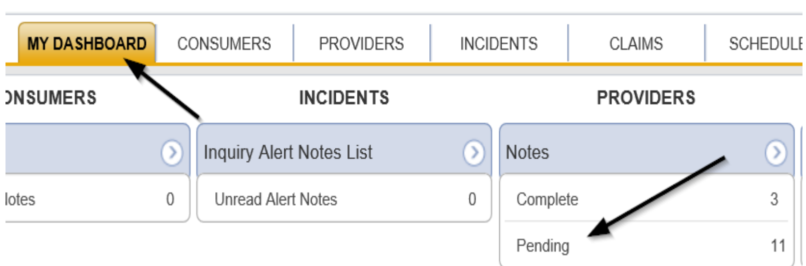
As Needed: Designation Denied

The Region Clinical Workstream Worker will receive notification on My Dashboard and update the existing pending note to Denied.

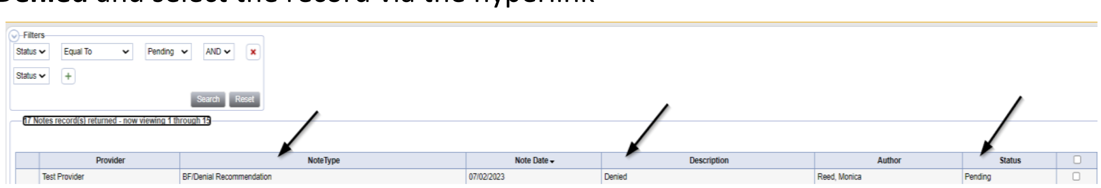
1. Set "Role" = Region Clinical Workstream Worker then click **Go**



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

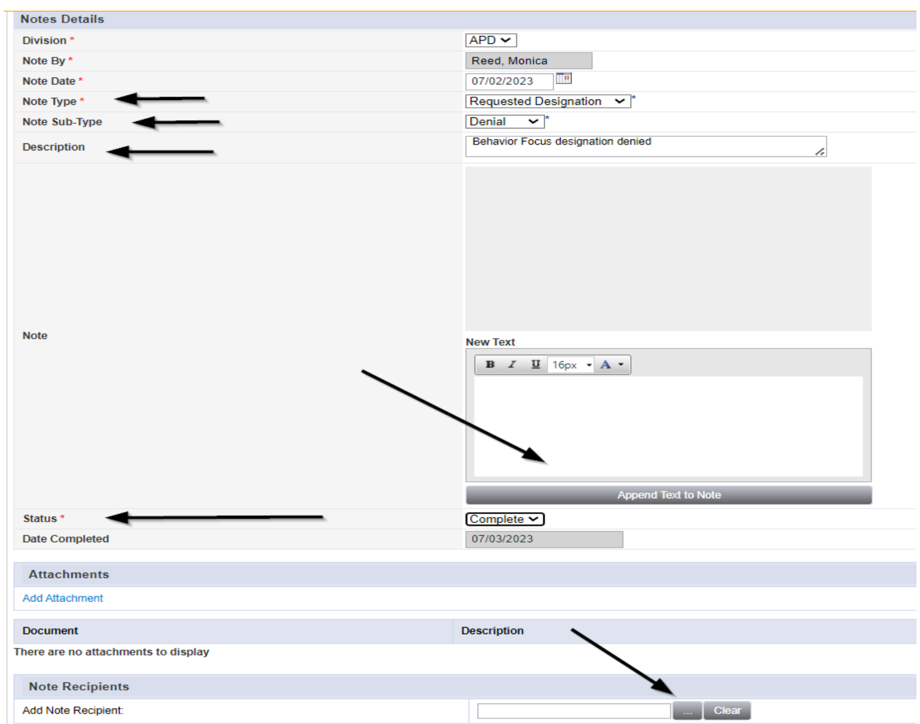


3. Select the **Note Type = BF/IB/EIB/MEIB/Denial Recommendation and Description = Denied** and select the record via the hyperlink

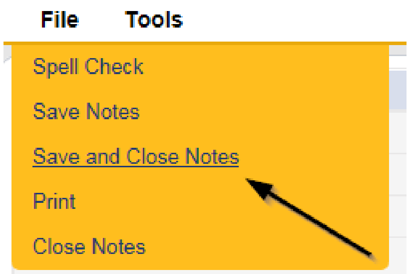


4. In the pending Note record, update the following fields:

a. "Note Type" = Update to Requested Designation
b. “Note Subtype” = Denial
c. "Description" = Specify which designation is Denied
d. "Click Append Text to Note" = Enter notes
e. "Status" = Update to Complete
f. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* 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 *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
j. Click the ellipsis on the "Add Note Recipient" to add the *Region Clinical Workstream Lead* as the Note Recipient
k. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note
l. Click the ellipsis on the "Add Note Recipient" to add the *Provider Enrollment* as the Note Recipient
m. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note



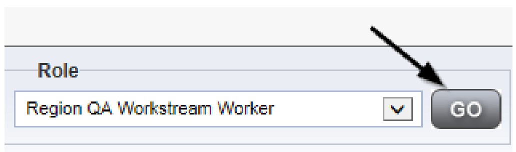
5. When finished click **File > Save and Close Notes**



As Needed: Word Merges

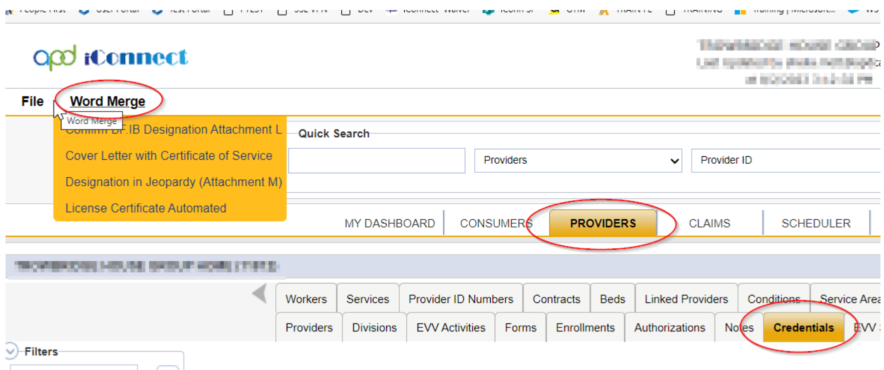
Generating the Word Merge

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

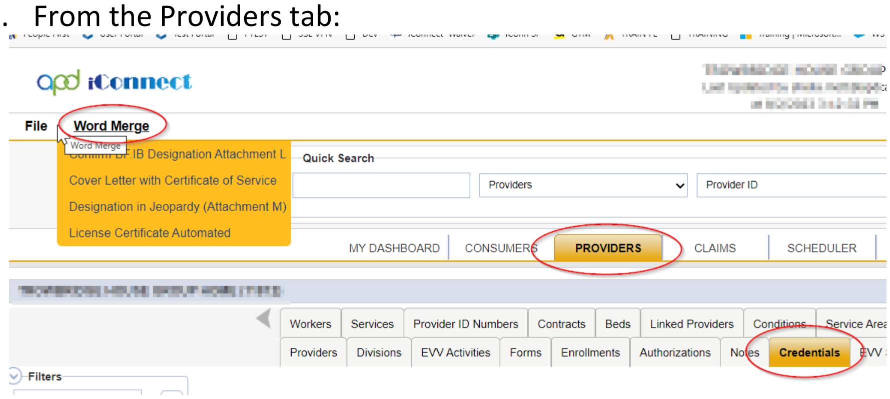


2. From the appropriate **Word Merge** menu based on the workflow, select the desired word merge.
    a. Examples of **Word Merge** menus
        i. From a form:

        ii. From the Credentials tab:



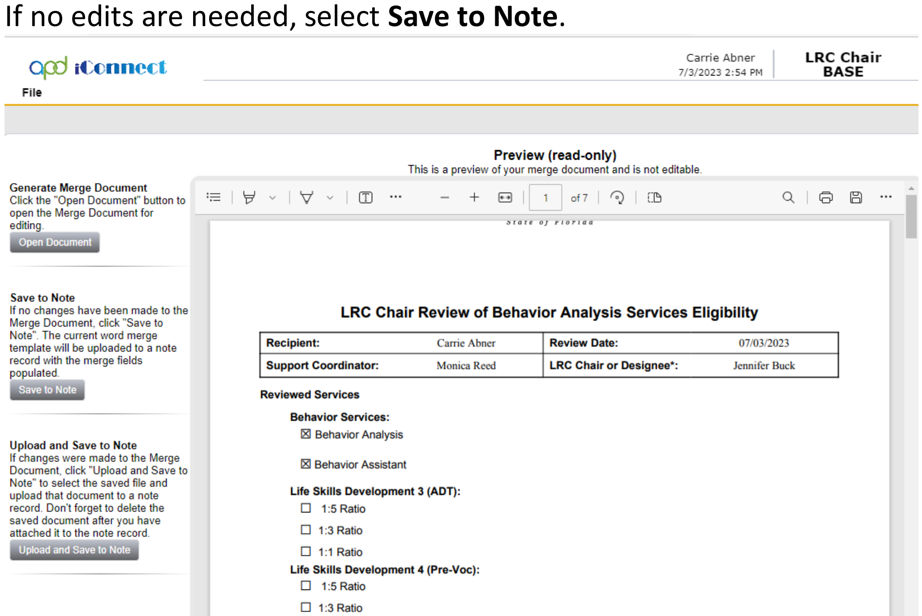
iii. From the Providers tab:



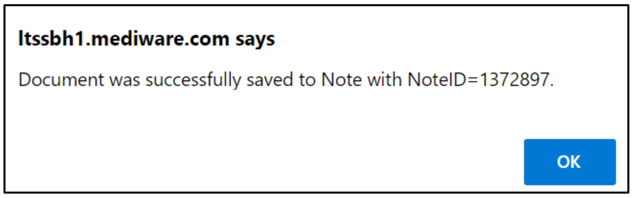
3. The Word Merge preview window displays.

No Edits Needed

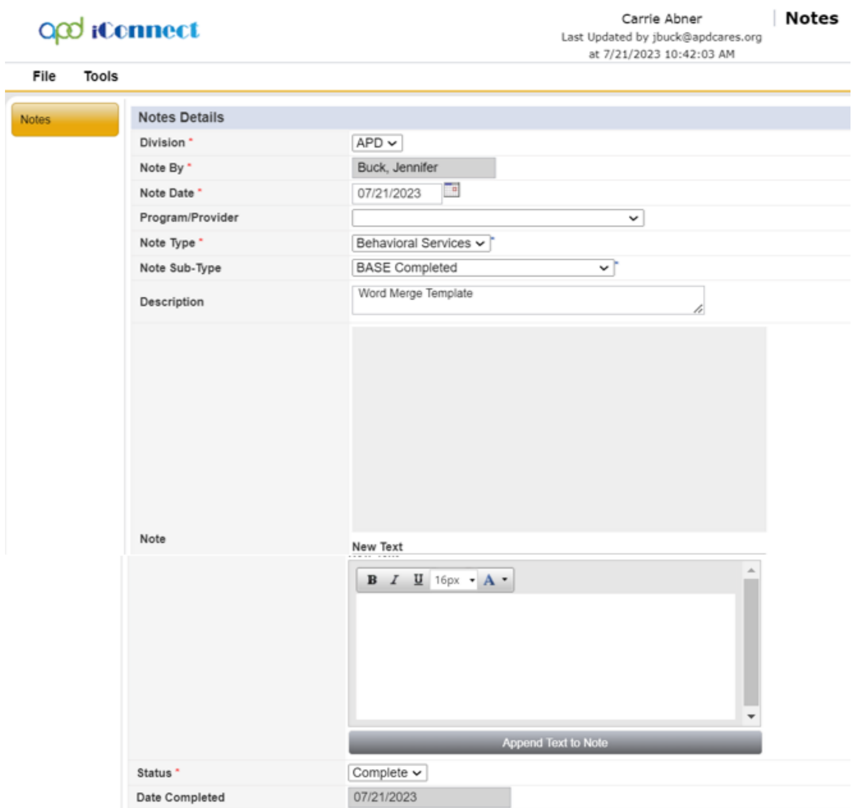
1. If no edits are needed, select **Save to Note**.



2. A notification message displays confirming the Word Merge was saved to a note. Click **Okay**.



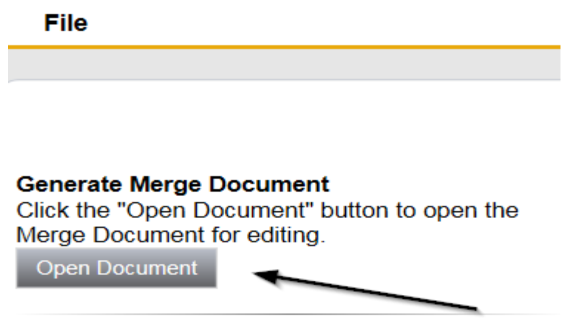
3. The Note Details page displays. Update fields per the associated workflow.



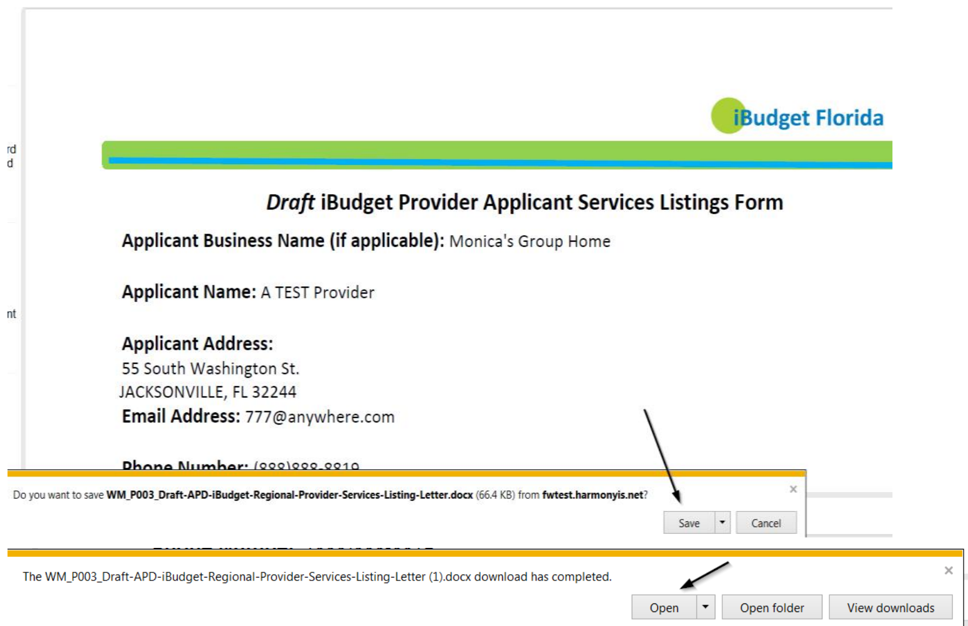
4. From the **File** menu, select **Save and Close Notes**.

Edits Needed

1. Select **Open Document** to open the Word Merge document for editing.

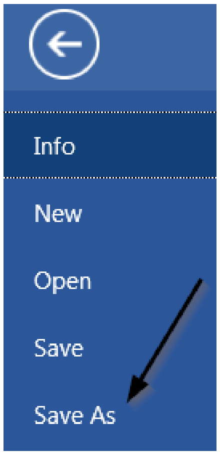


2. Save the Word Merge Document to the computer desktop by clicking the **Save** button and then **Open.**

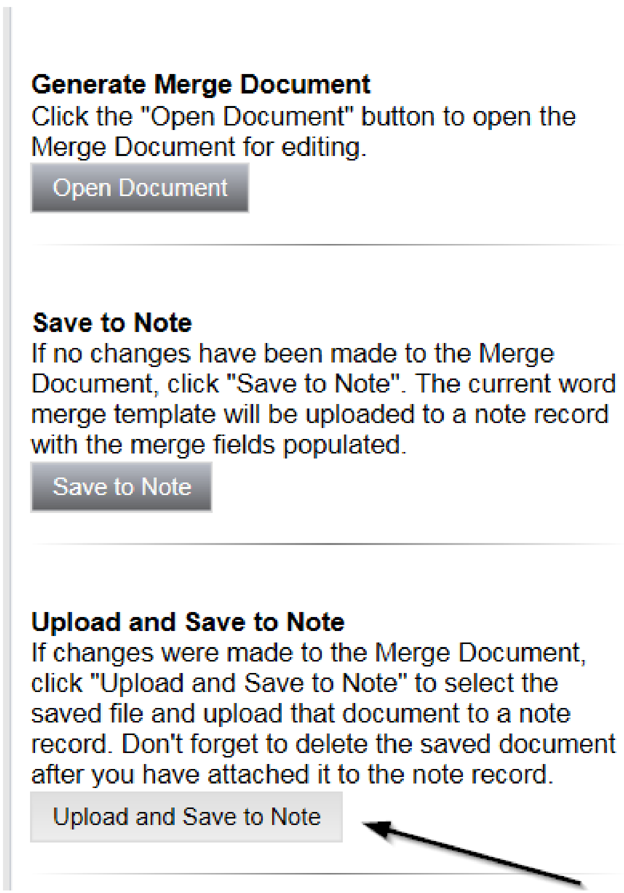


3. **Edit** the Word Merge Document as necessary.

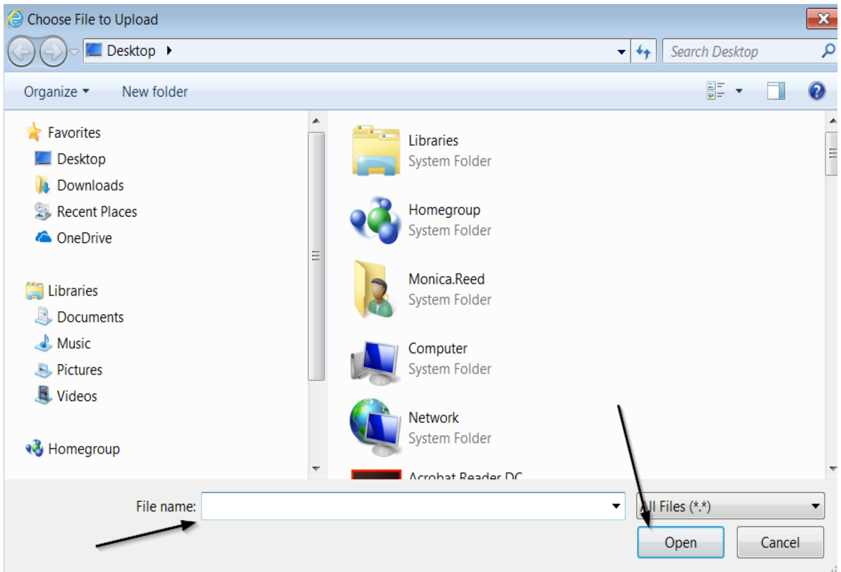
4. When finished with editing the Word Merge Document, click **File > Save as** to save the updated Word Merge to a specified folder on the user's device.

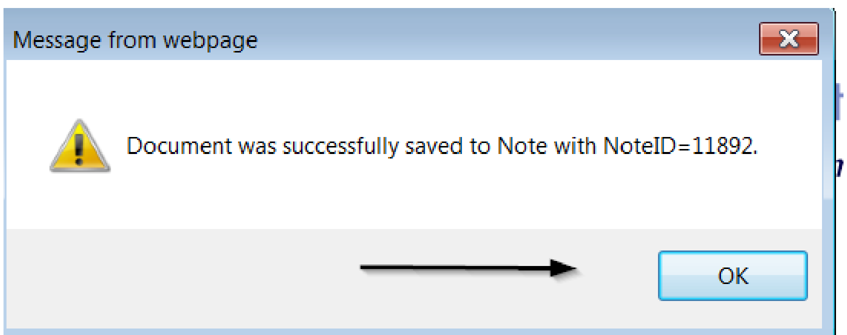


5. In APD iConnect, Click **Upload and Save to Note** after saving the word document.

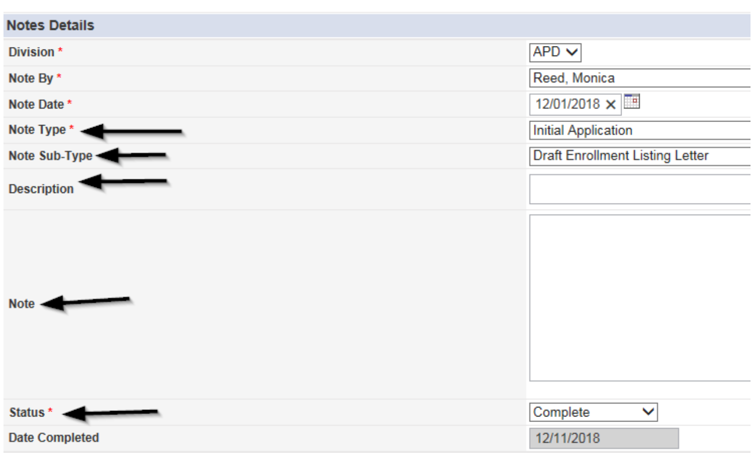


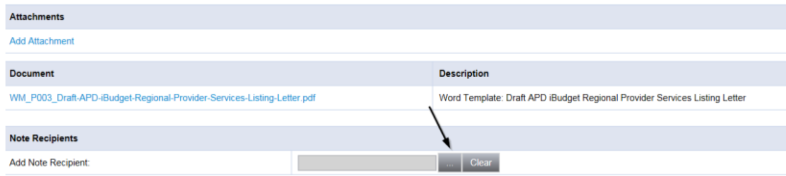
6. Select the file name on the device and then Click **Open** to open the word document and then click **OK** on the pop-up message box.



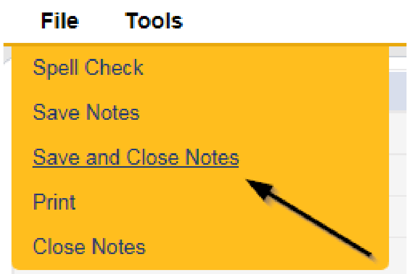


7. In the new Notes Detail Screen, update the fields according to the associated workflow.





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



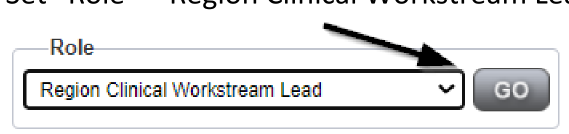
Annual Designation Renewal

A facility with an additional credential (“designation”) that allows them to serve special populations of consumers will need to complete a formal review by the Region Regional Senior Behavior Analyst for their annual designation renewal process.

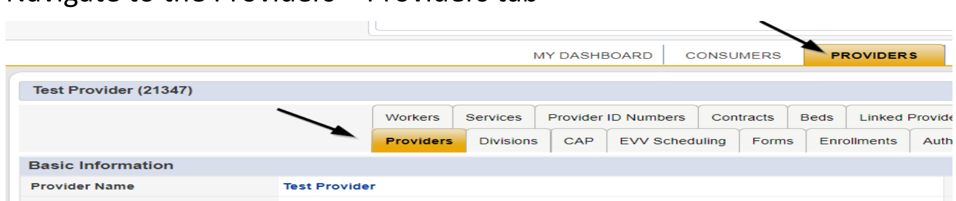
Assign Regional Senior Behavior Analyst

The Region Clinical Workstream Lead will receive notification on My Dashboard 90 days prior to the expiration of the designation. This will initiate the Annual Designation Review. The Region Clinical Workstream Lead will add the Regional Senior Behavior Analyst to the Provider’s record and a new note to advise the Regional Senior Behavior Analyst that they have been assigned.

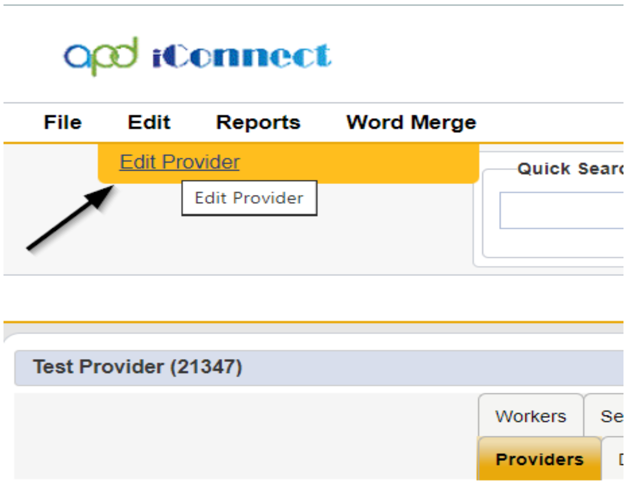
1. Set “Role” = Region Clinical Workstream Lead then click **Go**



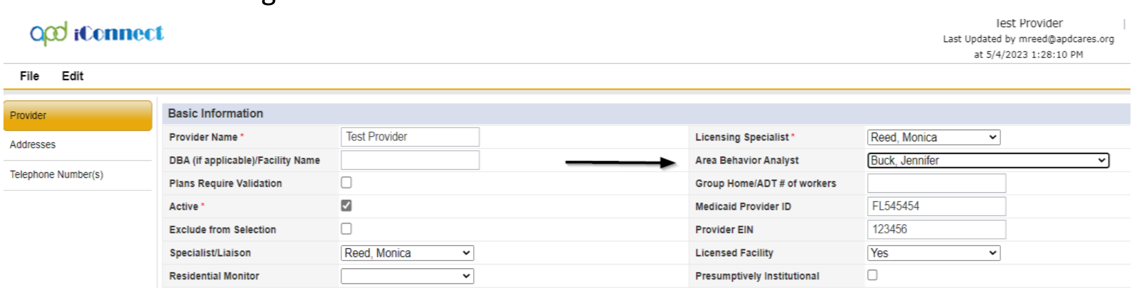
2. Navigate to the Providers > Providers tab



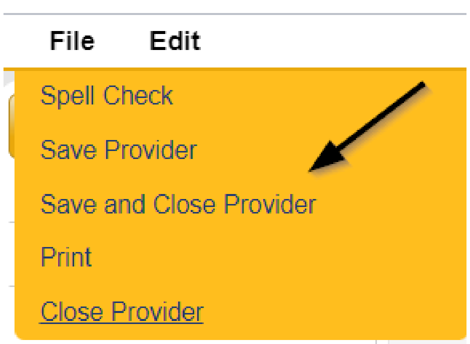
3. Select **Edit > Edit Provider**



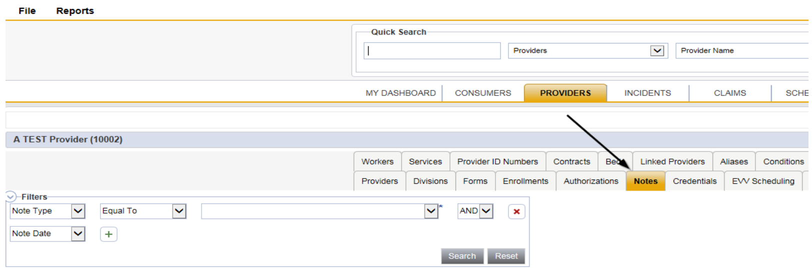
4. Select the Regional Senior Behavior Analyst name from the drop-down list for that field in order to assign them to the Provider's record



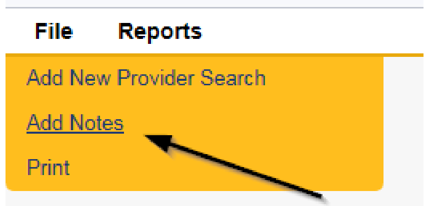
5. When finished, Select **File > Save and Close Provider**



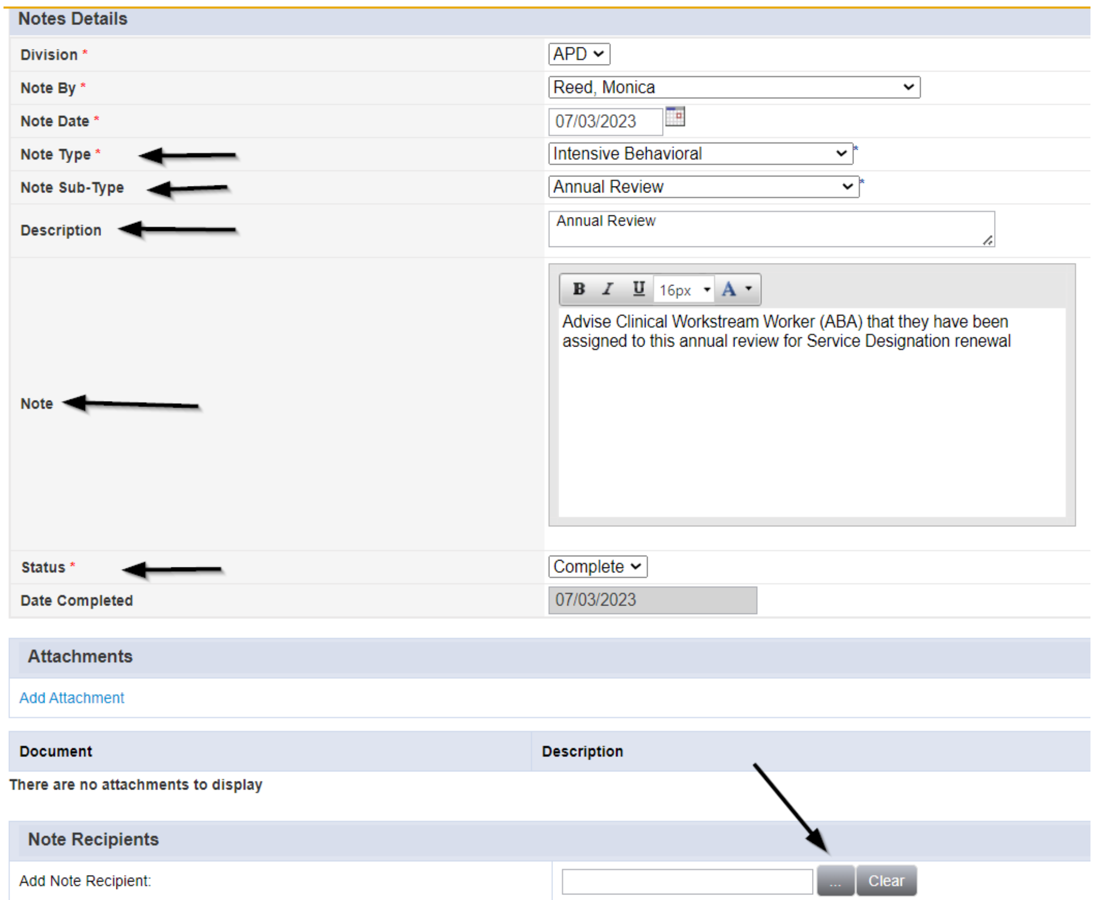
6. Navigate to the **Providers > Notes** tab



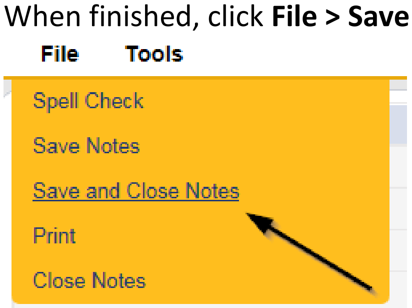
7. Click **File > Add Notes**



8. In the new Note record, update the following fields:
    a. "Note Type" = BF/IB/EIB/MEIB
    b. "Note Subtype" = Annual Review
    c. "Description" = Annual Review
    d. "Note" = Advise Region Clinical Workstream Worker (ABA) that they have been assigned to this annual review for Service Designation renewal
    e. "Status" = Complete
    f. Click the ellipsis on the "Add Note Recipient" to add the *Region Clinical Workstream Worker* 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



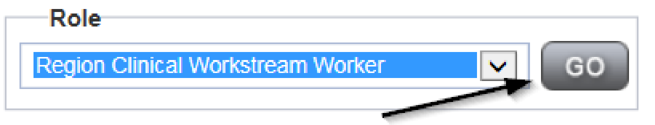
9. When finished, click **File > Save and Close Notes**



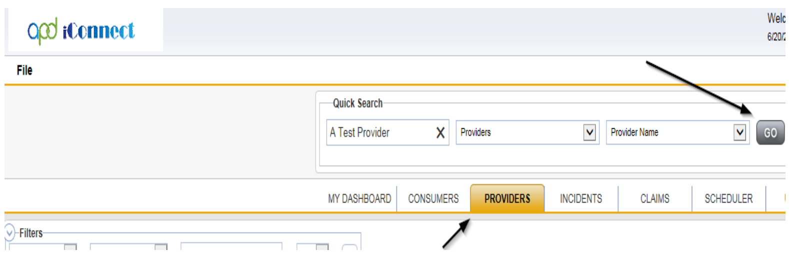
Schedule Site Visit

The Region Clinical Workstream Worker will call the Service Provider to set the Site Visit appointment date/time. They will then enter the site visit appointment into iConnect.

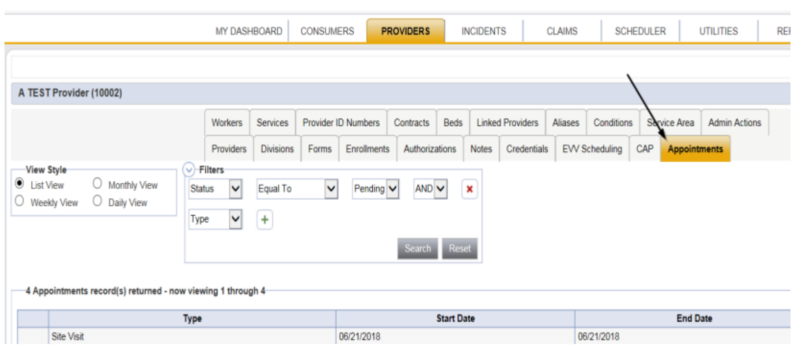
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



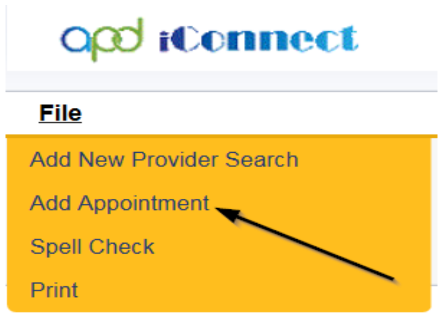
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click go.



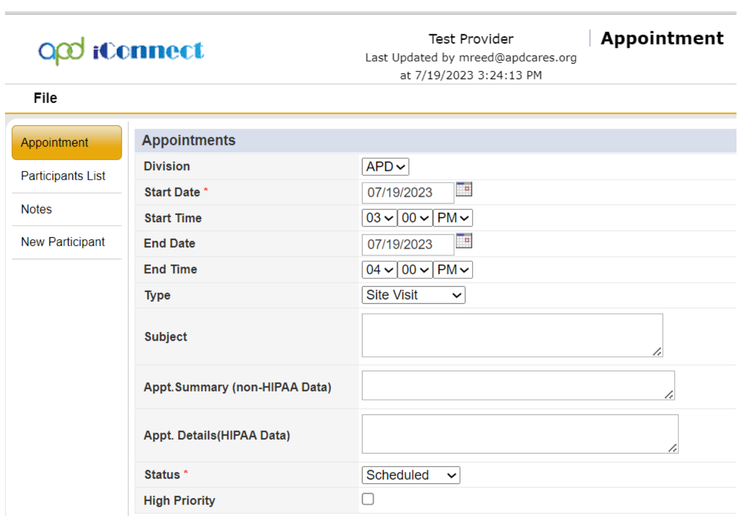
3. The Provider’s record will display. Navigate to the **Providers > Appointments** tab.



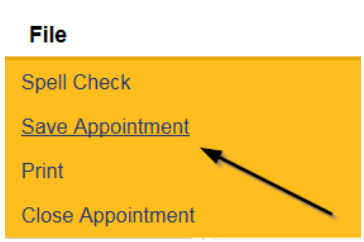
4. Click **File > Add Appointment**



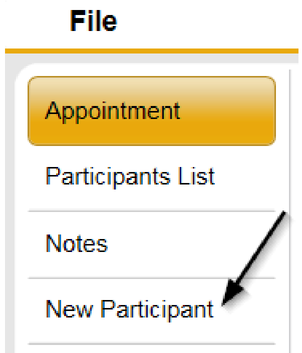
5. Enter the following fields on the Appointment Details page
    a. "Division" = APD
    b. "Start Date" = Enter date
    c. "Start Time" = Enter time
    d. "End Date" = Enter end date
    e. "End Time" = Enter end time
    f. "Type" = Site Visit
    g. "Subject" = Enter description
    h. "Appt Summary" = Enter summary
    i. "Appt Details" = Enter details
    j. "Status" = Scheduled



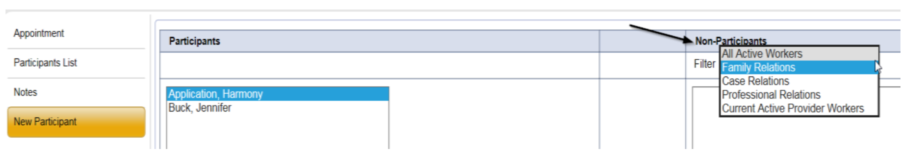
6. When finished select **File > Save Appointment**



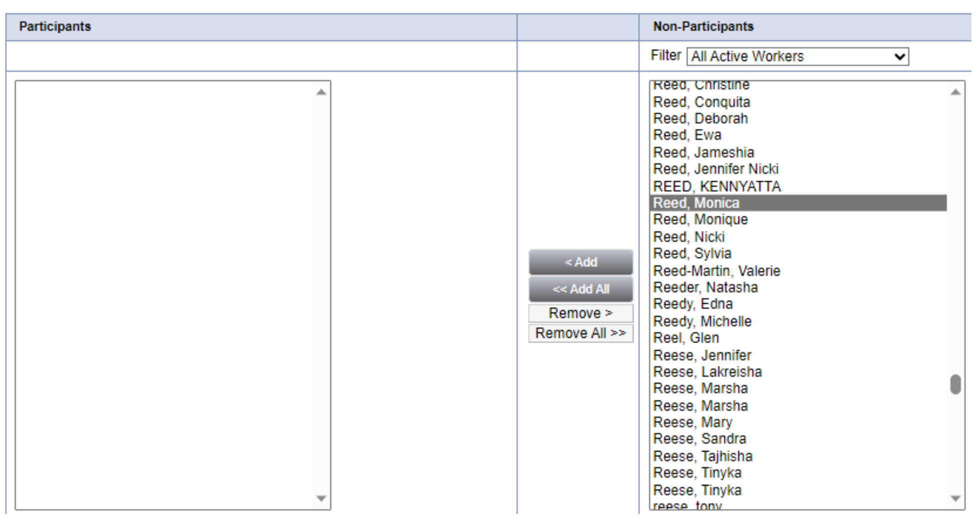
7. Click **New Participant** on the left-hand navigation menu



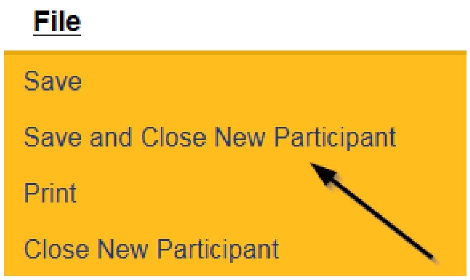
8. Set the **Non-Participants filter** list to the appropriate value in order to select the appointment participants. Select Current Active Provider Workers to list the names of the workers on that provider's Workers tab. Workers are listed under the parent corporation. Select All Active Workers to list all workers in APD iConnect.



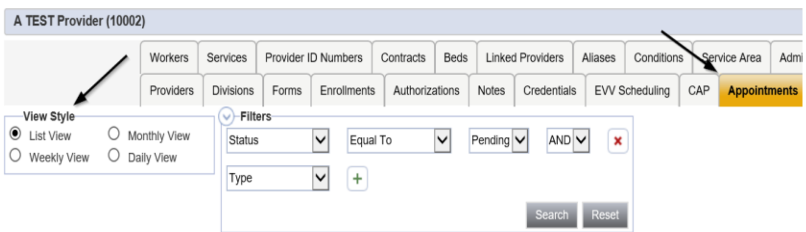
9. Select the appropriate Region Clinical Workstream Worker and Service Provider Worker names by holding the control key down and clicking on the names and then **Click < Add.**



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



11. The Provider can view all scheduled/announced appointments on the **Providers > Appointments tab** by managing the view via the View Style filter.

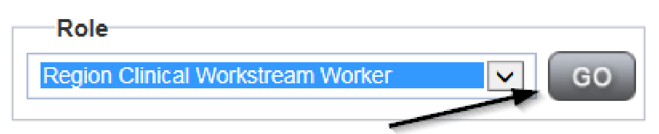


Conduct Site Visit

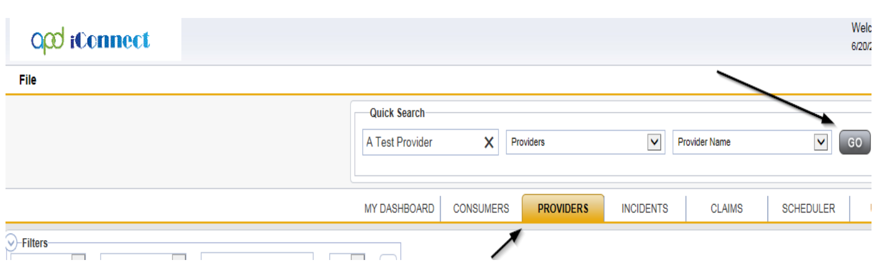
The Region Clinical Workstream Worker will print the appropriate BF/IB/Res. Hab. Monitoring Tool from MS Word (not in iConnect) prior to the site visit. They will then conduct the site visit and manually document all findings on the hard copy checklist. Upon returning to the office, they will then complete the online form in iConnect and add a note.

Complete Monitoring Tool Form

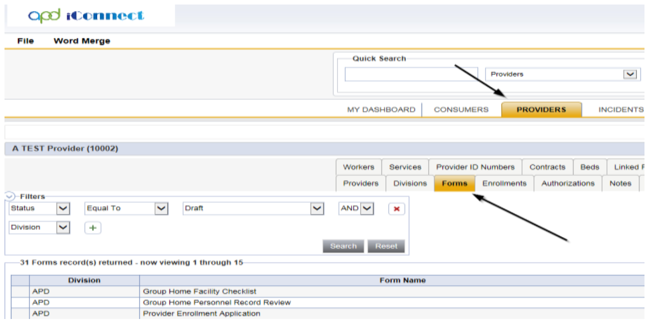
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



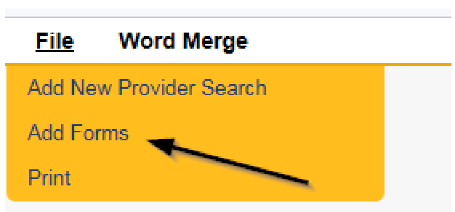
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **Go**.



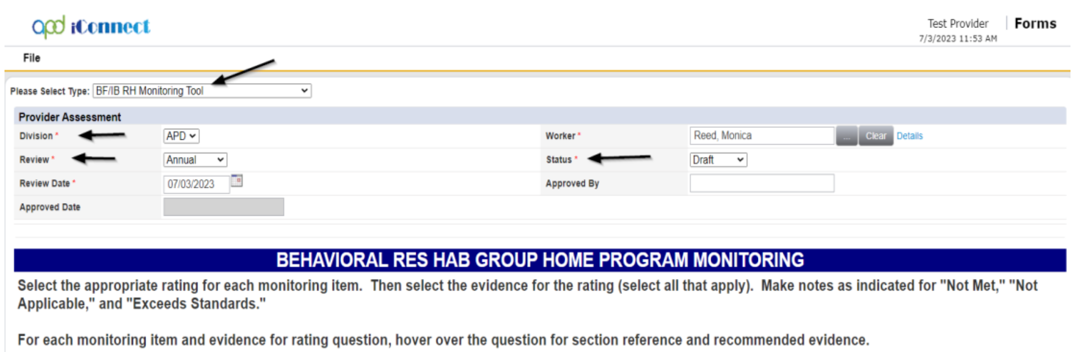
3. The Provider's record will display. Navigate to the **Providers > Forms** tab



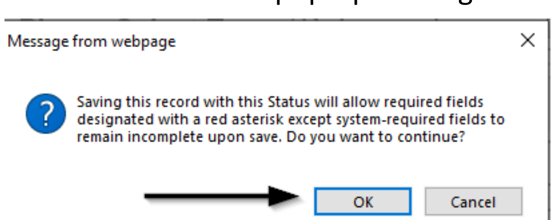
4. Click **File > Add Forms**



5. Select "BF/IB RH Monitoring Tool" from the drop-down list

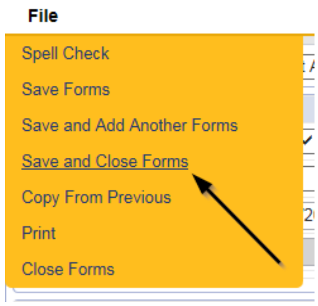


6. Update the following Header fields:
   a. "Division" = APD
   b. "Review" = Annual
   c. "Status" = Draft for initial Save then Complete
   d. Click "OK" on the pop-up message box



e. Complete all fields on the Form

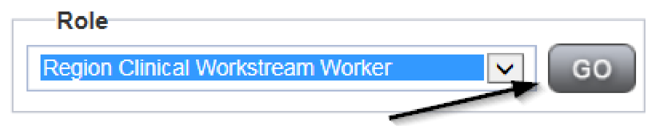
7. When finished, click **File > Save and Close Forms**



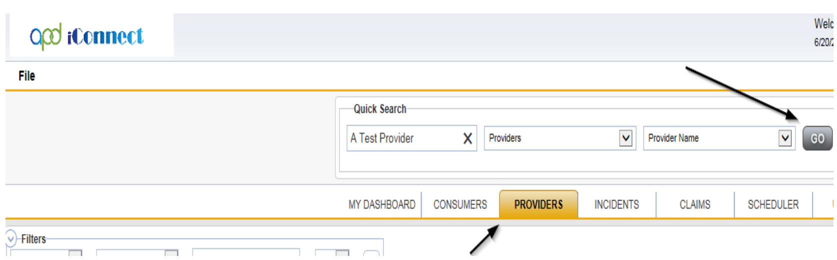
Generate Approval Letter

The Region Clinical Workstream Worker will generate the approval letter Attachment L confirming the requested designation and attach to an existing note if the Provider continues to meet designation eligibility.

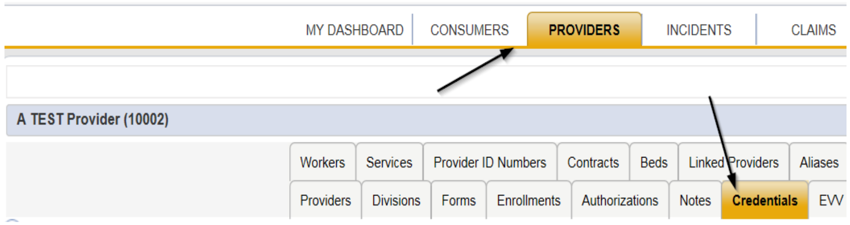
1. Set "Role" = Region Clinical Workstream Worker then click **Go.**



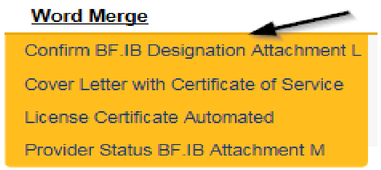
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.



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



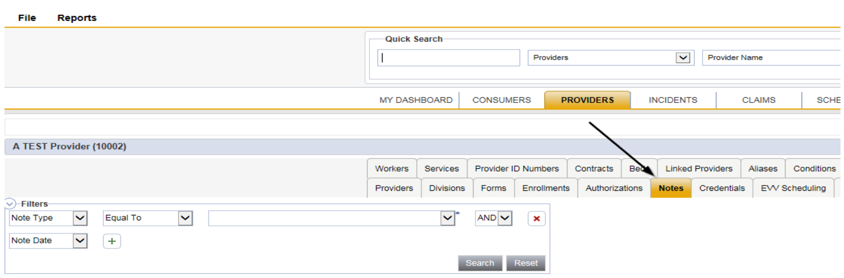
4. Select **Word Merge > Confirm BF.IB Designation Attachment L**



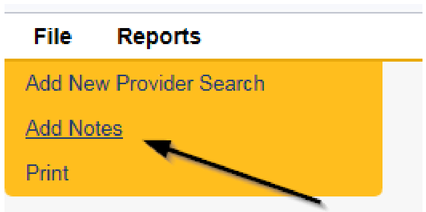
5. **Edit** the Word Merge Document as necessary

6. When finished with editing the Word Merge Document, click **File > Save as** to save the updated Word Merge to a specified folder on the user's device.

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



8. Click **File > Add Notes**



9. In the new Note record, update the following fields:
    a. "Note Type" = Requested Designation
    b. "Note Subtype" = Approved
    c. "Description" = Specify the facility and the effective date along with the designation level (*e.g., Intensive Behavior Renewal Designation Approved)*
    d. "Note" = Enter notes
    e. "Status" = Complete

f. Click "Add Attachment" and search for the Confirm BF IB Designation Attachment L document on the user's computer. Click Upload

g. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient

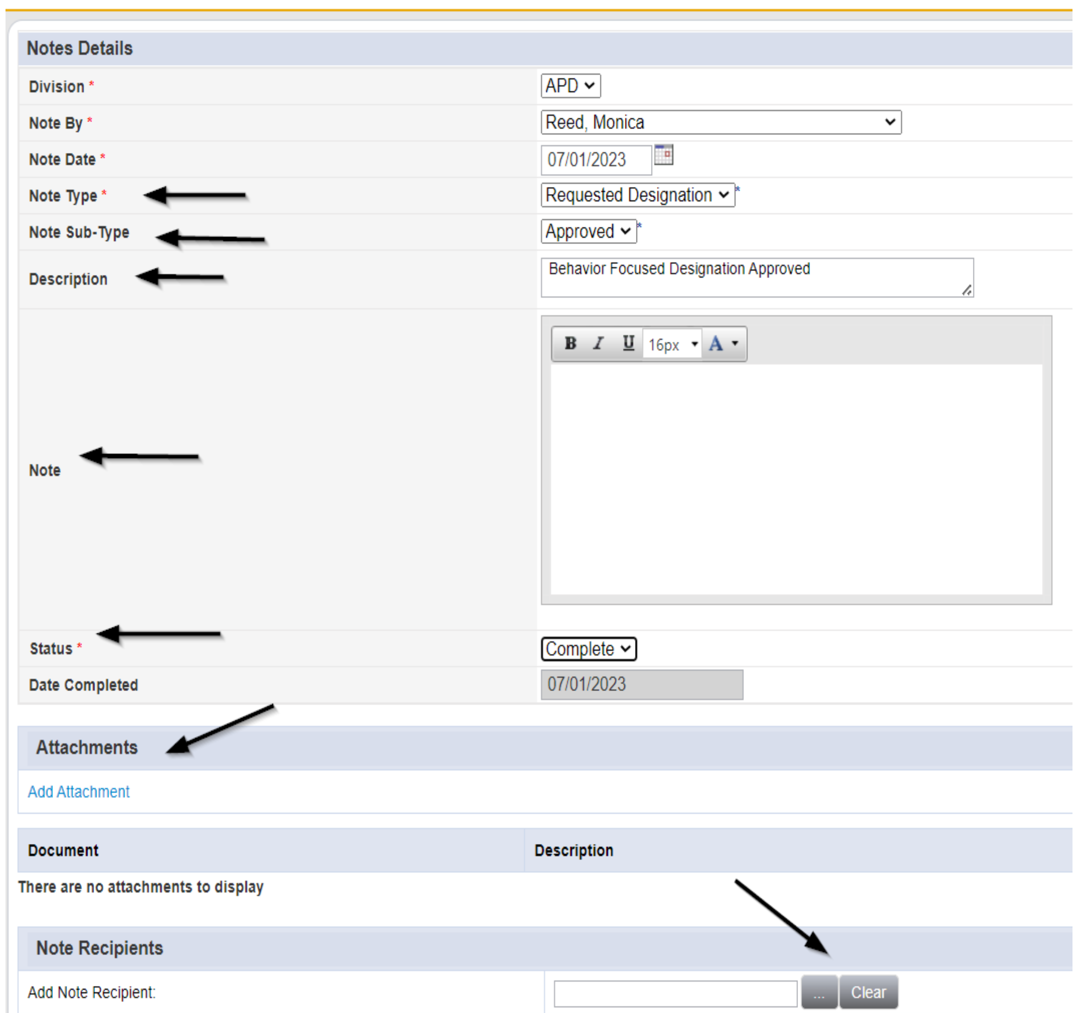
h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

i. Click the ellipsis on the "Add Note Recipient" to add an additional recipient – *Region Clinical Workstream Lead*

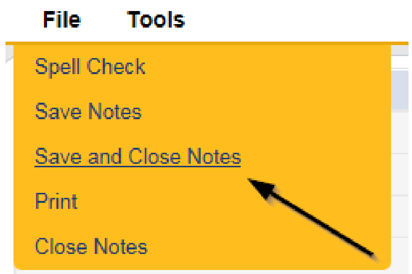
j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

k. Click the ellipsis on the "Add Note Recipient" to add an additional recipient – *Provider Enrollment*

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



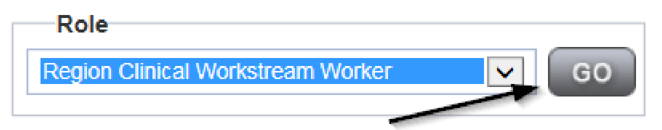
10. When finished, click **File > Save and Close Notes**



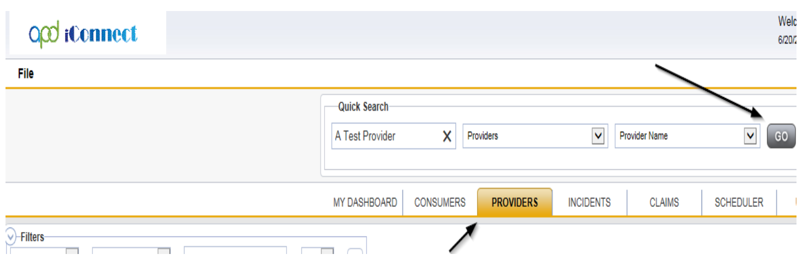
11. For more detailed general Word Merge instruction, see the [As Needed: Word Merges] section.

Add License Information

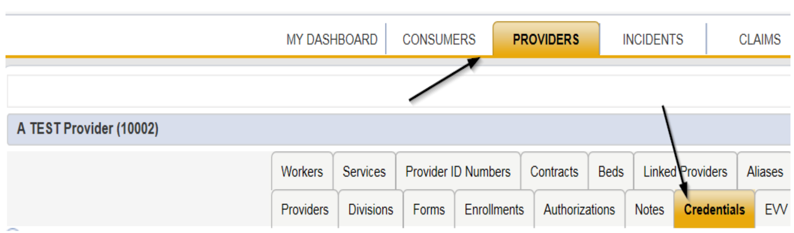
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



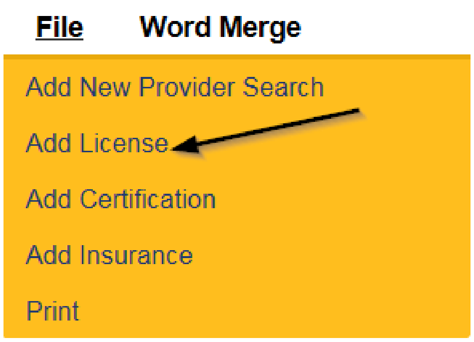
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **Go**.



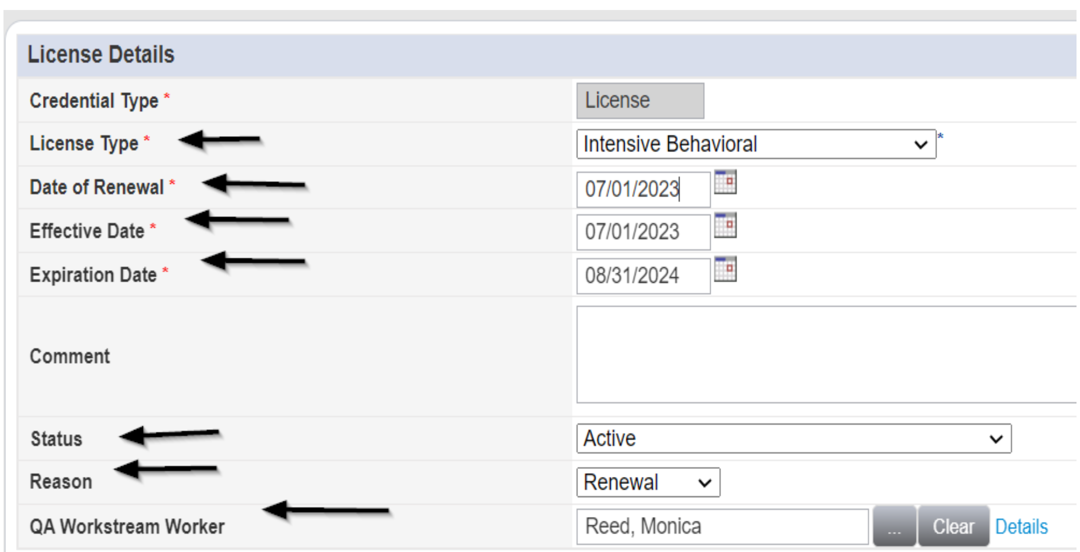
3. The Provider’s record will display. Navigate to the **Providers > Credentials** tab



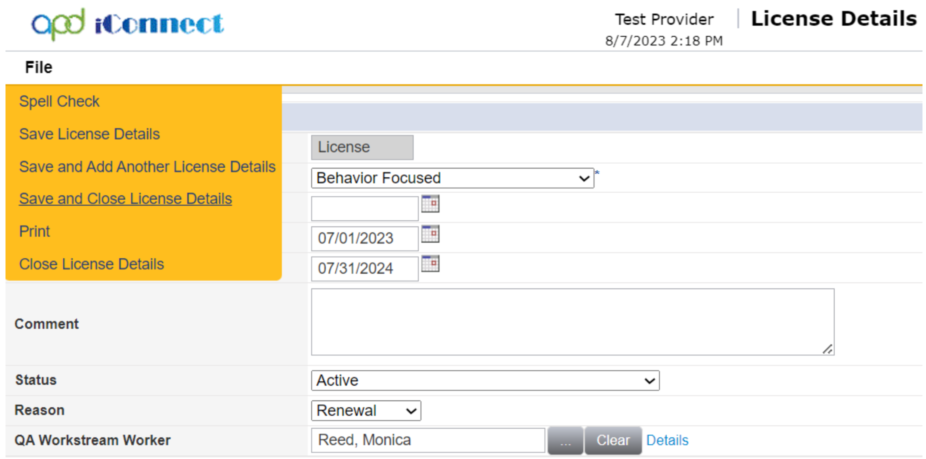
4. Select **File > Add License**



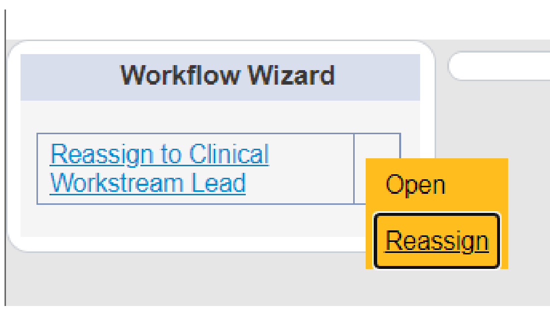
5. Update the following fields:
    a. "License Type" = Select one of the following:
        i. Behavior Focused
        ii. Intensive Behavior
        iii. Enhanced Intensive Behavior
        iv. Medical Enhanced Intensive Behavior
    b. “Date of Renewal” = Enter Date (conditionally displayed when Reason = Renewal)
    c. "Effective Date" = Enter Date
    d. "Expiration Date" = Enter Date as the last day of the month in which it expires (designation must be renewed annually)
    e. "Comment" = Enter comments if applicable
    f. "Status" = Active
    g. "Reason" = Renewal
    h. "QA Workstream Worker" = Click ellipses on the field to Add the Licensing Specialist. Enter the Last Name and Click Search and then select the Name

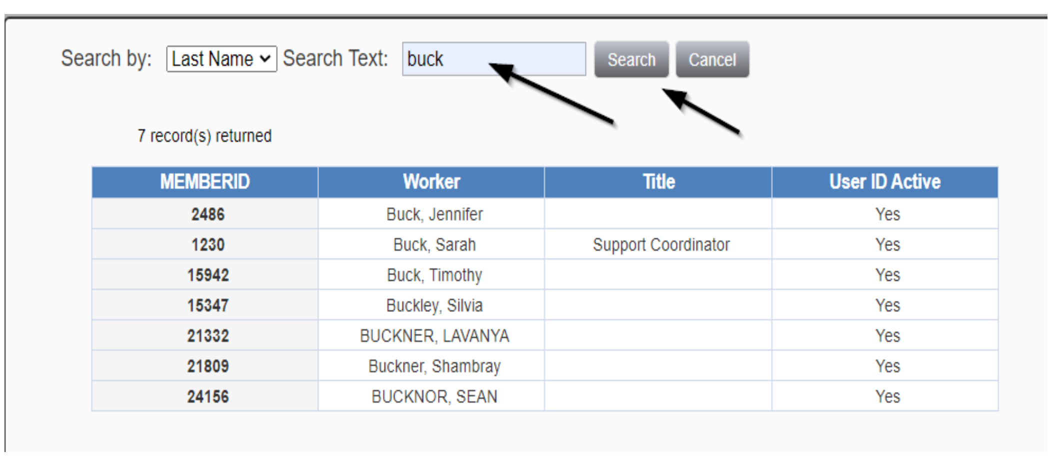


6. When finished, click **File > Save and Close License Details**

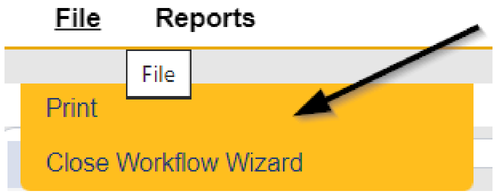


7. Upon saving the license record, a Workflow Wizard triggered the reminder tickler that is due in 365 calendar days
    f. Tickler 1 - Reassign to Region Clinical Workstream Lead"
    g. Due immediately for reassignment
    h. From the tickler flyout menu, select Reassign and then enter the Region Clinical Workstream Leads last name in the pop-up box and click Search. Select the name via the hyperlink.





    i. Select **File > Close Workflow Wizard**

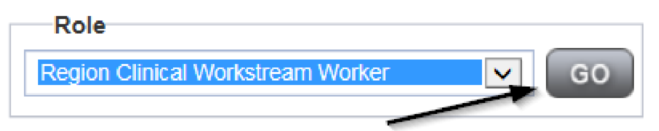


j. Tickler 2 - “Assign Regional Senior Behavior Analyst to review Service Level designation due to pending expiration.
k. Assigned to Monitor 4 (Region Clinical Workstream Worker)
l. Due on the ***90th*** calendar day before the Designation expiration date (365 days from originally entered expiration date)

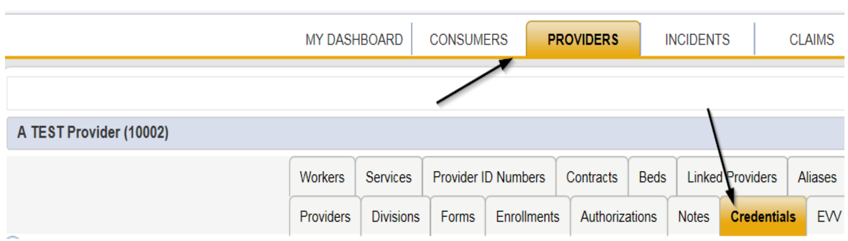
As Needed: Does Not Meet Designation Eligibility

If the Region Clinical Workstream Worker determines that the Service Provider does not continue to meet designation eligibility, they will generate the Designation in Jeopardy Attachment M word merge, make their updates, save it to their device, and upload and save to a note.

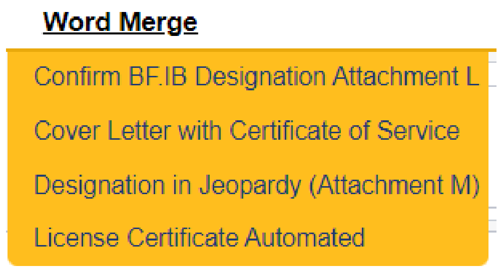
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



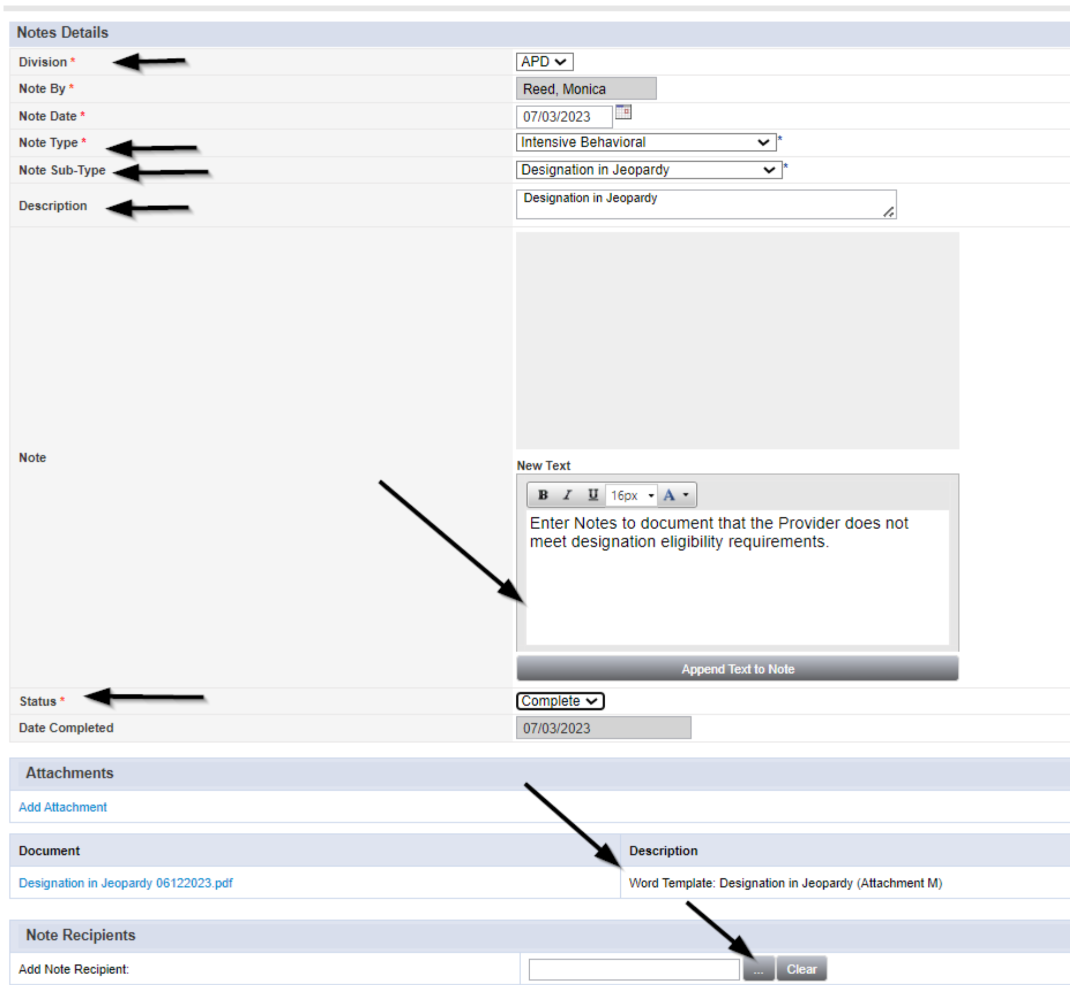
2. Navigate to the **Providers > Credentials** tab



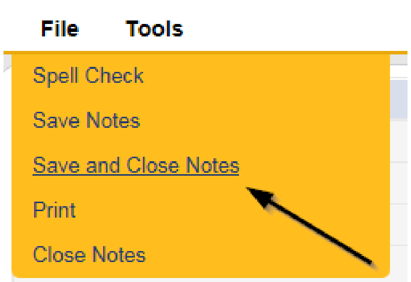
3. Select **Word Merge > Designation in Jeopardy (Attachment M.)** The user will make their updates, save it to their device, and upload and save to a note.



4. In the new Note record, update the following fields:
    a. "Note Type" = **BF/IB/EIB/MEIB**
    b. "Note Subtype" = Designation in Jeopardy
    c. "Description" = Designation in Jeopardy
    d. "Note" = Enter Notes to document that the Provider does not meet designation eligibility requirements
    e. "Status" = Complete
    f. Attach = Designation in Jeopardy (Attachment M) Word Merge
    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
    i. Click the ellipsis on the "Add Note Recipient" to add the *Licensing Specialist* 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 an additional recipient – *Licensing Supervisor*
    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
    m. Click the ellipsis on the "Add Note Recipient" to add an additional recipient – *ROM/Deputy ROM*
    n. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note
    o. Click the ellipsis on the "Add Note Recipient" to add an additional recipient – *Region Clinical Workstream Lead*
    p. 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**

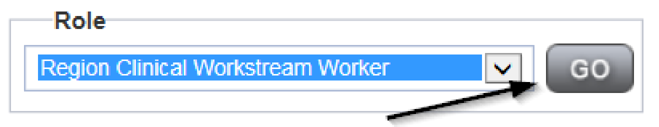


6. For more detailed general Word Merge instruction, see the [As Needed: Word Merges] section.

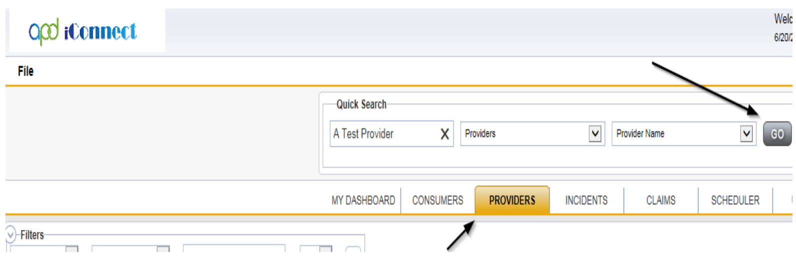
As Needed: Add CAP Record

The Region Clinical Workstream Worker will create the CAP record for the eligibility requirements that are not being met by the Service Provider for the Designation.

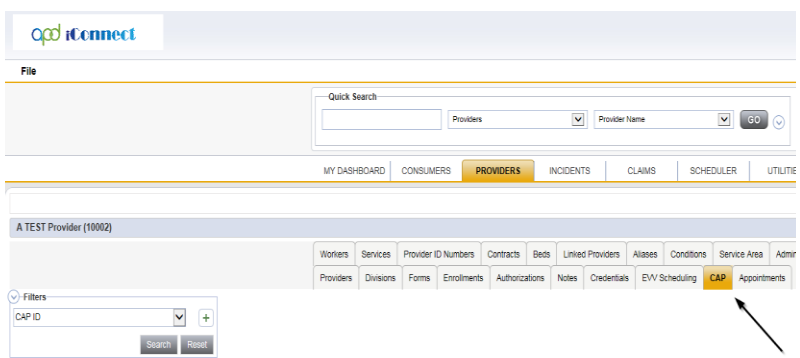
1. Set “Role” = Region Clinical Workstream Worker then click **Go.**



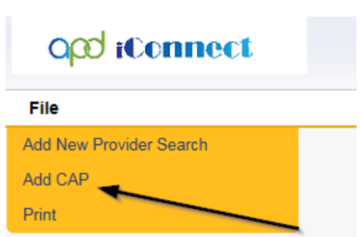
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click go.



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



4. Select **File > Add CAP**



5. Update the following fields:

a. "CAP Type" = Plan of Remediation

b. "Date of CAP" = Date of Designation in Jeopardy Letter

c. Associated Form ID# = Enter if applicable

d. "Date Provider Notified" = Date of CAP

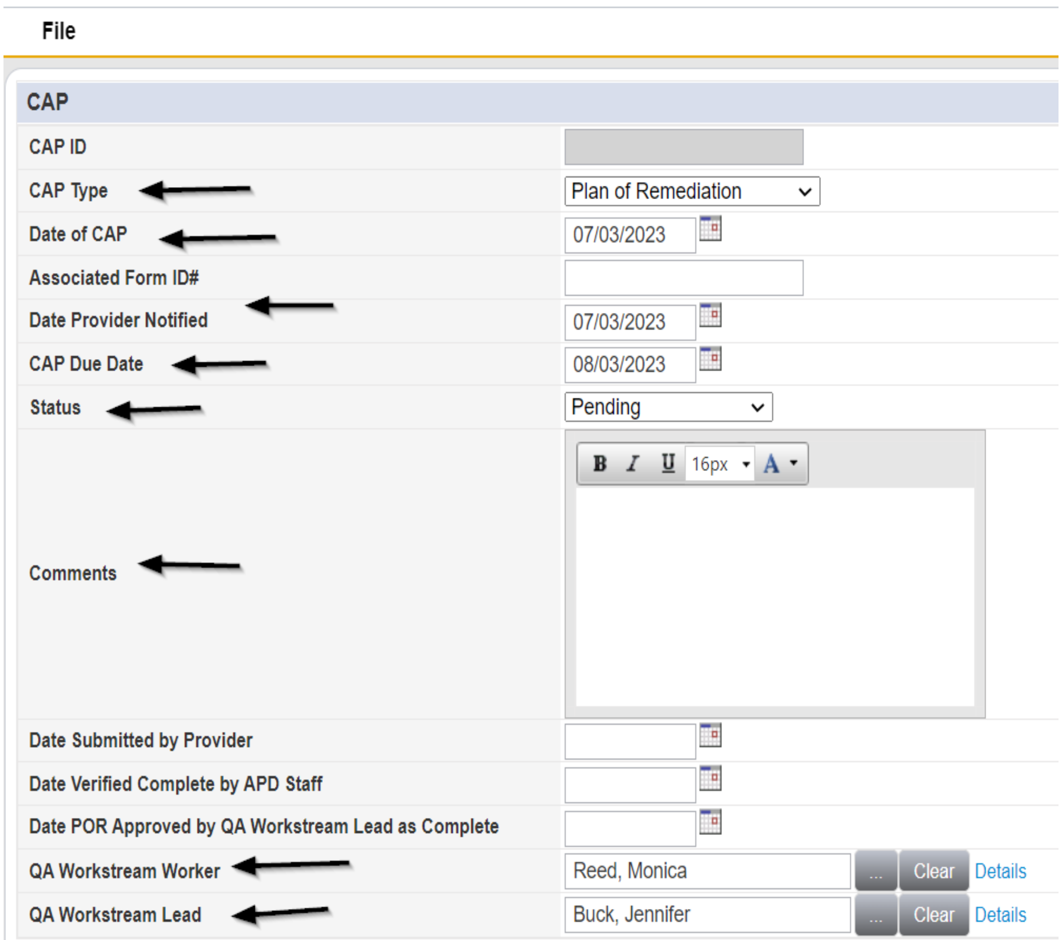
a. “CAP Due Date” = Enter Date CAP is due

- *NOTE: Update the Date of CAP when the Service Provider advises of new dates to fix certain things (e.g., new roof)*

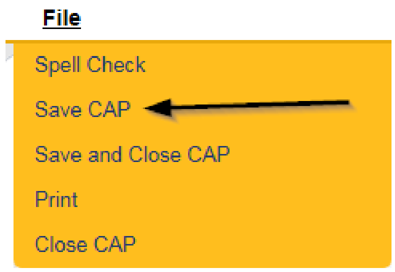
e. "Comments" = Enter if applicable

f. "QA Workstream Worker" = Click the ellipsis to add the appropriate worker

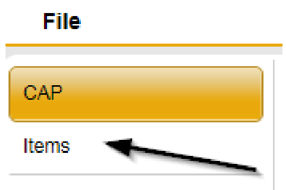
g. "QA Workstream Lead" = Click the ellipsis to add the appropriate worker

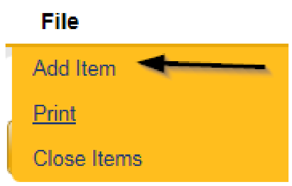


6. When finished, select **File > Save CAP**

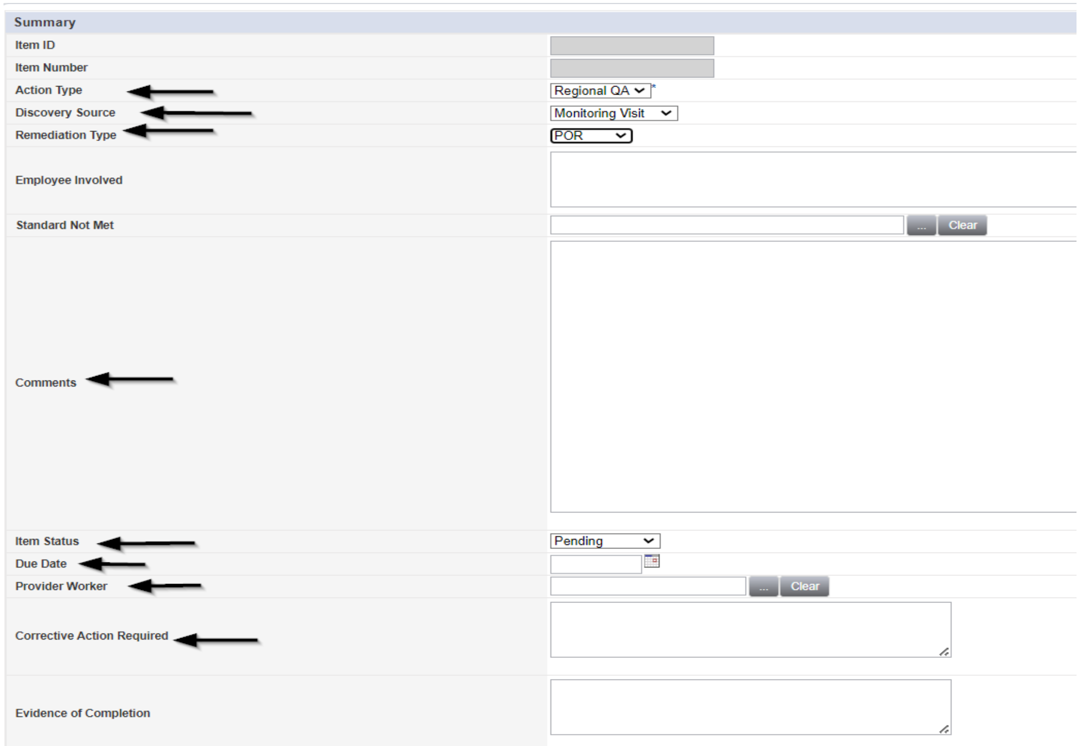


7. Click “Items” on the left-hand navigation menu and then **File > Add Item**



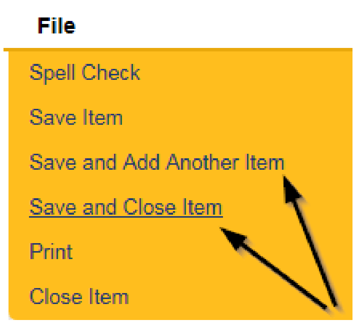


8. Update the following fields:
   a. "Action Type" = Regional QA
   b. "Discovery Source" = Monitoring Visit or as appropriate
   c. "Remediation Type" = POR
   d. "Employee Involved" = Enter Name if applicable
   e. "Comments" = Enter Comments
   f. "Status" = Pending
   g. "Due Date" = Enter Date
   h. "Provider Worker" = Click the ellipsis to add the worker
   i. "Corrective Action Required" = Enter Information



If additional items need to be added, then repeat steps 5 and 6 as necessary by selecting **File > Save and Add Another Item** for each new item.

9. When finished, select **File > Save and Close Item**



Follow the relevant CAP/POR process for the Provider.

If the Provider does not remediate the items then initiate the PAARF process to revoke the designation in the Chapter 24 Adverse Actions Terminations Training Manual.