



**State of Florida**  
**Agency for Persons with Disabilities**

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

## Table of Contents

<b>Chapter 8   Behavior Service Level Designation for Licensed Homes</b> .....	<b>4</b>
<b>Introduction</b> .....	<b>4</b>
<i><b>Apply for Behavior Service Level Designation</b></i> .....	<b>4</b>
<i><b>Check Parent Company</b></i> .....	<b>10</b>
<i><b>As Needed: Advise Provider to Request an Expansion</b></i> .....	<b>11</b>
<i><b>Service Provider Enrolled</b></i> .....	<b>14</b>
<i><b>Assign Regional Senior Behavior Analyst</b></i> .....	<b>16</b>
<i><b>Request for Designation</b></i> .....	<b>19</b>
<i><b>Submit Supporting Documentation</b></i> .....	<b>22</b>
<i><b>Initial Review</b></i> .....	<b>25</b>
<i><b>Schedule Site Visit</b></i> .....	<b>26</b>
<i><b>Packet Complete</b></i> .....	<b>30</b>
<i><b>Conduct Site Visit</b></i> .....	<b>32</b>
<i><b>Complete Behavior Initial Eligibility Forms</b></i> .....	<b>32</b>
<i><b>Generate Approval Letter</b></i> .....	<b>34</b>
<i><b>Add License Information</b></i> .....	<b>37</b>
<i><b>As Needed: Further Documentation Required</b></i> .....	<b>40</b>
<i><b>As Needed: Additional Documentation</b></i> .....	<b>43</b>
<i><b>As Needed: Designation Request Closed</b></i> .....	<b>46</b>
<i><b>As Needed: Recommendation for Denial</b></i> .....	<b>48</b>
<i><b>As Needed: Denial Meeting Determination</b></i> .....	<b>50</b>
<i><b>As Needed: Designation Denied</b></i> .....	<b>52</b>
<i><b>As Needed: Word Merges</b></i> .....	<b>54</b>
<i><b>Annual Designation Renewal</b></i> .....	<b>60</b>
<i><b>Assign Regional Senior Behavior Analyst</b></i> .....	<b>60</b>
<i><b>Schedule Site Visit</b></i> .....	<b>64</b>
<i><b>Conduct Site Visit</b></i> .....	<b>67</b>
<i><b>Complete Monitoring Tool Form</b></i> .....	<b>67</b>
<i><b>Generate Approval Letter</b></i> .....	<b>69</b>
<i><b>Add License Information</b></i> .....	<b>72</b>
<i><b>As Needed: Does Not Meet Designation Eligibility</b></i> .....	<b>75</b>



## 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.*

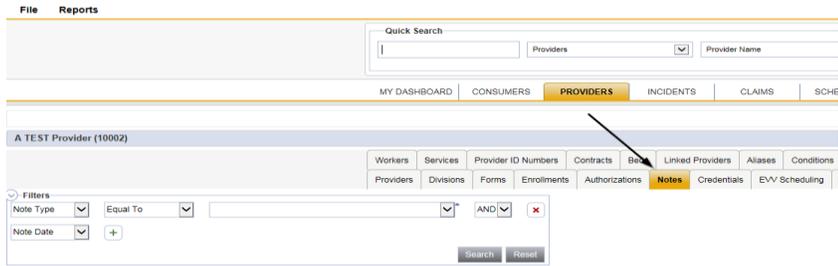
1. Set “Role” = Service Provider then click **Go**

A screenshot of a web form showing a dropdown menu for 'Role' with 'Service Provider' selected. A black arrow points to the 'GO' button next to the dropdown.

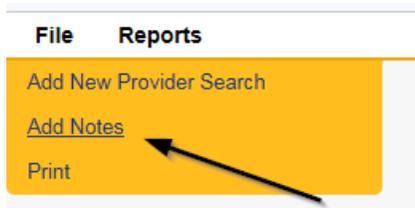
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **Go**.

A screenshot of the 'Providers' page in the system. The 'Quick Search' filter is visible with 'A Test Provider' entered and 'Providers' selected. A black arrow points to the 'GO' button. Below the search bar, the 'PROVIDERS' tab is highlighted in the navigation menu.

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.

**Notes Details**

Division \* APD

Note By \* Reed, Monica

Note Date \* 06/30/2023

Note Type \* Behavior Focused

Note Sub-Type \* Provider Request

Description \* Request to provide Behavior Services

Note \* Request to provide Behavior Services

Status \* Pending

Date Completed

**Attachments**

Add Attachment

Document	Description
There are no attachments to display	

**Note Recipients**

Add Note Recipient:

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

- "Note Type" = **Intensive Behavioral**
- "Note Subtype" = Provider Request
- "Description" = Provider Request
- "Note" = Document in the Note field the request to provide Behavior services
- "Status" = Pending
- 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

File Tools

---

**Notes Details**

Division \* APD ▾

Note By \* Reed, Monica ▾

Note Date \* 06/30/2023 📅

Note Type \* Intensive Behavioral ▾

Note Sub-Type Provider Request ▾

Description Provider Request

Note

Status \* Pending ▾

Date Completed

---

**Attachments**

[Add Attachment](#)

Document	Description
There are no attachments to display	

---

**Note Recipients**

Add Note Recipient:  ... Clear

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.

**File Tools**

---

**Notes Details**

Division \*

Note By \*

Note Date \*

Note Type \*

Note Sub-Type

Description

Note 

B I U 16px A  
 Request to provide Behavior Services

Status \*

Date Completed

---

**Attachments**

[Add Attachment](#)

Document	Description
There are no attachments to display	

---

**Note Recipients**

Add Note Recipient:  ...

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

**File Tools**

---

**Notes Details**

Division *	APD ▾
Note By *	Reed, Monica ▾
Note Date *	06/30/2023
Note Type *	Medical Enhanced Intensive Behavior ▾
Note Sub-Type	Provider Request ▾
Description	Provider Request
Note	<div style="border: 1px solid #ccc; padding: 5px;"><p><b>B</b> <i>I</i> <u>U</u> 16px <b>A</b> ▾</p><p>Request to provide Behavior Services</p></div>
Status *	Pending ▾
Date Completed	<input type="text"/>

**Attachments**

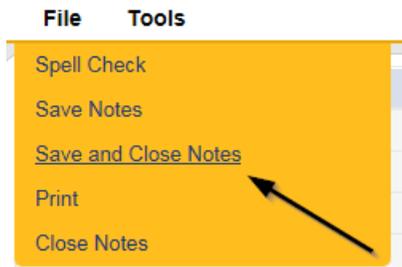
[Add Attachment](#)

Document	Description
There are no attachments to display	

**Note Recipients**

Add Note Recipient:

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



## 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**.

A screenshot of a web form showing a dropdown menu for "Role" with "Region QA Workstream Worker" selected. A black arrow points to the "GO" button to the right of the dropdown.

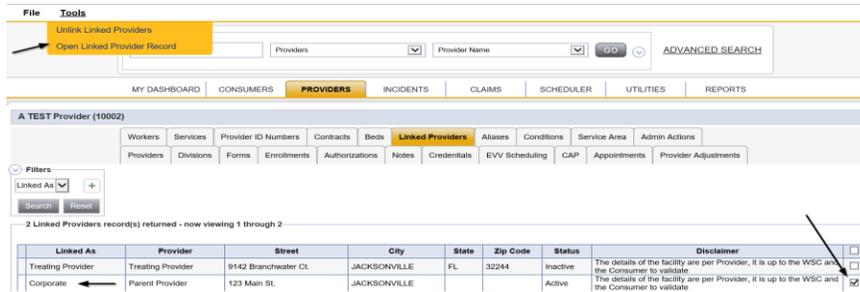
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.

A screenshot of the "Providers" search page in the QoDiConnect system. The "Quick Search" filter contains "A Test Provider" and "Providers" is selected in the dropdown. A black arrow points to the "GO" button. Below the search bar, the "PROVIDERS" tab is highlighted in the navigation menu.

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

A screenshot of a provider record for "A TEST Provider (10002)". The "PROVIDERS" tab is selected in the navigation menu. Below the provider name, a grid of tabs is shown, with "Linked Providers" highlighted. A black arrow points to the caret at the end of the provider name row.

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.

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Behavior Focused	06/30/2023	Provider Request	Reed, Monica	Pending

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.

File Tools

Notes

**Notes Details**

Division \* APD

Note By \* Reed, Monica

Note Date \* 06/30/2023

Note Type \* Behavior Focused

Note Sub-Type Provider Request

Description 

Contact Provider Enrollment and Submit an Expansion Request

On 6/30/2023 at 11:17 AM, Monica Reed wrote:  
Request to provide Behavior services

Note

New Text

**B I U** 16px 

Append Text to Note

Status \* 

Complete

Date Completed 06/30/2023

**Attachments**

Add Attachment

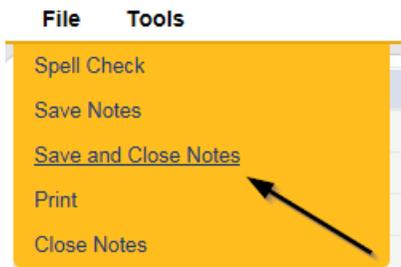
Document Description

There are no attachments to display 

**Note Recipients**

Add Note Recipient:

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.

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

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

File Tools

Filters

Status: Equal To Pending AND

Note Type: +

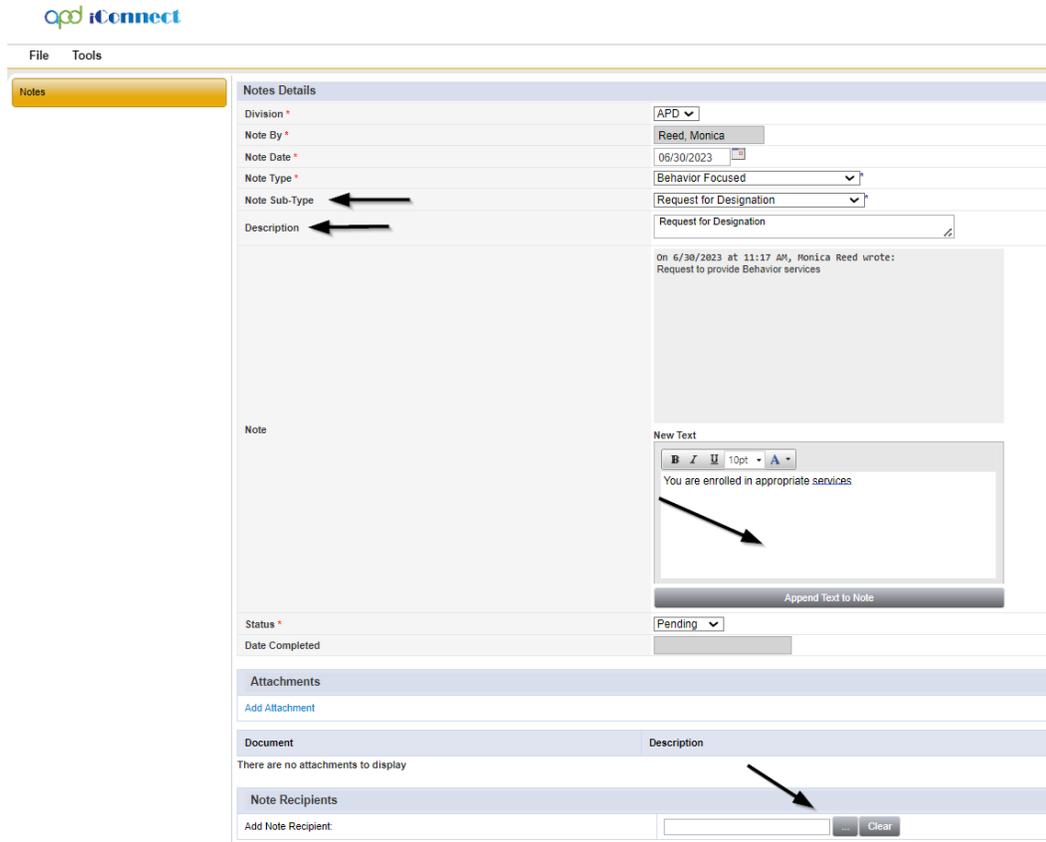
Search Reset

18 Notes record(s) returned - now viewing 1 through 15

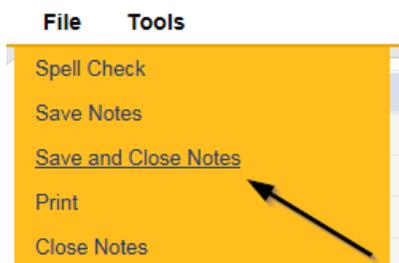
Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Behavior Focused	06/30/2023	Provider Request	Reed, Monica	Pending

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**

A screenshot of a web form showing a dropdown menu for "Role" with "Region Clinical Workstream Lead" selected. A black arrow points to the dropdown arrow. To the right of the dropdown is a "GO" button.

2. Navigate to the Providers > Providers tab

A screenshot of a web application interface. At the top, there are navigation tabs: "MY DASHBOARD", "CONSUMERS", and "PROVIDERS". The "PROVIDERS" tab is highlighted in yellow and has a black arrow pointing to it. Below the tabs, there is a header for "Test Provider (21347)". Underneath, there are several sub-tabs: "Workers", "Services", "Provider ID Numbers", "Contracts", "Beds", "Linked Provide", "Providers", "Divisions", "CAP", "Evv Scheduling", "Forms", "Enrollments", and "Auth". The "Providers" sub-tab is highlighted in yellow and has a black arrow pointing to it. Below the sub-tabs, there is a "Basic Information" section with fields for "Provider Name" (containing "Test Provider") and "DBA (if applicable)/Facility Name".

3. Select **Edit > Edit Provider**

A screenshot of a web application interface showing a menu. The logo "opd iConnect" is at the top. Below it are menu items: "File", "Edit", "Reports", and "Word Merge". The "Edit" menu is expanded, showing a sub-menu with "Edit Provider" highlighted in yellow. A black arrow points to the "Edit Provider" option. To the right of the menu is a "Quick Search" field. Below the menu, there is a header for "Test Provider (21347)". Underneath, there are sub-tabs: "Workers", "Se", and "Providers". The "Providers" sub-tab is highlighted in yellow.

- 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.

Test Provider  
Last Updated by mreed@apdcares.org  
at 5/4/2023 1:28:10 PM

File Edit

Provider	Basic Information	
Addresses	Provider Name * Test Provider	Licensing Specialist * Reed, Monica
Telephone Number(s)	DBA (if applicable) Facility Name	Area Behavior Analyst Buck, Jennifer
	Plans Require Validation <input type="checkbox"/>	Group Home/ADT # of workers
	Active * <input checked="" type="checkbox"/>	Medicaid Provider ID FL545454
	Exclude from Selection <input type="checkbox"/>	Provider EIN 123456
	Specialist/Liaison Reed, Monica	Licensed Facility Yes
	Residential Monitor	Presumptively Institutional <input type="checkbox"/>

- When finished, Select **File > Save and Close Provider**

File Edit

Spell Check

Save Provider

Save and Close Provider

Print

Close Provider

- 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 Beds Linked Providers Aliases Conditions

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

Filters  
Note Type [ ] Equal To [ ] [ ] AND [ ] X  
Note Date [ ] +

Search Reset

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

Test Provider (21347)

Workers Services Provider ID Numbers Beds Linked Providers Service Area

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

Filters  
Note Type [ ] Equal To [ ] Behavior Focused [ ] AND [ ] X  
Note Date [ ] +

Search Reset

2 Notes record(s) returned - now viewing 1 through 2

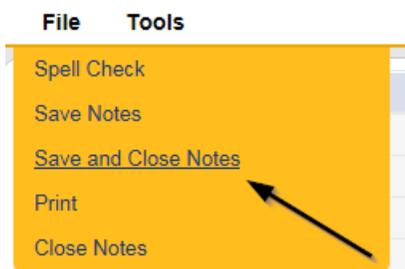
Note Date	Note Type	Note Sub-Type	Description	Status	Date Completed	Attachment	Note By
06/30/2023	Behavior Focused	Request for Designation	Request for Designation	Pending		No	Reed, Monica

- In the existing Note record, update the following fields:
  - "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.

The screenshot shows the 'Notes Details' form in the iConnect system. The form is divided into several sections: 'Notes Details', 'Description', 'Note', 'Status', 'Date Completed', 'Attachments', and 'Note Recipients'. The 'Notes Details' section contains the following information: Division: APD; Note By: Reed, Monica; Note Date: 06/30/2023; Note Type: Behavior Focused; Note Sub-Type: Request for Designation. The 'Description' field contains the text 'Request for Designation'. The 'Note' section contains a text box with the text 'Jennifer Buck - you have been assigned to this request for Service Designation'. The 'Status' is set to 'Pending'. The 'Attachments' section has an 'Add Attachment' link and a table with columns 'Document' and 'Description'. The 'Note Recipients' section has an 'Add Note Recipient' field and a search button.

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**

Role

Region Clinical Workstream Worker

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

Complete 3

Pending 11

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

Filters

Status Equal To Pending AND

Status +

Search Reset

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

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Behavior Focused	06/30/2023	Request for Designation	Reed, Monica	Pending

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

File  No file chosen

File Name  from uploaded file  
 create new

Description

Category

Note: Maximum size for attachment is set to 18.46 MBytes.

- 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.



File Tools

Notes

Notes Details

Division \*

Note By \*

Note Date \*

Note Type \*

Note Sub-Type

Description

On 6/30/2023 at 11:17 AM, Monica Reed wrote:  
Request to provide Behavior services  
On 6/30/2023 at 12:26 PM, Monica Reed wrote:  
Jennifer Buck - you have been assigned to this request for Service Designation

Note

New Text

16px

Review Attachment I and submit appropriate documentation

Status \*

Date Completed

Attachments

[Add Attachment](#)

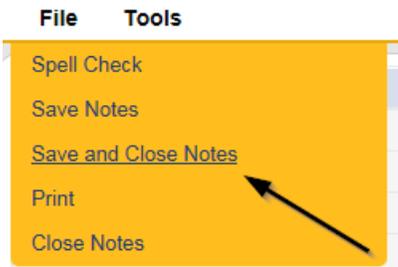
Document Description

There are no attachments to display

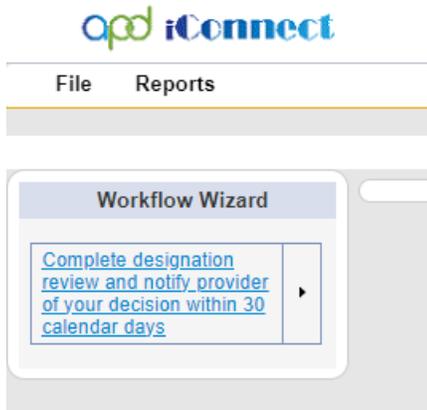
Note Recipients

Add Note Recipient:

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 **Ticklers** link to open the Tickler Queue:

PROVIDERS	
<b>Notes</b>	
Complete	30
I'm Interested	10
Pending	16
<b>Ticklers</b>	
Ticklers	57

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

**File**

Filters

Date Created Equal To 07/11/2018 AND

Status +

Apply Alert Days Before Due

Search Reset



**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.

- Set "Role" = Service Provider then click **Go**

**Role**

Service Provider

GO

- 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 Billing Linked Providers Aliases Conditions

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

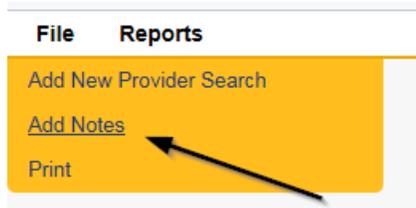
Filters

Note Type Equal To

Note Date +

Search Reset

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.

File Tools

**Notes Details**

Division \* APD ▾

Note By \* Reed, Monica ▾

Note Date \* 07/01/2023 📅

Note Type \* Behavior Focused ▾\*

Note Sub-Type Table of Organization ▾\*

Description

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

Note

Status \* Complete ▾

Date Completed 07/01/2023

**Attachments**

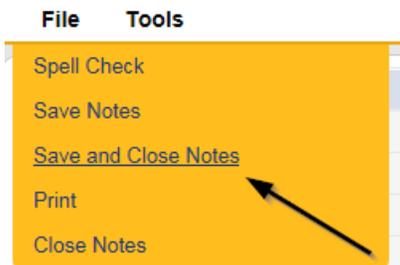
[Add Attachment](#)

Document	Description
There are no attachments to display	

**Note Recipients**

Add Note Recipient:  ... Clear

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



- 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.

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

A screenshot of a web form. At the top, the word 'Role' is written in a small font. Below it is a dropdown menu with a white background and a black border. The text 'Region Clinical Workstream Worker' is visible in the dropdown, followed by a small downward-pointing arrow. To the right of the dropdown is a grey button with the word 'GO' in white capital letters. A black arrow points from the top right towards the dropdown menu.

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

**PROVIDERS**

Notes	
Complete	18
Pending	15

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.

File Tools

Filters

Status Equal To Complete AND

NoteType Equal To Behavior Focused AND

NoteType +

Search Reset

5 Notes record(s) returned - now viewing 1 through 5

Provider	Note Type	Note Date	Description	Author	Status	
Test Provider	Behavior Focused	06/30/2023	Request for Designation	Reed, Monica	Complete	<input type="checkbox"/>
Test Provider	Behavior Focused	07/01/2023	Clinical Director Experience	Reed, Monica	Complete	<input type="checkbox"/>
Test Provider	Behavior Focused	07/19/2023	Curriculum staff are/will be trained in Policy for medical rule-out Policy for use	Reed, Monica	Complete	<input type="checkbox"/>
Test Provider	Behavior Focused	07/20/2023	Annual Review	Reed, Monica	Complete	<input type="checkbox"/>
Test Provider	Behavior Focused	07/20/2023	Designation in Jeopardy	Reed, Monica	Complete	<input type="checkbox"/>

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**.

Role

Region Clinical Workstream Worker

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 display. Navigate to the **Providers > Appointments** tab.

MY DASHBOARD CONSUMERS **PROVIDERS** CLAIMS SCHEDULER REPORTS

Test Provider (21347)

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

View Style  
 List View  Monthly View  
 Weekly View  Daily View

Filters  
 Status Equal To Scheduled AND  
 Start Date +

Search Reset

2 Appointments record(s) returned - now viewing 1 through 2

	Start Date	Start Time	End Time	Type	Subject	Status
▢	07/19/2023	3:23:00 PM	3:53:00 PM	Site Visit	Site Visit for Service Level Designation	Scheduled
▢	06/05/2023	1:00:00 PM	3:00:00 PM	Other		Scheduled

4. Click **File > Add Appointment**

opd iConnect

**File**

- Add New Provider Search
- Add Appointment**
- Spell Check
- Print

5. Enter the following fields on the Appointment Details page

- "Division" = APD
- "Start Date" = Enter date
- "Start Time" = Enter time
- "End Date" = Enter end date
- "End Time" = Enter end time
- "Type" = Site Visit
- "Subject" = Enter description
- "Appt Summary" = Enter summary
- "Appt Details" = Enter details
- "Status" = Scheduled



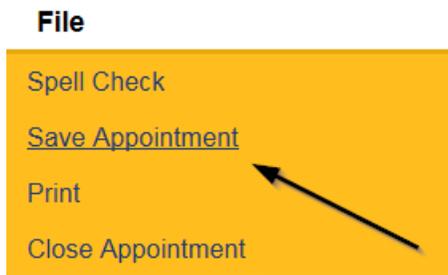
**Test Provider**  
 Last Updated by mreed@apdcares.org  
 at 7/19/2023 3:24:13 PM
 
**Appointment**

---

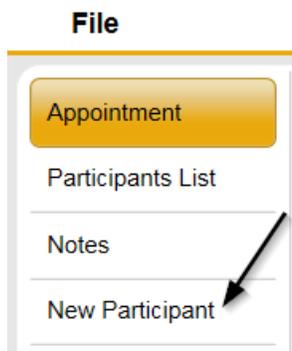
**File**

Appointment	<b>Appointments</b>
Participants List	Division <input type="text" value="APD"/>
Notes	Start Date * <input type="text" value="07/19/2023"/>
New Participant	Start Time <input type="text" value="03"/> <input type="text" value="00"/> <input type="text" value="PM"/>
	End Date <input type="text" value="07/19/2023"/>
	End Time <input type="text" value="04"/> <input type="text" value="00"/> <input type="text" value="PM"/>
	Type <input type="text" value="Site Visit"/>
	Subject <input type="text"/>
	Appt. Summary (non-HIPAA Data) <input type="text"/>
	Appt. Details(HIPAA Data) <input type="text"/>
	Status * <input type="text" value="Scheduled"/>
	High Priority <input type="checkbox"/>

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



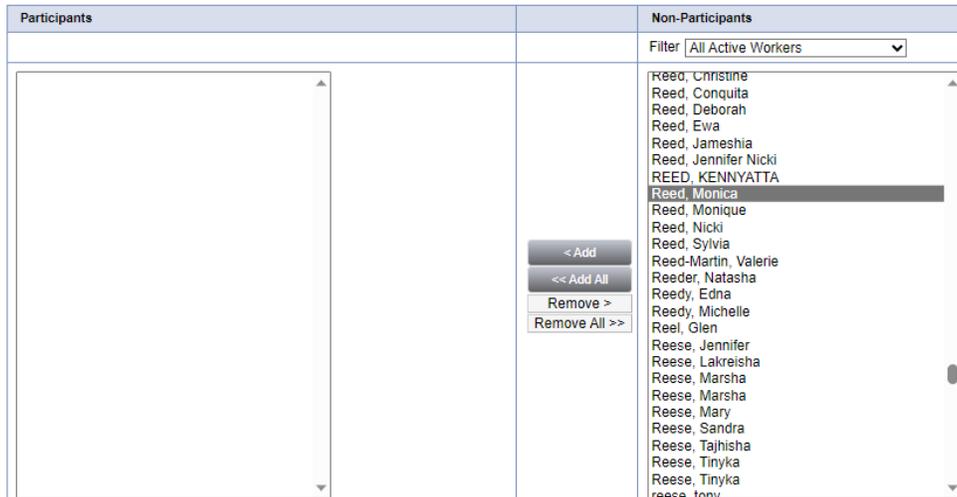
7. Click **New Participant** on the left-hand navigation menu



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.

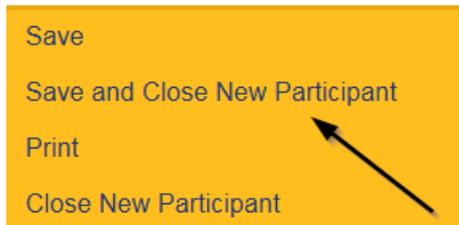


9. Select the appropriate Region Clinical Workstream Worker and Service Provider Worker names by holding the control key down and clicking on the names and then **Click < Add**

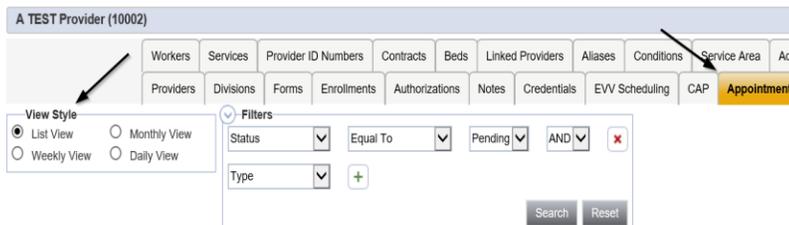


10. When finished, Select **File > Save and Close New Participant**

**File**



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**.

A screenshot of a web form titled "Role". It features a dropdown menu with "Region Clinical Workstream Worker" selected. To the right of the dropdown is a grey button labeled "GO". A black arrow points from the dropdown menu 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 "Providers" chapter in a software application. At the top, there is a "Quick Search" section with a text input field containing "A Test Provider", a dropdown menu set to "Providers", and another dropdown menu set to "Provider Name". A "GO" button is to the right. Below this is a navigation bar with tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS" (highlighted in yellow), "INCIDENTS", "CLAIMS", and "SCHEDULER". A "Filters" section is visible below the navigation bar. A black arrow points from the "GO" button to the "PROVIDERS" tab.

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

A screenshot of a provider record for "A TEST PROVIDER (10002)". The "Providers" tab is active in the navigation bar. Below the navigation bar, there is a "Notes" tab highlighted in yellow. A "Quick Search" section is at the top. Below the "Notes" tab, there is a search filter section with "Note Type" and "Note Date" dropdowns, and "Search" and "Reset" buttons. A black arrow points from the "Notes" tab to the search filter section.

4. Click **File > Add Notes**

A screenshot of a software application's "File" menu. The menu is open, showing options: "Add New Provider Search", "Add Notes" (highlighted in yellow), and "Print". A black arrow points to the "Add Notes" option.

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.

File Tools

---

**Notes Details**

Division *	APD
Note By *	Reed, Monica
Note Date *	07/01/2023
Note Type *	Behavior Focused
Note Sub-Type	Packet Complete
Description	Packet Complete
Note	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>B</b> <i>I</i> <u>U</u> 16px <b>A</b></p> <p>Enter Notes to document that all required information is received, and the packet is complete. Include the Site Visit appointment date/time</p> </div>
Status *	Complete
Date Completed	07/01/2023

**Attachments**

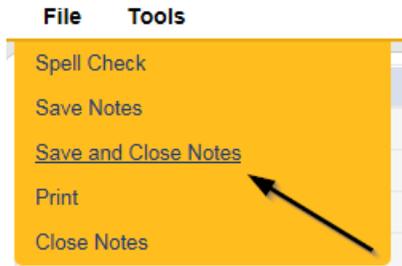
[Add Attachment](#)

Document	Description
There are no attachments to display	

**Note Recipients**

Add Note Recipient:  ... Clear

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

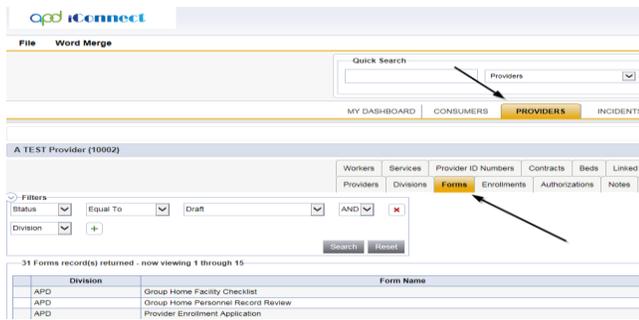
1. Set "Role" = Region Clinical Workstream Worker then click **Go**.

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

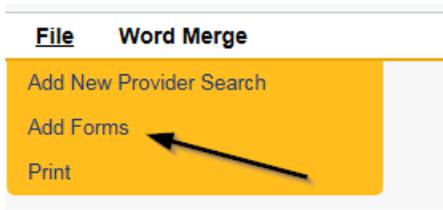
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.

 A screenshot of the iConnect web application interface. The 'Providers' tab is highlighted in the navigation bar. Above the navigation bar is a 'Quick Search' filter with a text input containing 'A Test Provider', a dropdown menu set to 'Providers', and a 'GO' button. A black arrow points to the 'GO' button. Below the navigation bar, there is a 'Filters' section.

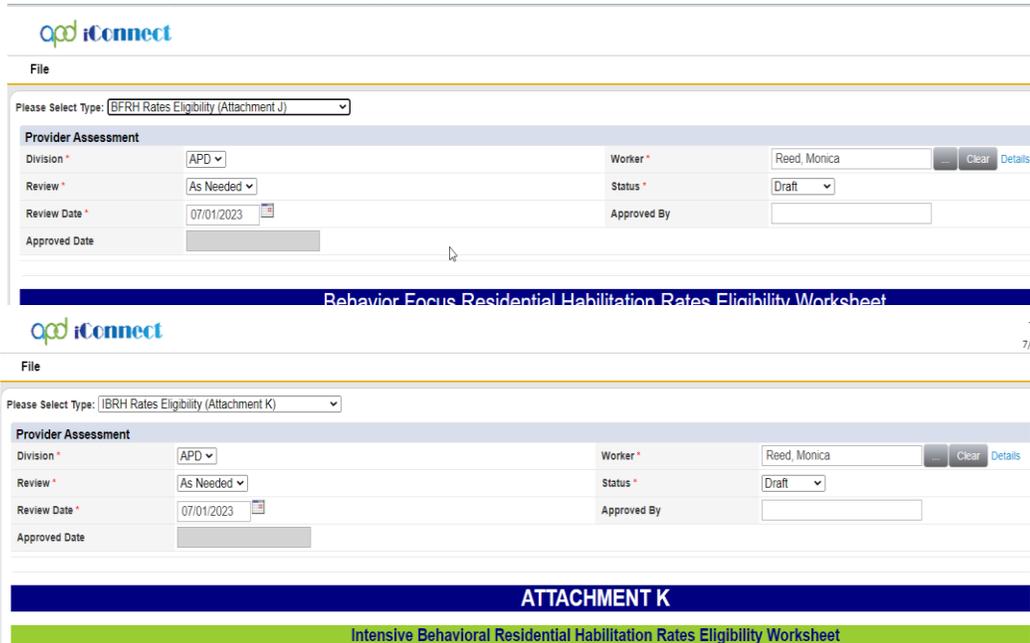
3. The Provider's record will display. Navigate to the **Providers > Forms** tab



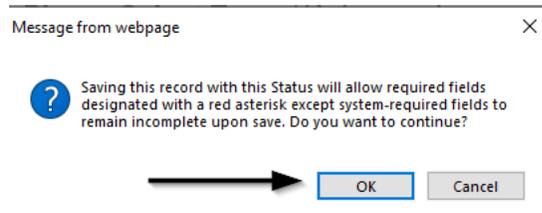
4. Click **File > Add Forms**



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

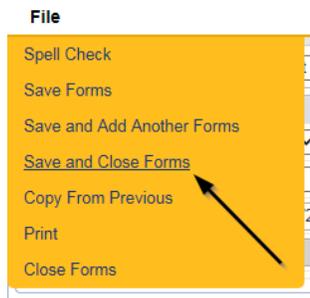


6. Update the following Header fields:
- "Division" = APD
  - "Review" = As Needed
  - "Status" = Draft for Initial Save then Complete
  - Click "OK" on the pop-up message box



e. Complete all fields on the Form

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

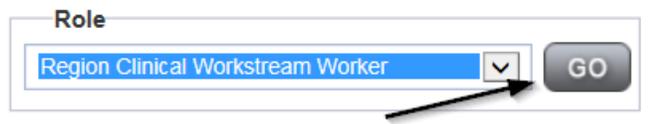


## Generate Approval Letter

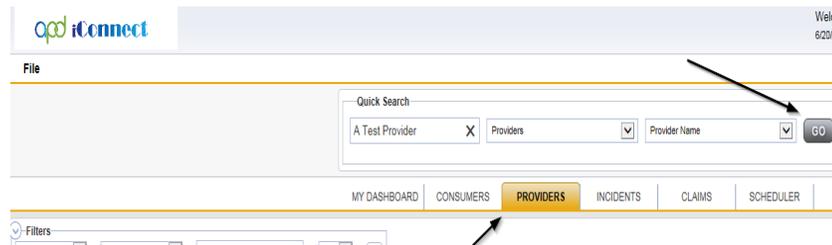


The Region Clinical Workstream Worker will generate the approval letter Attachment L confirming the requested designation and attach to an existing note

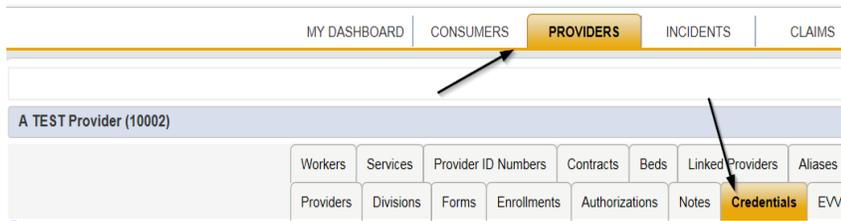
1. Set “Role” = Region Clinical Workstream Worker then click **Go**.



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.



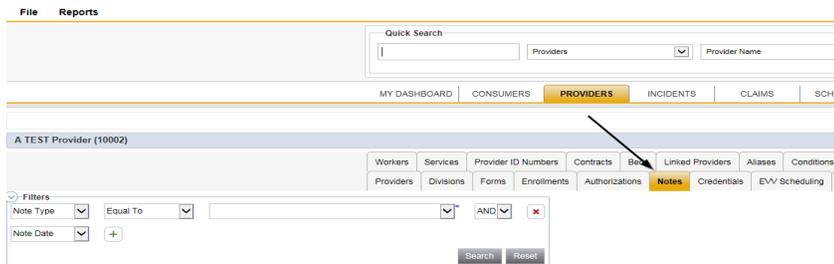
4. Select **Word Merge > Confirm BF.IB Designation Attachment L**



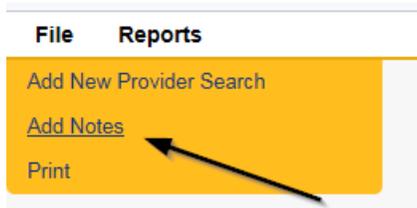
5. **Edit** the Word Merge Document as necessary.

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:

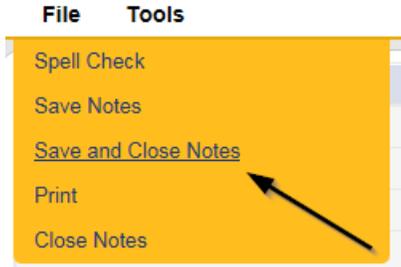
- a. "Note Type" = Requested Designation
- b. "Note Subtype" = Approved
- c. "Description" = Specify which designation is approved (e.g., *Behavior Focused Designation Approved*)
- d. "Note" = Enter notes
- e. "Status" = Complete

- 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

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

- Division: APD
- Note By: Reed, Monica
- Note Date: 07/01/2023
- Note Type: Requested Designation
- Note Sub-Type: Approved
- Description: Behavior Focused Designation Approved
- Note: (Empty text area)
- Status: Complete
- Date Completed: 07/01/2023
- Attachments: (Section with 'Add Attachment' link)
- Document/Description table: (Empty table with 'There are no attachments to display')
- Note Recipients: (Section with 'Add Note Recipient' field and an ellipsis button)

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



- For more detailed general Word Merge instruction, see the [As Needed: Word Merges](#) section.

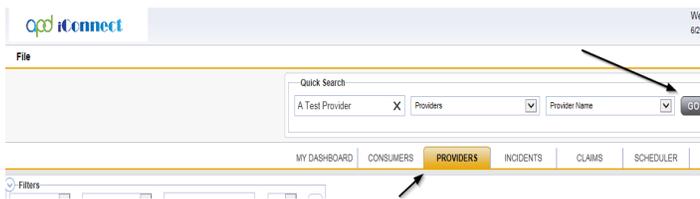


*If there was a service expansion request that was approved for new services for this behavior service level designation, Provider Enrollment will need to update the BF/IB/EIB/MEIB services to “active” and confirm and update the services active date. See Chapter 11 Expansions – New Services training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

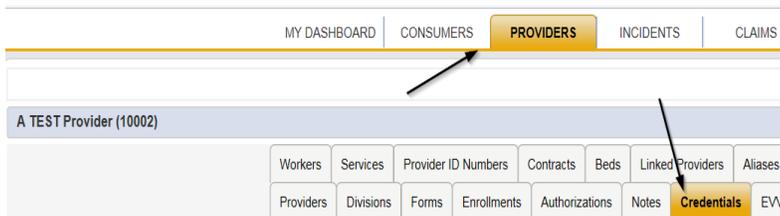
### Add License Information

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

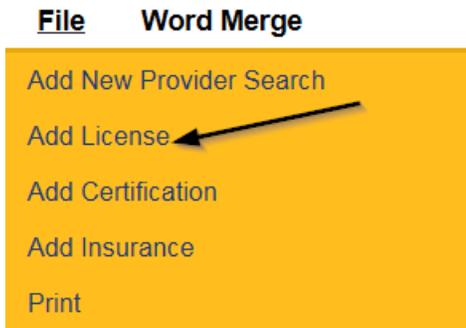
- Navigate to the **Providers** chapter and enter the Provider’s name (licensed facility) in the Quick Search filter and click **Go**.



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

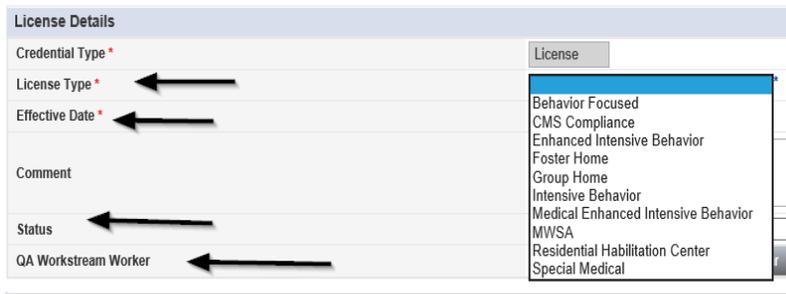


4. Select **File > Add License**

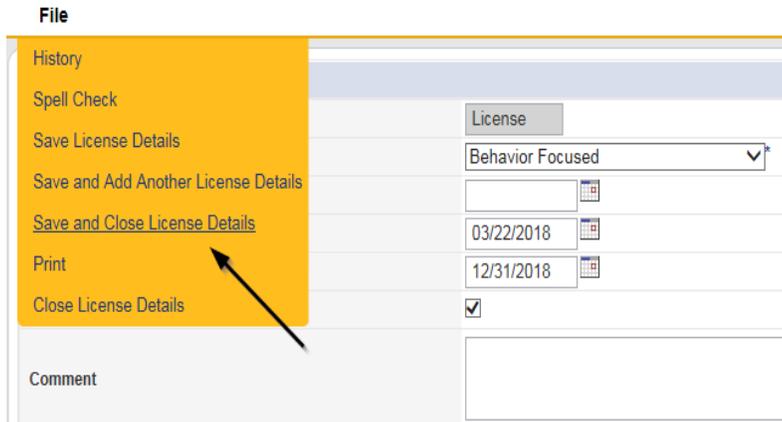


5. Update the following fields:

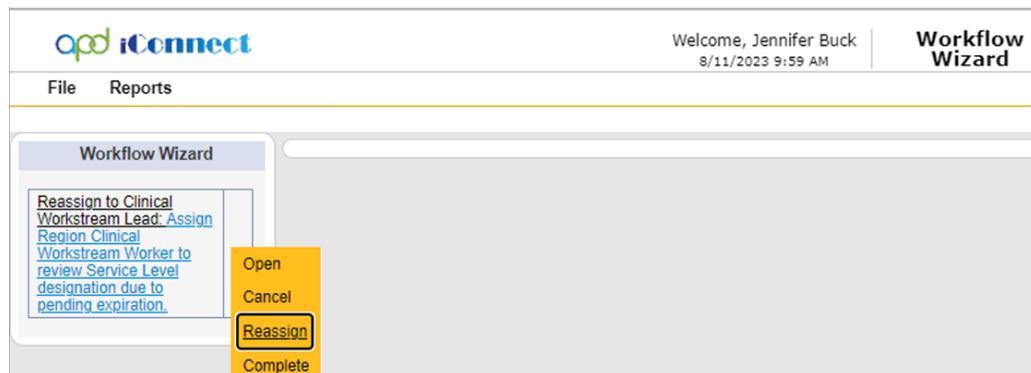
- a. "License Type" = Select as appropriate
  - i. Behavior Focused
  - ii. Intensive Behavior
  - iii. Enhanced Intensive Behavior
  - iv. Medical Enhanced Intensive Behavior
- b. "Effective Date" = Enter Date that the designation was approved
- c. "Expiration Date" = Enter Date as the last day of the 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.

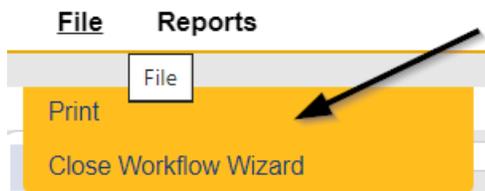


Search by:  Search Text:

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

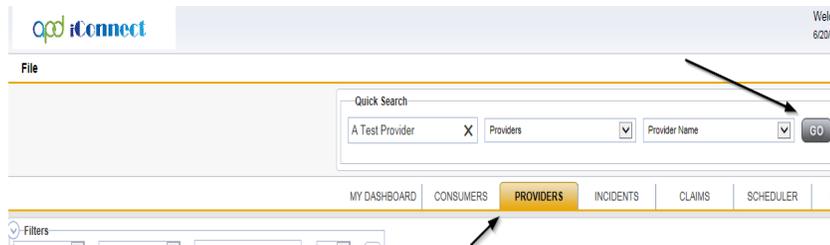


If the Region Clinical Workstream Worker determines that the packet is not complete and further documentation is required, they will add a note for the Service Provider.

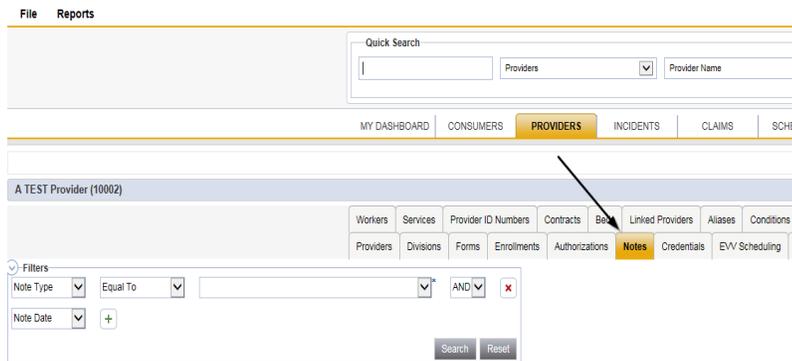
1. Set "Role" = Region Clinical Workstream Worker then click **Go**.

The image shows a form with a 'Role' dropdown menu. The dropdown is open, and 'Region Clinical Workstream Worker' is selected. A 'GO' button is next to the dropdown. An arrow points to the 'GO' button.

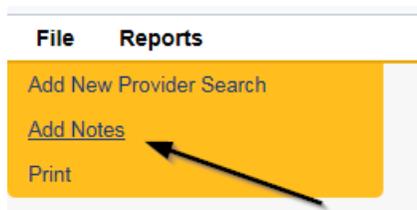
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click go.



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



- Click **File > Add Notes**



- In the new Note record, update the following fields:
  - "Note Type" = BF/IB/EIB/MEIB
  - "Note Subtype" = Further Documentation Required
  - "Description" = List names of missing documents
  - "Note" = Enter notes and list the missing or incomplete documents
  - "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 \*  ←

Note By \*  ←

Note Date \*  ←

Note Type \*  ←

Note Sub-Type  ←

Description  ←

Note  ←

Status \*  ←

Date Completed

**Attachments**

[Add Attachment](#)

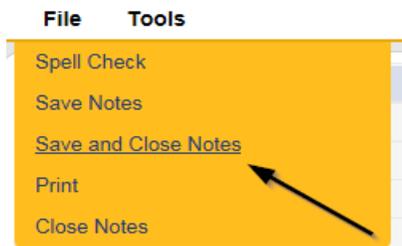
**Document** Description

There are no attachments to display

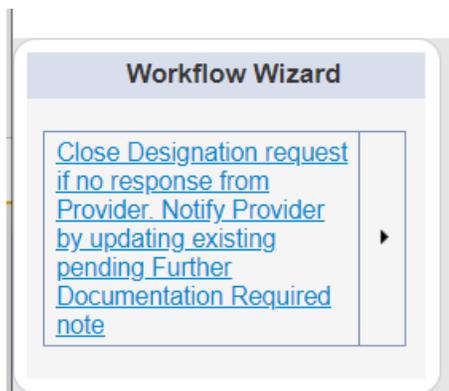
**Note Recipients**

Add Note Recipient:

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



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



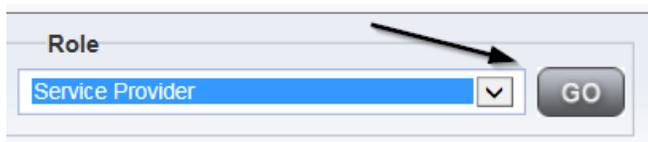
The Region Clinical Workstream Worker will proceed to [As Needed: Designation Request Closed](#)

### As Needed: Additional Documentation

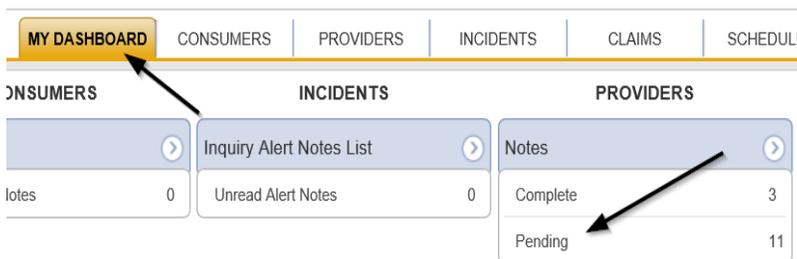


The Service Provider will scan and save a copy of any requested documentation to their desktop and attach it to the pending note. They will upload each document as an attachment to the existing note and then send it to the Region Clinical Workstream Worker. The Region Clinical Workstream Worker will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

Filters

Status ▾ Equal To ▾ Pending ▾ AND ▾ ✕

Status ▾ +

Search Reset

10 Notes record(s) returned - now viewing 1 through 10

Provider	NoteType	Note Date ▾	Description	Author	Status
Monica Agency	Behavior Focused	04/15/2020	Further Documentation Required	Reed, Monica	Pending

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

- "Note Subtype" = Leave as Further Documentation Required
- "Description" = List documents
- "Click Append Text to Note" = Enter notes
- "Status" = Leave as Pending until all attachments are added then update to Complete
- Click "Add Attachment" and search for the copy of the requested documentation on the user's computer. Click Upload and Add Another until finished

**File**  Browse...

**File Name**  from uploaded file  
 create new

**Description**

**Category**  ▾

Upload Upload and Add Another

**Note: Maximum size for attachment is set to 5.76 MBytes.**

- Click the ellipsis on the "Add Note Recipient" to add the [Region Clinical Workstream Worker](#) 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

File Tools

Notes

**Notes Details**

Division \* APD

Note By \* Reed, Monica

Note Date \* 07/02/2023

Note Type \* Behavior Focused

Note Sub-Type Further Documentation Required

Description ← List documents

Note

New Text

B I U 16px A

Append Text to Note

Status \* ← Complete

Date Completed 07/02/2023

**Attachments**

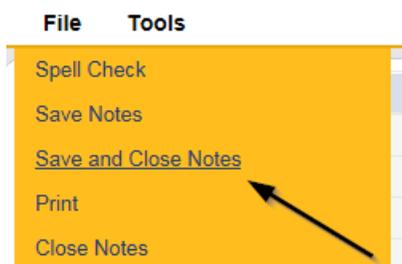
Add Attachment ←

Document	Description
There are no attachments to display	

**Note Recipients**

Add Note Recipient:  ... Clear

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



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**

A screenshot of a web form. At the top, the word "Role" is displayed. Below it is a dropdown menu with "Region Clinical Workstream Worker" selected. To the right of the dropdown is a grey button labeled "GO". An arrow points from the top right towards the dropdown menu.

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

A screenshot of the "Providers" page in the system. At the top left is the "iConnect" logo. Below it is a "Quick Search" section with a text input containing "A Test Provider", a dropdown menu set to "Providers", and another dropdown menu set to "Provider Name". A "GO" button is to the right. Below the search section is a navigation bar with tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS" (highlighted), "INCIDENTS", "CLAIMS", and "SCHEDULER". An arrow points from the top right towards the "GO" button.

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

A screenshot of the provider 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 the navigation bar 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". Below the sub-navigation bar is a "Filters" section with dropdown menus for "Note Type" and "Note Date", and a "Search" button. An arrow points from the top right towards the "Notes" tab.

4. Click **File > Add Notes**

A screenshot of the "Add Notes" button in the provider record page. The button is yellow and contains the text "Add New Provider Search", "Add Notes", and "Print". An arrow points from the bottom right towards the "Add Notes" text.

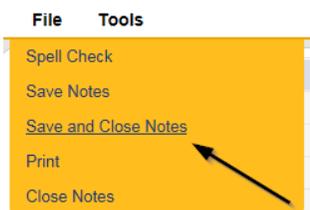
5. In the new Note record, update the following fields:
  - a. "Note Type" = **BF/IB/EIB/MEIB**
  - b. "Note Subtype" = **Designation Request Closed**

- 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

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

- Division \***: APD
- Note By \***: Reed, Monica
- Note Date \***: 07/01/2023
- Note Type \***: Behavior Focused (with an arrow pointing to the field)
- Note Sub-Type**: Designation Request Closed (with an arrow pointing to the field)
- Description**: Designation Request Closed (with an arrow pointing to the field)
- Note**: Document in the Note field that the request is being closed due to no document submission (with an arrow pointing to the text area)
- Status \***: Complete (with an arrow pointing to the field)
- Date Completed**: 07/01/2023
- Attachments**: Add Attachment
- Document** and **Description** columns: There are no attachments to display (with an arrow pointing to the 'Add Note Recipient' section below)
- Note Recipients**: Add Note Recipient: [input field] ... Clear

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**.

A screenshot of a web form. At the top, the word "Role" is displayed. Below it is a dropdown menu with "Region Clinical Workstream Worker" selected. To the right of the dropdown is a grey button with the text "GO" in white. A black arrow points from the bottom of the dropdown menu to the "GO" button.

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

A screenshot of a web application interface. At the top, there are navigation tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", and "CLAIMS". The "PROVIDERS" tab is highlighted in yellow. Below the tabs, there is a header for "A TEST Provider (10002)". Underneath, there is a grid of sub-tabs: "Workers", "Services", "Provider ID Numbers", "Contracts", "Beds", "Linked Providers", "Aliases", "Providers", "Divisions", "Forms", "Enrollments", "Authorizations", "Notes", "Credentials", and "EVV". The "Credentials" tab is highlighted in yellow. A black arrow points from the "PROVIDERS" tab to the "Credentials" tab.

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

### Word Merge

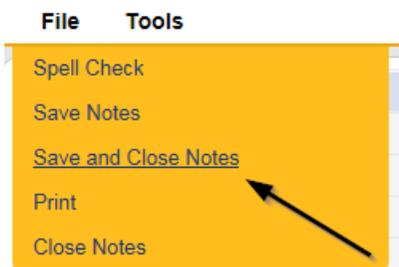
A screenshot of a yellow rectangular preview window. It contains a list of four items:

- Confirm BF.IB Designation Attachment L
- Cover Letter with Certificate of Service
- Designation in Jeopardy (Attachment M)
- License Certificate Automated

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**.



- 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.

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

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

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

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	BF/Denial Recommendation	07/02/2023	Denial Recommendation	Reed, Monica	Pending

- In the existing Note record, update the following fields:
  - “Note Type” = Leave as BF/IB/EIB/MEIB/Denial Recommendation
  - “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

**Notes Details**

Division \* APD

Note By \* Reed, Monica

Note Date \* 07/02/2023

Note Type \* BF/Denial Recommendation

Note Sub-Type \*

Description Denied

Note

New Text

B I U 16px A

Append Text to Note

Status \* Pending

Date Completed

**Attachments**

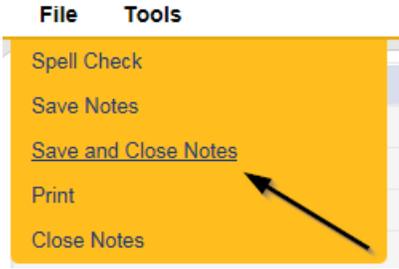
[Add Attachment](#)

Document	Description
There are no attachments to display	

**Note Recipients**

Add Note Recipient:  ... Clear

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



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**

The image shows a form field labeled 'Role' with a dropdown menu containing 'Region Clinical Workstream Worker' and a 'GO' button. An arrow points to the dropdown menu.

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

The image shows a dashboard with tabs for MY DASHBOARD, CONSUMERS, PROVIDERS, INCIDENTS, CLAIMS, and SCHEDULE. The PROVIDERS tab is active, showing sub-sections for CONSUMERS, INCIDENTS, and PROVIDERS. The PROVIDERS section has a 'Notes' link with a right arrow and a count of 11 Pending notes. An arrow points to the 'Notes' link.

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

The image shows a search filter with 'Status' set to 'Equal To' and 'Pending'. Below the filter is a table of notes. An arrow points to the 'BF-Denial Recommendation' row, and another arrow points to the 'Denied' description. A third arrow points to the 'Status' column.

Provider	NoteType	Note Date	Description	Author	Status
Test Provider	BF-Denial Recommendation	07/02/2023	Denied	Reed, Monica	Pending

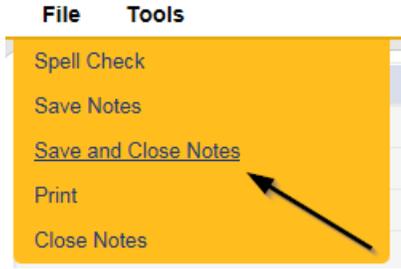
4. In the pending Note record, update the following fields:
  - a. "Note Type" = Update to Requested Designation
  - b. "Note Subtype" = Denial
  - c. "Description" = Specify which designation is Denied
  - d. "Click Append Text to Note" = Enter notes
  - e. "Status" = Update to Complete
  - f. Click 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

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

- Division: APD
- Note By: Reed, Monica
- Note Date: 07/02/2023
- Note Type: Requested Designation
- Note Sub-Type: Denial
- Description: Behavior Focus designation denied
- Note: (Empty text area)
- Status: Complete
- Date Completed: 07/03/2023

A 'New Text' pop-up window is open over the 'Note' field, showing a text editor with a '16px' font size and an 'Append Text to Note' button. Arrows point to the 'Note Type', 'Note Sub-Type', 'Description', 'Status', and 'Append Text to Note' button. Below the form, there are sections for 'Attachments' (Add Attachment), 'Document' (Description), and 'Note Recipients' (Add Note Recipient, Clear).

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**

A screenshot of a web form. It features a 'Role' label above a dropdown menu. The dropdown menu is open, showing 'Region QA Workstream Worker' as the selected option. To the right of the dropdown is a grey button labeled 'GO'. A black arrow points to the 'GO' button.

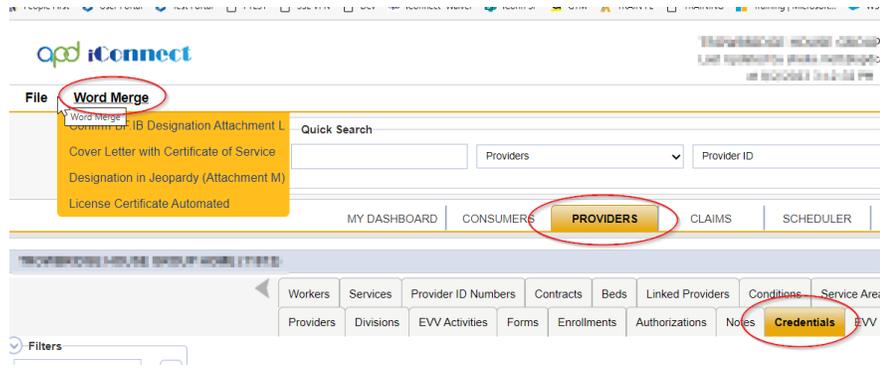
2. From the appropriate **Word Merge** menu based on the workflow, select the desired word merge.

- a. Examples of **Word Merge** menus

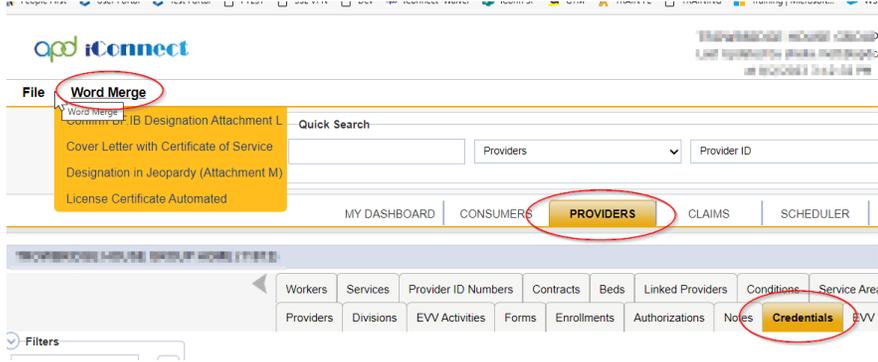
- i. From a form:

A screenshot of the 'iConnect' system interface. The 'Word Merge' menu is highlighted with a red circle. Below the menu, there is a form for 'LRC Chair BASE'. The form includes fields for 'Review' (set to 'As Needed'), 'Review Date' (07/03/2023), 'Division' (APD), 'Worker' (Buck, Jennifer), 'Status' (Draft), and 'Approved By'. Below the form is a section titled 'ATTACHMENT E' with the heading 'LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)'. A note states: 'Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or an approval for the rate, hours or cost plan.' Below the note are input fields for 'Consumer Name', 'First Name' (Carlie), 'Middle Name' (R), and 'Last Name' (Abner).

- ii. From the Credentials tab:



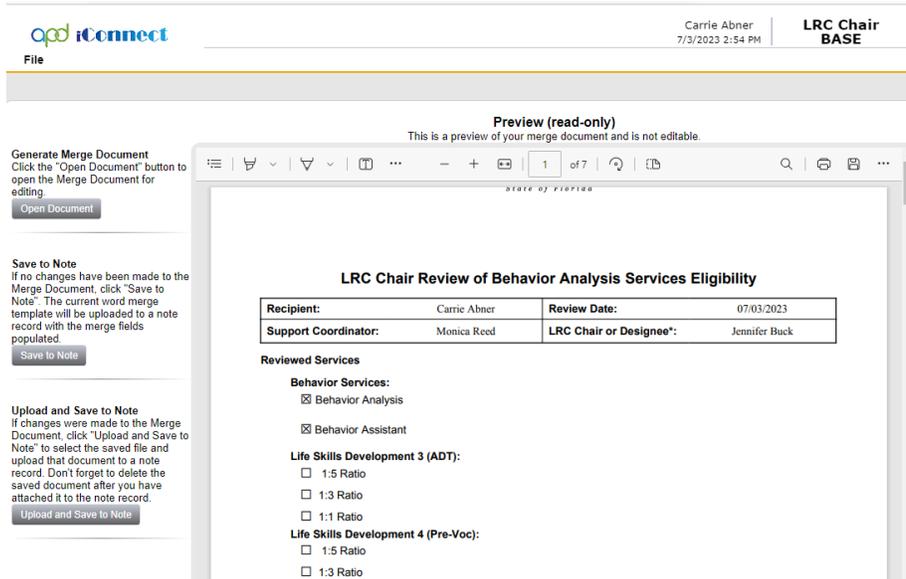
iii. From the Providers tab:



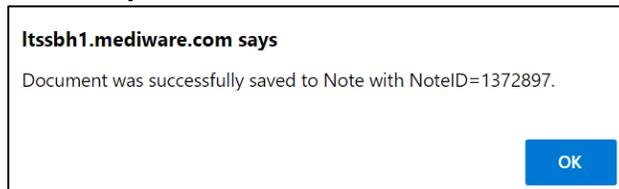
3. The Word Merge preview window displays.

## No Edits Needed

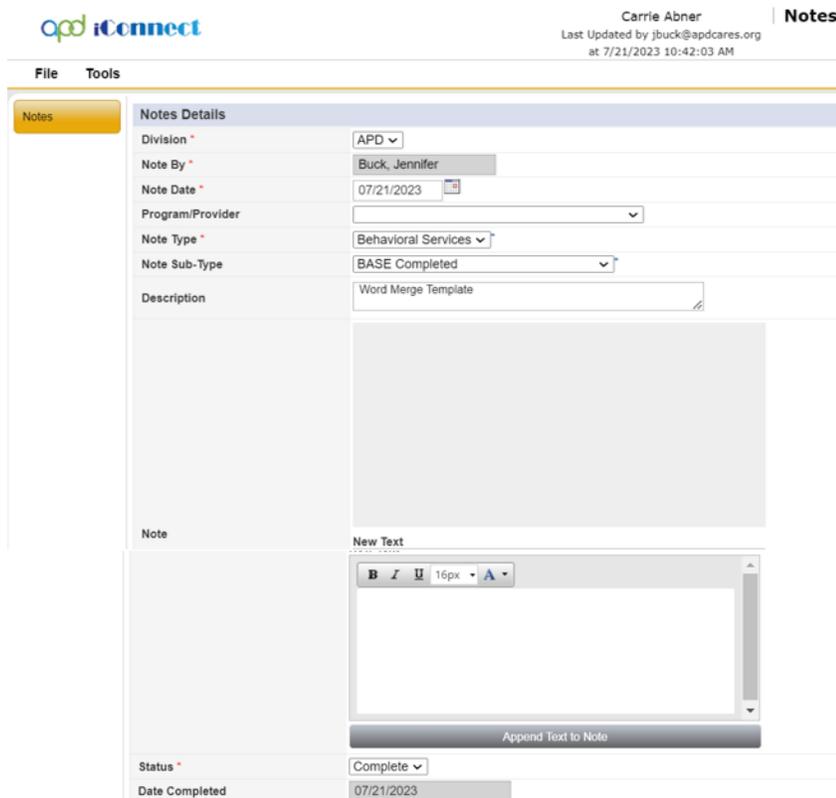
1. If no edits are needed, select **Save to Note**.



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.

**File**

**Generate Merge Document**

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

Open Document



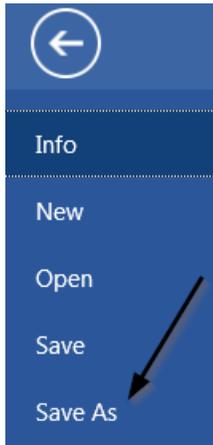
- 2. Save the Word Merge Document to the computer desktop by clicking the **Save** button and then **Open**.

The screenshot shows the 'Draft iBudget Provider Applicant Services Listings Form' with the following details: Applicant Business Name: Monica's Group Home; Applicant Name: A TEST Provider; Applicant Address: 55 South Washington St., JACKSONVILLE, FL 32244; Email Address: 777@anywhere.com; Phone Number: (888)888-8819. Two dialog boxes are overlaid: the top one asks 'Do you want to save WM\_P003\_Draft-APD-iBudget-Regional-Provider-Services-Listing-Letter.docx (66.4 KB) from fwtest.harmonyis.net?' with 'Save' and 'Cancel' buttons; the bottom one states 'The WM\_P003\_Draft-APD-iBudget-Regional-Provider-Services-Listing-Letter (1).docx download has completed.' with 'Open', 'Open folder', and 'View downloads' buttons. Arrows point to the 'Save' and 'Open' buttons.

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

The screenshot shows the 'Draft iBudget Provider Applicant Services Listings Form' with the following details: Applicant Business Name: Monica's Group Home; Applicant Name: A TEST Provider; Applicant Address: 55 South Washington St., JACKSONVILLE, FL 32244; Email Address: 777@anywhere.com; Phone Number: (888)888-8819. Below the phone number are two checkboxes: 'Solo: ' and 'Agency: '. At the bottom, there are two fields: 'Effective Date of Form: Click or tap to enter a date.' and 'Expiration Date of Form: Click or tap to enter a date.'. Arrows point to the 'Agency' checkbox and the 'Expiration Date of Form' field.

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.

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

Open Document

---

**Save to Note**  
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.

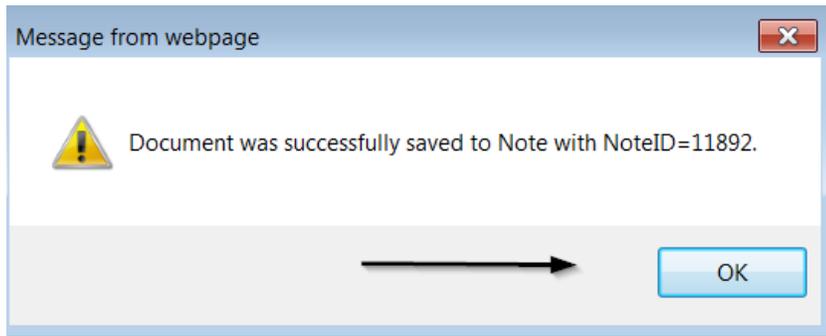
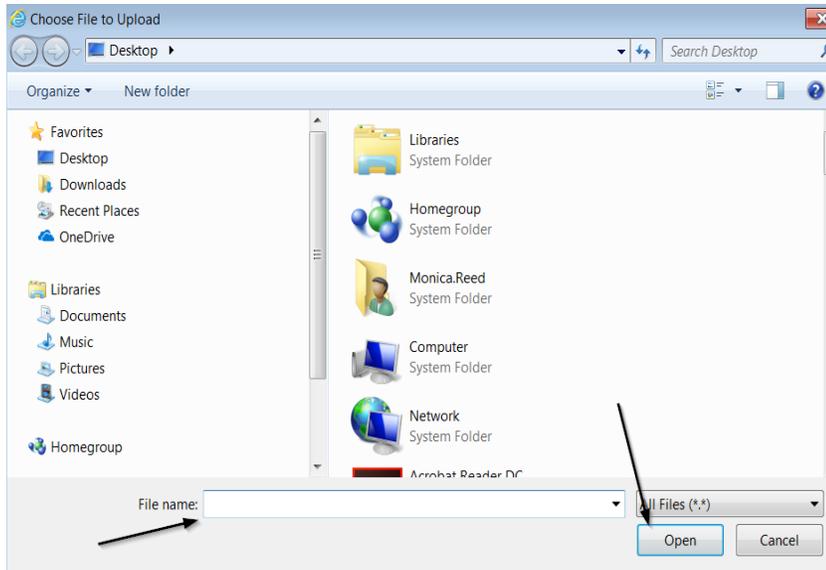
Save to Note

---

**Upload and Save to Note**  
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.

Upload and Save to Note

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.

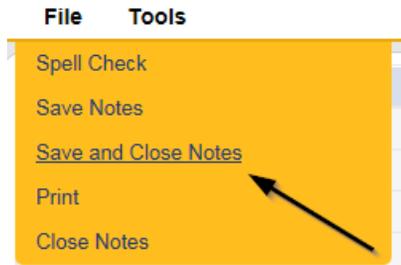


7. In the new Notes Detail Screen, update the fields according to the associated workflow.

Notes Details	
Division *	APD
Note By *	Reed, Monica
Note Date *	12/01/2018
Note Type *	Initial Application
Note Sub-Type	Draft Enrollment Listing Letter
Description	
Note	
Status *	Complete
Date Completed	12/11/2018

Attachments	
Add Attachment	
Document	Description
WM_P003_Draft-APD-Budget-Regional-Provider-Services-Listing-Letter.pdf	Word Template: Draft APD (Budget Regional Provider Services Listing Letter)
Note Recipients	
Add Note Recipient:	Clear

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.

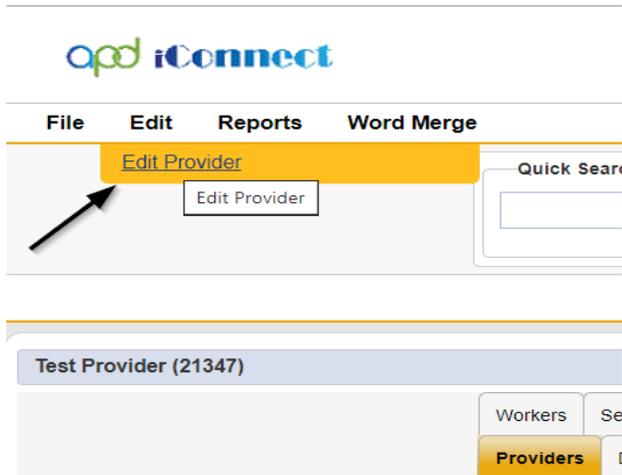
1. Set “Role” = Region Clinical Workstream Lead then click **Go**

The image shows a form field labeled 'Role' with a dropdown menu containing 'Region Clinical Workstream Lead' and a 'GO' button to its right. An arrow points to the dropdown menu.

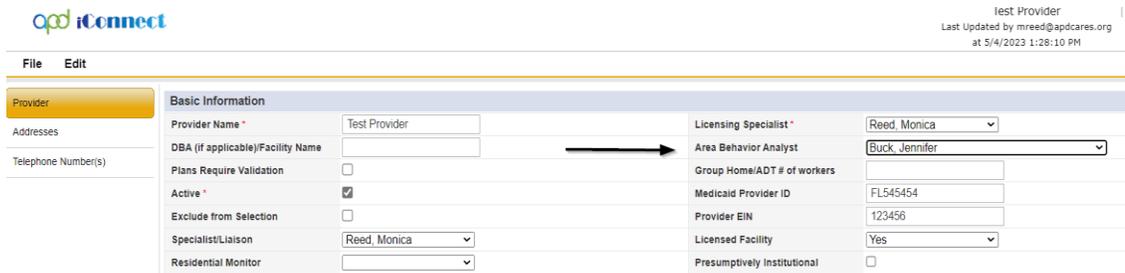
2. Navigate to the Providers > Providers tab

The image shows a web interface with tabs for 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS'. The 'PROVIDERS' tab is active. Below it, there are sub-tabs for 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Beds', and 'Linked Provider'. The 'Providers' sub-tab is selected. Below the sub-tabs, there is a section for 'Basic Information' with fields for 'Provider Name' (Test Provider) and 'DBA (if applicable)/Facility Name'.

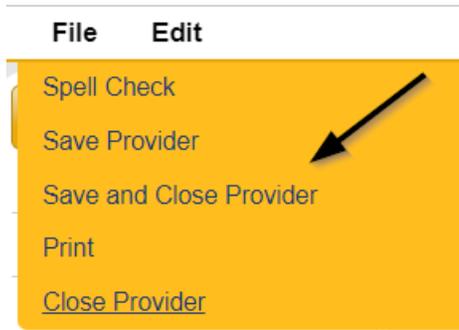
3. Select **Edit > Edit Provider**



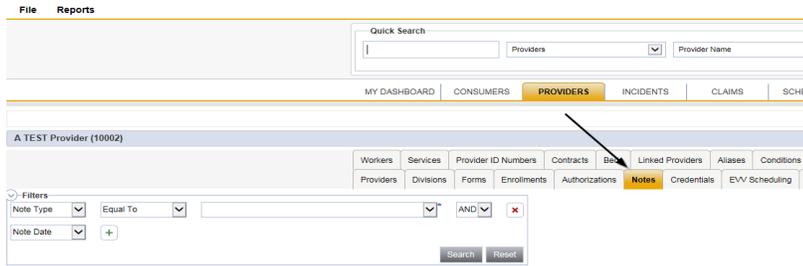
4. Select the Regional Senior Behavior Analyst name from the drop-down list for that field in order to assign them to the Provider's record



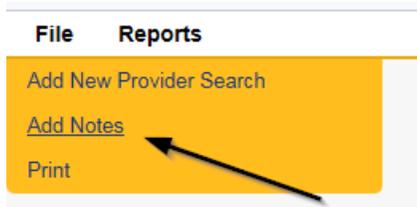
5. When finished, Select **File > Save and Close Provider**



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

**Notes Details**

Division *	APD ▾
Note By *	Reed, Monica ▾
Note Date *	07/03/2023 📅
Note Type *	Intensive Behavioral ▾
Note Sub-Type	Annual Review ▾
Description	Annual Review
Note	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>B</b> <i>I</i> <u>U</u> 16px ▾ A ▾</p> <p>Advise Clinical Workstream Worker (ABA) that they have been assigned to this annual review for Service Designation renewal</p> </div>
Status *	Complete ▾
Date Completed	07/03/2023

**Attachments**

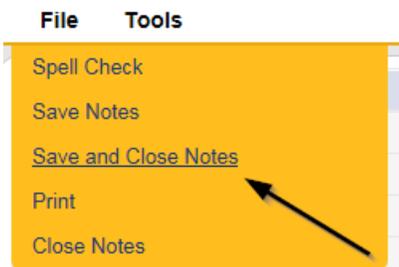
[Add Attachment](#)

Document	Description
There are no attachments to display	

**Note Recipients**

Add Note Recipient:  ...

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**.

A screenshot of a web form titled "Role". It features a dropdown menu with "Region Clinical Workstream Worker" selected. To the right of the dropdown is a grey button labeled "GO". A black arrow points from the dropdown menu to the "GO" button.

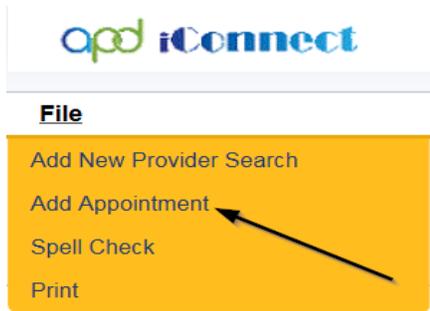
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click go.

A screenshot of the iConnect web application. The top navigation bar includes "MY DASHBOARD", "CONSUMERS", "PROVIDERS" (highlighted), "INCIDENTS", "CLAIMS", and "SCHEDULER". Below the navigation is a "Quick Search" section with a text input containing "A Test Provider", a dropdown menu set to "Providers", and another dropdown menu set to "Provider Name". A "GO" button is to the right. A black arrow points from the "GO" button to the "PROVIDERS" tab in the navigation bar.

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

A screenshot of the iConnect web application showing the "A TEST Provider (10002)" record. The "Appointments" tab is selected in the sub-navigation. A "Filters" dialog box is open, showing "Status" set to "Equal To", "Pending", and "AND". Below the dialog is a table with 4 columns: "Type", "Start Date", and "End Date". The first row shows "Site Visit" with "06/21/2018" for both start and end dates. A black arrow points from the "Appointments" tab to the table.

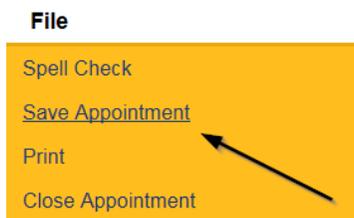
4. Click **File > Add Appointment**



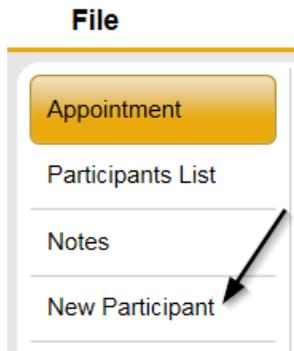
5. Enter the following fields on the Appointment Details page
- a. "Division" = APD
  - b. "Start Date" = Enter date
  - c. "Start Time" = Enter time
  - d. "End Date" = Enter end date
  - e. "End Time" = Enter end time
  - f. "Type" = Site Visit
  - g. "Subject" = Enter description
  - h. "Appt Summary"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

Appointment	
Division	APD
Start Date *	07/19/2023
Start Time	03   00   PM
End Date	07/19/2023
End Time	04   00   PM
Type	Site Visit
Subject	
Appt. Summary (non-HIPAA Data)	
Appt. Details (HIPAA Data)	
Status *	Scheduled
High Priority	<input type="checkbox"/>

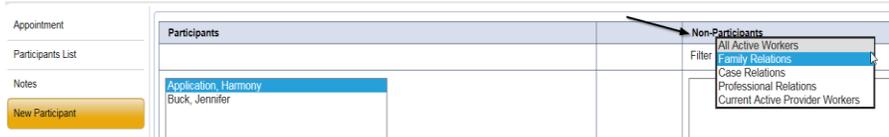
6. When finished select **File > Save Appointment**



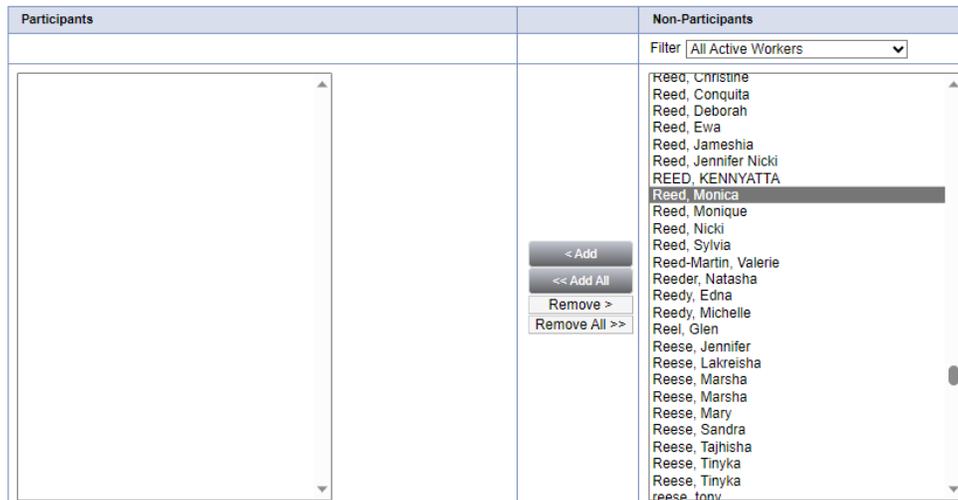
- Click **New Participant** on the left-hand navigation menu



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

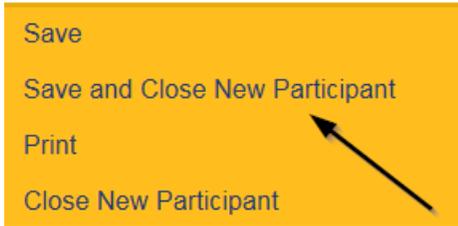


- Select the appropriate Region Clinical Workstream Worker and Service Provider Worker names by holding the control key down and clicking on the names and then **Click < Add**.

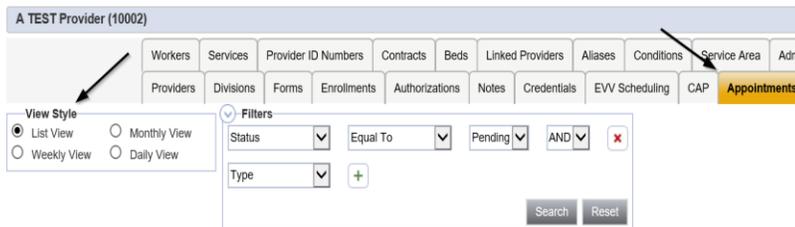


- When finished, Select **File > Save and Close New Participant**

## File



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



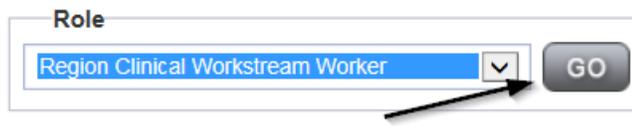
## Conduct Site Visit



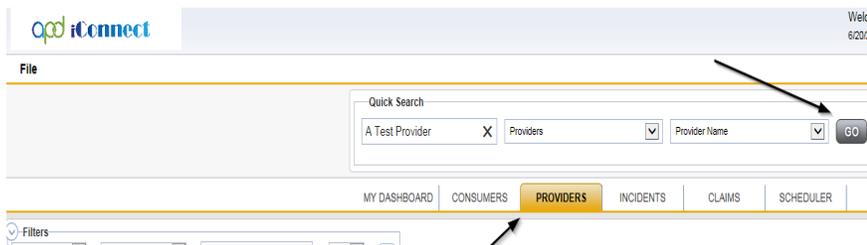
The Region Clinical Workstream Worker will print the appropriate BF/IB/Res. Hab. Monitoring Tool from MS Word (not in iConnect) prior to the site visit. They will then conduct the site visit and manually document all findings on the hard copy checklist. Upon returning to the office, they will then complete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

## Complete Monitoring Tool Form

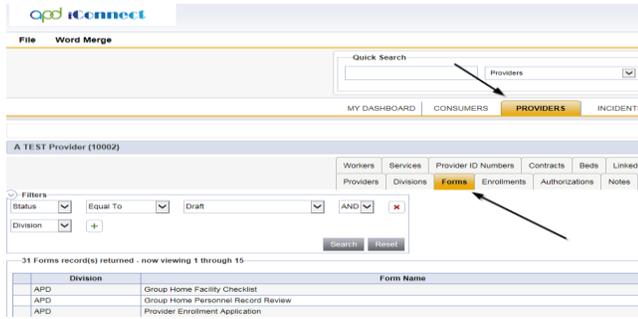
1. Set "Role" = Region Clinical Workstream Worker then click **Go**.



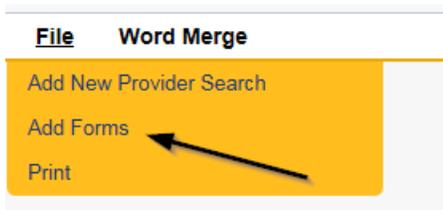
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.



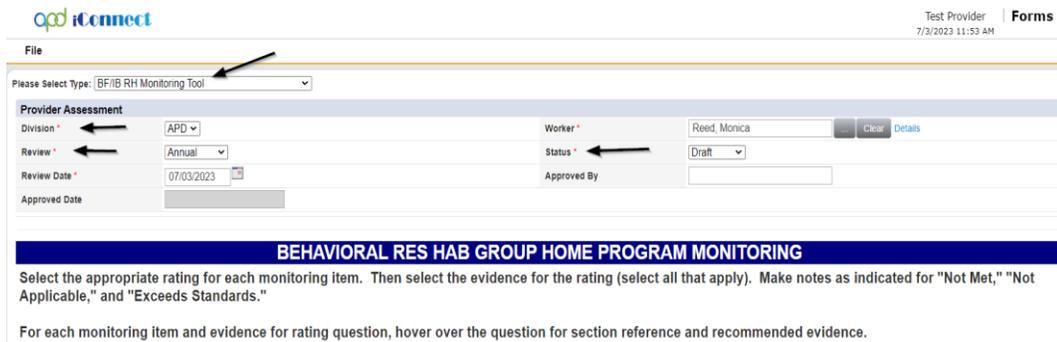
- The Provider's record will display. Navigate to the **Providers > Forms** tab



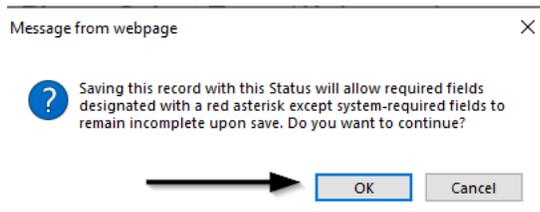
- Click **File > Add Forms**



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

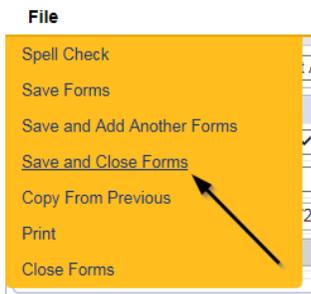


- Update the following Header fields:
  - "Division" = APD
  - "Review" = Annual
  - "Status" = Draft for initial Save then Complete
  - Click "OK" on the pop-up message box



e. Complete all fields on the Form

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

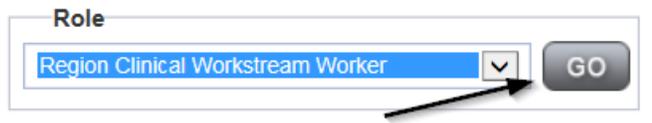


### Generate Approval Letter

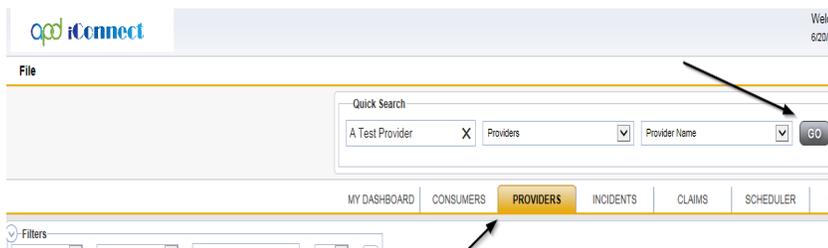


The Region Clinical Workstream Worker will generate the approval letter Attachment L confirming the requested designation and attach to an existing note if the Provider continues to meet designation eligibility.

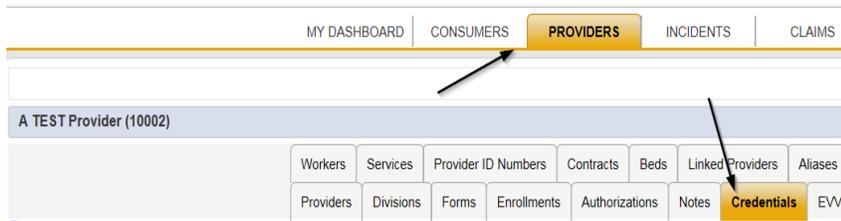
1. Set "Role" = Region Clinical Workstream Worker then click **Go**.



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



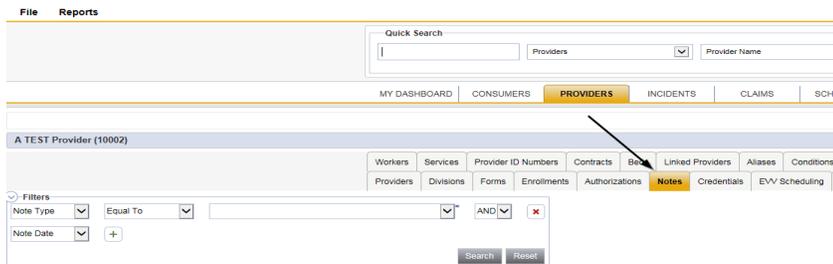
4. Select **Word Merge > Confirm BF.IB Designation Attachment L**



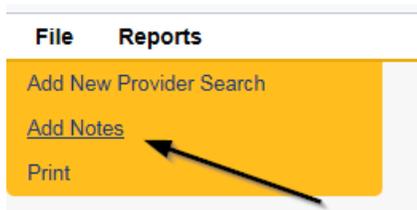
5. **Edit** the Word Merge Document as necessary

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**



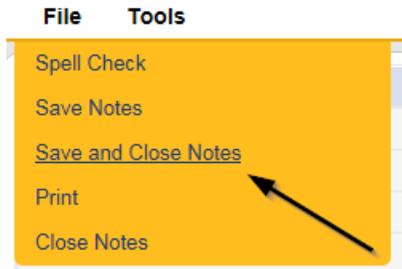
9. In the new Note record, update the following fields:
- "Note Type" = Requested Designation
  - "Note Subtype" = Approved
  - "Description" = Specify the facility and the effective date along with the designation level (*e.g., Intensive Behavior Renewal Designation Approved*)
  - "Note" = Enter notes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

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

- Division: APD
- Note By: Reed, Monica
- Note Date: 07/01/2023
- Note Type: Requested Designation
- Note Sub-Type: Approved
- Description: Behavior Focused Designation Approved
- Note: (Empty text area)
- Status: Complete
- Date Completed: 07/01/2023
- Attachments: (Section with 'Add Attachment' link)
- Document/Description table: (Empty table with 'There are no attachments to display')
- Note Recipients: (Section with 'Add Note Recipient' field and an ellipsis button)

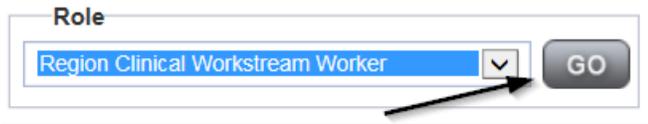
10. When finished, click **File > Save and Close Notes**



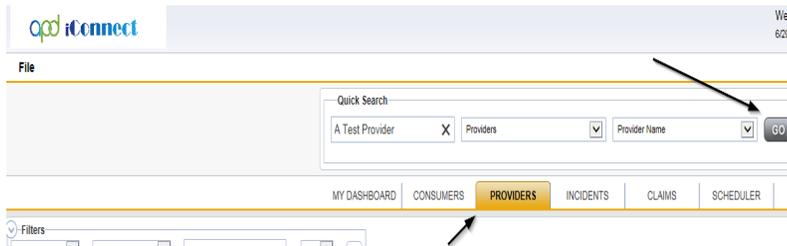
11. For more detailed general Word Merge instruction, see the [As Needed: Word Merges](#) section.

### 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**.

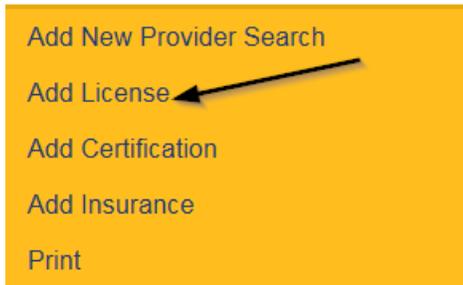


3. The Provider's record will display. Navigate to the **Providers > Credentials** tab



4. Select **File > Add License**

**File Word Merge**



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

License Details	
Credential Type *	License
License Type *	Intensive Behavioral
Date of Renewal *	07/01/2023
Effective Date *	07/01/2023
Expiration Date *	08/31/2024
Comment	
Status	Active
Reason	Renewal
QA Workstream Worker	Reed, Monica

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

**File**

- Spell Check
- Save License Details
- Save and Add Another License Details
- Save and Close License Details
- Print
- Close License Details

**License**

License: Behavior Focused

Start Date: 07/01/2023

End Date: 07/31/2024

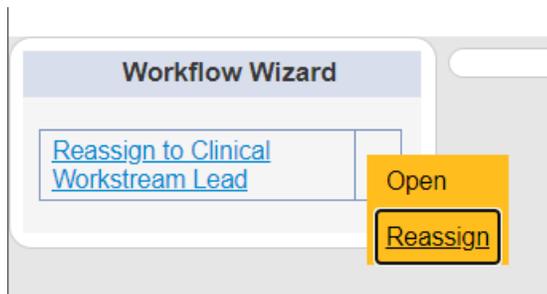
**Comment**

**Status**: Active

**Reason**: Renewal

QA Workstream Worker: Reed, Monica  [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.

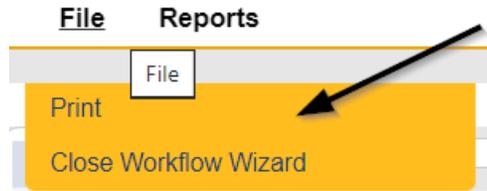


Search by: Last Name Search Text: buck

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

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



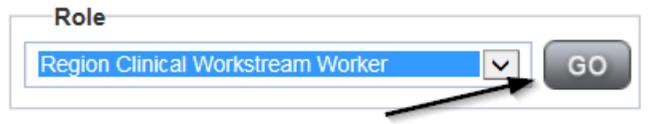
- j. Tickler 2 - “Assign Regional Senior Behavior Analyst to review Service Level designation due to pending expiration.
- k. Assigned to Monitor 4 (Region Clinical Workstream Worker)
- l. Due on the **90th** calendar day before the Designation expiration date (365 days from originally entered expiration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

**As Needed: Does Not Meet Designation Eligibility**

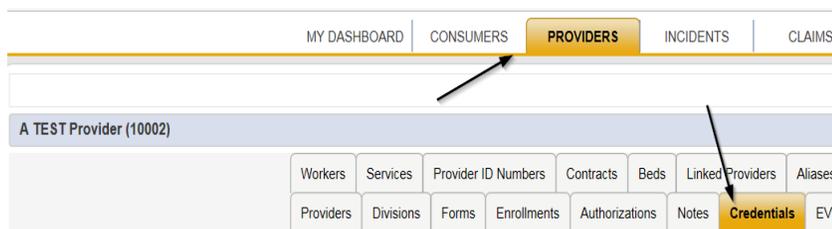


If the Region Clinical Workstream Worker determines that the Service Provider does not continue to meet designation eligibility, they will generate the Designation in Jeopardy Attachment M word merge, make their updates, save it to their device, and upload and save to a note.

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.

### Word Merge

Confirm BF.IB Designation Attachment L  
Cover Letter with Certificate of Service  
Designation in Jeopardy (Attachment M)  
License Certificate Automated

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

**Notes Details**

Division \*  ←

Note By \*  ←

Note Date \*  ←

Note Type \*  ←

Note Sub-Type \*  ←

Description  ←

Note

New Text

**B** *I* **U** 16px **A**

Enter Notes to document that the Provider does not meet designation eligibility requirements.

Append Text to Note

Status \*  ←

Date Completed  ←

**Attachments**

[Add Attachment](#)

**Document**

[Designation in Jeopardy 06122023.pdf](#)

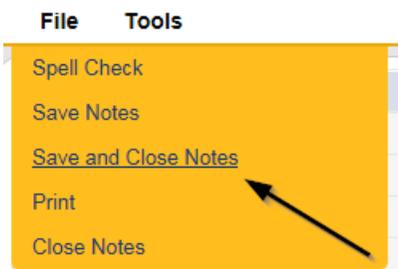
**Description**

Word Template: Designation in Jeopardy (Attachment M)

**Note Recipients**

Add Note Recipient:

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**.

A screenshot of a web form. At the top, the word "Role" is displayed. Below it is a dropdown menu with "Region Clinical Workstream Worker" selected. To the right of the dropdown is a grey button labeled "GO". An arrow points from the dropdown menu 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 web application. The top navigation bar includes the iConnect logo and a "Welcome" message. Below the navigation bar is a "File" menu. A "Quick Search" filter is visible, containing the text "A Test Provider" and a dropdown menu set to "Providers". A "GO" button is to the right of the filter. Below the filter is a navigation menu with tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULER". The "PROVIDERS" tab is highlighted. An arrow points to the "PROVIDERS" tab.

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

A screenshot of the iConnect web application showing the "Providers" chapter. The "Quick Search" filter is empty. The navigation menu below the filter includes "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", "SCHEDULER", and "UTILITIES". The "PROVIDERS" tab is highlighted. Below the navigation menu is a sub-menu for "A TEST PROVIDER (10002)". The sub-menu includes tabs: "Workers", "Services", "Provider ID Numbers", "Contracts", "Beds", "Unlinked Providers", "Aliases", "Conditions", "Service Area", "Admin", "Providers", "Divisions", "Forms", "Enrollments", "Authorizations", "Notes", "Credentials", "EVV Scheduling", "CAP", and "Appointments". The "CAP" tab is highlighted. An arrow points to the "CAP" tab.

4. Select **File > Add CAP**

A screenshot of the iConnect web application showing the "File" menu. The menu items are "Add New Provider Search", "Add CAP", and "Print". The "Add CAP" option is highlighted in yellow. An arrow points to the "Add CAP" option.

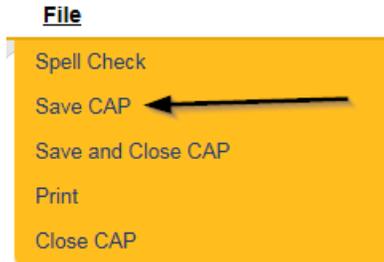
5. Update the following fields:

- 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

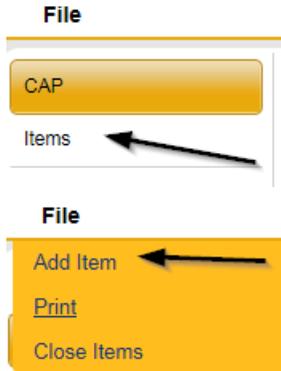
File

CAP	
CAP ID	<input type="text"/>
CAP Type	Plan of Remediation
Date of CAP	07/03/2023
Associated Form ID#	<input type="text"/>
Date Provider Notified	07/03/2023
CAP Due Date	08/03/2023
Status	Pending
Comments	<div style="border: 1px solid #ccc; padding: 5px;"><p><b>B</b> <i>I</i> <u>U</u> 16px <b>A</b></p><div style="height: 100px;"></div></div>
Date Submitted by Provider	<input type="text"/>
Date Verified Complete by APD Staff	<input type="text"/>
Date POR Approved by QA Workstream Lead as Complete	<input type="text"/>
QA Workstream Worker	Reed, Monica <span>...</span> <span>Clear</span> <a href="#">Details</a>
QA Workstream Lead	Buck, Jennifer <span>...</span> <span>Clear</span> <a href="#">Details</a>

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



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



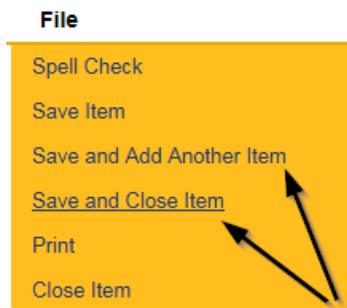
8. Update the following fields:
- "Action Type" = Regional QA
  - "Discovery Source" = Monitoring Visit or as appropriate
  - "Remediation Type" = POR
  - "Employee Involved" = Enter Name if applicable
  - "Comments" = Enter Comments
  - "Status" = Pending
  - "Due Date" = Enter Date
  - "Provider Worker"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

Summary	
Item ID	<input type="text"/>
Item Number	<input type="text"/>
Action Type	Regional QA
Discovery Source	Monitoring Visit
Remediation Type	POR
Employee Involved	<input type="text"/>
Standard Not Met	<input type="text"/> ... Clear
Comments	<input type="text"/>
Item Status	Pending
Due Date	<input type="text"/> ...
Provider Worker	<input type="text"/> ... Clear
Corrective Action Required	<input type="text"/>
Evidence of Completion	<input type="text"/>



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.