



State of Florida
Agency for Persons with Disabilities

Harmony for APD iConnect
Admin Actions – Region to Region Provider Expansion Training Manual

Updated: June 09, 2023

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Chapter 11 | Expansions – Region to Region

Introduction

FL APD allows active providers to request 3 different types of expansions: expansion of a solo provider to become an agency provider, expansion to provide additional services, and expansion to provide services in additional geographic (service) areas. All expansions follow the same general business process as new provider applications: providers indicate what they'd like to expand, complete/submit required documentation and data, APD reviews and either approves or denies request. The differences in the process are in the documentation/data that the provider must submit and the criteria by which they are evaluated. Unique requirements for each expansion type are described in the following section.



The Service Provider will notify the Home Region that they wish to expand into additional regions via a phone call or email. The Region will direct the Service Provider to complete all tasks, documentation and the Provider Expansion Request form.



The Specialist/Liaison will want to review Provider Notes to see if there has been any prior expansion requests that have been denied/approved.

Region to Region Expansion Note

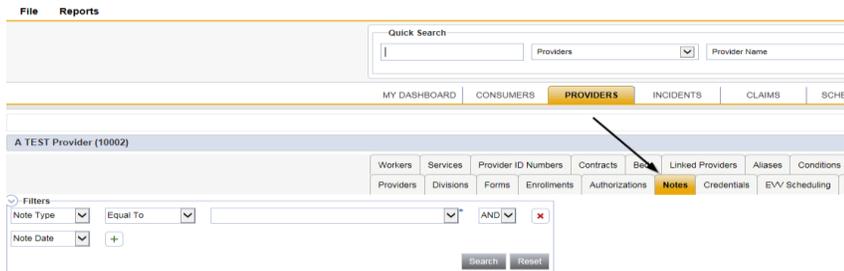


The Service Provider decides that they want to expand to a new region and will create a note to contact the QA Workstream Worker. When the QA Workstream worker receives the expansion note, they will review provider notes to see if there have been any prior expansion requests that have been denied or approved.

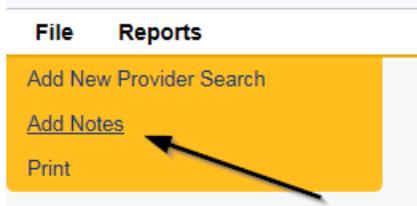
1. Set "Role" = Service Provider then click **Go**.

A screenshot of a web form. At the top, the label "Role" is displayed. Below it is a dropdown menu with "Service Provider" selected and highlighted in blue. To the right of the dropdown is a dark grey button with the text "GO" in white. A black arrow points from the top right towards the dropdown menu.

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



3. Click **File > Add Notes**



4. In the new Provider Note record, update the following fields:
- "Division" = APD
 - "Note Type" = Provider Expansion Request
 - "Note Subtype" = Region Expansion
 - "Description" = Region Expansion
 - "Note" = Enter details about the expansion request
 - "Status" = Pending
 - Click the ellipsis on the "Add Note Recipient" to add the [QA 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

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 05/19/2023

Note Type * ← Provider Expansion Request ▾*

Note Sub-Type ← Region Expansion ▾*

Description ← Region Expansion

Note ←

Status * ← Pending ▾

Date Completed

Attachments

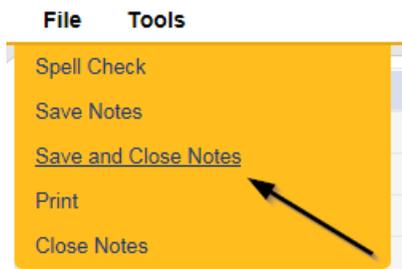
Add Attachment

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ← ... Clear

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



Expansion Request Response



The QA Workstream Worker will determine if the Provider qualifies and will update the pending note with any questions or requests for documentation pertinent to the new service expansion.

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

Role

Region QA Workstream Lead

GO

- 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

Complete	3
Pending	11

- Select the **Note Type = Provider Expansion Request** and **Description = Region Expansion** and select the pending record via the hyperlink.

Filters

Status Equal To Pending AND

NoteType Equal To Provider Expansion Request AND

Search Reset

6 Notes record(s) returned - now viewing 1 through 6

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Provider Expansion Request	05/19/2023	Region Expansion	Reed, Monica	Pending

- In the pending Note record, update the following fields:
 - "Append Text to Note" = Enter details on the next steps the provider must take such as completing the Provider Expansion Request form.
 - "Status" = Leave as *Pending*
 - Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/19/2023

Note Type * Provider Expansion Request

Note Sub-Type Region Expansion

Associated Form ID#

Description Region Expansion

Note

New Text

B I U 10pt A

Advise Provider to complete the Provider Expansion Request Form

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

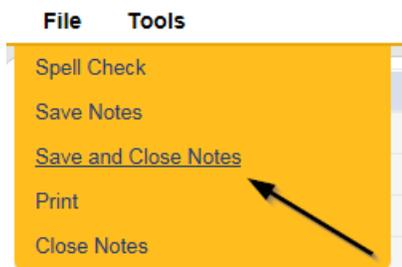
Document Description

There are no attachments to display

Note Recipients

Add Note Recipient: Clear

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



Complete Provider Expansion Request Form

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

Role

Service Provider

GO

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

oqod iConnect

File Word Merge

Quick Search

Providers

MY DASHBOARD CONSUMERS **PROVIDERS** INCIDENTS

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts Beds Linked F

Providers Divisions **Forms** Enrollments Authorizations Notes

Filters

Status Equal To Draft AND

Division +

Search Reset

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

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

3. Click **File > Add Forms**

File Word Merge

Add New Provider Search

Add Forms

Print

4. Select "Please Select Type" as "Provider Expansion Request" from the drop-down list

oqod iConnect

File

Please Select Type: Provider Expansion Request_NEW

Provider Assessment

Division * APD

Worker * Reed, Monica

Review * Initial

Status * Draft

Review Date * 05/10/2023

Approved By

Approved Date

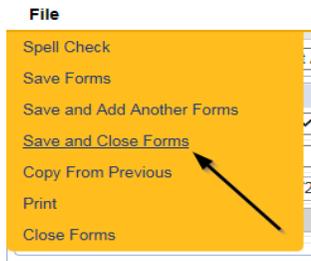
Provider Expansion Request Form

Current Provider Designation:*

Solo Provider
 Agency Provider
 Waiver Support Coordinator
 Qualified Organization

5. Update the following Header fields on the form:
 - a. "Division" = APD
 - b. "Review" = Initial
 - c. "Status" = Update to Complete when finished
 - d. Complete all fields on the Provider Expansion Request Form

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



Sign Provider Expansion Request Form



The Service Provider will print, sign, scan and attach the Provider Expansion Request form to the existing note.

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

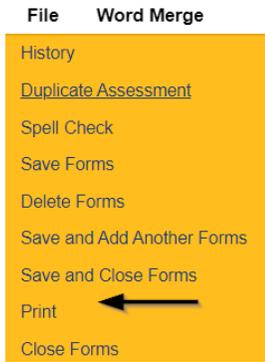
The image shows a form field labeled 'Role' with a dropdown menu. The dropdown is open and shows 'Service Provider' selected. To the right of the dropdown is a grey 'GO' button. A black arrow points to the dropdown arrow.

2. Navigate to the **Providers > Forms** tab and click the hyperlink for the Provider Expansion Request form.

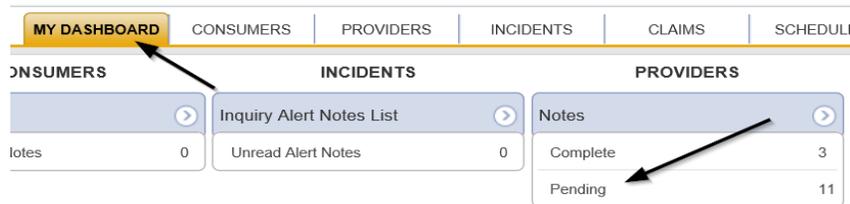
The image shows a software interface for 'Test Provider (21347)'. The 'Forms' tab is selected in the top navigation bar. Below the navigation bar is a 'Filters' section with a 'Division' dropdown set to 'APD' and 'Search' and 'Reset' buttons. Below the filters is a table with one record. A black arrow points to the 'Status' column of the record.

Division	Form ID	Form Name	Review	Review Date	Status	Worker
APD	364	Provider Expansion Request_NEW	Initial	05/15/2023	Complete	Reed, Monica

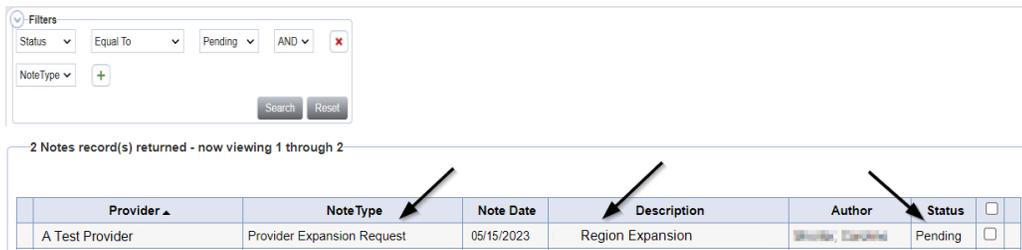
3. Select **File > Print** from within the completed form.



4. The Service Provider will print, sign and scan the hard copy and then attach it to the Provider Expansion Request pending note.
5. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



6. Select the **Note Type = Provider Expansion Request** and **Description = Region Expansion** and select the pending record via the hyperlink.



7. In the pending Note record, complete the following fields:
 - a. "Status" = Leave as Pending
 - b. Click "Add Attachment" and search for the copy of the signed Provider Expansion Request form on the user's device. Click Upload.

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.

- c. Click the ellipsis on the "Add Note Recipient" to add the *QA Workstream Worker* as the Note Recipient
- d. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Append Text to Note

Status * Pending ▼

Date Completed

Attachments

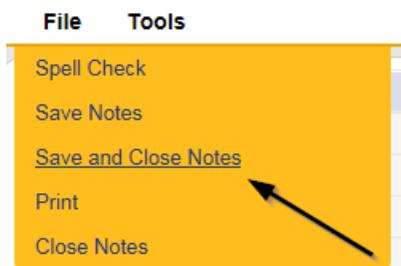
Add Attachment ←

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ← ... Clear

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



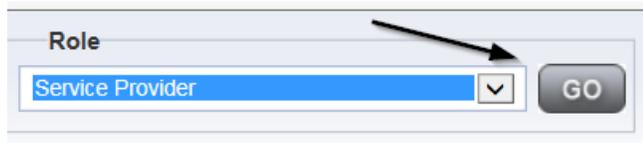
Expansion Intake Documentation Note



Expansion Intake documentation can include requisite documentation for a qualifying worker. The Service Provider will scan and save a copy of the intake or qualifying

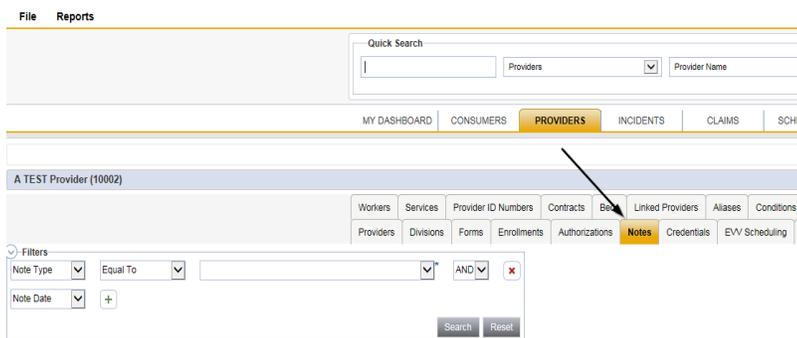
worker documentation to their device and attach it to an individual note.

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



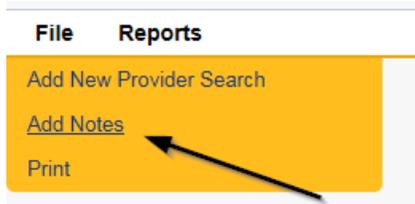
A screenshot of a web form with a label 'Role' above a dropdown menu. The dropdown menu is open, showing 'Service Provider' as the selected option. To the right of the dropdown is a grey button labeled 'GO'. An arrow points from the text above to the dropdown menu.

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



A screenshot of a web application interface. At the top, there are tabs for 'File' and 'Reports'. Below that is a 'Quick Search' section with a search bar and a dropdown menu set to 'Providers'. A navigation bar contains tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'SCHE'. The 'PROVIDERS' tab is active. Below this, there is a header for 'A TEST Provider (10002)' and a sub-navigation bar with tabs for 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Benefits', 'Linked Providers', 'Aliases', and 'Conditions'. The 'Notes' tab is selected. Below the navigation is a 'Filters' section with dropdowns for 'Note Type' and 'Note Date', and a search bar. A 'Search' button and a 'Reset' button are at the bottom right. An arrow points from the text above to the 'Notes' tab.

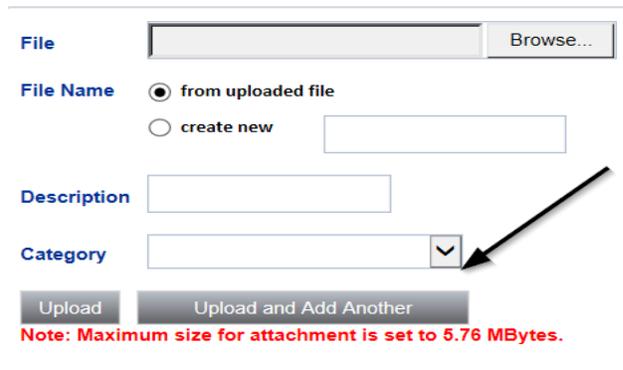
3. Click **File > Add Notes**



A screenshot of a web application interface showing a 'File' menu. The menu is open, displaying three options: 'Add New Provider Search', 'Add Notes', and 'Print'. The 'Add Notes' option is highlighted in yellow. An arrow points from the text above to the 'Add Notes' option.

4. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Expansion Intake
 - c. "Note Subtype" = Select as appropriate or Qualifying Worker Documentation (if applicable)
 - i. Attestation of Good Moral Character
 - ii. Attestation of Policies/Procedures
 - iii. Final APD iBudget Waiver Sign-off
 - iv. Level II Background Screening
 - v. Org Chart
 - vi. Professional Liability Insurance – naming APD as certificate holder
 - vii. Provider Signed MWSA
 - viii. Qlarant Review
 - ix. Qualifying Worker Documentation

- x. SS4/W9
- xi. Transportation Council Approval
- xii. Vehicle Registration/Insurance
- d. "Description" = same as note subtype
- e. "Note" = Enter notes
- f. "Status" = Complete
- g. Click "Add Attachment" and search for the copy of the supporting documentation on the user's device. Click Upload




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.



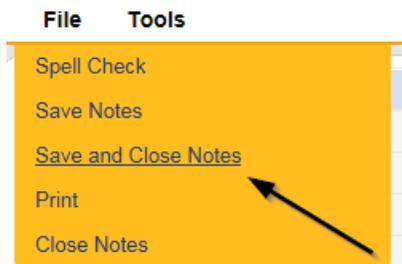
Note

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

- h. Click the ellipsis on the "Add Note Recipient" to add each *Home Region QA Workstream Worker* 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

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



Repeat Steps 4-5 until a supporting documentation has been attached.
 Here is the internet URL for regions with a link for region staff information
[Regional Offices | APD - Agency for Persons with Disabilities - State of Florida \(myflorida.com\)](https://myflorida.com)

Submit Expansion Request Note



When the Service Provider has completed the expansion request and attached all required intake documentation, they will create a note to submit the request to the *Home* Region QA Workstream Worker.

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

A screenshot of a web form with a label 'Role' above a dropdown menu. The dropdown menu is open and shows 'Service Provider' as the selected option. To the right of the dropdown is a grey button labeled 'GO'. An arrow points from the text 'Service Provider' to the dropdown arrow.

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

A screenshot of a dashboard with a top navigation bar containing 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'SCHEDULE'. Below this are three main sections: 'CONSUMERS', 'INCIDENTS', and 'PROVIDERS'. The 'PROVIDERS' section contains a 'Notes' table with two rows: 'Complete' with a count of 3, and 'Pending' with a count of 11. Arrows point to the 'MY DASHBOARD' button, the 'PROVIDERS' section, and the 'Pending' row in the 'Notes' table.

3. Select the **Note Type = Provider Expansion Request** and **Description = Region Expansion** and select the pending record via the hyperlink.

A screenshot of a search filter interface. The filter section has two rows: 'Status' set to 'Equal To' and 'Pending', and 'Note Type' set to 'Equal To' and 'Provider Expansion Request'. Below the filter is a table with 6 columns: 'Provider', 'Note Type', 'Note Date', 'Description', 'Author', and 'Status'. The first row of data is: 'Test Provider', 'Provider Expansion Request', '05/19/2023', 'Region Expansion', 'Reed, Monica', and 'Pending'. Arrows point to the filter criteria and the corresponding fields in the table.

4. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Ready to Submit*
 - b. "Description" = *Update to Region to Region Expansion Request*
 - c. "Note" = Enter notes
 - d. "Status" = Pending
 - e. Click the ellipsis on the "Add Note Recipient" to add the *Home QA Workstream Worker* as the Note Recipient for each region into which they wish to expand
 - 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

File Tools

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 05/10/2023

Note Type * ← Provider Expansion Request ▾*

Note Sub-Type ← Ready To Submit ▾*

Description ← Region to Region Expansion Request

Note ←

B I U 16px ▾ A ▾

Status * ← Pending ▾

Date Completed

Attachments

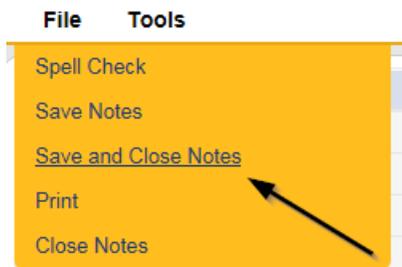
[Add Attachment](#)

Document	Description
There are no attachments to display	

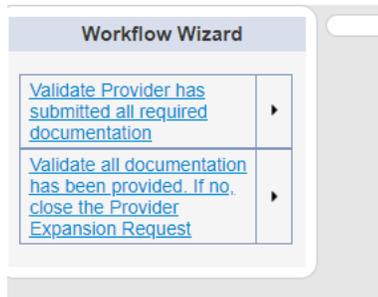
Note Recipients

Add Note Recipient: ... Clear

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



6. Upon saving the note, two Workflow Wizards are triggered. One is due in 30 calendar days, the second is due 75 days from the note creation date.



- a. Tickler - “Validate Provider has submitted all required documentation”
 - i. Due on the **30th** calendar day from the “Provider Expansion Request/Ready to Submit” completed note
- b. Tickler – “Validate all documentation has been provided. If no, close the Provider Expansion request”
 - i. Due on the **75th** calendar day from the “Provider Expansion Request/Ready to Submit” completed note
- c. Assigned to the Specialist/Liaison (Monitor 1)

7. The QA Workstream Worker can access Ticklers via **My Dashboard**.

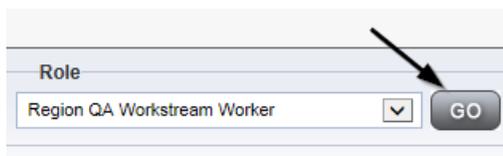
- a. Go to **My Dashboard > Providers** and scroll down to the Ticklers Panel. Click on the **Ticklers** link to open the Tickler Queue.

Submit Expansion Complete Note

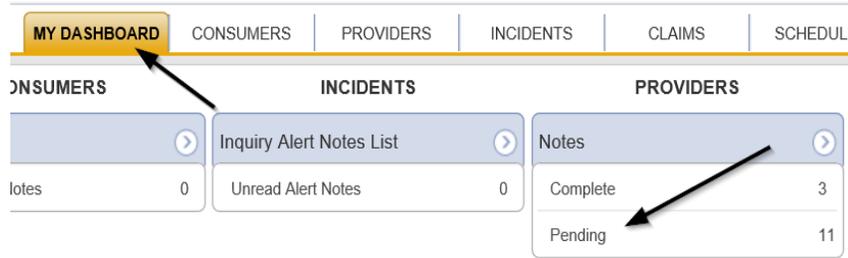


The Home Region QA Workstream Worker will review the Provider record, forms, and all documentation. If not complete, they will respond accordingly and update the Pending Note requesting information. If complete, they will create a note to inform the Service Provider that the request will be reviewed.

- 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 = Provider Expansion Request** and **Description = Ready to Submit** and select the pending record via the hyperlink.



4. In the pending Note record, update the following fields:
 - a. "Note Subtype" = Update to *Request Complete* or leave as *Ready to Submit* if all information has not been provided
 - b. "Description" = Update to *Request Complete* only if all information has been provided
 - c. "Append Text to Note" = Enter notes and list any missing documentation or if any corrections need to be made.
 - d. "Status" = Update to *Complete* only if applicable
 - 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

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 01/08/2020

Note Type * Provider Expansion Request

Note Sub-Type ← Request Complete

Description ←

Note

New Text

B I U 13px A

Append Text to Note

Status * ← Complete

Date Completed 01/08/2020

Attachments

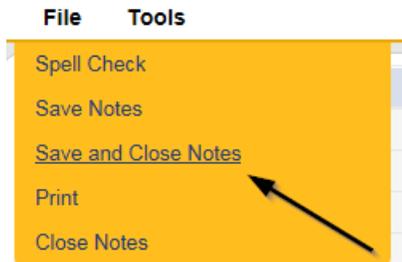
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient:

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

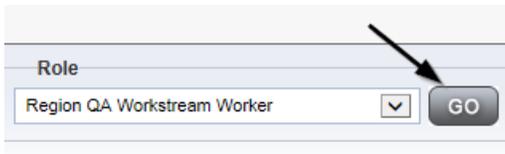


ROM Review

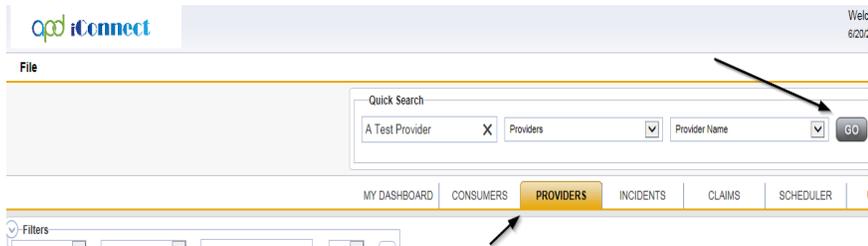


If the Region-to-Region expansion request is approved, the *Home Region* QA Workstream Worker will generate the Final APD iBudget Waiver Sign-off form and include all the regions to which the expansion has been approved for.

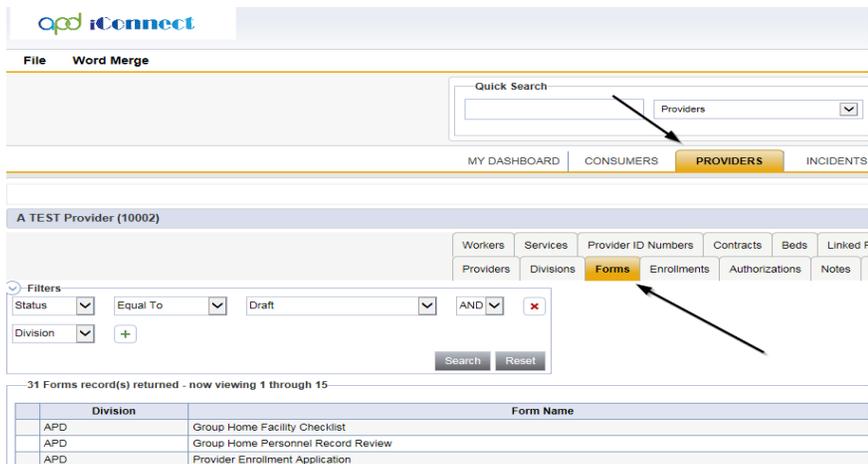
1. Set "Role" = Region QA Workstream Worker then click **Go**.



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



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



4. Select **Word Merge > Final APD iBudget Waiver Sign-Off Form**.



5. Generate and Open the Word Merge document for editing and *include all regions to which the expansion is approved for*.

Generate Merge Document

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

Open Document



iBudget Florida

Final iBudget Waiver Sign-Off Form

Provider Name: Test Provider

DBA (if applicable):

Contact Name: John Test

Provider Address: 9125 Branchwater Ct Jacksonville, FL 32244

Email Address:

Phone Number:

Designation: Solo: Agency:

Qualified Organization: WSC of a Qualified Organization:

Home Region: [Click to Select Region.](#)

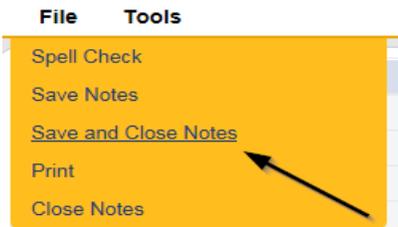


Approved Regions: Northwest Northeast Central Suncoast Southeast Southern

6. Save the Word Merge Document and Click **Upload and Save to Note.**

7. Update the following fields on the Notes Detail Screen:
 - a. "Division" = APD
 - b. "Note Type" = Expansion Request
 - c. "Note Subtype" = ROM Review
 - d. "Description" = ROM Review
 - e. "Note" = Enter notes to direct the ROM to review and sign
 - f. "Status" = Pending
 - g. Click the ellipsis on the "Add Note Recipient" to add the *NEW Region ROM/Designee* as the Note Recipient.
NOTE: if there are multiple regions that are requested then add those ROM/Designees as note recipients and the Home Region ROM/Designee will sign the Final APD iBudget Waiver Sign-Off form.
 - 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

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



ROM Signature



The *Home* Region ROM/Designee will print, sign, and attach a copy of the Final APD iBudget Waiver Sign-off form to the existing pending note.

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

Role

ROM/Deputy ROM

GO

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

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Inquiry Alert Notes List

Unread Alert Notes

Notes

Complete	3
Pending	11

3. Select the **Note Type = Expansion Request** and **Description = ROM Review** and select the record via the hyperlink

Filters

Status Equal To Complete AND X

NoteType Equal To Expansion Request AND X

NoteType +

Search Reset

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

Provider	NoteType	Note Date	Description
Test Provider	Expansion Request	05/10/2023	ROM Review

4. Click on the attachment within the ROM Review note and then click **Open** on the pop-up message box.

Document	Description
FINAL APD iBudget Waiver Sign-Off Form.pdf	Word Template: Final APD iBudget Waiver Sign-Off Form

5. Open the attachment and Print.
6. The ROM will sign the hard copy and save it to the existing Pending note in the next section.

ROM Approval



The *Home* Region ROM/Designee signs the Final APD iBudget Waiver Sign-off form, they will scan and save an electronic copy to a specified folder on their device. They will update the existing note to advise the *New* Region QA Workstream Worker that the expansion has been approved.

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

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

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

PROVIDERS

Notes	
Complete	27
Pending	10

An arrow points to the 'Pending' link in the table.

3. Select the **Note Type = Expansion Request** and **Description = ROM Review** and select the record via the hyperlink.

Filters:

- Status: Complete
- Note Type: Expansion Request

Search Reset

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

Provider	Note Type	Note Date	Description
Test Provider	Expansion Request	05/10/2023	ROM Review

Arrows point from the filter fields to the corresponding columns in the results table.

4. In the existing Note record, update the following fields:
 - a. "Note Subtype" = *Update to ROM Approval*
 - b. "Description" = *Update to ROM Approval*
 - c. "Note" = Enter notes
 - d. "Status" = *Update to Complete*
 - e. Click "Add Attachment" and search for the copy of the signed Final APD iBudget Waiver Sign-off form on the user's device. Click Upload

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.

- f. Click the ellipsis on the "Add Note Recipient" to add the *Home/New Region QA 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 * 05/10/2023

Note Type * Expansion Request

Note Sub-Type ROM Approval

Associated Form ID# ROM Approval

Description

On 5/10/2023 at 9:38 PM, Monica Reed wrote:
Please review and sign

New Text

Append Text to Note

Status * Complete

Date Completed 05/11/2023

Attachments

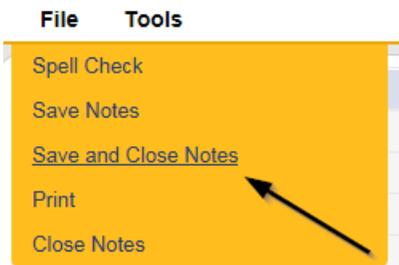
Add Attachment

Document	Description
FINAL APD iBudget Waiver Sign-Off Form.pdf	Word Template: Final APD iBudget Waiver Sign-Off Form

Note Recipients

Add Note Recipient: Clear

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



Add Service Area



The **New** Region QA Workstream Worker will update the Service Area if applicable in the for the region to region expansion.

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 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' chapter in the software. It shows a 'Quick Search' filter 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. Navigate to the **Providers > Service Area** tab.

A screenshot of the 'Service Area' tab for a provider. The 'Service Area' tab is highlighted in the navigation menu. A black arrow points to the 'Service Area' tab.

5. If applicable, Select **File > Edit Service Area** to update the Provider’s approved Service Area.

File

A screenshot of the 'File' menu showing three options: 'Add New Provider Search', 'Edit Service Area', and 'Print'. A black arrow points to the 'Edit Service Area' option.

6. Select the additional approved Region and move it to the right column. The County, City and Zip Code fields will automatically populate for that Region.

Service Area

Unrestricted

Region * CENTRAL

NORTHEAST
NORTHWEST
SOUTHEAST
SOUTHERN
SUNCOAST

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

File

History

Save Service Area

Delete Service Area

Save and Close Service Area

Print

Close Service Area

Add Services

The *New* Region QA Workstream Worker will add new services for the region to region expansion when geographic rates are needed.

If this expansion request is in conjunction with a Behavior Focused, Intensive Behavioral, Enhanced Intensive Behavior or Medical Enhanced Intensive Behavior service level designation, the QA Workstream Worker will need to add the services, but disable the “active” checkbox. Additionally, the Active date will need to be in the future to allow time for the designation approval.



Service

ServiceID * 5740

Service Code 0998-BasD

Division APD

Unit Type Day

Service Description Residential Habilitation Child - Basic (day)

Secondary Code * 0998-BasD

Active Date * 07/01/2023

Service End Date

Unit Cost * \$38.00

Start Age

End Age

Require Credentials

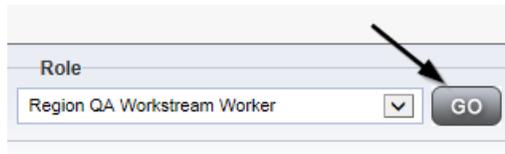
Provider Rate Type * Agency

Consumer County

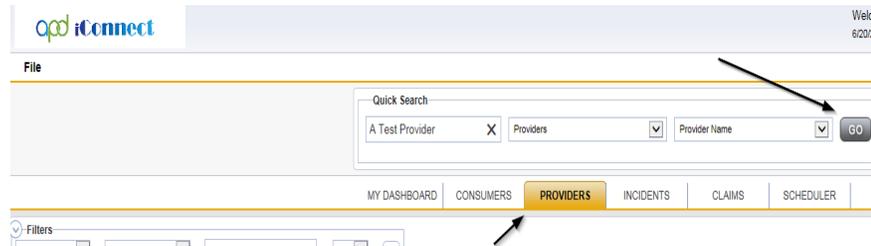
Service Ratio

Active

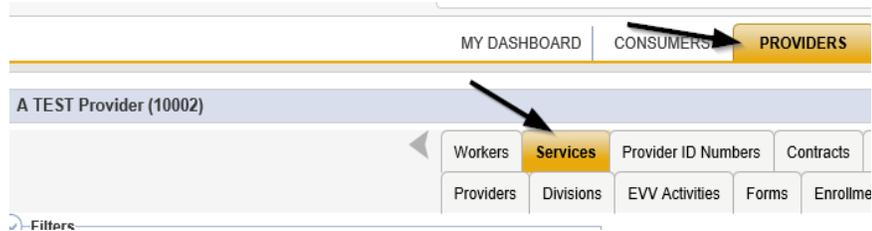
1. Set “Role” = Region QA Workstream Worker then click **Go**.



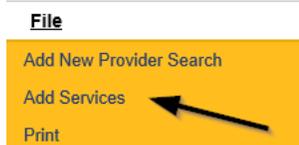
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click Go.



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



4. Select **File > Add Services**.



5. In the new services record, update the following fields:
 - a. "ServiceID" = Select the approved Service Code
 - b. "Division" = APD
 - c. "Active Date" = the effective date of Final APD iBudget Waiver Sign-Off Form

NOTE: The '0000 – WVR' service code MUST BE ADDED for providers to create non-billable notes.

Service	
ServiceID *	<input type="text"/>
Service Code	<input type="text"/>
Division *	<input type="text"/>
Unit Type	<input type="text"/>
Service Description	<input type="text"/>
Secondary Code *	<input type="text"/>
Active Date *	05/15/2023 <input type="text"/>

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

File



7. Repeat steps 4 – 6 to add additional services

Provider Notification



After ROM approval and services are added, the *Home* Region QA Workstream Worker will send the signed Final APD iBudget Waiver Sign-Off form to the provider.

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

A form section titled 'Role' containing a dropdown menu with 'Region QA Workstream Worker' selected and a grey 'GO' button to its right. A black arrow points to the 'GO' button.

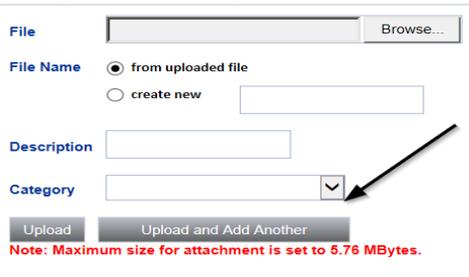
2. Navigate to the **Providers > Notes** tab.

A screenshot of a web application interface. At the top, there is a 'File Reports' header and a 'Quick Search' box. Below that is a navigation bar with tabs: MY DASHBOARD, CONSUMERS, PROVIDERS, INCIDENTS, CLAIMS, and SCHE. Under the 'PROVIDERS' tab, there is a sub-section for 'A TEST Provider (10002)' with various sub-tabs: Workers, Services, Provider ID Numbers, Contracts, BEN, Linked Providers, Aliases, Conditions, Providers, Divisions, Forms, Enrollments, Authorizations, Notes, Credentials, and EVV Scheduling. The 'Notes' sub-tab is highlighted in yellow. Below the sub-tabs is a 'Filters' section with dropdown menus for 'Note Type' and 'Note Date', and a 'Search' button.

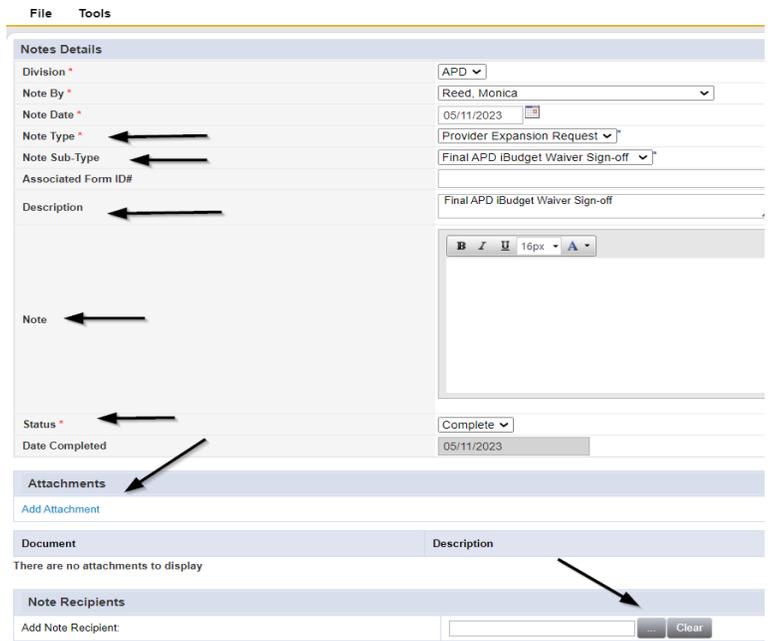
3. Click **File > Add Notes**.



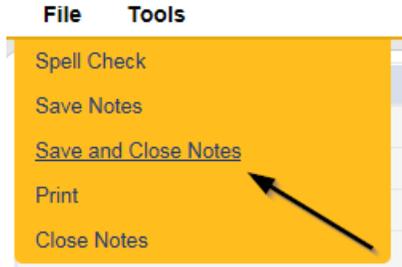
4. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Provider Expansion Request
 - c. "Note Subtype" = Final APD iBudget Waiver Sign-Off
 - d. "Description" = Final APD iBudget Waiver Sign-Off
 - e. "Note" = Enter notes
 - f. "Status" = Complete
 - g. Click "Add Attachment" and search for the copy of the signed Final APD iBudget Waiver Sign-off form on the user's device. Click Upload.



- h. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient for each region into which they wish to expand
 - 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



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



As Needed: Generate PAARF



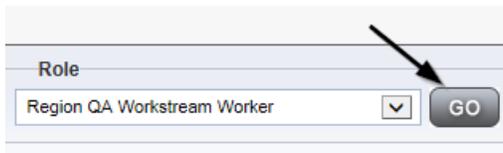
If the region to region service expansion is denied and it is a without cause denial, the *Home* Region QA Workstream Worker will proceed to Chapter 25 to follow the PAARF process for issuing the without cause expansion denial.

As Needed: Send With Cause Denial Letter

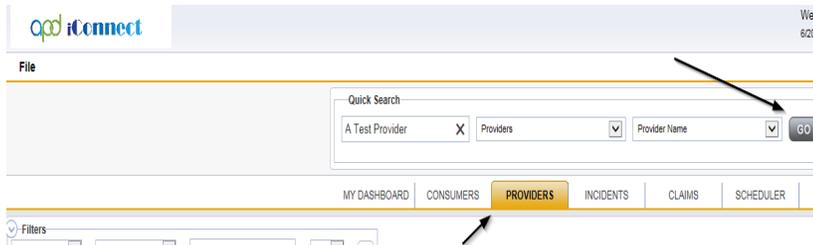


If the Region- to-Region request is denied due to with cause, the *Home* Region QA Workstream Worker will generate the handbook denial notice and attach it to a note in the Provider record.

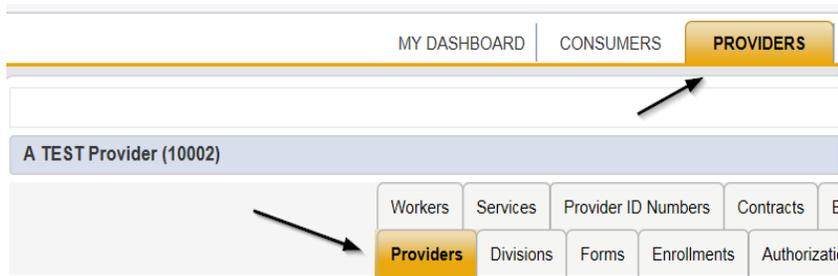
1. Set “Role” = Region QA Workstream Worker then click **Go**.



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



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



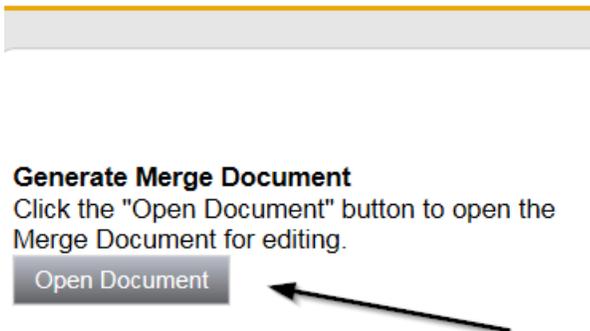
4. Generate the **Word Merge > Provider Expansion Denial with Cause – Region.**

Word Merge



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

File



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

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

8. 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.

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

10. Update the following fields on the Notes Detail Screen
 - a. "Division" = APD
 - b. "Note Type" = Provider Expansion Request
 - c. "Note Subtype" = Expansion Denial
 - d. "Description" = Region to Region expansion request does not meet handbook requirements
 - e. "Note" = Enter notes
 - f. "Status" = Complete
 - g. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

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

- Division: APD
- Note By: Reed, Monica
- Note Date: 05/10/2023
- Note Type: Provider Expansion Request
- Note Sub-Type: Expansion Denial
- Description: Region to Region expansion request does not meet handbook requirements
- Note: (Empty text area)
- Status: Complete
- Date Completed: 05/10/2023

Arrows in the image point to the following fields: Note Type, Note Sub-Type, Description, Note, Status, Attachments (Add Attachment), and the ellipsis button in the Note Recipients section.

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

