



State of Florida
Agency for Persons with Disabilities

Harmony for APD iConnect
Admin Actions – New Services Provider Expansion Training Manual

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Chapter 11 | Expansions – New Services

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.

New Service Expansion Note



The Solo Service Provider decides that they want to expand services. They will create a note to contact the QA Workstream Worker to determine what the next steps need to be. When an expansion note is received, they will review provider notes to see if there have been any prior expansion requests that have been denied or approved.

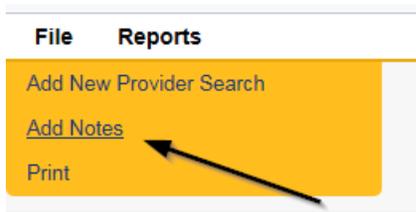
1. Set “Role” = Service Provider then click **Go**.

A screenshot of a web form showing a dropdown menu labeled "Role" with "Service Provider" selected. A black arrow points to the dropdown arrow. To the right of the dropdown is a grey button labeled "GO".

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

A screenshot of a web application interface. At the top, there is a "Quick Search" bar with a search input and a dropdown menu set to "Providers". Below this is a navigation bar with tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHE". The "PROVIDERS" tab is active. Below the navigation bar, there is a sub-tabbed interface for "A TEST Provider (10002)". The sub-tabs include: "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 active. Below the sub-tabs is a "Filters" section with dropdown menus for "Note Type" and "Note Date", and a search bar. At the bottom right of the filters section are "Search" and "Reset" buttons.

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



4. In the new Provider Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Provider Expansion Request
 - c. "Note Subtype" = New Service Expansion
 - d. "Description" = New Service Expansion
 - e. "Note" = Enter details about the expansion request
 - f. "Status" = Pending
 - g. Click the ellipsis on the "Add Note Recipient" to add the *QA 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

Notes Details

Division *

Note By *

Note Date *

Note Type *

Note Sub-Type

Description

Note

B I U 16px A
 details about the expansion request

Status *

Date Completed

Attachments

[Add Attachment](#)

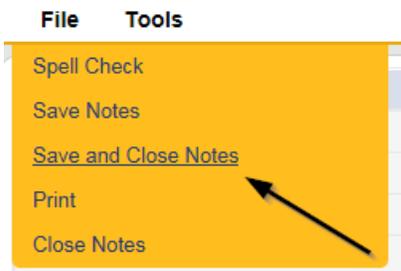
Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
Reed, Monica	05/16/2023		Unread	

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

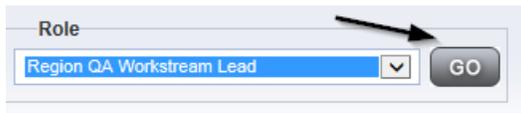


Expansion Request Response

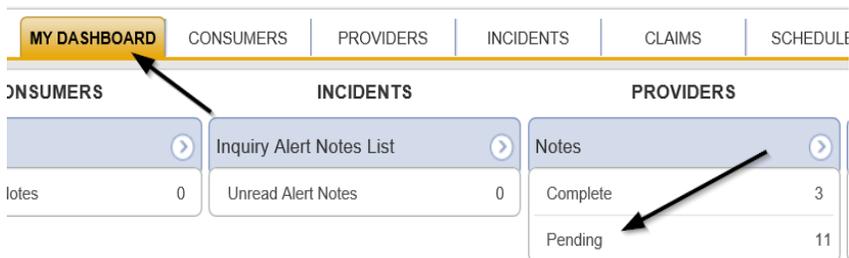


The QA Workstream Worker will determine if the Provider qualifies and will update the pending note with any questions or requests for documentation pertinent to the new service expansion.

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



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



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



- 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.

- b. "Status" = Leave as *Pending*
- c. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
- d. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/18/2023

Note Type * Provider Expansion Request

Note Sub-Type New Service Expansion

Associated Form ID#

Description New Service Expansion

Note

On 5/18/2023 at 10:06 PM, Monica Reed wrote:
enter details about the expansion request

New Text

QA Workstream Worker enters next steps for the provider

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

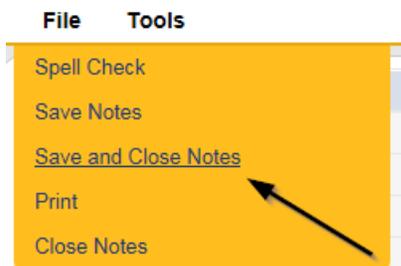
Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient: ... Clear

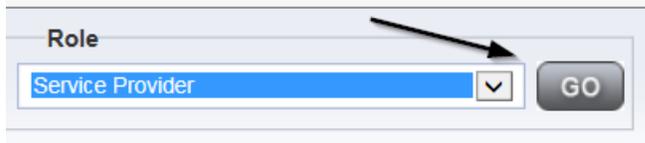
Name	Date Sent	Date Read	Status	Date Signed	
Reed, Monica	05/18/2023		Unread		Remove

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



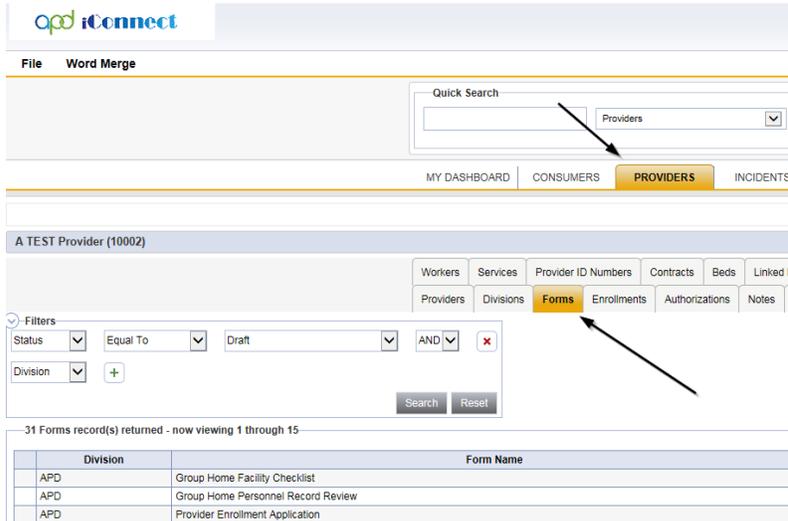
Complete Provider Expansion Request Form

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



A screenshot of a web form. At the top, the word "Role" is displayed. Below it is a dropdown menu with "Service Provider" selected. To the right of the dropdown is a grey button labeled "GO". An arrow points from the text "Service Provider" to the dropdown arrow.

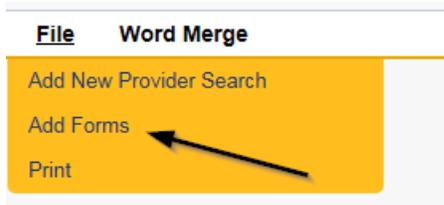
2. Navigate to the **Providers > Forms** tab.



A screenshot of the iConnect web application. The top navigation bar includes "File" and "Word Merge". Below this is a "Quick Search" box with a "Providers" dropdown. A secondary navigation bar contains "MY DASHBOARD", "CONSUMERS", "PROVIDERS", and "INCIDENTS". The "PROVIDERS" tab is active. Below this, a sub-tab bar includes "Workers", "Services", "Provider ID Numbers", "Contracts", "Beds", "Linked F", "Providers", "Divisions", "Forms", "Enrollments", "Authorizations", and "Notes". The "Forms" tab is highlighted. A "Filters" section is visible with options for "Status" (set to "Equal To"), "Draft", and "AND". A table below shows 31 records, with the first three rows visible:

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

3. Click **File > Add Forms**.



A screenshot of the "File" menu. The menu items are "Add New Provider Search", "Add Forms", and "Print". The "Add Forms" item is highlighted in yellow. An arrow points to the "Add Forms" text.

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

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**.

Role

Service Provider

GO

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

Test Provider (21347)

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

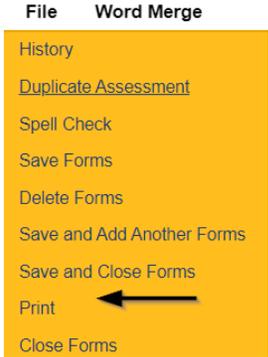
Providers Divisions EVV Activities **Forms** Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments Provider Adj

Filters
Division
Search Reset

6 Forms record(s) returned - now viewing 1 through 4

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.

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Notes	Unread Alert Notes	Notes
0	0	Complete: 3 Pending: 11

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

Filters
Status Equal To Pending AND
NoteType
Search Reset

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

Provider	NoteType	Note Date	Description	Author	Status
A Test Provider	Provider Expansion Request	05/15/2023	New Service Expansion	Shirley, Caroline	Pending

- 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

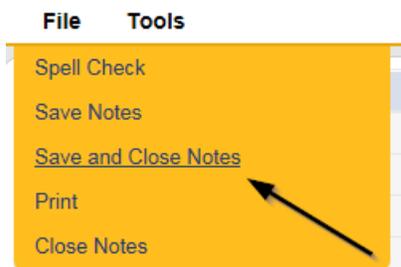
Add Attachment ←

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 Provider note.

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

Role

Service Provider

GO

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

File Reports

Quick Search

Providers

Provider Name

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHE

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts Benefits Linked Providers Aliases Conditions

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

Filters

Note Type Equal To

Note Date +

Search Reset

3. Click **File > Add Notes**

File Reports

Add New Provider Search

Add Notes

Print

4. In the new Provider 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

File

File Name from uploaded file
 create new

Description

Category

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



Note

Each attachment must be under 5.76 MB. A note can have up to 10 attachments. Total size 18MB.



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

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/18/2023

Note Type ← Expansion Intake

Note Sub-Type ← Professional Liability Insurance

Description ← Professional Liability Insurance

Note ←

Status * ← Complete

Date Completed 05/18/2023

Attachments

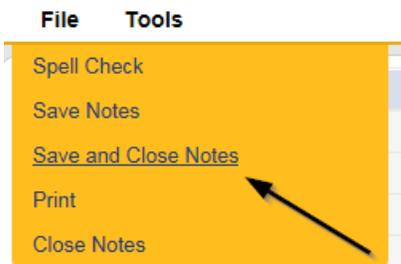
Add Attachment ←

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient: ... Clear

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



6. Repeat steps 3 – 5 for to add a new note for each documentation type.

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 QA Workstream Worker.

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

Role

Service Provider

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

Inquiry Alert Notes List

Notes

Unread Alert Notes

Complete

Pending

0 0 3 11

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

Filters

Status Equal To Pending

NoteType Equal To Provider Expansion Request

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	New Service Expansion	Reed, Monica	Pending

7. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Ready to Submit*
 - b. "Description" = *Update to New Services Expansion Request*
 - c. "Append Text to Note" = Enter notes
 - d. "Status" = Pending
 - e. Click the ellipsis on the "Add Note Recipient" to add the *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

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/19/2023

Note Type * Provider Expansion Request

Note Sub-Type * Ready To Submit

Associated Form ID# 1256

Description * New Services Expansion Request

Note

New Text

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

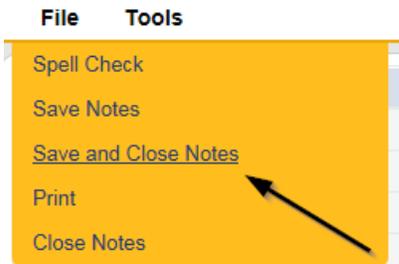
Document Description

There are no attachments to display

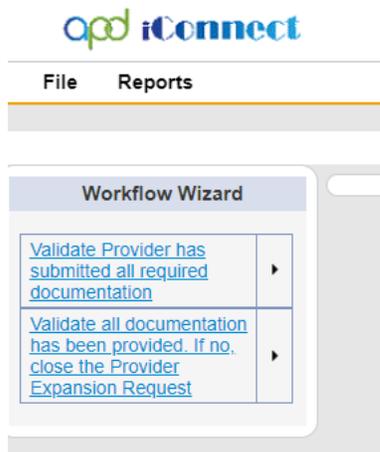
Note Recipients

Add Note Recipient: Clear

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



9. 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 not, 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)

10. The QA Workstream Worker will access Ticklers via **My Dashboard**.

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 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 update the existing 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.

Provider	Note Type	Note Date	Description	Author	Status
A Test Provider	Provider Expansion Request	02/24/2020	Ready to Submit	Reed, Monica	Pending

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

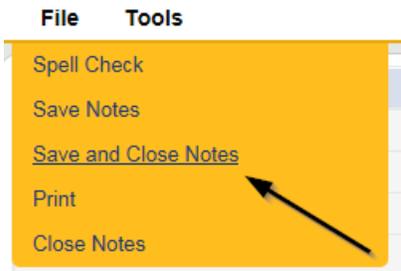
- "Note Subtype" = Update to *Request Complete* or leave as *Ready to Submit* if all information has not been provided
- "Description" = Update to *Request Complete* only if all information has been provided
- "Append Text to Note" = Enter notes and list any missing documentation or if any corrections need to be made when leaving as Ready to Submit.
- "Status" = Update to *Complete* only if applicable
- 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

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

- Division: APD
- Note By: Reed, Monica
- Note Date: 05/19/2023
- Note Type: Provider Expansion Request
- Note Sub-Type: Request Complete
- Associated Form ID#: 1256
- Description: Request Complete
- Note: (Empty text area)
- Status: Complete
- Date Completed: 05/19/2023

Annotations include arrows pointing to 'Note Sub-Type', 'Description', 'Status', and the 'Add Note Recipient' field. A 'New Text' pop-up window is open over the 'Note' field with an arrow pointing to its text area.

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



ROM Review



If the New Service expansion request is approved, The QA Workstream Worker will generate the Final APD iBudget Waiver Sign-off form.

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

The image shows a form field labeled 'Role' with a dropdown menu. The selected option is 'Region QA Workstream Worker'. To the right of the dropdown is a grey 'GO' button. 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.

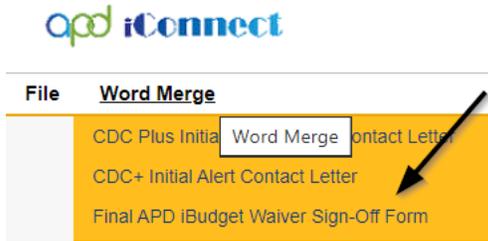
The image shows the iConnect dashboard. The 'PROVIDERS' tab is selected in the navigation bar. A 'Quick Search' filter is visible with the text 'A Test Provider' and a 'GO' button. A black arrow points to the 'GO' button.

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

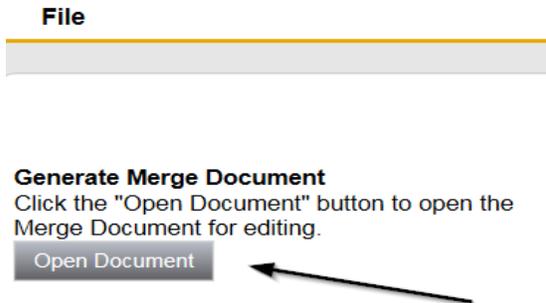
The image shows the 'Providers > Forms' tab in the iConnect system. A 'Quick Search' filter is visible. Below the navigation bar, there are tabs for 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Beds', and 'Linked F'. Underneath, there are tabs for 'Providers', 'Divisions', **Forms**, 'Enrollments', 'Authorizations', and 'Notes'. A 'Filters' section is visible with 'Status' set to 'Draft' and 'Division' set to 'APD'. A table of forms is displayed below.

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

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

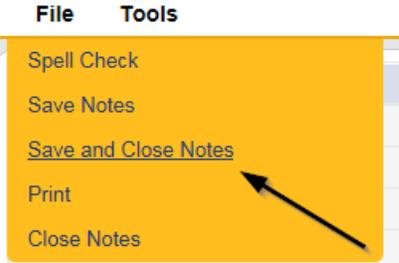


5. Generate and Open the Word Merge document for editing.



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 *ROM/Designee* 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

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



ROM Signature



The 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 [v] GO

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

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER

CONSUMERS PROVIDERS

Notes [v] Notes [v]

Complete 38

Pending 15

Ticklers [v] Ticklers [v]

Ticklers 21

Alert Notes [v] Provider Selections [v]

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

Filters

Status [v] Equal To [v] Complete [v] AND [v] X

NoteType [v] Equal To [v] Expansion Request [v] AND [v] X

NoteType [v] +

Search Reset

1 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. The attachment will open and then Print

6. The ROM will sign the printed copy

ROM Approval



Once the 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 then update the existing pending note to advise the QA Workstream Worker and Supervisor 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 labeled "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 Equal To Complete AND x

NoteType Equal To Expansion Request AND x

NoteType +

Search Reset

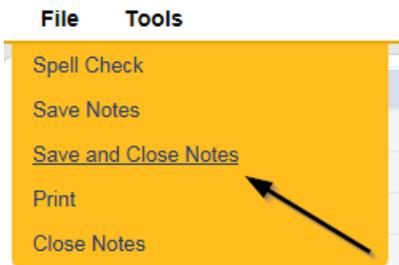
Notes record(s) returned - now viewing 1 through 1

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

Arrows point to the "Expansion Request" and "ROM Review" cells in the 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" = 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
 - f. Click the ellipsis on the "Add Note Recipient" to add the *QA Workstream Worker/Lead* as the Note Recipient
 - g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

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



Add Services

The QA Workstream Worker will add new services for the new service expansion. 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.

A screenshot of a web form titled "Service". The form contains several fields: Service ID (5740), Service Code (0998-BasD), Division (APD), Unit Type (Day), Service Description (Residential Habitation Child - Basic (day)), Secondary Code (0998-BasD), Active Date (07/01/2023), Service End Date, Unit Cost (\$38.80), Start Age, End Age, Requires Credentials (checkbox), Provider Rate Type (Agency), Consumer County (list of counties including ALACHUA, BAKER, BAY, BRADFORD, BREVARD, CALHOUN, CHARLOTTE), Service Ratio (list of ratios from 1.1 to 1.7), and an Active checkbox which is checked. Red boxes highlight the Active Date and the Active checkbox.

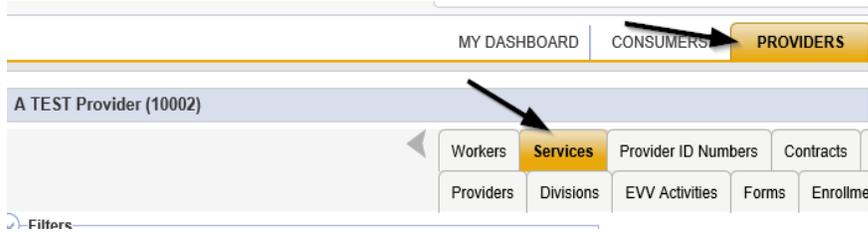
1. Set “Role” = Region QA Workstream Worker then click **Go**.

A screenshot of a dropdown menu for "Role". The selected option is "Region QA Workstream Worker". To the right of the dropdown is a "GO" button. An arrow points to the "GO" button.

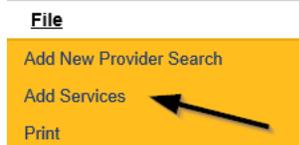
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click Go.

A screenshot of the "Providers" chapter in the system. The top navigation bar includes "MY DASHBOARD", "CONSUMERS", "PROVIDERS" (highlighted), "INCIDENTS", "CLAIMS", and "SCHEDULER". Below the navigation bar is a "Quick Search" filter with a text input containing "A Test Provider", a dropdown menu set to "Providers", another dropdown menu set to "Provider Name", and a "GO" button. An arrow points to the "GO" button. Below the search bar is a "Filters" section.

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.

A screenshot of a 'Service' form. The form has a header 'Service' and several fields: 'ServiceID *' (with a dropdown arrow), 'Service Code' (with a dropdown arrow), 'Division *' (with a dropdown arrow), 'Unit Type' (with a dropdown arrow), 'Service Description' (with a dropdown arrow), 'Secondary Code *' (with a dropdown arrow), and 'Active Date *' (with a date input field showing '05/15/2023' and a calendar icon). An arrow points to the 'Active Date' field.

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



6. Repeat steps 4 – 6 to add additional services



If the New Service expansion is for an LSD 3 or 4 or Residential Habilitation services then the QA Workstream Worker will need to notify the CMS Compliance Reviewer. The CMS Compliance Reviewer will then follow the CMS Review process.

Provider Notification



After ROM approval and services are added, the QA Workstream Worker will send the signed Final APD iBudget Waiver Sign-Off form to the provider by attaching it to a note.

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

Role
Region QA Workstream Worker [v] GO

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

File Reports

Quick Search
Providers [v] Provider Name

MY DASHBOARD CONSUMERS **PROVIDERS** INCIDENTS CLAIMS SCHE

A TEST Provider (10002)

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

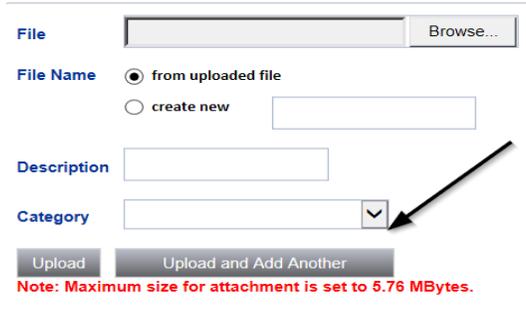
Filters
Note Type [v] Equal To [v] [v] AND [v] x
Note Date [v] +
Search Reset

3. Click **File > Add Notes**

File Reports

Add New Provider Search
Add Notes
Print

4. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = 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.



The screenshot shows a form for adding an attachment. It has a 'File' input field with a 'Browse...' button. Below it, the 'File Name' section has two radio buttons: 'from uploaded file' (which is selected) and 'create new'. There is a text input field next to the 'create new' option. The 'Description' field is a text input. The 'Category' field is a dropdown menu with a downward arrow, which is pointed to by a black arrow. At the bottom of the form are two buttons: 'Upload' and 'Upload and Add Another'. Below the buttons is a red note: 'Note: Maximum size for attachment is set to 5.76 MBytes.'

- 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

File Tools

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 05/11/2023 📅

Note Type * ← Provider Expansion Request ▾*

Note Sub-Type ← Final APD iBudget Waiver Sign-off ▾*

Associated Form ID#

Description ← Final APD iBudget Waiver Sign-off

Note ←

Status * ← Complete ▾

Date Completed 05/11/2023

Attachments ←

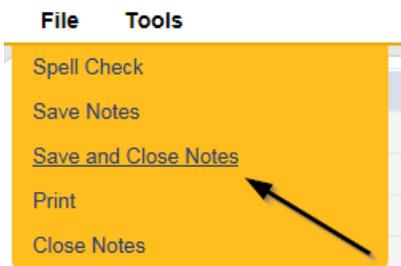
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ... Clear

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



As Needed: Generate PAARF



If the new service expansion is denied and it is a without cause denial, the 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 new services request is denied due to with cause, the 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**.

A screenshot of a web form with a label "Role" above a dropdown menu. The dropdown menu is open and shows "Region QA Workstream Worker" as the selected option. To the right of the dropdown is a grey button labeled "GO". An arrow points from the top right towards the "GO" button.

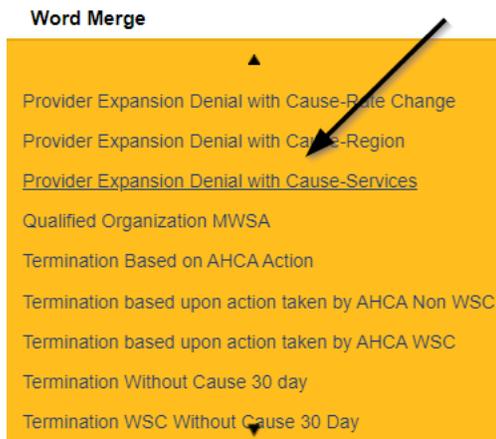
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click Go.

A screenshot of a web application interface. At the top left is the "QoD iConnect" logo. Below it 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 the search bar is a navigation menu with tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULER". The "PROVIDERS" tab is highlighted. An arrow points to the "GO" button, and another arrow points to the "PROVIDERS" tab.

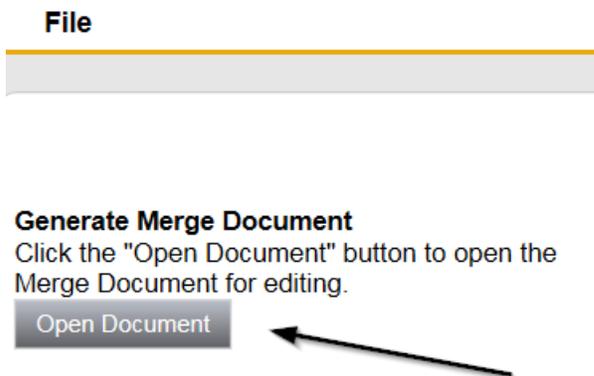
3. The Provider's record will be displayed. Navigate to the **Providers > Providers** tab.

A screenshot of a web application showing a provider record for "A TEST Provider (10002)". Below the provider name is a row of tabs: "Workers", "Services", "Provider ID Numbers", "Contracts", "E", "Providers", "Divisions", "Forms", "Enrollments", and "Authorizati". The "Providers" tab is highlighted. An arrow points to the "Providers" tab, and another arrow points to the "PROVIDERS" tab in the navigation menu above.

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



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



6. Save the Word Merge Document to the 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" = Service expansion request does not meet handbook requirements
- e. "Note" = Enter notes
- f. "Status" = Complete

- g. Click "Add Attachment" and search for the copy of the signed *Provider Expansion Denial with Cause* - Services 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
- 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

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

