



State of Florida
Agency for Persons with Disabilities

APD iConnect
Behavioral Services Training Manual Version 6
8/11/23

Reporting the Use of Reactive Strategies

Behavioral Services

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1. Report Use of Reactive Strategies

Any provider who uses reactive strategies is required to complete the Reactive Strategies Form in APD iConnect. Reporting the use of Reactive Strategies includes the following steps:

1. The service provider uses one or more reactive strategies during a single event.
2. The service provider completes the Reactive Strategies form in APD iConnect.
3. The regional senior behavior analyst or
4. designee runs a report to identify events that require follow up.

Role: Service Provider, Service Provider Worker

1. The service provider uses one or more reactive strategies during a single event.
2. The service provider will complete the Reactive Strategies form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select the **“Reactive Strategies Form”** The Form Details page displays. Update the following fields:
 - a. Review = select As Needed
 - b. Review Date = defaults to today
 - c. Division = defaults to APD
 - d. Worker = pre-populated with your name
 - e. Status = defaults to Draft. Once all questions are answered, change to Complete.
 - f. Provider/Program = enter the name of the provider’s agency
3. Complete the questions in the form. When all questions are answered, change the form status to Complete.

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The screenshot shows the iConnect interface. At the top right, it says 'Carrie Abner | Forms' and '7/3/2023 4:13 PM'. Below the 'File' menu, there is a dropdown for 'Please Select Type:' set to 'Reactive Strategies Form'. Under 'Consumer Forms', there are fields for 'Review' (As Needed), 'Review Date' (07/03/2023), 'Division' (APD), 'Approved By' (Buck, Jennifer), 'Worker' (Buck, Jennifer), 'Status' (Complete), 'Provider/Program' (ABA SOLUTIONS, INC.), and 'Approved Date' (07/03/2023). The main form is titled 'REACTIVE STRATEGIES FORM' and includes fields for 'Event Date' (06/29/2023), 'County (where occurred)' (LEON), 'Provider Name' (Dr. Giggles), 'Site Name' (ABA Solutions SouthWest), 'Facility Type' (Behavior Focused (BF) Designated Group Hon), 'Emergency Procedures Curriculum' (TEAM), and 'Label the Behavior' (Property Destruction - Any behavior engaged in).

- From the **File** menu, select **Save and Close Form**.



Note

If more than one reactive strategy needs to be reported, for example, the same reactive strategy is used multiple days in a row, the Duplicate Assessment functionality can be used. With the completed Reactive Strategies form open, from the **File** menu, select **Duplicate Assessment**. The page refreshes and a new, editable version of the Reactive Strategies form displays. Update the fields as applicable and save the form with a status of complete.

This screenshot shows the 'File' menu open, with 'Duplicate Assessment' highlighted in yellow. The background shows the same 'Reactive Strategies Form' as in the previous screenshot, but with the 'Event Date' updated to 07/04/2023 and the 'Approved Date' to 07/21/2023. The 'Status' is still 'Complete'.

- The provider does not need to notify the Regional Senior Behavior Analyst or designee because the Provider Reactive Strategies report run at least monthly, will capture the detail added by the provider on the Reactive Strategies form. Events requiring follow up are addressed in the [Reactive Strategies Event Review and Follow Up](#) section.

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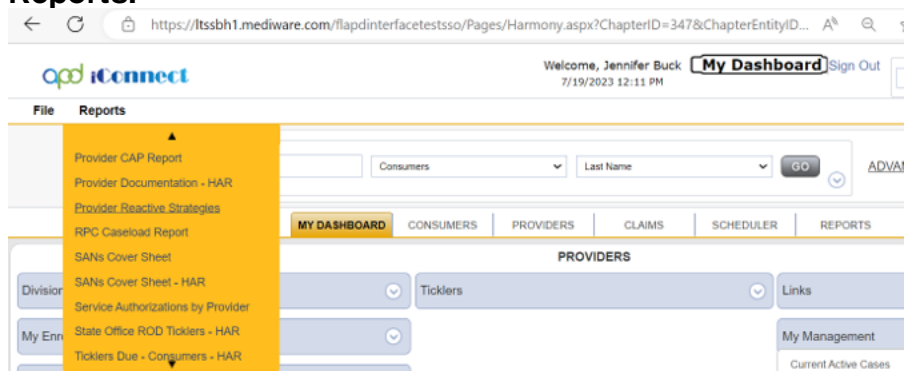
2. Reactive Strategies Event Review and Follow Up

The Reactive Strategies Event Review and Follow Up process includes the following steps:

1. The regional senior behavior analyst or designee runs the Provider Reactive Strategies report to identify events that require follow up.
2. The regional senior behavior analyst communicates with the provider via a note if a correction is needed.
3. The regional senior behavior analyst communicates with the provider via a note or meeting to obtain the information needed to complete the follow up.
4. The regional senior behavior analyst or designee completes the follow up section on the Reactive Strategies form.

Role = Region Clinical Workstream Worker

1. The regional senior behavior analyst or designee runs the Provider Reactive Strategies report to identify events that require follow up. This report is located on **My Dashboard > Reports**.



2. The regional senior behavior analyst or designee will review the report and determine if corrections or follow up is needed. (e.g. injury, death or duration exceeding 60 minutes) This report does not include data entered today.
3. If follow up is NOT needed, and corrections are NOT needed the process ends, otherwise proceed to the [Corrections Required](#) or [Follow Up Required](#) section.

2a. Corrections Required

Role = Region Clinical Workstream Worker

1. The regional senior behavior analyst or designee may identify corrections that needs to be made on the Reactive Strategy

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form. The regional senior behavior analyst will reverse the status of the Reactive Strategies form so the provider can make the corrections. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form. The Form Details page displays. From the **File** menu, select **Reverse Status** so the form can be updated.

Update the following fields:

- Follow up Completed? = Yes
- Follow-up Event Date = enter date
- Actions Needed for Follow-Up = Request revision/update to report
- Follow up Comments = enter if needed
- Follow Up Completed By = search for an select your name
- Assessor/Worker = change to self, at the top of the page.

This will allow you to find the form in the Pending Assessments Queue.

- Status = Pending

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Follow-up Completed?	Yes ▾						
Follow-up Event Date	07/19/2023 <input type="text"/>						
Actions Needed for Follow-Up	<div style="border: 1px solid #ccc; padding: 2px;"> Request additional information (consumer-spec Request additional information (provider-specifi Recommend review of individual's service need Recommend provider training Require LRC review (BASP or data review) Refer event to MCM Refer event to OI Stream </div>	<div style="border: 1px solid #ccc; padding: 2px;">Request revision/update to report</div>					
Follow-Up Comments	<div style="border: 1px solid #ccc; padding: 2px;">asked provider to update the form</div>						
Follow-Up Completed By:	<div style="border: 1px solid #ccc; padding: 2px;"> 1 Worker record(s) returned - now viewing 1 through 1 </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="width: 70%;">Name</th> <th>ID</th> </tr> </thead> <tbody> <tr> <td>Buck, Jennifer</td> <td>2486</td> </tr> </tbody> </table> <div style="text-align: center; margin-top: 5px;"> <input type="button" value="Search"/> </div>			Name	ID	Buck, Jennifer	2486
Name	ID						
Buck, Jennifer	2486						

- From the **File** menu, select **Save Forms, NOT Save and Close Forms.**



Note

The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of Reactive Strategy forms that require corrections.

Filter by Filter by Assessment = Reactive Strategies
Status = Pending.

MY DASHBOARD
CONSUMERS
PROVIDERS
CLAIMS
SCHEDULER
REPORTS

CONSUMERS	PROVIDERS	TASKS
<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">sion</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Enrollments</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">vider Selections</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">ps</div>	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Ticklers</div>	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Links</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">My Management</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Current Active Cases</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Enrollments</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">SAN Queue</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Pending Assessments Queue</div>

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The screenshot shows the APD iConnect interface. At the top left is the logo and at the top right is the user name 'Jennifer Buck' and the date '7/3/2023 4:21 PM'. The main heading is 'Pending Assessments Queue'. Below this is a 'File' menu and a 'Filters' section. The filters include 'Assessment' (set to 'Reactive Strategies Form'), 'Begins With', and 'Consumer Name'. There are 'Search' and 'Reset' buttons. Below the filters, it says '1 Pending Assessments Queue record(s) returned - now viewing 1 through 1'. A table with columns 'Consumer Name', 'Case No', 'Assessment', 'Review Date', 'Rater', and 'Status' contains one row for 'Abner, Carrie' with case number 59217, assessment 'Reactive Strategies Form', review date '06/21/2023', rater 'Buck, Jennifer', and status 'Pending'. At the bottom are navigation buttons: 'First', 'Previous', 'Records per page: 15', 'Next', and 'Last'.

- The regional senior behavior analyst or designee will communicate the correction needs to the provider via a note in APD iConnect. This is done from the **Note icon** in the header of the form.

The screenshot shows the 'Consumer Forms' section. It includes fields for 'Review' (set to 'As Needed'), 'Review Date' (07/03/2023), and 'Division' (APD). There is an 'Approved By' field and a 'Note' field with a yellow sticky note icon.



Note

The form must be saved, at least one, to display the Note icon. Save the form by selecting the **File** menu, then select **Save Form**.

- Click the **Note icon**. The Note Details page displays. Update the following fields:
 - Cost Plan Review Note = No
 - Note Type = Reactive Strategies
 - Note Subtype = Required Follow-up
 - Description = Revision Requested
 - Note = list the corrections that need to be made
 - Status = Pending
 - Recipient = provider
- From the **File** menu, select **Save and Close Notes**.
- The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. The form status will be changed to complete later in the workflow.

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The image shows two overlapping screenshots from the iConnect system. The background screenshot is the 'Reactive Strategies Form 6/1/2023' with fields for Review (As Needed), Review Date (07/19/2023), Division (APD), and a Note field. The foreground screenshot is the 'Notes' form, showing a note for 'Revision Requested' with a status of 'Pending'. The note content includes a list of updates: 'Please make the following updates: 1. 2. 3.'

Role = Service Provider, Service Provider Worker

- The provider monitors **My Dashboard > Consumers > Notes > Pending** for incoming notes.

The screenshot shows the 'MY DASHBOARD' with the 'CONSUMERS' tab selected. Under the 'Notes' section, there are 13 'Complete' notes and 6 'Pending' notes. The 'PROVIDERS' tab is also visible with a 'Ticklers' dropdown.

- The provider will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes for the requested corrections.

The screenshot shows the 'Notes' list view with a filter for 'Status = Pending'. The table below shows the following data:

IConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	LRC Review	BASP Submission	07/03/2023	BASP Revision 7/3/23	Buck, Jennifer	Pending
59217	Abner, Carrie	Behavioral Services	BASE - Additional Information Requested	07/03/2023		Buck, Jennifer	Pending
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Revision Requested	Buck, Jennifer	Pending

- Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
 - Questions on the form that need to be corrected per instruction in the Reactive Strategies Required Follow-up note.

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- b. In the Header, keep the status as Pending.

The screenshot shows the iConnect system interface. At the top left is the iConnect logo. At the top right, it says "Carrie Abner" and "Last Updated by j.buck@apdcares.org at 7/3/2023 4:40:04 PM". Below this is a "Forms" tab. A "File" menu is visible. The main content area is titled "Reactive Strategies Form 6/1/2023". Underneath is a "Consumer Forms" section with the following fields: Review (As Needed), Review Date (07/03/2023), Division (APD), Approved By (empty), Note (with a note icon), Worker (Buck, Jennifer), Status (Pending), and Provider/Program (ABA SOLUTIONS, INC.). Below this is a blue header for "REACTIVE STRATEGIES FORM" with the following fields: Event Date (06/29/2023), County (LEON), Provider Name (Dr. Giggles), and Site Name (ABA Solutions SouthWest). A "77 characters remaining" indicator is shown next to the Site Name field.

10. From the **File** menu, select **Save Form, NOT Save and Close Forms**.

11. The provider will notify the regional senior behavior analyst or designee the corrections have been made by replying to the existing Reactive Strategies note. This is done from the **Note icon** in the header of the form.

This screenshot shows a close-up of the "Consumer Forms" section. It includes the following fields: Review (As Needed), Review Date (07/03/2023), Division (APD), Approved By (empty), and Note (with a note icon).

12. Click the **Note icon**. The Note Details page displays. Update the following fields:
- Note = details on the corrections that were made. Click **Append Text to Note**.
 - Status = Complete
 - Recipient = regional senior behavior analyst

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opd iConnect Carrie Abner | **Notes**
 Last Updated by jbuck@apdcares.org
 at 7/21/2023 3:18:54 PM

File Tools

Notes

Division * APD
 Note By * Buck, Jennifer
 Note Date * 07/21/2023
 Cost Plan Review Note? * No
 Note Type * Reactive Strategies
 Note Sub Type Required Follow Up
 Description Revision Requested

On 7/21/2023 at 3:18 PM, Jennifer Buck wrote:
 Please make the following updates.
 1.
 2.
 3.

Note

New Text
 B I U 16px A
 Corrections have been made
 Append Text to Note

Status * Complete
 Date Completed 07/21/2023

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

14. The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. Keep the form in Pending status. The form status will be changed to complete later in the workflow.

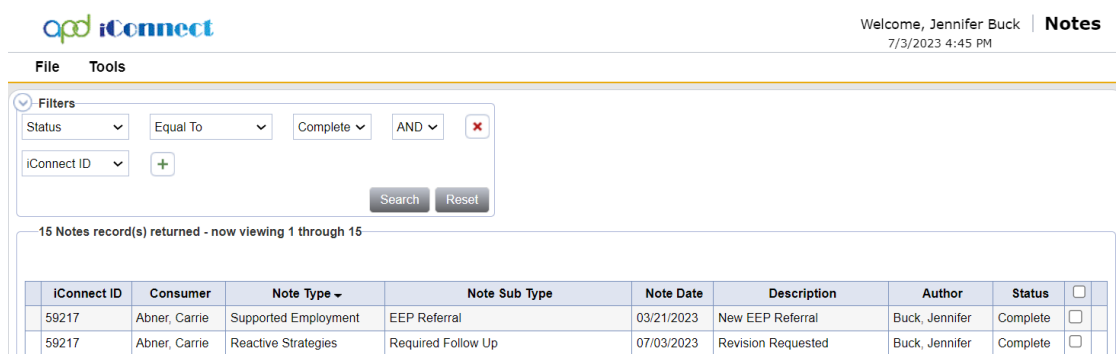
Role = Region Clinical Workstream Worker

15. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes > Complete** for incoming notes as notification the Reactive Strategies form has been corrected.

CONSUMERS		PROVIDERS	
Division	▼	Ticklers	▼
Notes	▶		
Complete	13		
Pending	6		

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16. The regional senior behavior analyst or designee will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes that the corrections have been made.



The screenshot shows the iConnect interface. At the top, there is a navigation bar with 'File' and 'Tools' menus. The user is identified as 'Welcome, Jennifer Buck' and the date is '7/3/2023 4:45 PM'. Below the navigation bar, there is a 'Filters' section with dropdown menus for 'Status' (set to 'Complete'), 'Equal To' (set to 'AND'), and 'iConnect ID' (empty). There are 'Search' and 'Reset' buttons. Below the filters, it says '15 Notes record(s) returned - now viewing 1 through 15'. A table displays the following data:

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	<input type="checkbox"/>
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Complete	<input type="checkbox"/>
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Revision Requested	Buck, Jennifer	Complete	<input type="checkbox"/>

Note



The **Provider Reactive Strategies Report** can be used to monitor follow up actions by the provider in bulk.

17. The regional senior behavior analyst or designee will review the form to determine if the revisions were sufficient. If they were sufficient, the follow up section at the bottom of the Reactive Strategies form is completed. If they were not sufficient, repeat steps 3 - 14 to create a new note for the provider and repeat the correction process.
18. If corrections have been made, navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
- APD Follow Up Completed = Yes
 - Follow-up Event Date = select the date
 - Actions Needed for Follow-Up = select one or more actions
 - Follow-Up Comments = enter comments
 - Follow-Up By = enter name
 - In the Header, change the status to Complete

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Follow-up Completed?

Follow-up Event Date

Actions Needed for Follow-Up

Request additional information (consumer-spec	Request revision/update to report
Request additional information (provider-specif	Recommend provider training
Recommend review of individual's service need	
Require LRC review (BASP or data review)	
Refer event to MCM	
Refer event to Qi Stream	
Refer event to State Office	

Follow-Up Comments

provider completed corrections

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

Name	ID
Buck, Jennifer	2486

Follow-Up Completed By:

Search

19. From the **File** menu, select **Save and Close Form**.

b. Follow Up Required

The regional senior behavior analyst or designee will review the Provider Reactive Strategies report and determine if follow up is needed. Follow up information may be obtained through a note with the provider in APD iConnect or a meeting may need to be scheduled. This meeting is usually held during the LRC General Session but will be scheduled on alternate dates as needed.

Role = Region Clinical Workstream Worker

1. For events that require follow up, the regional senior behavior analyst or designee will document the follow up actions on the Reactive Strategies form. The regional senior behavior analyst will first have to reverse the status of the form before edits can be made. Navigate to the consumer's record and select the **Forms** tab. Select the completed **Reactive Strategies Form** from the list. From the **File** menu, select **Reverse Status**. The status of the form changes from Complete to Pending.
2. Update the following fields:
 - a. Follow up Completed? = Yes
 - b. Follow-up Event Date = enter date
 - c. Actions Needed for Follow-Up = Request revision/update to report
 - d. Follow up Comments = enter if needed
 - e. Follow Up Completed By = search for and select your name.
 - f. Assessor/Worker = change to self, at the top of the page. This will allow you to find the form in the Pending Assessments Queue.
 - g. Status = Pending

Behavioral Services

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Follow-up Completed?

Follow-up Event Date

Actions Needed for Follow-Up

- Request revision/update to report
- Request additional information (provider-specific)
- Recommend review of individual's service needs
- Require LRC review (BASP or data review)
- Refer event to MCM
- Refer event to QI Stream
- Refer event to State Office

Follow-Up Comments

follow up comments from the Regional Senior Behavior Analyst

Follow-Up Completed By:

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

Name	ID
Buck, Jennifer	2486

Search

3. From the **File** menu, select **Save Form**.



Note

The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of Reactive Strategy forms that require follow up.
Filter by Filter by Assessment = Reactive Strategies
Status = Pending.



4. Proceed to one of the follow up method sections:
 - a. [Follow Up During the LRC Meeting](#)
 - b. [Follow Up via Scheduled Meeting](#)
 - c. [Follow Up via a Note](#)

2bi. Follow Up During LRC Meeting

Role = Region Clinical Workstream Worker

1. If follow-up can be obtained during the LRC meeting, it will be documented on the **LRC Case Review and Approval form** during the meeting. No additional note is needed and the Reactive Strategies form can be completed.
2. After the follow up section of the Reactive Strategies form is completed from the previous section, change the status of the form to Complete.



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- From the **File** menu, select **Save and Close Form**. Proceed to the [LRC Meeting section](#).

2bii. Follow Up via Scheduled Meeting

Role = Region Clinical Workstream Worker

- If follow-up must be obtained from a meeting with the provider, the Region Clinical Workstream Worker will schedule a time to meet the provider to obtain additional information via a note. This is done from the **Note icon** in the header of the form.

Consumer Forms	
Review *	As Needed ▾
Review Date *	07/03/2023 
Division *	APD ▾
Approved By	<input type="text"/>
Note	

- Click the **Note icon**. The Note Details page displays. Update the following fields:
 - Cost Plan Review Note? = No
 - Note Type = Reactive Strategies
 - Note Subtype = Required Follow-up
 - Description = Meeting Requested
 - Note = additional details of the request
 - Status = Pending
 - Recipient = provider

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The screenshot shows the 'Notes' form in the iConnect system. The form is titled 'Notes' and has a 'File' menu and 'Tools' button. The user is identified as 'Carrie Abner' and the date/time is '7/21/2023 3:48 PM'. The form fields are as follows:

Division *	APD
Note By *	Buck, Jennifer
Note Date *	07/21/2023
Cost Plan Review Note? *	No
Note Type *	Reactive Strategies
Note Sub Type	Required Follow Up
Description	Meeting Requested
Note	<p>Need to schedule a meeting to obtain additional information.</p>
Status *	Pending
Date Completed	

3. From the **File** menu, select **Save and Close Notes**.
4. The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. Keep the form in Pending status. The form status will be changed to complete later in the workflow.

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Note

The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue of Reactive Strategy** forms that are pending follow up.

Filter by Filter by Assessment = Reactive Strategies Form
Status = Pending.

If follow up details are never received, the senior regional behavioral analyst can use this queue to identify Reactive Strategy forms that need to be closed referred to QI.

The screenshot shows the iConnect system interface. At the top, there are navigation tabs: MY DASHBOARD, CONSUMERS, PROVIDERS, CLAIMS, SCHEDULER, and REPORTS. Below these are three main sections: CONSUMERS, PROVIDERS, and TASKS. The CONSUMERS section includes links for Division, My Enrollments, Provider Selections, and Notes. The PROVIDERS section includes a link for Ticklers. The TASKS section includes a link for My Management, which has a dropdown menu with options: Current Active Cases, Enrollments, SAN Queue, and Pending Assessments Queue. Below this is a search filter section with the following filters: Assessment (dropdown), Begins With (dropdown), Reactive Strategies Form. (dropdown), AND (dropdown), and Consumer Name (dropdown). There are Search and Reset buttons. Below the filters, it says "1 Pending Assessments Queue record(s) returned - now viewing 1 through 1". A table with the following columns: Consumer Name, Case No, Assessment, Review Date, Rater, and Status. The table contains one row: Abner, Carrie, 50217, Reactive Strategies Form, 06/21/2023, Buck, Jennifer, Pending. At the bottom, there are pagination controls: First, Previous, Records per page: 15, Next, Last.

Role = Service Provider, Service Provider Worker

5. The provider monitors **My Dashboard > Notes > Pending** for incoming notes regarding the requested meeting.
6. The provider meets with the regional senior behavior analyst and provides additional information.
7. The provider may also need to update the Reactive Strategies form depending on the outcome of the meeting. If applicable, navigate to the consumer's Forms tab. From the list select the **Reactive Strategies form** in Pending status. Update fields as needed. Leave the form in Pending status. From the **File** menu, select **Save and Close Forms**.
8. The provider will document information has been provided and/or updates have been made on the existing **Reactive Strategies > Required Follow Up** note. This is done from the **Note icon** in the header of the form.

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Consumer Forms	
Review *	As Needed ▾
Review Date *	07/03/2023
Division *	APD ▾
Approved By	
Note	

9. Click the **Note icon**. The Note Details page displays. Update the following fields:
 - a. Description = Update to Meeting Completed + mm/dd/yy
 - b. Note = details on the corrections that were made or information provided. Click **Append Text to Note**.
 - c. Status = Update to Complete
 - d. Recipient = Region Clinical Workstream Worker

Carrie Abner | **Notes**
Last Updated by j.buck@apdcares.org
at 7/21/2023 3:56:15 PM

File Tools

Notes

Division * APD

Note By * Buck, Jennifer

Note Date * 07/21/2023

Cost Plan Review Note? * No ▾

Note Type * Reactive Strategies ▾

Note SubType Required Follow Up ▾

Description Meeting Requested

On 7/21/2023 at 3:56 PM, Jennifer Buck wrote:
Need to schedule a meeting to obtain additional information.

Note

New Text

B I U 16px ▾ A ▾

meeting completed. details on the corrections that were made and/or additional information provided.

Append Text to Note

Status * Complete ▾

Date Completed 07/21/2023

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

11. The page refreshes and you're returned to the Reactive Strategies Form. Leave the form in Pending status. From the **File** menu, select **Save and Close Forms**.

Role = Region Clinical Workstream Worker

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12. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes > Complete** for incoming notes as notification the additional information has been provided.
13. The regional senior behavior analyst or designee will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes with the additional information.

IConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Complete
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Revision Requested	Buck, Jennifer	Complete
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Meeting Completed 7/3/23	Buck, Jennifer	Complete
59217	Abner, Carrie	LRC Review	BASP Submission	06/20/2023	Revisions Requested	Buck, Jennifer	Complete

14. The regional senior behavior analyst will complete the follow up section at the bottom of the Reactive Strategies form. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
 - a. Actions Needed for Follow-Up = update if needed
 - b. Follow-Up Comments = enter additional comments if needed
 - c. In the Header, change the status to Complete

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Follow-up Completed? Yes

Follow-up Event Date 06/29/2023

Actions Needed for Follow-Up
 Request revision/update to report
 Request additional information (provider-specifi
 Recommend review of individual's service need
 Refer event to MCM
 Refer event to QI Stream
 Refer event to State Office
 Request additional information (consumer-spec
 Require LRC review (BASP or data review)
 Recommend provider training

Follow-Up Comments
 provider completed corrections

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

Name	ID
Buck, Jennifer	2486


Follow-Up Completed By:

15. From the **File** menu, select **Save and Close Form**.
16. When the regional senior behavior analyst or designee runs the Provider Reactive Strategies report again, it will reflect the follow up has been completed.

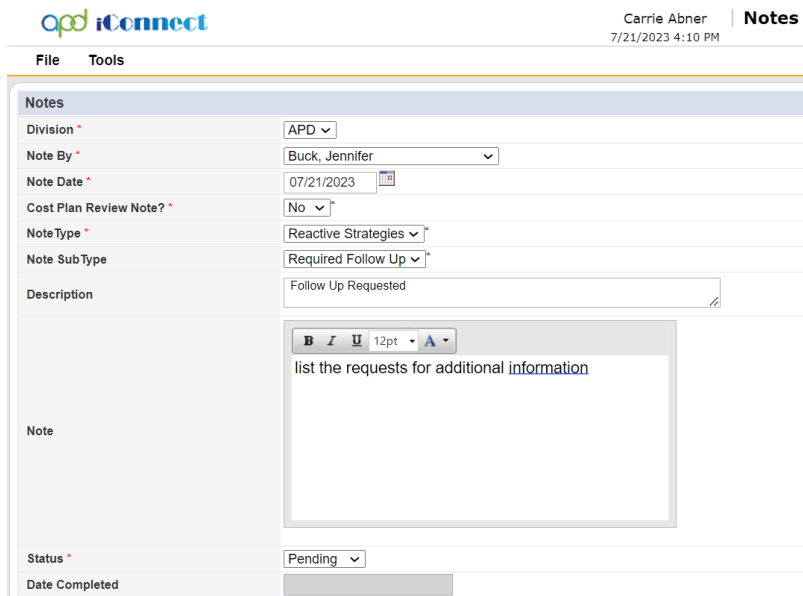
2biii. Follow Up via a Note

Role = Region Clinical Workstream Worker

1. If follow-up can be gathered from the provider from a note, the regional senior behavior analyst will communicate with the provider via a note in APD iConnect. This is done from the **Note icon** in the header of the Reactive Strategies Form.

Consumer Forms	
Review *	As Needed ▾
Review Date *	07/03/2023 📅
Division *	APD ▾
Approved By	
Note	

2. Click the **Note icon**. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note? = No
 - b. Note Type = Reactive Strategies
 - c. Note Subtype = Required Follow-up
 - d. Description = Follow Up Requested
 - e. Note = details of the follow up request
 - f. Status = Pending
 - g. Recipient = provider



APD iConnect

Carrie Abner | Notes
7/21/2023 4:10 PM

File Tools

Notes

Division * APD ▾

Note By * Buck, Jennifer ▾

Note Date * 07/21/2023 📅

Cost Plan Review Note? * No ▾

Note Type * Reactive Strategies ▾

Note Sub Type Required Follow Up ▾

Description Follow Up Requested

Note

Status * Pending ▾

Date Completed

3. From the **File** menu, select **Save and Close Notes**.
4. The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close**

Behavioral Services

Forms. Keep the form in Pending status. The form status will be changed to complete later in the workflow.



Note

The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue of Reactive Strategy** forms that are pending follow up.

Filter by Filter by Assessment = Reactive Strategies Form Status = Pending.

If follow up details are never received, the senior regional behavioral analyst can use this queue to identify Reactive Strategy forms that need to be closed referred to QI.

The screenshot shows the 'MY DASHBOARD' interface with tabs for CONSUMERS, PROVIDERS, CLAIMS, SCHEDULER, and REPORTS. The 'CONSUMERS' tab is active, showing a sidebar with 'My Enrollments', 'Provider Selections', and 'Notes'. The main content area displays a table with one record:

Consumer Name	Case No	Assessment	Review Date	Rater	Status
Abner, Carrie	59217	Reactive Strategies Form	06/21/2023	Buck, Jennifer	Pending

Below the table are navigation controls: First, Previous, Records per page (15), Next, Last.

Role = Service Provider, Service Provider Worker


- The provider monitors **My Dashboard > Notes > Pending** for incoming notes regarding the follow up request. The provider will review the Reactive Strategies note and provide the answers about the event in the same note.

The screenshot shows the 'Notes' page in the iConnect system. The sidebar has 'File' and 'Tools' tabs. The main content area displays a table with 7 records:

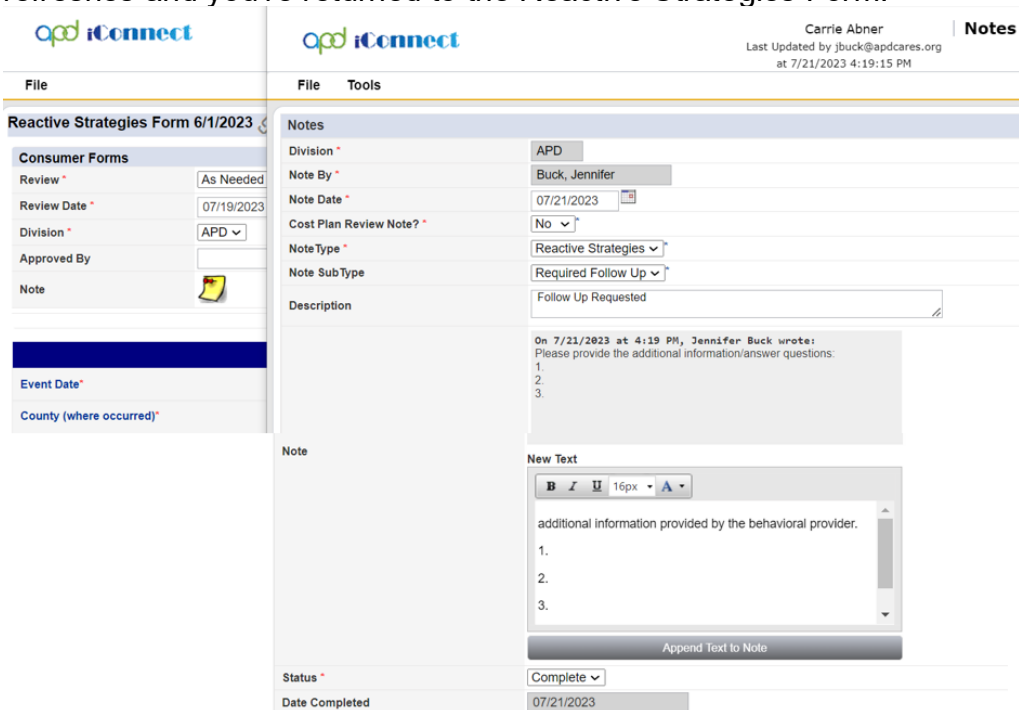
iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	Supported Employment	EEP IFS Approval	03/22/2023	FY2023 EEP Funding Approved	Buck, Jennifer	Pending
47966	Abner, Megan	Reactive Strategies	Required Follow Up	06/19/2023		Buck, Jennifer	Pending
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Follow Up Requested	Buck, Jennifer	Pending

Behavioral Services

6. The reactive strategies follow up note is also accessible from the Reactive Strategies Form from the **Note icon** in the header of the form.

Consumer Forms	
Review *	As Needed
Review Date *	07/03/2023
Division *	APD
Approved By	
Note	

7. Click the **Note icon**. The Note Details page displays. Update the following fields:
- Note = answers questions/provides additional information about the event. Click **Append Text to Note**.
 - Status = Complete
 - Recipient = Region Clinical Workstream Worker or designee
8. From the **File** menu, select **Save and Close Notes**. The page refreshes and you're returned to the Reactive Strategies Form.



The screenshot shows the iConnect system interface. On the left, there is a sidebar with a 'File' menu and a 'Tools' menu. The main content area is titled 'Reactive Strategies Form 6/1/2023' and contains a 'Notes' section. The 'Notes' section has a header with 'Notes' and a sub-header with 'Division *' (APD). Below this, there are several fields: 'Note By *' (Buck, Jennifer), 'Note Date *' (07/21/2023), 'Cost Plan Review Note? *' (No), 'Note Type *' (Reactive Strategies), and 'Note SubType' (Required Follow Up). The 'Description' field contains the text 'Follow Up Requested'. Below the 'Description' field, there is a 'New Text' section with a rich text editor containing the text 'additional information provided by the behavioral provider.' and a list of three numbered items. The 'Status *' field is set to 'Complete' and the 'Date Completed' is 07/21/2023.

9. Leave the form in Pending status. From the **File** menu, select **Save and Close Forms**.

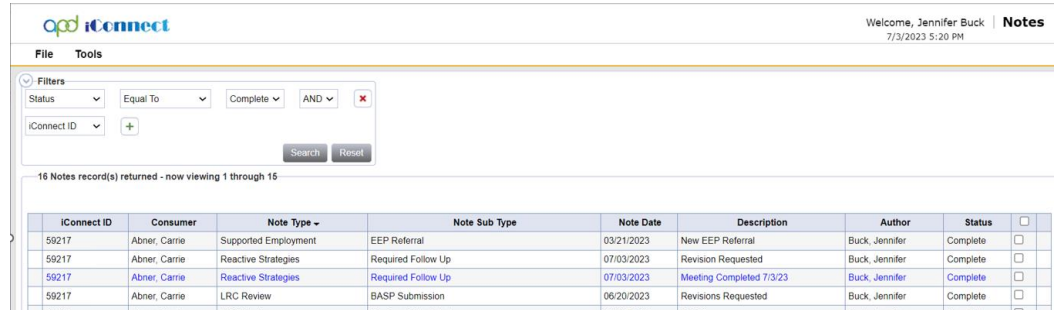
Role = Region Clinical Workstream Worker

10. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes > Complete** for

Behavioral Services

incoming notes as notification the additional information has been provided.

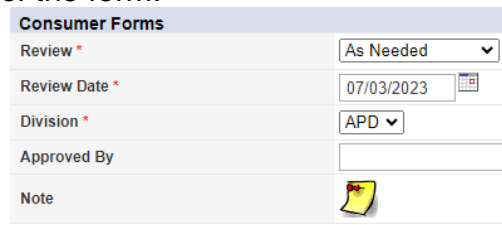
11. The regional senior behavior analyst or designee will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes with the additional information.



The screenshot shows the iConnect web application interface. At the top, there is a navigation bar with the iConnect logo and a user greeting: "Welcome, Jennifer Buck | Notes 7/3/2023 5:20 PM". Below the navigation bar is a "Filters" section with dropdown menus for "Status", "Equal To", "Complete", and "AND", along with a search and reset button. A message indicates "16 Notes record(s) returned - now viewing 1 through 16". The main content is a table with the following columns: iConnect ID, Consumer, Note Type, Note Sub Type, Note Date, Description, Author, Status, and a checkbox. The table contains four rows of data.

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Complete	<input type="checkbox"/>
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Revision Requested	Buck, Jennifer	Complete	<input type="checkbox"/>
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Meeting Completed 7/3/23	Buck, Jennifer	Complete	<input type="checkbox"/>
59217	Abner, Carrie	LRC Review	BASP Submission	06/20/2023	Revisions Requested	Buck, Jennifer	Complete	<input type="checkbox"/>

12. The reactive strategies follow up note is also accessible from the Reactive Strategies Form from the **Note icon** in the header of the form.



The screenshot shows the "Consumer Forms" section of the iConnect system. It includes a "Review" dropdown menu set to "As Needed", a "Review Date" field with a calendar icon set to "07/03/2023", a "Division" dropdown menu set to "APD", an "Approved By" field, and a "Note" field with a yellow sticky note icon.

Click the **Note icon**. The Note Details page displays.

13. The regional senior behavior analyst will complete the follow up section at the bottom of the Reactive Strategies form. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
 - a. Actions Needed for Follow-Up = update if needed
 - b. Follow-Up Comments = enter additional comments if needed
 - c. In the Header, change the status to Complete

Behavioral Services

FOR APD STAFF USE ONLY

Follow-up Completed?	Yes ▾				
Follow-up Event Date	06/29/2023				
Actions Needed for Follow-Up	<div style="display: flex; justify-content: space-between;"><div style="border: 1px solid #ccc; padding: 2px; width: 45%;"><p>Request revision/update to report</p><p>Request additional information (provider-specific)</p><p>Recommend review of individual's service need</p><p>Refer event to MCM</p><p>Refer event to QI Stream</p><p>Refer event to State Office</p></div><div style="border: 1px solid #ccc; padding: 2px; width: 45%;"><p>Request additional information (consumer-specific)</p><p>Require LRC review (BASP or data review)</p><p>Recommend provider training</p></div></div>				
Follow-Up Comments	<div style="border: 1px solid #ccc; padding: 2px; min-height: 30px;">provider completed corrections</div>				
Follow-Up Completed By:	<div style="border: 1px solid #ccc; padding: 2px;"><p>1 Worker record(s) returned - now viewing 1 through 1 </p><table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="width: 60%;">Name</th><th>ID</th></tr></thead><tbody><tr><td>Buck, Jennifer</td><td>2486</td></tr></tbody></table><p style="text-align: center;"><input type="button" value="Search"/></p></div>	Name	ID	Buck, Jennifer	2486
Name	ID				
Buck, Jennifer	2486				

14. From the **File** menu, select **Save and Close Form**.

15. When the regional senior behavior analyst or designee runs the Provider Reactive Strategies report again, it will reflect the follow up has been completed.

3. State Office Reactive Strategies (RS) Event Follow-Up and CMS Reporting

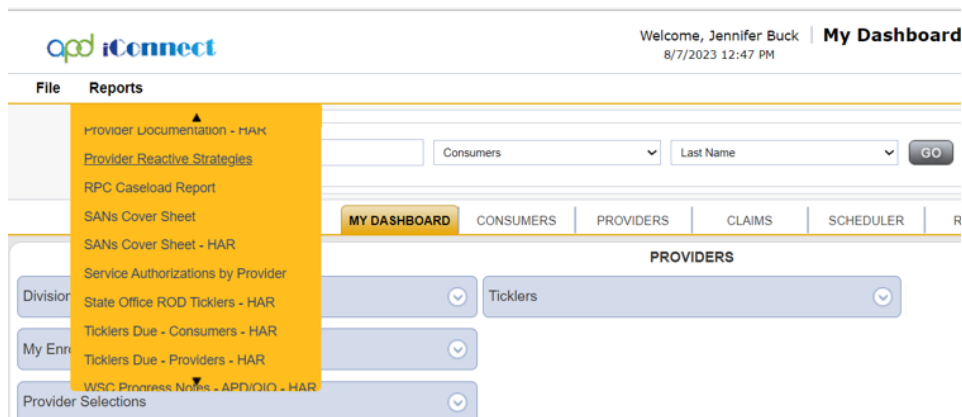
The APD agency senior behavior analyst may identify corrections or follow up needs that were not completed by the regional senior behavior analyst. The APD agency senior behavior analyst will notify the Region to work with the provider to complete the corrections and/or follow up according to the steps in the previous section of this manual.

The State Office staff Reactive Strategies (RS) Event Follow-Up and CMS Reporting process includes the following steps:

1. The APD agency senior behavior analyst runs the Provider Reactive Strategies report to identify events that require follow up that were not completed by the Region.
 - a. This same report provides data to generate statistics and graphs for the quarterly CMS report.
2. Communicate with the regional senior behavior analyst or designee via a note if a correction is needed.
3. The regional senior behavior analyst will work with the provider to make the corrections on the Reactive Strategies form.

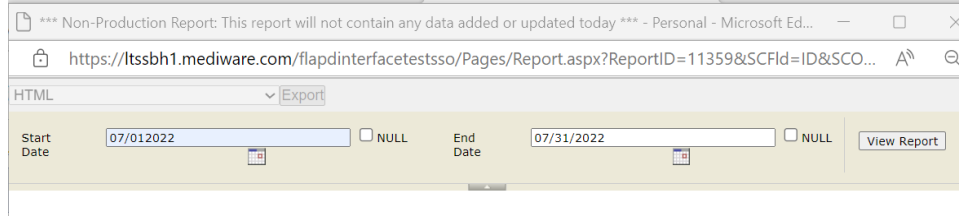
Role = State Office Worker

1. APD agency senior behavior analyst or designee runs the Provider Reactive Strategies report to identify events that require follow up. To run the report, navigate to **My Dashboard**. From the **Report** menu, select the **Provider Reactive Strategies** report.

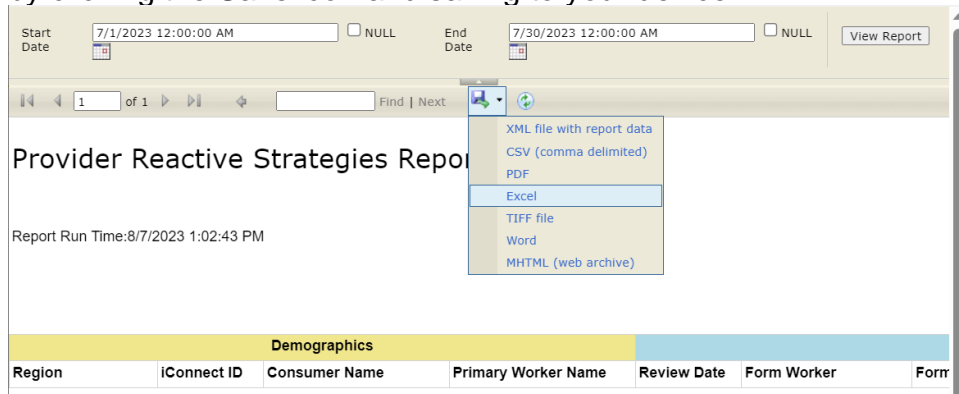


2. A new window opens where the report filters are selected. Enter the date range you wish to review and click **View Report**.

Behavioral Services



- The results display on the screen and can be exported to Excel by clicking the Save icon and saving to your device.



Demographics						
Region	IConnect ID	Consumer Name	Primary Worker Name	Review Date	Form Worker	Form



Note

This same report provides data to generate statistics and graphs for the quarterly CMS report. The quarterly CMS report is created in Excel, outside of APD iConnect.

- APD agency senior behavior analyst or designee will review the report and determine whether follow up is needed. Follow up is needed for events that exceed 60 minutes, or involve the death or injury of a consumer.)
- The APD agency senior behavior analyst or designee will communicate the correction or follow up needs to the regional senior behavior analyst via a note in APD iConnect. Navigate to the consumers record and select the tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - Note Type = Reactive Strategies
 - Note Subtype = Required Follow-up
 - Description = (insert Event ID) Revision Requested or Follow Up Requested
 - Note = details of the corrections or follow up that is needed
 - Status = Complete
 - Recipient = regional senior behavior analyst

Behavioral Services

The screenshot shows the 'Notes Details' form in the iConnect system. The form is titled 'Notes' and is dated 7/19/2023 3:10 PM. The user is Carrie Abner. The form includes the following fields:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 07/19/2023
- Program/Provider: (empty)
- Note Type: Reactive Strategies
- Note Sub-Type: Required Follow Up
- Description: Revision Requested OR Follow Up Requested
- Note: (Rich text editor with text: enter the details of the corrections and/or follow up being requested.)
- Status: Complete
- Date Completed: 07/19/2023

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

Role = Region Clinical Workstream Worker

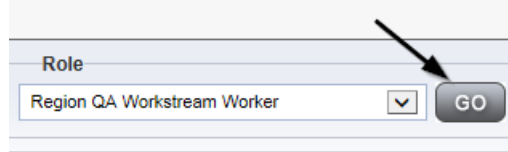
7. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes > Complete** for incoming notes.
8. The Regional Senior Behavior Analyst or designee will select the **Reactive Strategies > Required Follow Up** note from the list view and review the note that corrections and/or follow up that is needed.
9. Proceed to [Corrections Required section](#) OR
10. Proceed to [Follow Up During LRC Meeting section](#) OR
11. Proceed to [Follow Up via Scheduled Meeting section](#) OR
12. Proceed to [Follow Up via a Note section](#).

Behavioral Services

4. As Needed: Word Merges

Generating the Word Merge

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



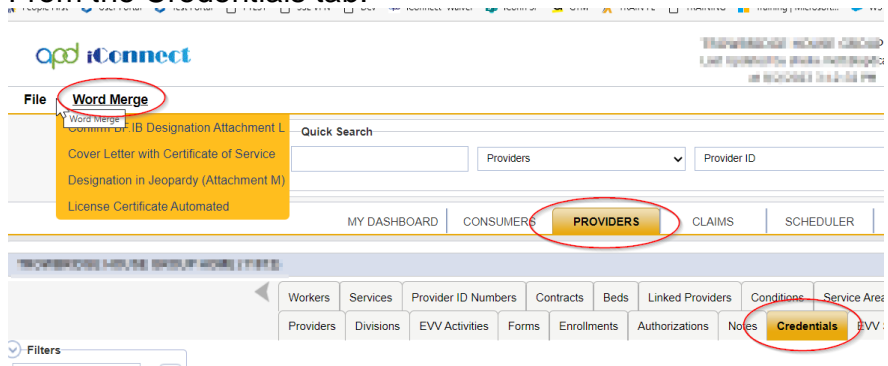
A screenshot of a web form showing a dropdown menu for 'Role' with 'Region QA Workstream Worker' selected. A black arrow points to a 'GO' button to the right of the dropdown.

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 'Word Merge' menu in a form. The 'Word Merge' option is circled in red. Below the menu, there is a section titled 'ATTACHMENT E' and a note: '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.' The form also includes fields for Consumer Name (First Name: Carrie, Middle Name: R, Last Name: Abner), Review Date (07/03/2023), Division (APD), and Worker (Buck, Jennifer).

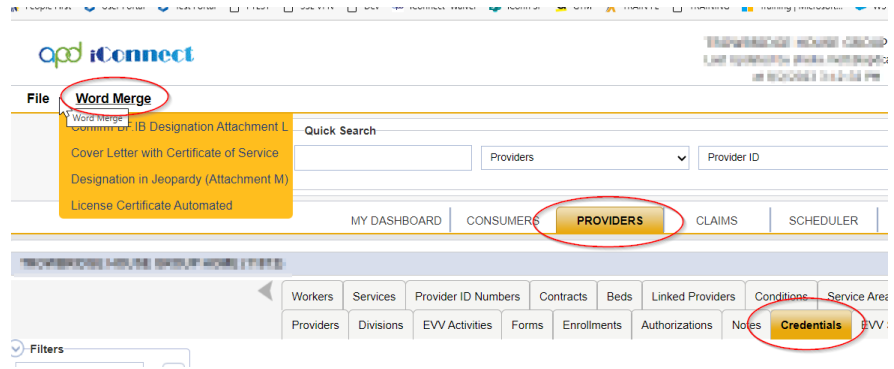
- ii. From the Credentials tab:



A screenshot of the 'Word Merge' menu in the Credentials tab. The 'Word Merge' option is circled in red. The menu also includes options for 'Cover Letter with Certificate of Service', 'Designation in Jeopardy (Attachment M)', and 'License Certificate Automated'. The 'PROVIDERS' tab is highlighted in the navigation bar, and the 'Credentials' tab is highlighted in the bottom navigation bar.

- iii. From the Providers tab:

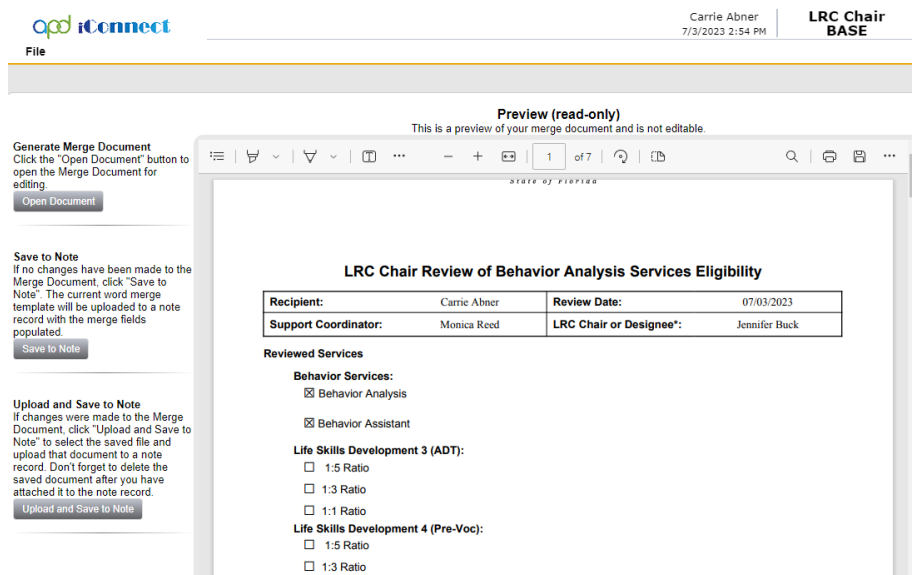
Behavioral Services



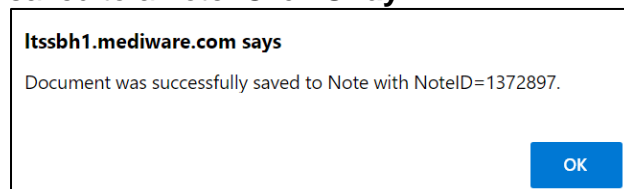
3. The Word Merge preview window displays.

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.

Behavioral Services

The screenshot shows the iConnect Notes interface. At the top, the iConnect logo is on the left, and the user name 'Carrie Abner' and 'Notes' are on the right. Below the header, there is a 'File Tools' menu. The main area is titled 'Notes Details' and contains a form with the following fields:

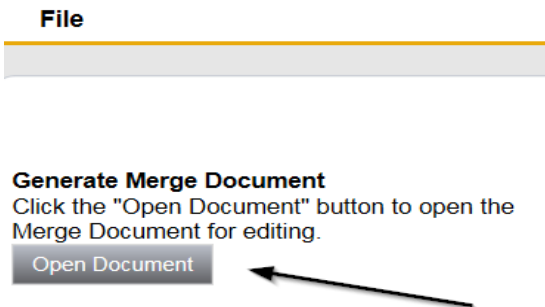
- Division: APD
- Note By: Buck, Jennifer
- Note Date: 07/21/2023
- Program/Provider: (empty dropdown)
- Note Type: Behavioral Services
- Note Sub-Type: BASE Completed
- Description: Word Merge Template

Below the form is a large text area for the note content. At the bottom of the form, there is a 'Status' dropdown set to 'Complete' and a 'Date Completed' field set to '07/21/2023'. A 'New Text' window is open over the text area, showing a rich text editor with buttons for Bold, Italic, Underline, font size (16px), and text color. An 'Append Text to Note' button is located at the bottom of the 'New Text' window.

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

Edits Needed

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



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

Behavioral Services

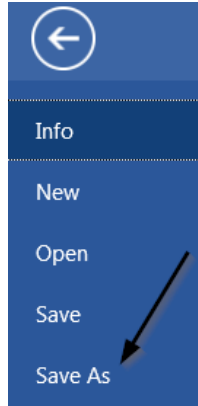
The screenshot shows the 'Draft iBudget Provider Applicant Services Listings Form' with the following fields filled: Applicant Business Name (if applicable): Monica's Group Home; Applicant Name: A TEST Provider; Applicant Address: 55 South Washington St. JACKSONVILLE, FL 32244; Email Address: 777@anywhere.com; Phone Number: (888)888-8819. Two dialog boxes are overlaid on the form. The first dialog box asks 'Do you want to save WM_P003_Draft-APD-iBudget-Regional-Provider-Services-Listing-Letter.docx (66.4 KB) from fwtest.harmonys.net?' with 'Save' and 'Cancel' buttons. The second dialog box 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 from the text in step 3 to the 'Save' button and the 'Open' button.

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

The screenshot shows the 'Draft iBudget Provider Applicant Services Listings Form' with the following fields filled: Applicant Business Name (if applicable): 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: '. Below these are two instructions: '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 from the text in step 4 to the 'Solo' and 'Agency' checkboxes.

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.

Behavioral Services



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.

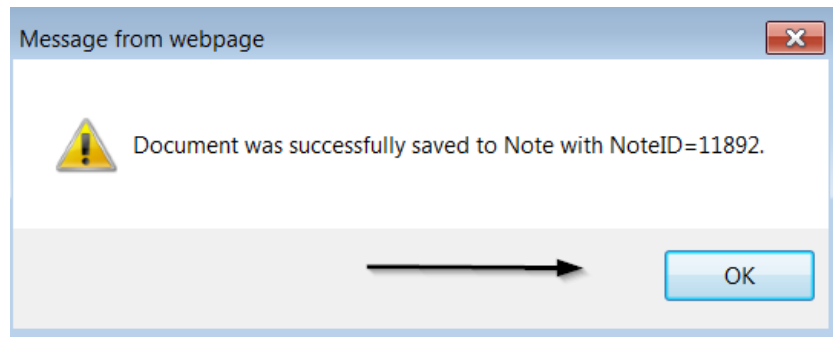
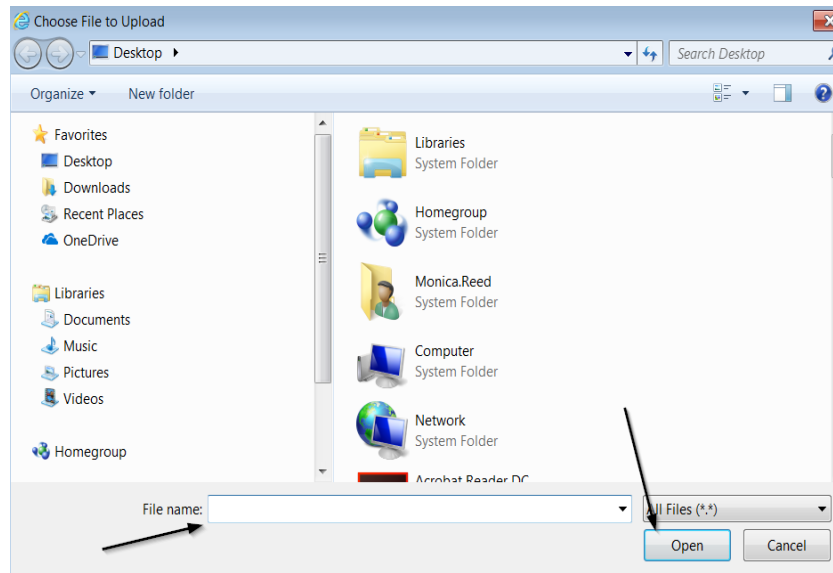
Save to Note

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.

Behavioral Services




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

Behavioral Services

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

Note Recipients	
<input type="text" value="Add Note Recipient"/>	<input type="button" value="Clear"/>



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

