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

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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:

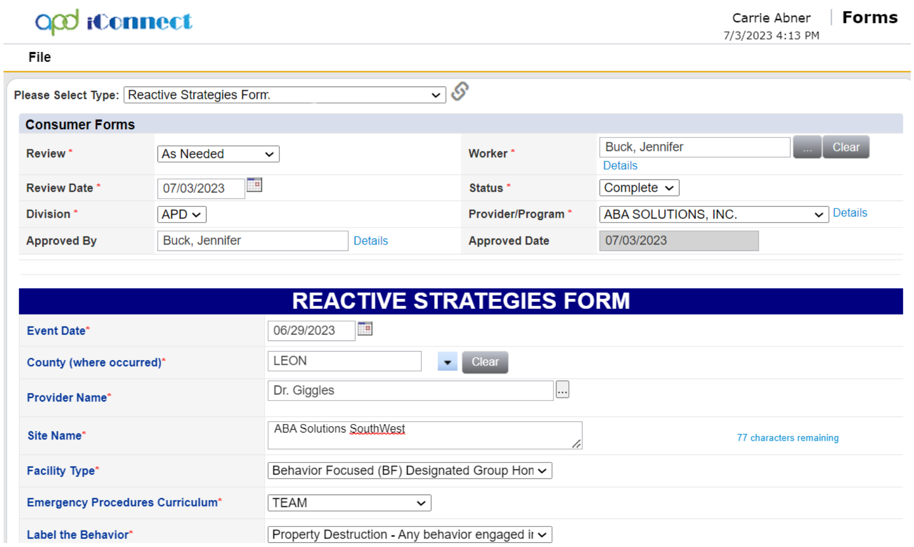
1. The service provider uses one or more reactive strategies during a single event.
2. The service provider completes the Reactive Strategies form in APD iConnect.
3. The regional senior behavior analyst or
4. designee runs a report to identify events that require follow up.

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

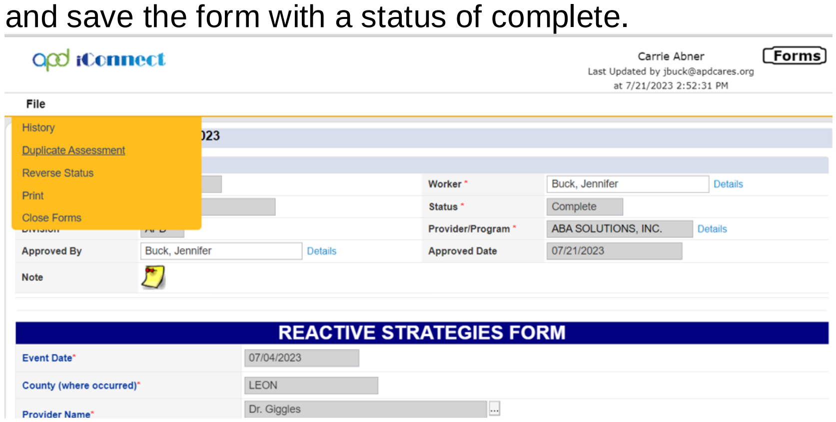
3. Complete the questions in the form. When all questions are answered, change the form status to Complete.



4. 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.



5. 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.

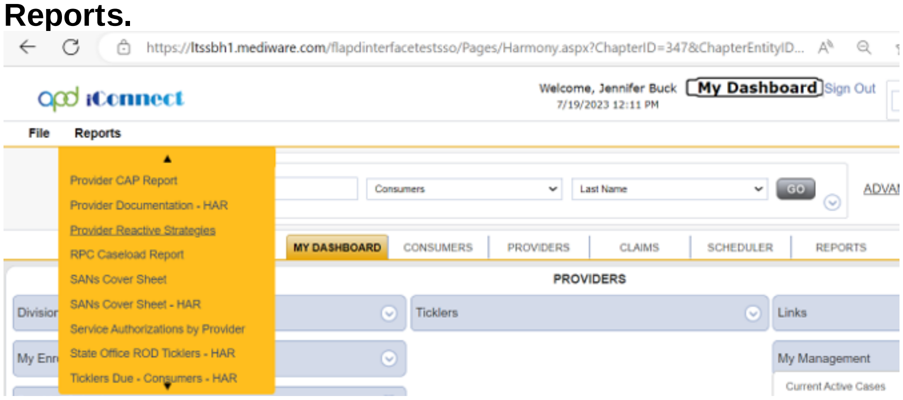
2. Reactive Strategies Event Review and Follow Up

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.

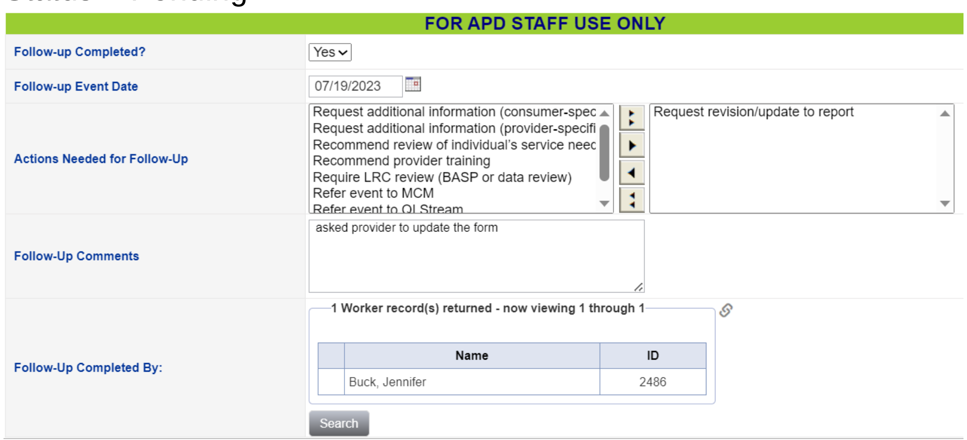
2a. Corrections Required

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

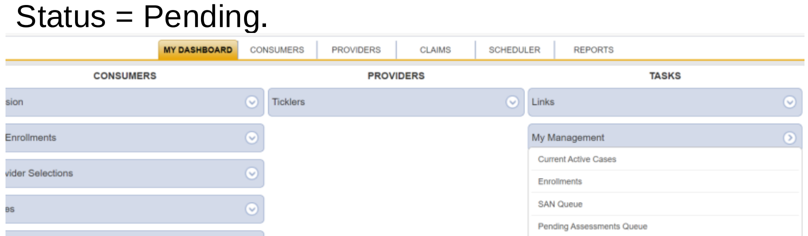
form. The regional senior behavior analyst will reverse the status of the Reactive Strategies form so the provider can make the corrections. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form. The Form Details page displays.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

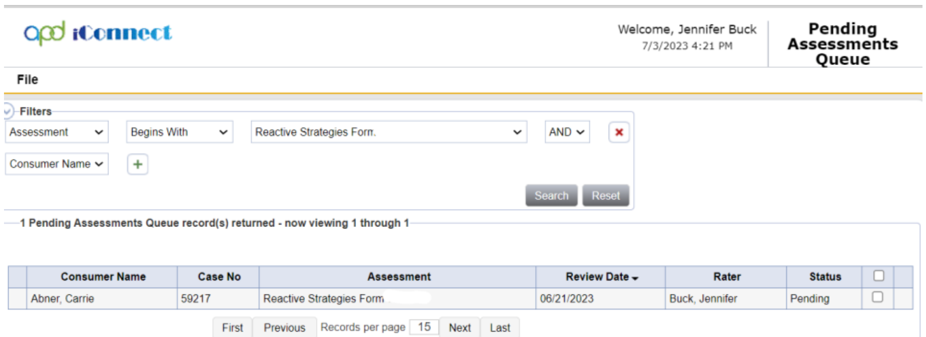
a. Follow up Completed? = Yes
b. Follow-up Event Date = enter date
c. Actions Needed for Follow-Up = Request revision/update to report
d. Follow up Comments = enter if needed
e. Follow Up Completed By = search for an select your name
f. Assessor/Worker = change to self, at the top of the page. This will allow you to find the form in the Pending Assessments Queue.
g. Status = Pending



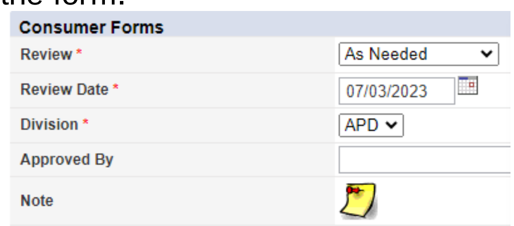
2. From the **File** menu, select **Save Forms, NOT Save and Close Forms**.

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.





3. 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.

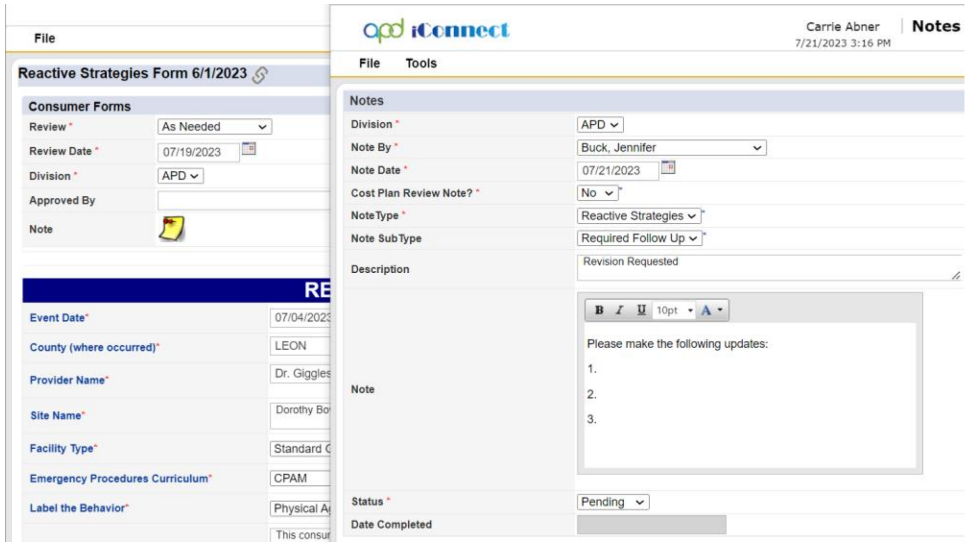


Note
The form must be saved, at least one, to display the Note icon. Save the form by selecting the **File** menu, then select **Save Form**.

4. 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 = Revision Requested
   e. Note = list the corrections that need to be made
   f. Status = Pending
   g. Recipient = provider

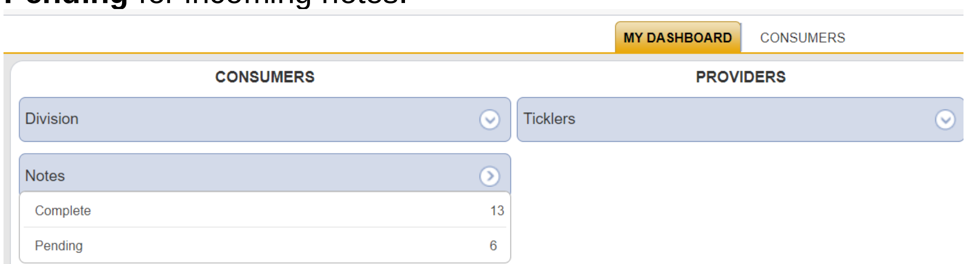
5. From the **File** menu, select **Save and Close Notes**.

6. 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.

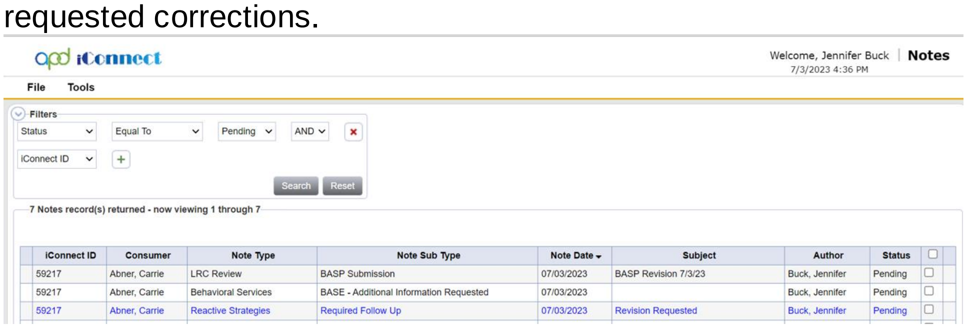


Role = Service Provider, Service Provider Worker

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

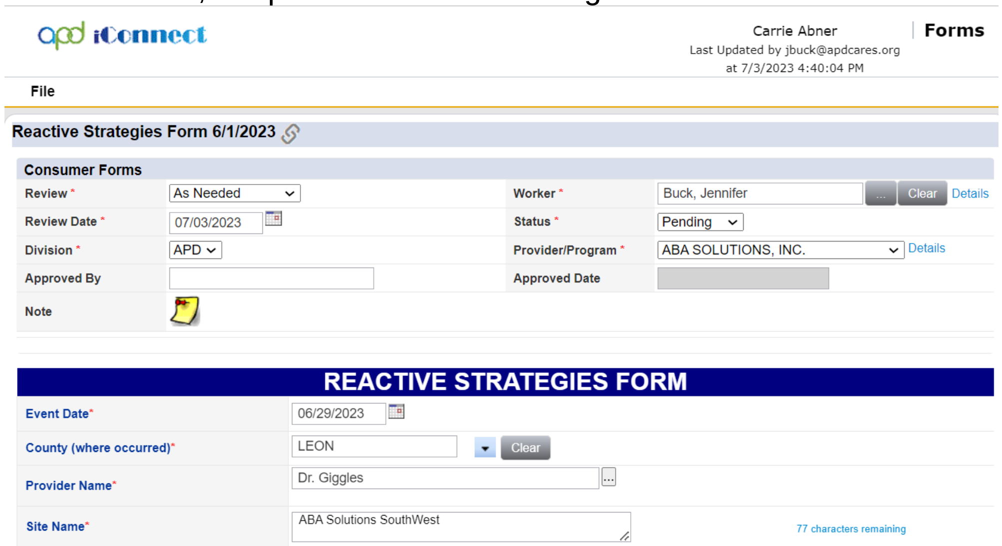


8. The provider will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes for the requested corrections.



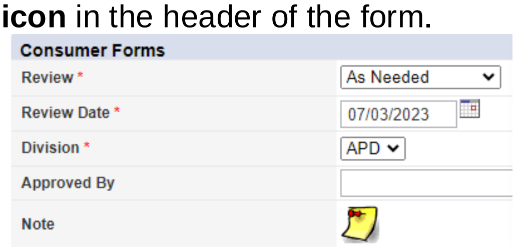
9. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
   a. Questions on the form that need to be corrected per instruction in the Reactive Strategies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

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



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.



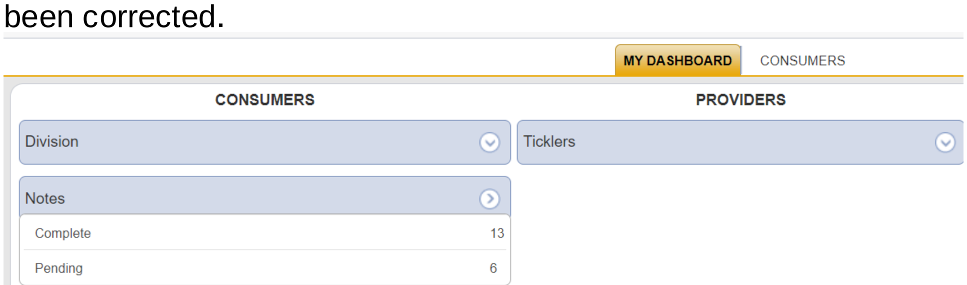
12. Click the **Note icon**. The Note Details page displays. Update the following fields:
    a. Note = details on the corrections that were made. Click **Append Text to Note.**
    b. Status = Complete
    c. Recipient = regional senior behavior analyst

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

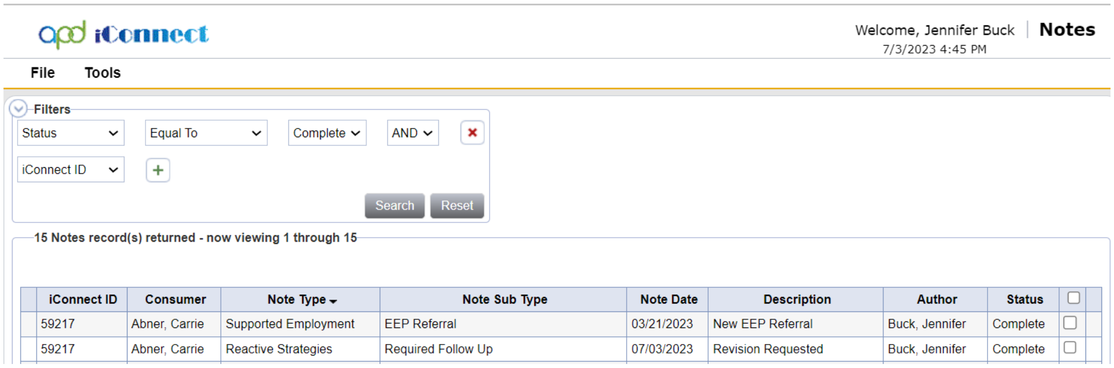
14. The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. Keep the form in Pending status. The form status will be changed to complete later in the workflow.

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.



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.

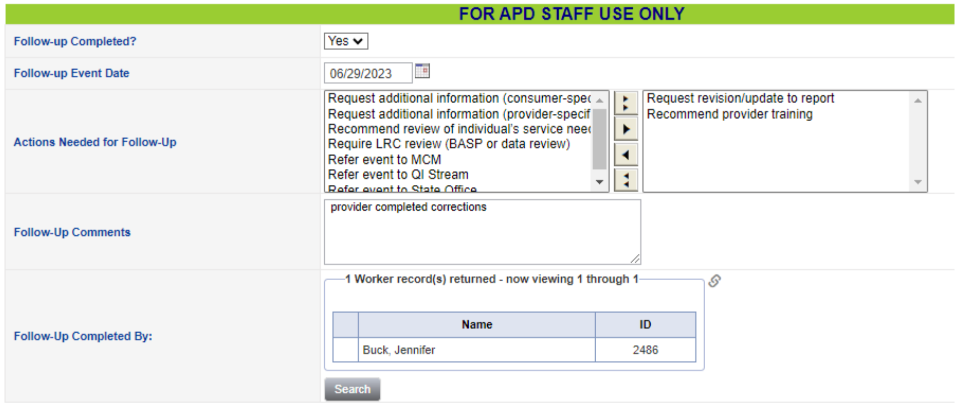


Note

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:
    a. APD Follow Up Completed = Yes
    b. Follow-up Event Date = select the date
    c. Actions Needed for Follow-Up = select one or more actions
    d. Follow-Up Comments = enter comments
    e. Follow-Up By = enter name
    f. In the Header, change the status to Complete



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

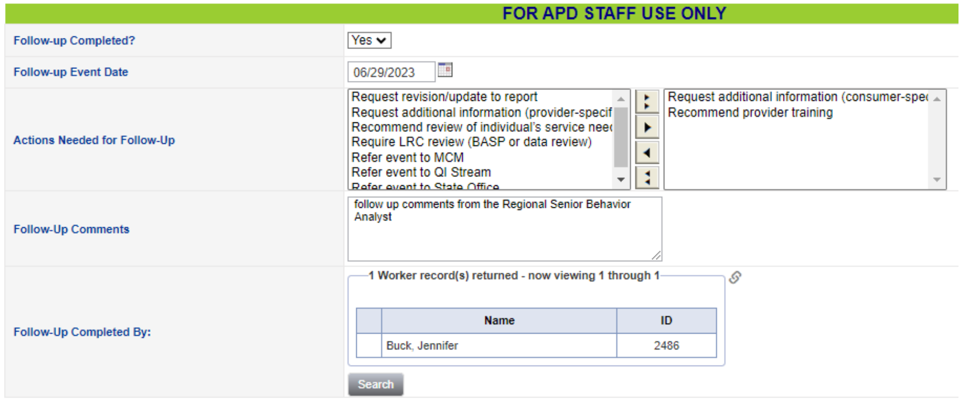
b. Follow Up Required

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

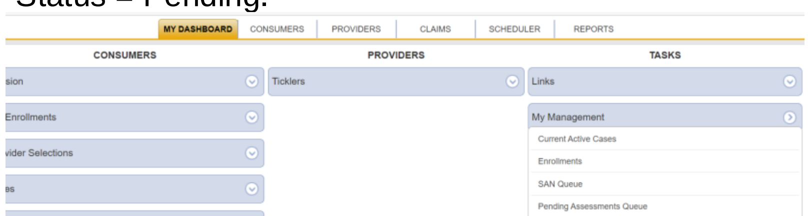
1. For events that require follow up, the regional senior behavior analyst or designee will document the follow up actions on the Reactive Strategies form. The regional senior behavior analyst will first have to reverse the status of the form before edits can be made. Navigate to the consumer's record 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



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.

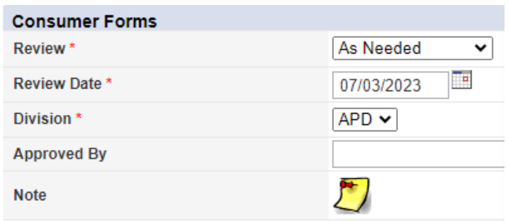
2. After the follow up section of the Reactive Strategies form is completed from the previous section, change the status of the form to Complete.

5. From the **File** menu, select **Save and Close Form**. Proceed to the LRC Meeting section.

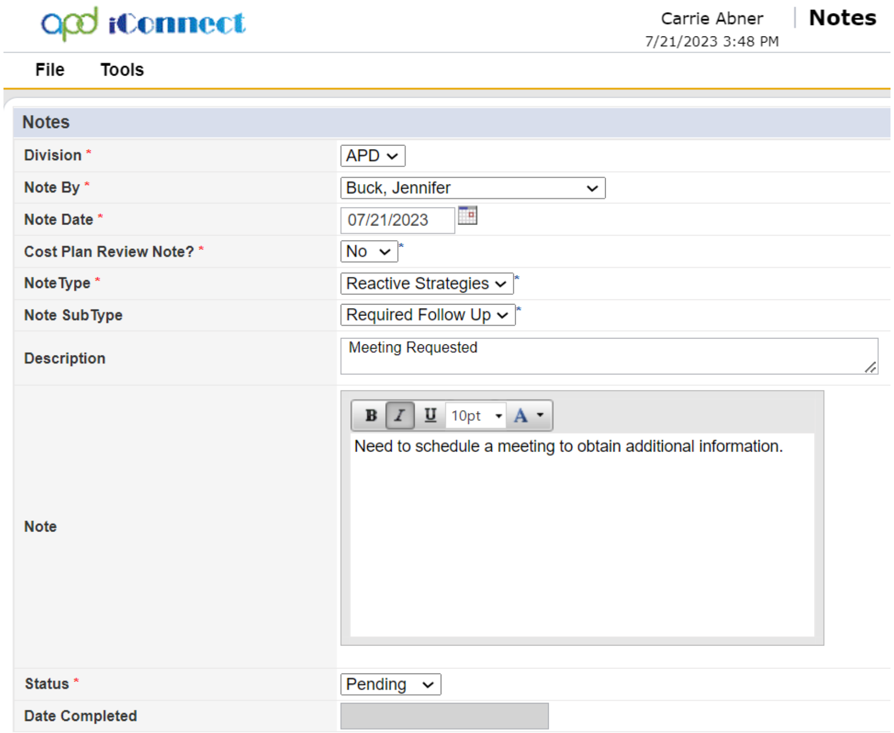
2bii. Follow Up via Scheduled Meeting

Role = Region Clinical Workstream Worker

1. 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.



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 = Meeting Requested
   e. Note = additional details of the request
   f. Status = Pending
   g. Recipient = provider



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

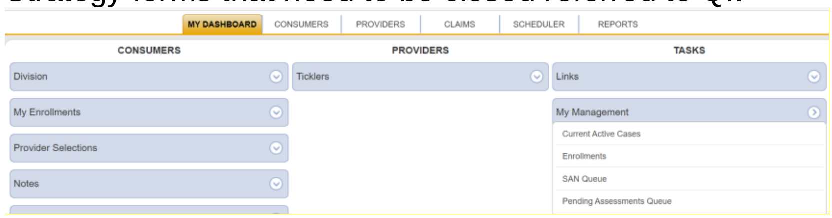
4. The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. Keep the form in Pending status. The form status will be changed to complete later in the workflow.

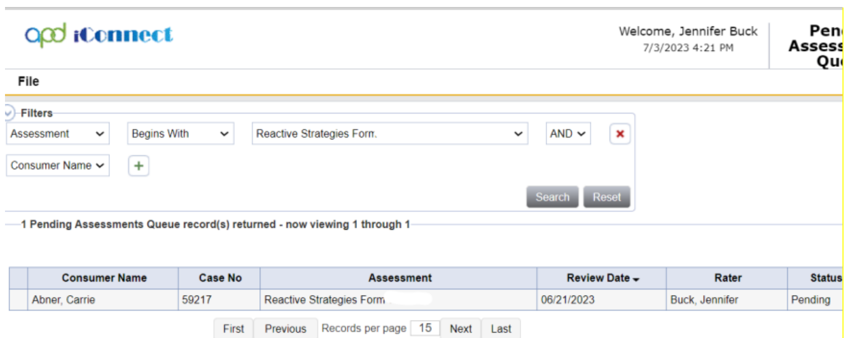
Note

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.





Role = Service Provider, Service Provider Worker

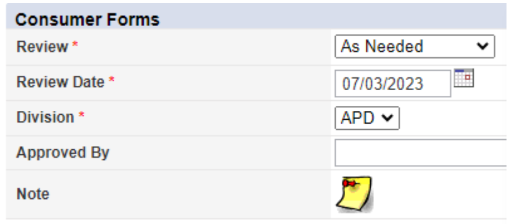
5. The provider monitors **My Dashboard > Notes > Pending** for incoming notes regarding the requested meeting.

6. The provider meets with the regional senior behavior analyst and provides additional information.

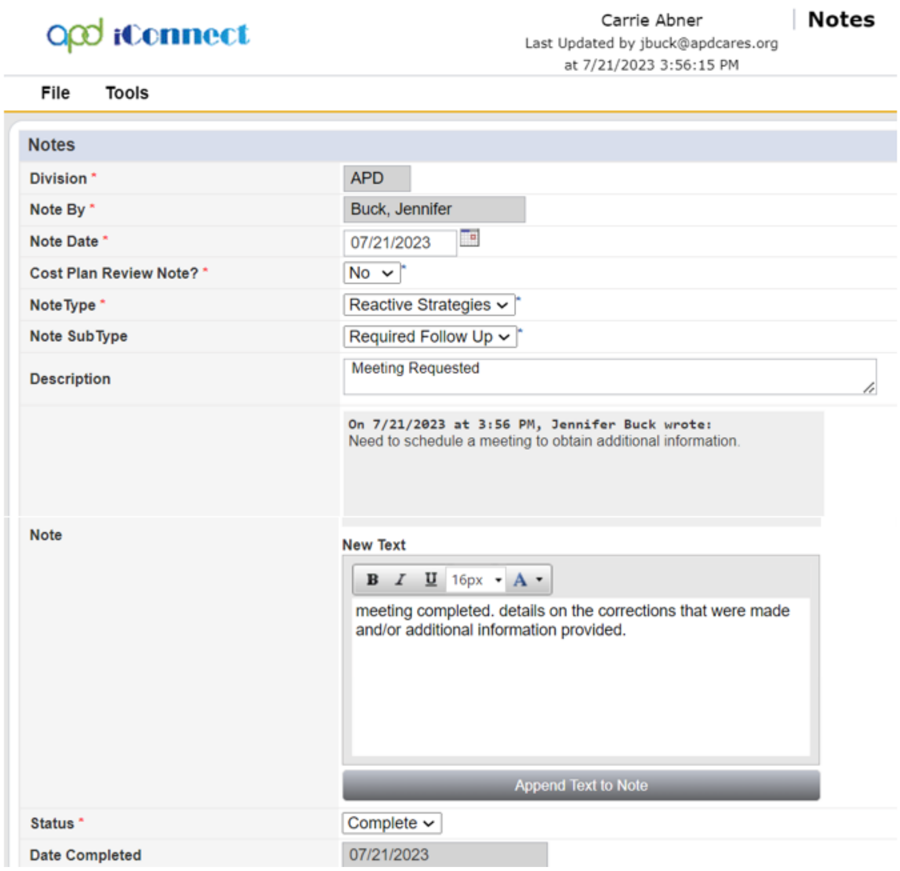
7. The provider may also need to update the Reactive Strategies form depending on the outcome of the meeting. If applicable, navigate to the consumer's Forms tab. From the list select the **Reactive Strategies form** in Pending status. Update fields as needed. Leave the form in Pending status. From the **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.

Behavioral Services



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



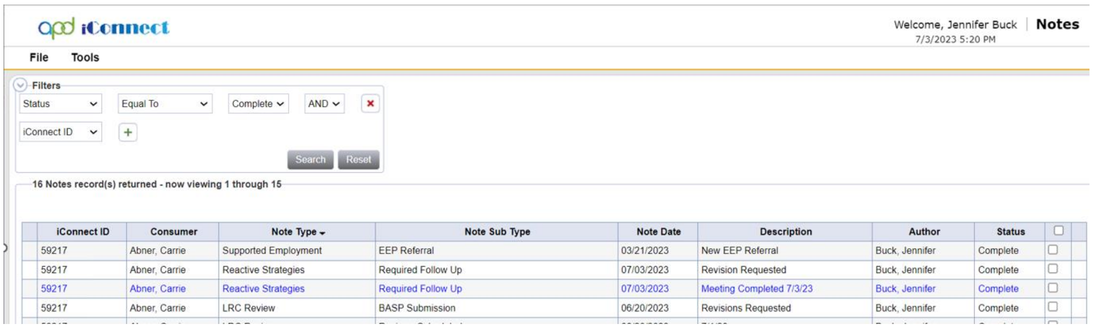
10. From the **File** menu, select **Save and Close Notes**.

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

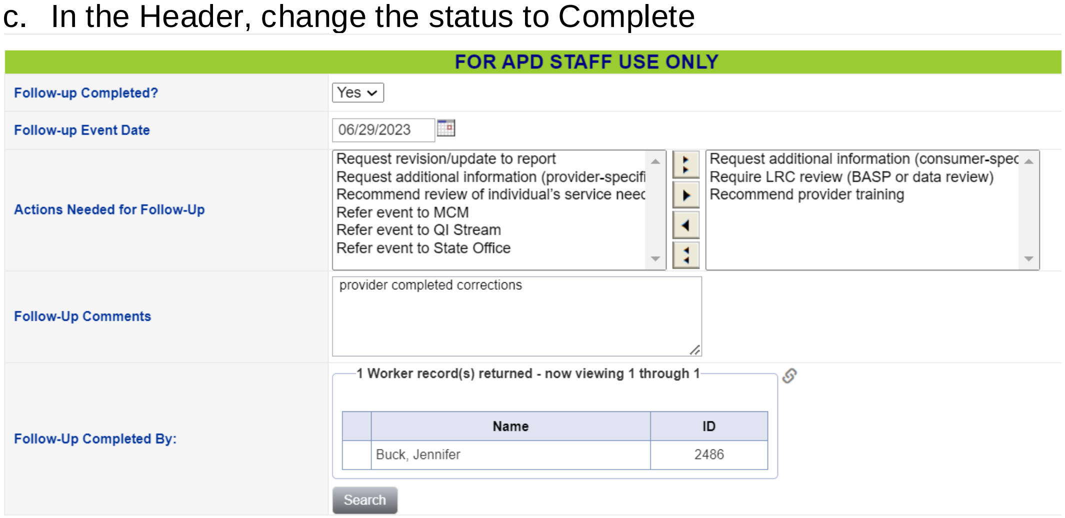
12. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes** > **Complete** for incoming notes as notification the additional information has been provided.

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



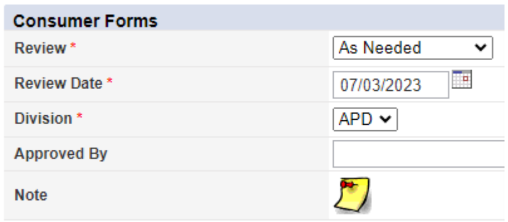
15. From the **File** menu, select **Save and Close Form**.

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.

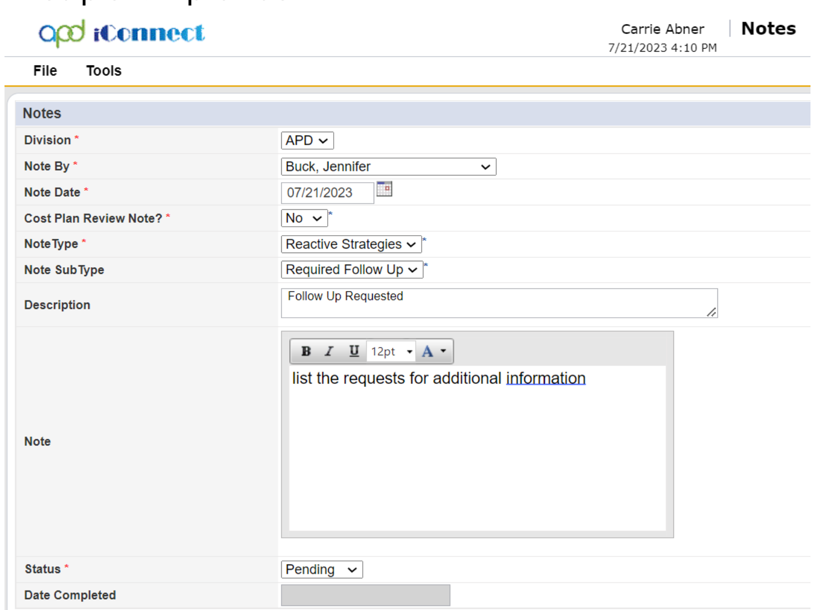
2biii. Follow Up via a Note

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.



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

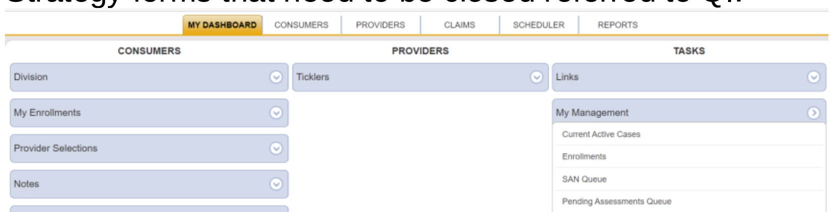


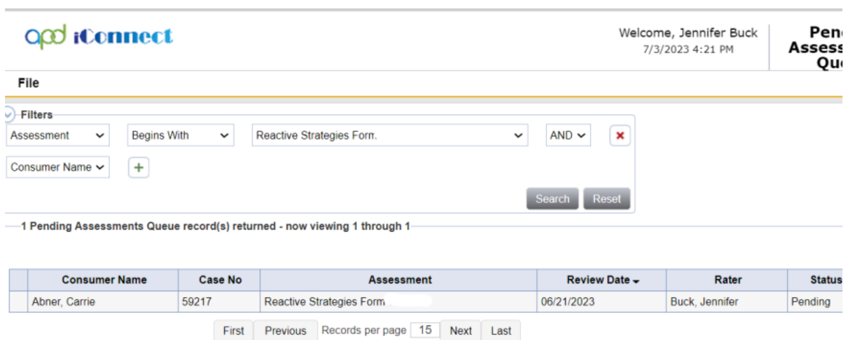
3. From the **File** menu, select **Save and Close Notes**.

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.

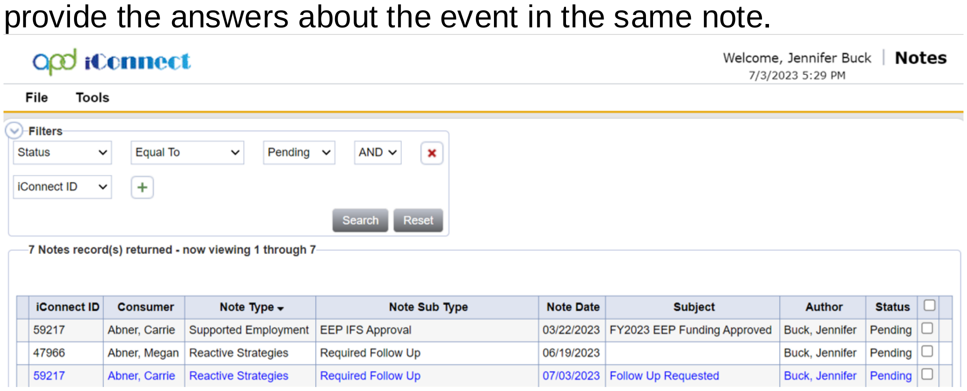
Note
The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of **Reactive Strategy** forms that are pending follow up.
Filter by Filter by Assessment = Reactive Strategies Form Status = Pending.
If follow up details are never received, the senior regional behavioral analyst can use this queue to identify Reactive Strategy forms that need to be closed referred to QI.



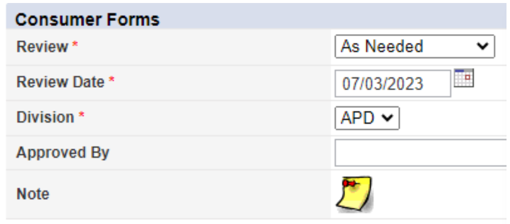


Role = Service Provider, Service Provider Worker

5. 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.

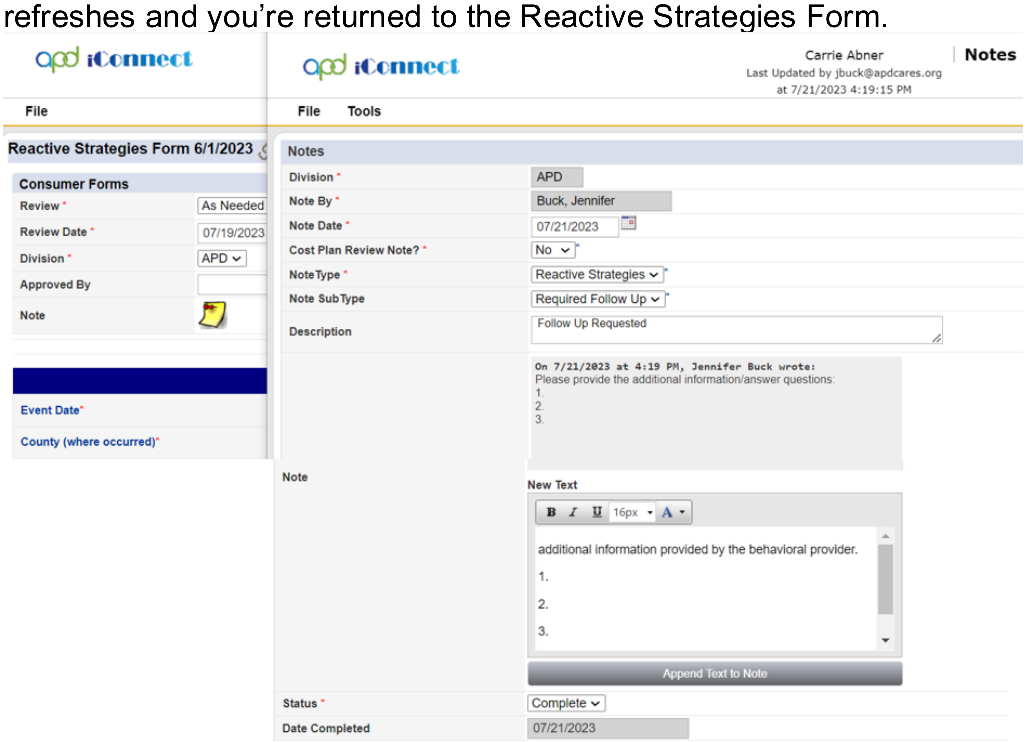


6. The reactive strategies follow up note is also accessible from the Reactive Strategies Form from the **Note icon** in the header of the form.



7. Click the **Note icon**. The Note Details page displays. Update the following fields:
   a. Note = answers questions/provides additional information about the event. Click **Append Text to Note**.
   b. Status = Complete
   c. 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.



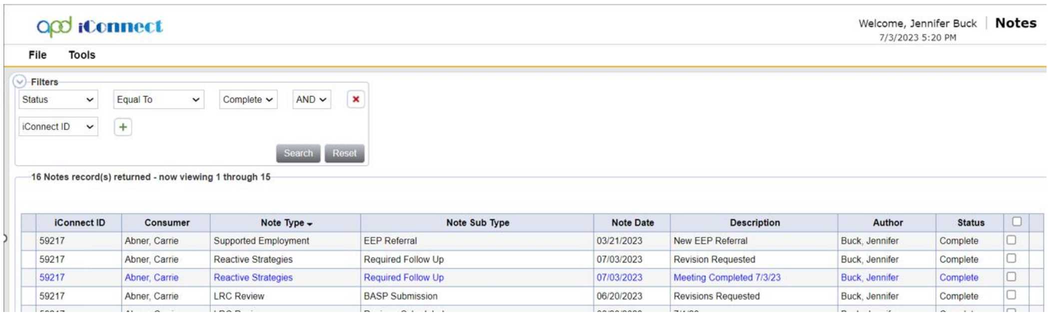
9. Leave the form in Pending status. From the **File** menu, select **Save and Close Forms.**

Role = Region Clinical Workstream Worker

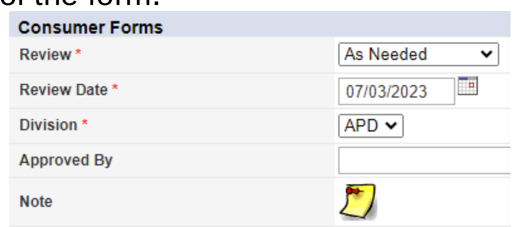
10. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes** > **Complete** for

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.

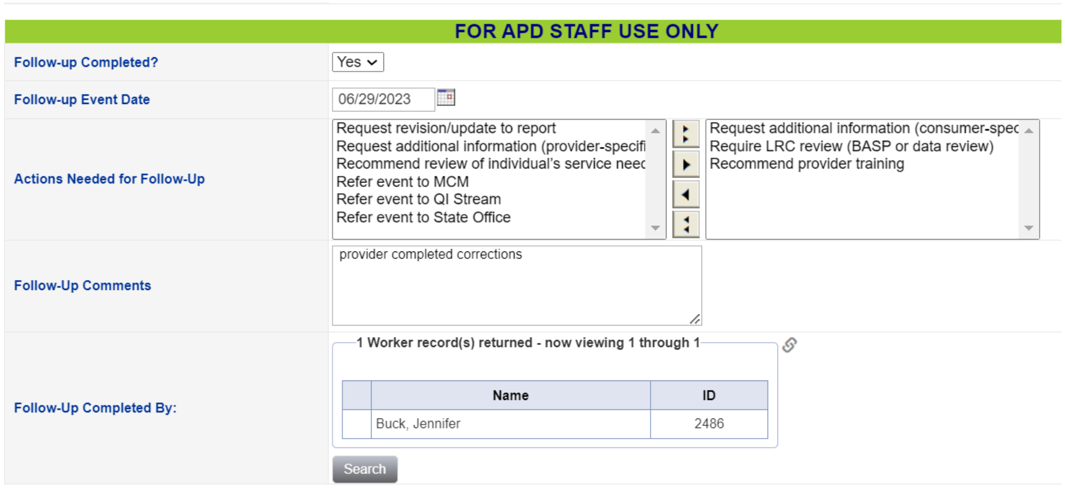


12. The reactive strategies follow up note is also accessible from the Reactive Strategies Form from the **Note icon** in the header of the form.



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



FOR APD STAFF USE ONLY

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 neec 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
Follow-Up Completed By:	1 Worker record(s) returned - now viewing 1 through 1 Name: Buck, Jennifer — ID: 2486 Search

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

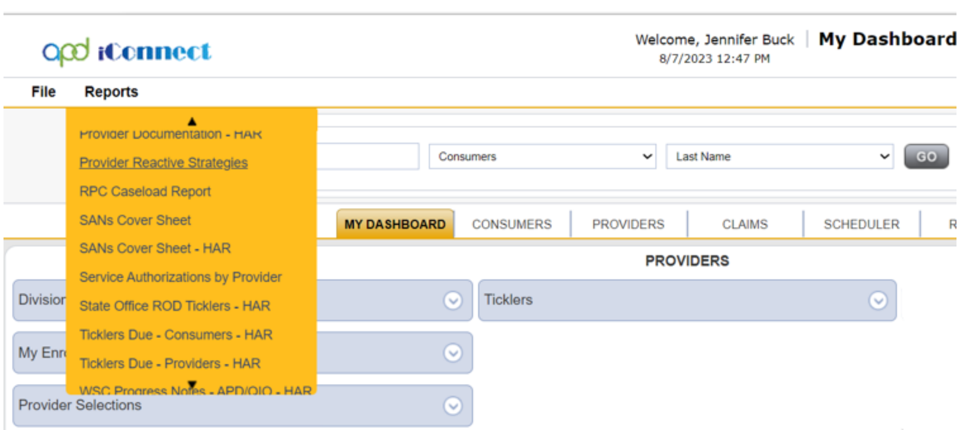
The APD agency senior behavior analyst may identify corrections or follow up needs that were not completed by the regional senior behavior analyst. The APD agency senior behavior analyst will notify the Region to work with the provider to complete the corrections and/or follow up according to the steps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

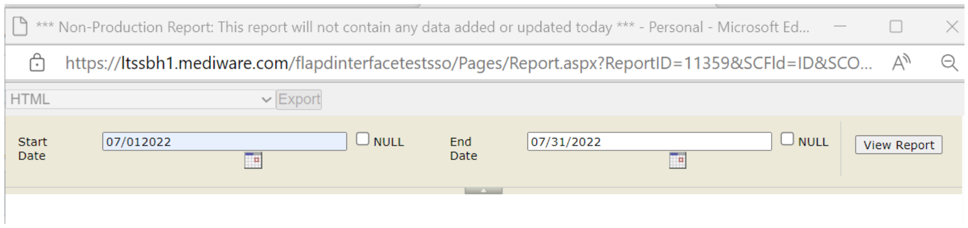
1. The APD agency senior behavior analyst runs the Provider Reactive Strategies report to identify events that require follow up that were not completed by the Region.
   a. This same report provides data to generate statistics and graphs for the quarterly CMS report.
2. Communicate with the regional 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

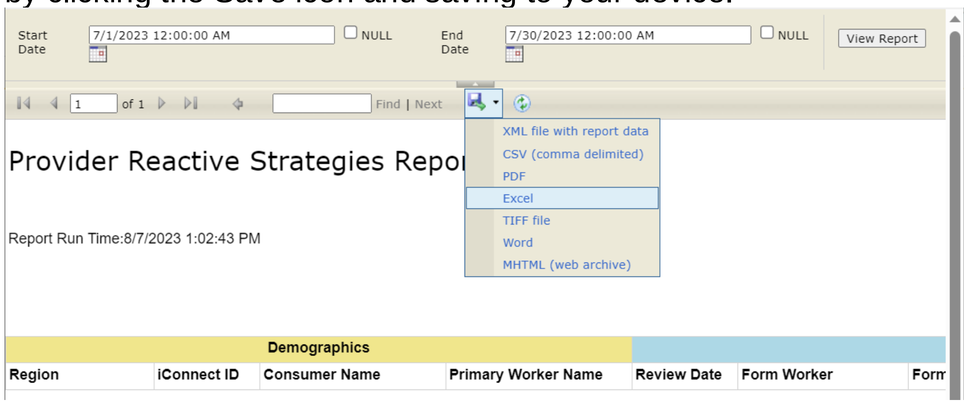
1. APD agency senior behavior analyst or designee runs the Provider Reactive Strategies report to identify events that require follow up. To run the report, navigate to **My Dashboard**. From the **Report** menu, select the **Provider Reactive Strategies** report.



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



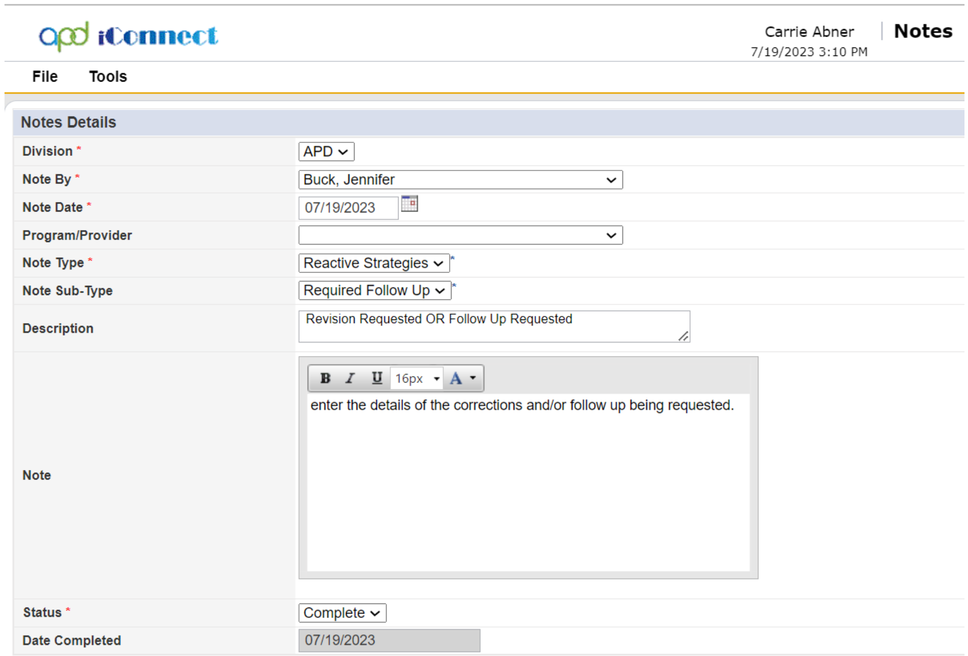
3. The results display on the screen and can be exported to Excel by clicking the Save icon and saving to your device.



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.

4. 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.)

5. 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:
   a. Note Type = Reactive Strategies
   b. Note Subtype = Required Follow-up
   c. Description = (insert Event ID) Revision Requested or Follow Up Requested
   d. Note = details of the corrections or follow up that is needed
   e. Status = Complete
   f. Recipient = regional senior behavior analyst



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

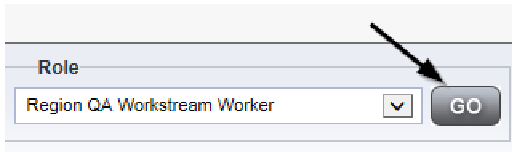
Role = Region Clinical Workstream Worker

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.

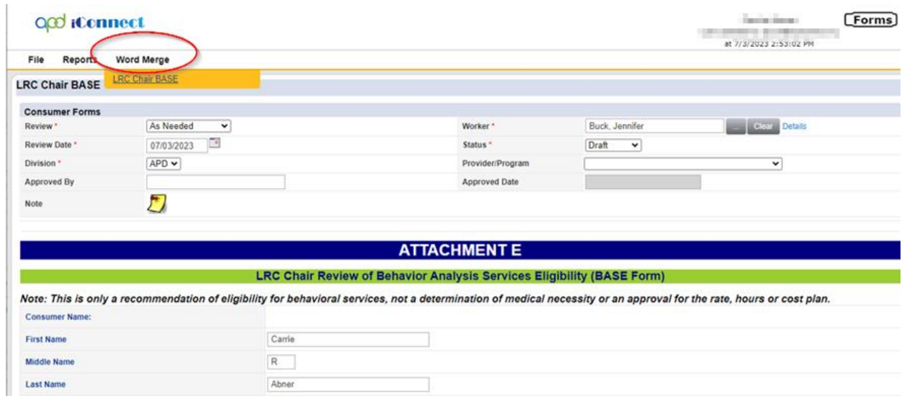
4. As Needed: Word Merges

Generating the Word Merge

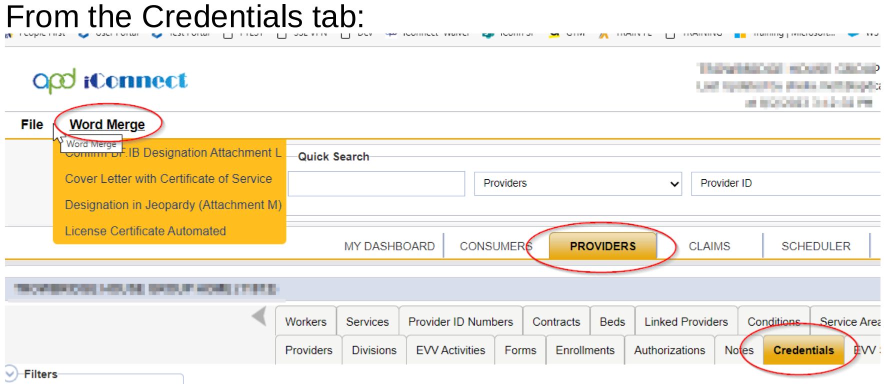
1. Set “Role” = Region QA Workstream Worker then click **Go**



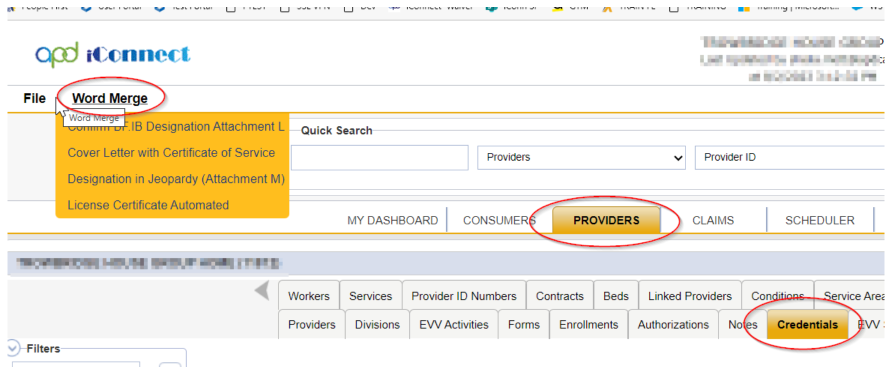
2. From the appropriate **Word Merge** menu based on the workflow, select the desired word merge.
   a. Examples of **Word Merge** menus
      i. From a form:



      ii. From the Credentials tab:



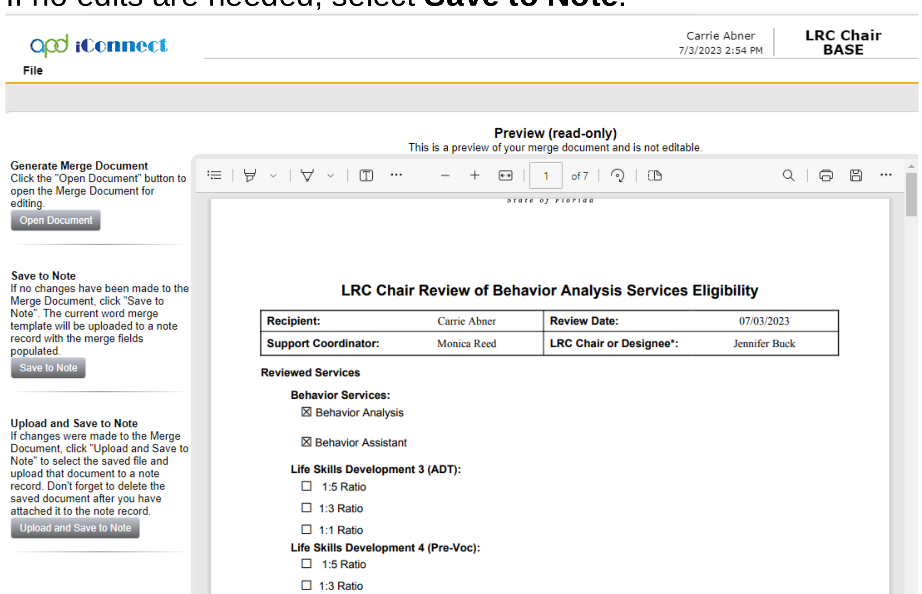
      iii. From the Providers tab:



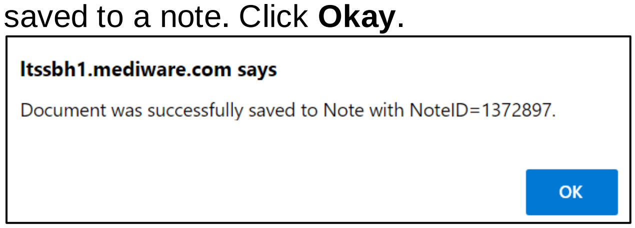
3. The Word Merge preview window displays.

No Edits Needed

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

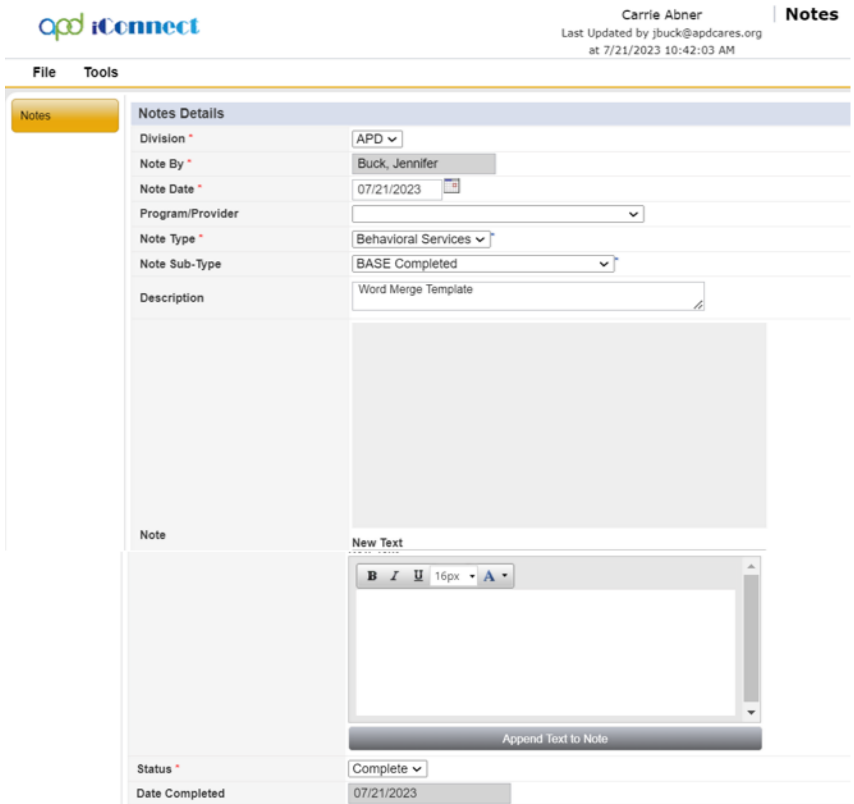


2. A notification message displays confirming the Word Merge was saved to a note. Click **Okay**.



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

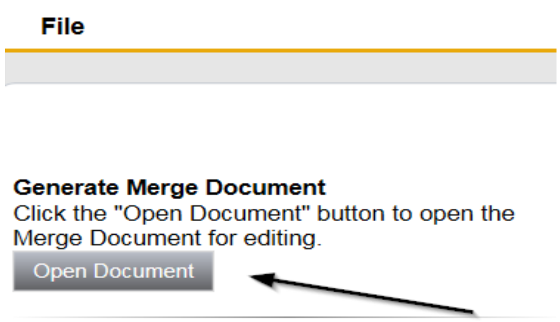
Behavioral Services



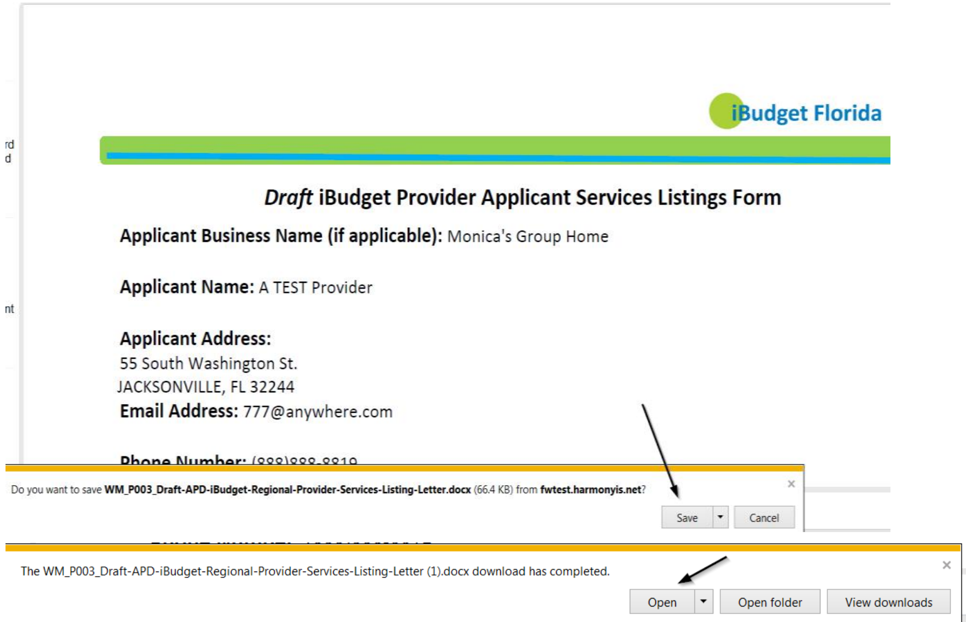
4. From the **File** menu, select **Save and Close Notes**.

Edits Needed

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

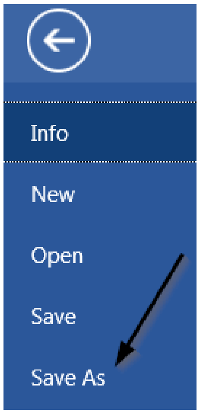


2. Save the Word Merge Document to the computer desktop by clicking the **Save** button and then **Open.**

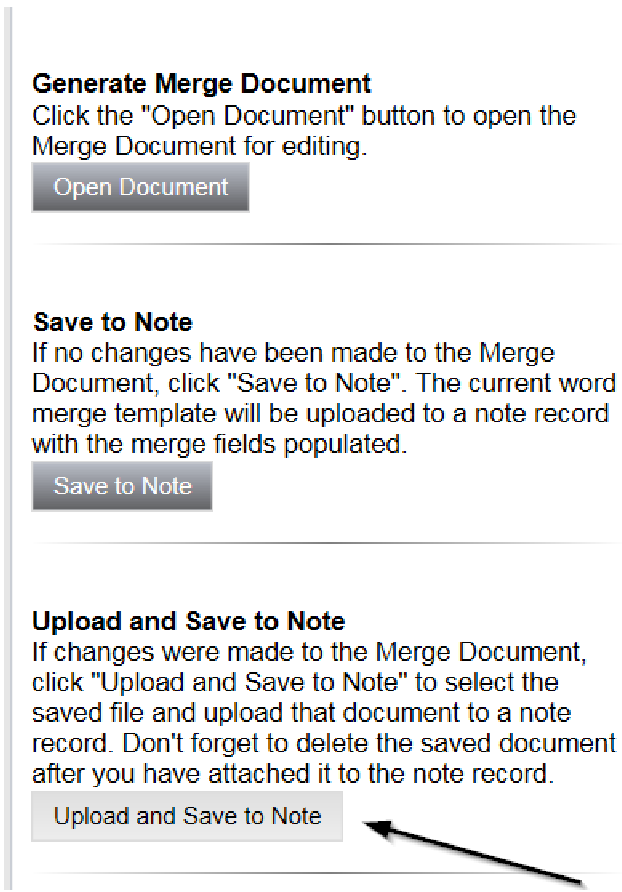


3. **Edit** the Word Merge Document as necessary.

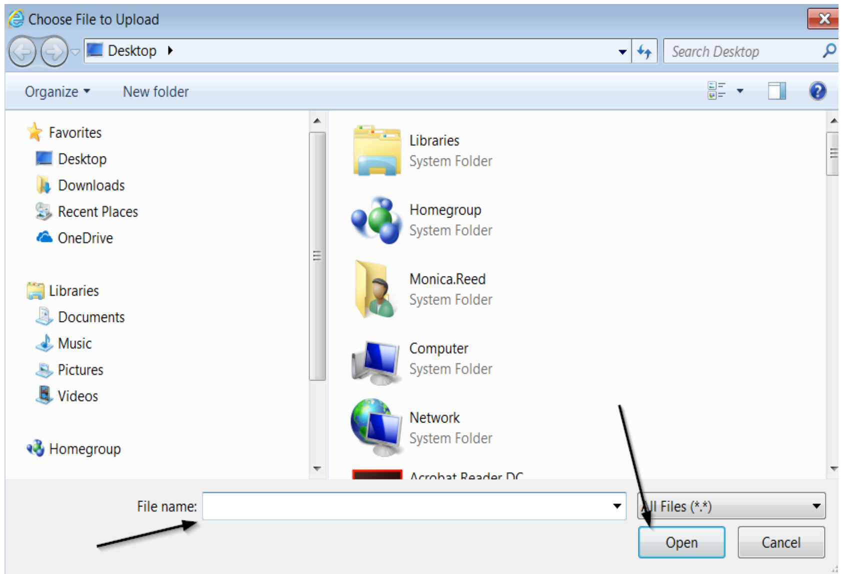
4. When finished with editing the Word Merge Document, click **File > Save as** to save the updated Word Merge to a specified folder on the user’s device.

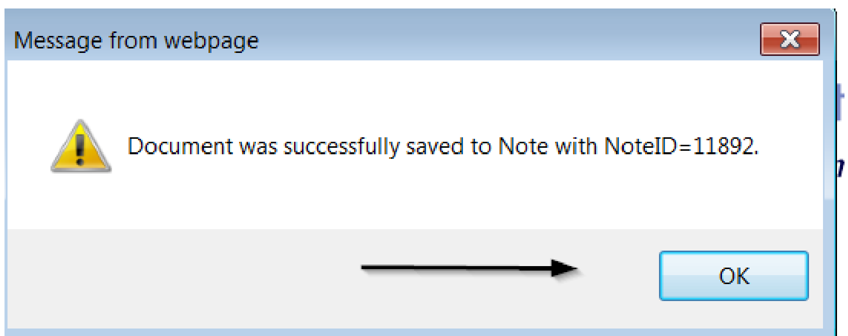


5. In APD iConnect, Click **Upload and Save to Note** after saving the word document.

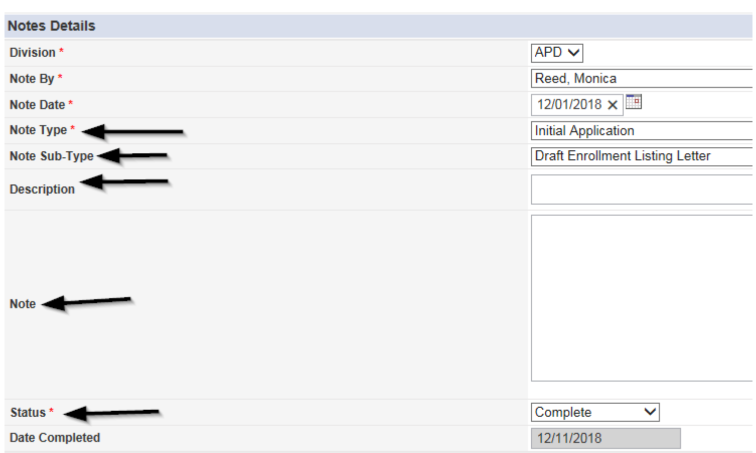


6. Select the file name on the device and then Click **Open** to open the word document and then click **OK** on the pop-up message box.

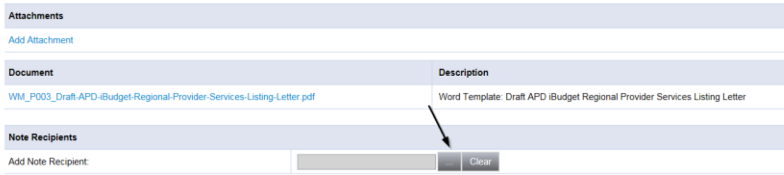




7. In the new Notes Detail Screen, update the fields according to the associated workflow.



Behavioral Services



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