



State of Florida

Agency for Persons with Disabilities

APD iConnect

Provider Mini-Manual For Providers

V1 April 27, 2020

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Introduction | Provider Management Training Mini-Manual

Summary

APD iConnect maintains a provider network that serves the consumers of the State of Florida - Agency for Persons with Disabilities. Due to the rolling implementation schedule for iBudget Waiver providers, this document reflects the specific functionalities included in the 2020 implementation schedule. It is not the entire Provider Management Training Manual. Additionally, for ease of use it also include excerpts from the Financial Management Training Manual, and the Electronic Visit Verification Training Manual.

Once all provider related functionalities are implemented in APD iConnect, the Provider Management Training Manual will be published in its entirety.

Learning Objectives for Provider Management Training Mini-Manual:

Log into and out of APD iConnect

Successfully navigate APD iConnect

Submit provider renewals and expansion requests

Respond to Plans of Remediation Corrective Action Plans (CAPs) and Complaints

Submit/void claims for services rendered

Assign workers to deliver services via the APD iConnect Electronic Visit Verification (EVV) mobile site

Review EVV service documentation

Submit claims for EVV services

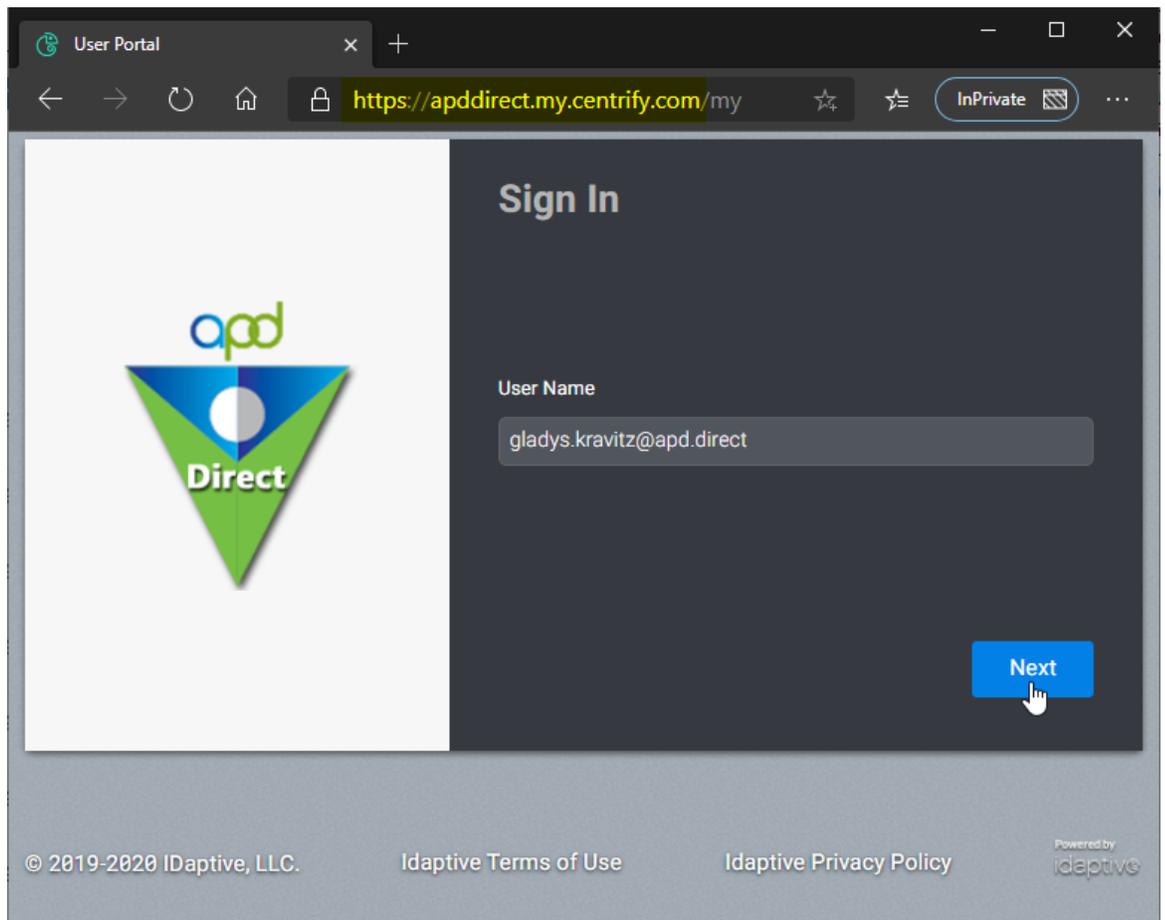
Navigating APD iConnect

APD iConnect is an application that is accessed through the Internet. Best Practices recommend Internet Explorer.



Provider Agency Owners and Solo Providers will receive their APD iConnect login credentials after completing the ID PASS identity proofing. Once completed, providers will go to <https://apddirect.my.centriify.com/my> to access APD iConnect.

1. Open Internet Explorer and then enter the URL for APD iConnect
2. At the login, type your **User ID** and click **Next**.



3. Once logged in, the **My Dashboard** is displayed

The screenshot shows the APD iConnect My Dashboard. At the top, the logo 'apd iConnect' is on the left, and the user information 'Welcome, Sheila Mott' and '3/30/2020 11:59 AM' is on the right. The user is logged in as 'Service Provider'. The dashboard is divided into four main sections: CONSUMERS, INCIDENTS, PROVIDERS, and TASKS. Each section contains a list of items with counts and expandable options.

CONSUMERS	INCIDENTS	PROVIDERS	TASKS
Division (6) APD Eligible - Waiver	Inquiry Alert Notes List (0) Unread Alert Notes	Notes (7) Complete Draft I'm Interested I'm Not Interested Pending	Links iConnect eLearning Library iConnect Help Desk
Notes (3) Complete Pending		Ticklers (5) Ticklers	My Management Current Active Cases Pending Plans Ticklers Due
Plans		Ticklers (3) Ticklers	My Claims

4. **Exit APD iConnect**, In the upper right portion of the screen, click **Sign Out**

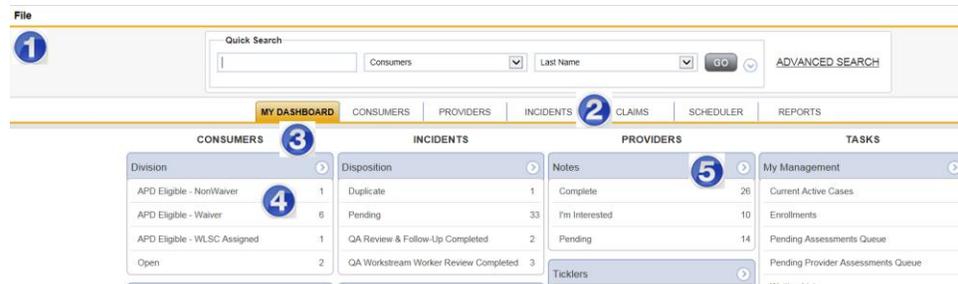
This image is a close-up of the top right corner of the dashboard. It shows the 'My Dashboard' text, a 'Sign Out' link, and a 'Role' dropdown menu set to 'Service Provider' with a 'GO' button. A black arrow points from the bottom left towards the 'Sign Out' link.

My Dashboard

My Dashboard is the user's home page and where tasks can be managed. When users first log in, they will begin from here. Keep in mind that any user's **My Dashboard** page may differ from that of a co-worker's. Roles determine which features a user may have.

My Dashboard Screen Elements

There are several parts of the **My Dashboard** screen, as shown in the screenshot below:



1	The File menu is located throughout the program. Items on the File menu vary, depending on what you are doing. One of the more common functions you will use is the File > Add Notes and File > Save and Close Notes .
2	The tabs along the top of the screen are called Chapters . A chapter is like a section of the program. To move to another chapter, just click it.
3	My Dashboard is divided into areas for consumers, incidents, providers and tasks. You may see all or just some of these areas.
4	Within each area are boxes that contain information. These are referred to as Panes .
5	Each pane includes a down arrow. When you click the down arrow, items in the pane are collapsed. This is helpful if you need more space on your screen. To expand the items in the pane, click the now right-facing arrow.



Many areas of the program allow you to collapse sections (panes). Click the down arrow in the circle . When you click it, it becomes a right-facing arrow .

Activities

Within each Pane on the My Dashboard homepage, numbers will be visible next to different items. These numbers represent the number of activities that are due. For example, in the screenshot below, one can see that there are thirty-nine “ticklers” or reminders.

The screenshot shows the 'MY DASHBOARD' interface with tabs for CONSUMERS, PROVIDERS, INCIDENTS, CLAIMS, and SCHEDULER. Under the PROVIDERS tab, there are two main sections: INCIDENTS and PROVIDERS. The INCIDENTS section has a 'Disposition' pane with counts: Duplicate (1), Pending (6), QA Review & Follow-Up Completed (1), and QA Workstream Worker Review Completed (2). The PROVIDERS section has a 'Notes' pane with counts: Complete (26), I'm Interested (10), and Pending (14). Below the Notes pane is a 'Ticklers' pane with a count of 39, which is highlighted with a black box and an arrow pointing to it from the right.

1. To display the ticklers, click anywhere in the row, as highlighted in the screenshot above. Ticklers will then display:

The screenshot shows the 'iConnect' interface with a 'File' header and a 'Ticklers' section. The 'Ticklers' section displays a table with 3 records. The second record is selected, showing a task guide. The table has columns for Tickler Name, Provider Name, Date Created, Date Due, Date Completed, and Status.

Tickler Name	Provider Name	Date Created	Date Due	Date Completed	Status
Validate all impacted plans have been updated	PERSONAL HEALTH SERVICES	01/31/2020	02/15/2020		New
Validate all Service Authorizations have been updated appropriately	PERSONAL HEALTH SERVICES	01/31/2020	03/01/2020		New
Review the status of any fines prior to licensure renewal	UNITED HEALTHCARE/PLANS-COMPASSION SERVICE, INC.	03/07/2019	08/27/2019		New

2. To complete a task associated with the tickler, first click on the record. In the screenshot below, the second record was selected revealing a task guide known as a **Workflow Wizard**:
3. To activate a **Workflow Wizard**, click anywhere in the blue box.

The screenshot shows the 'Workflow Wizard' task guide. It has a blue box with the text: 'Please create a note and assign it to the Deputy Director/Designees and Specialist/Liaison'. An arrow points to this blue box. To the right is the 'Notes Details' form with fields for Division (APD), Note By (Reed, Monica), Note Date (06/12/2018), Note Type, and Note Sub-Type.

- a. Once the tickler task has been completed, the Date Completed column in the tickler will automatically update with the date of completion.
4. For ticklers that have a due date in the future, uncheck the **Apply Alert Days Before Due** and click on search. The list view grid will refresh and present a list of the ticklers and their due dates.

Filters

Status Equal To New AND

Status +

Apply Alert Days Before Due

Search Reset

117 Ticklers record(s) returned - now viewing 1 through 15

Tickler Name	Provider Name	Date Created	Date Due	Date Completed	Status
Notify Provider Applicant of any Errors or Omissions	A TEST Provider	08/03/2017	09/02/2017		New
Apply for Renewal due to pending License Expiration	A TEST Provider	01/29/2018	01/29/2019		New
Annual License Review	Achieving Independence	01/29/2018	01/29/2019		New
Apply for Renewal due to pending License Expiration	Achieving Independence	01/29/2018	01/29/2019		New
Please create a note after saving this form and assign it to the Deputy Director/Designees and Specialist/Liaison	A TEST Provider	02/12/2018	02/12/2018		New

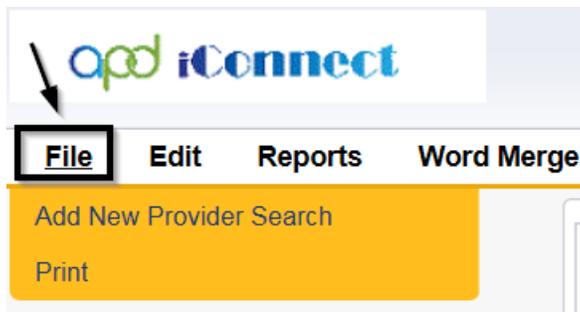


Completing a form via a Workflow Wizard or from the ticklers list, will flag the tickler as complete. It will not mark the status of the form as complete. If the status = pending, you will have to navigate to the forms tab and finish filling out the form and change it to complete.

File Menu Bar

The **File Menu Bar** is displayed throughout the application and is located in the upper left corner of the screen. Depending on the open screen, other menus may be displayed as well. This is the location where one would go to create or add files, close and save files and print files, among other key functions.

Additional functions remain available under each option. Hovering above each **File Menu** bar category will expand additional menus. Access to these are granted based on the permissions which are driven by roles. Some examples include and are not limited to: **Save, Save and Close,** and **Print.**



When users scroll through a page in APD iConnect, the **File Menu** header is frozen so that users will always be able to access these **File Menu** functions no matter where the cursor is located on the page.

- **File** – Contains the functions to add a new record or to view history changes to the data in view.
- **Edit** – Provides the ability to make changes to the data included in the record.
- **Tools** - Provides the user with additional functionality based on the page currently in view.
- **Reports** – Lists standard reports built into the Harmony software. Additional reports may be available to certain roles or groups. If a user has access to the Reports Menu, click the menu and select the report and it will open in a new window.
- **Word Merge** - Lists documents that have been uploaded to the application using the **Word Merge** Utility and are available to certain roles and groups. To access the document, click the file menu and select the document and it will open a new window.



When you need to add, remove or save files, the **File Menu** is the place to go. An example could appear as: Go to **File>Save and Close Notes.**

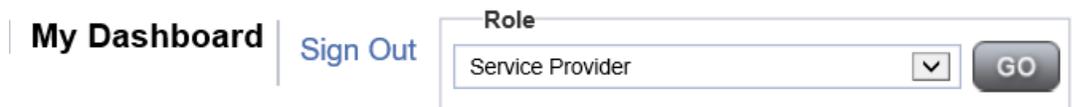
Common Functions

Throughout this training guide, some functions are performed multiple times. Rather than describing the complete function each time, the steps to perform the function are included in this section, with a reference to this section in the instruction.

Switching Roles

Throughout the application, you may use many different Roles. Roles define a set of capabilities you have within APD iConnect, and each Role performs different functions. A Role change is indicated by the following symbol and instruction:

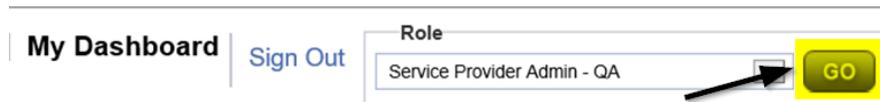
1. Switch Role to **Service Provider Admin-QA**
 - a. When you switch roles, the following process must be followed:
 - b. Go to the upper-right portion of the screen, in the **Role field**
 - c. Click the down arrow and then select the **Role** you want to work with. You may not see all the roles as displayed in the screenshot below



The screenshot shows a navigation bar with "My Dashboard" and "Sign Out" links. To the right is a "Role" dropdown menu currently displaying "Service Provider" with a downward arrow. A "GO" button is located to the right of the dropdown.

2. Click the down arrow and then select the **Role** you want to work with and then click **Go**. You may not see all the roles as displayed in the screenshot below.

- APD Admin
- APD Main
- Area Behavior Analyst
- Region Clinical Workstream Lead
- Region QA Workstream Lead
- Region QA Workstream Worker
- ROM/Deputy ROM
- Service Provider
- State Office Management
- State Office Process Owner
- State Office Worker
- System Admin
- WSC/CDC



The screenshot shows the same navigation bar as above. The "Role" dropdown menu is now open, showing a list of roles. "Service Provider Admin - QA" is selected and highlighted. A black arrow points to the "GO" button, which is also highlighted in yellow.

Begin a New Task

Each time you switch Roles and begin a new task, use the search function to locate the provider record you need.

Search the Database

Use **Quick Search** to verify the existence of an entity. This step is important to ensure duplicate provider records are not added to APD iConnect. Begin by clicking on the Providers Chapter.

1. Type the search term in the first field. The search is not case-sensitive.

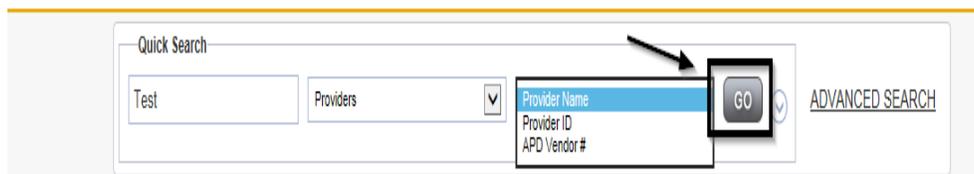


2. Click the down-arrow in the next field and Click the type of records on which to search.



3. Click the down-arrow in the last field. Click the type of records on which to search and Click **Go**
 - a. This list varies, depending on what was selected in the second field.

File



4. If more than one record matches the search term, they are displayed in a list. Click anywhere in the record to open it.

— 5 Quick Search Result record(s) returned - now viewing 1 through 5

	Provider Name	Provider ID
	A TEST Provider	10002
	APD Test GH	10057
	APD Test Provider	10051
	Online Provider Test	10038
	Tuesday Test Provider	10079

5. If only one record matches the search term, the record is opened.

A TEST Provider (10002)	
	Workers Services Provider ID Numbers
	Providers Divisions Forms Enrollments
Basic Information	
Provider Name	A TEST Provider
DBA (if applicable)	Monica's Group Home
APD Vendor #	7777712345
Licensed Home licensed for capacity	25
Plans Require Validation	Yes
Active	Yes
External	Yes
Exclude from Dropdown	No

File

Quick Search

Test Providers Provider Name GO **ADVANCED SEARCH**

- A user can execute an advanced search to locate a Provider record. The “Filters” box is presented allowing users to narrow their search by specifying one or more specific fields to search.

Filters

Active Equal To Yes AND X

Provider ID Equal To AND X

APD Vendor # +

Search Reset

- Use the Filter Dropdown to select the field to search, choose the Operator and then populate the search criteria. The Filter allows for multiple criteria to be used in a search. Use the “Plus” (+) button to build the query.

Filters

Active Equal To Yes AND X

Provider ID + ←

Search Reset

8. If there is a value in the filter dropdown that appears in the “Filter” you do not wish to search, use the “X” next to the row to remove it.

Filters

Active Equal To Yes AND X

Provider ID Equal To AND X

Provider Name Equal To AND X

APD Vendor # Equal To AND X

Worker Equal To AND X

Provider ID +

Search Reset



Each time you switch Roles and begin a new task, you must use **Search** to make sure that a record does not already exist.

Chapter 1 | MedWaiver Renewals

Introduction

Provider renewals are specific to Medicaid Waiver Services providers; IFS or Room and Board providers do not go through a renewal process. Renewals will occur every five years.



The Specialist/Liaison will review the Service Provider record and use the Renewal Notice to notify the Service Provider when the Medicaid Waiver Services Agreement (MWSA) is set to expire in 100 days.

The Specialist/Liaison will generate an updated MWSA and attach it to a note with Renewal Notice 1.



The Service Provider will receive the notification the MWSA is due for renewal. The Renewal Notice 1 will include a list of any documents need to be sent back to APD by the within 30 calendar days.

Documents include:

Signed MWSA

Eligible level II background screening

Local Law background screening

Limited Liability Insurance with APD listed as certificate holder

Copy of professional license or certificate (if applicable)

This notice will also include an updated MWSA for the provider to print, sign and return to the Specialist/Liaison

Respond to Renewal Notice 1 and Sign MWSA



The Service Provider will print the updated MWSA then sign, scan and save an electronic copy to their desktop. They will then attach it to a note back to the Specialist/Liaison.

1. Set "Role" = *Service Provider or if applicable, Service Provider Admin - QA* then click **Go**.

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

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

A screenshot of a dashboard with a top navigation bar containing 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', 'SCHEDULER', and 'UTILITIES'. Below this, there are two main sections: 'INCIDENTS' and 'PROVIDERS'. Under 'PROVIDERS', there is a 'Notes' section with a dropdown arrow. Below 'Notes', there are two rows: 'Complete' with a count of 2, and 'Pending' with a count of 12. Arrows point to the 'PROVIDERS' and 'Notes' sections.

3. Select the **Note Type = Medwaiver Renewal** and **Description = MWSA Renewal Notice 1** and select the completed note via the hyperlink

A screenshot of a search filter interface and a table of notes. The filter interface has 'Status' set to 'Equal To', 'Complete', and 'AND'. Below the filter, it says '27 Notes record(s) returned - now viewing 1 through 15'. The table below has the following data:

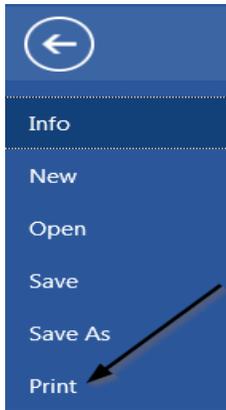
Provider	Note Type	Note Date	Description	Author	Status
Monica Agency	Medwaiver Renewal	04/01/2020	Provider Signature	Reed, Monica	Complete
Monica Agency	Medwaiver Renewal	04/01/2020	Supervisor Approval	Reed, Monica	Complete
Monica Agency	Medwaiver Renewal	04/01/2020	ROM Approval	Reed, Monica	Complete
Monica Agency	Medwaiver Renewal	04/01/2020	MWSA Renewal Notice 1	Reed, Monica	Complete

Arrows point to the 'Medwaiver Renewal' in the first row, 'MWSA Renewal Notice 1' in the last row, and 'Complete' in the last row.

4. Click on the attachment for the Blank MWSA within the Medwaiver Renewal/MWSA Renewal Notice 1 note and then click **Open** on the pop-up message box.

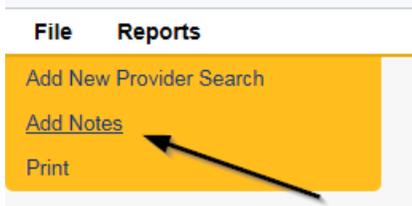
A screenshot of a pop-up message box with the text 'Do you want to open or save Blank MWSA.docx (50.9 KB) from fwtest.harmonyis.net?'. To the right of the text are three buttons: 'Open', 'Save', and 'Cancel'. An arrow points from the text to the 'Open' button.

5. Select **File > Print** within the Word Document



6. The Service Provider will sign the hard copy, scan and save it to their desktop and then attach it to a note back to the Specialist Liaison.

7. Click **File > Add Notes**



8. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Medwaiver Renewal
- c. "Note Subtype" = Provider Signature
- d. "Description" = Provider Signature
- e. "Note" = Enter notes
- f. "Status" = Complete
- g. Click "Add Attachment" and search for the copy of the signed MWSA on the user's computer. Click Upload
- h. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 04/01/2020 [calendar icon]

Note Type * Medwaiver Renewal ▾

Note Sub-Type Provider Signature ▾

Description Provider Signature ▾

Note [text area]

Status * Complete ▾

Date Completed 04/01/2020

Attachments

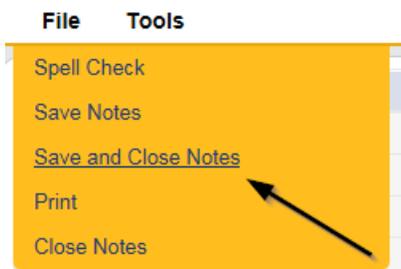
[Add Attachment](#)

Document	Description
MWSA Provider Signed	

Note Recipients

Add Note Recipient: [input] ... Clear

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



13. Update the following fields on the Notes Detail Screen

- a. "Division" = APD
- b. "Note Type" = Medwaiver Renewal
- c. "Note Subtype" = MWSA Renewal Notice 1
- d. "Description" = Enter description as form name
- e. "Note" = Enter notes
- f. "Status" = *Complete*
- g. Add Attachment – Browse and attach the blank MWSA you saved to your desktop
- h. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider or if applicable, Service Provider Admin - QA* 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

Notes Details

Division * ← APD ▾

Note By * ← Reed, Monica

Note Date * ← 06/26/2019 📅

Note Type * ← Medwaiver Renewal ▾

Note Sub-Type ← MWSA Renewal Notice 1 ▾

Description ← Word Merge Template

Note ←

Status * ← Pending ▾

Date Completed

Attachments

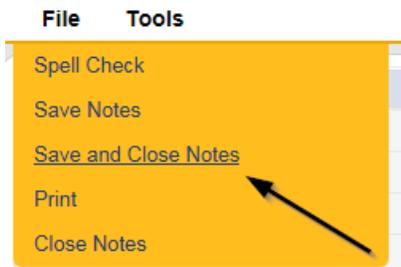
[Add Attachment](#)

Document	Description
MWSA RENEWAL NOTICE 1.pdf	Word Template: MWSA Renewal Notice 1

Note Recipients

Add Note Recipient: ...

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



As Needed: Respond to MWSA Renewal Notice 2



If the Service Provider does not respond to Renewal Notice 1 within 30 calendar days, the Specialist/Liaison will send a second notice to the Service Provider stating that their renewal remains incomplete. This notice also notifies the Service Provider that they are not entitled to payment for services rendered after the MWSA end date and if they are

still interested in being an APD provider, they will need to apply and enroll all over again.

As Needed: Generate MWSA Renewal Notice 3



If the Service Provider does not respond to Renewal Notice 2, the Specialist/Liaison will send a third notice to the Service Provider advising of the MWSA end date. This Renewal Notice 3 also notifies the Service Provider that they are not entitled to payment for services rendered after the MWSA end date and if they are still interested in being an APD provider, they will need to apply and enroll all over again.

NOTE: Service Providers who do not respond to MWSA Renewal Notice 1, MWSA Renewal Notice 2, or MWSA Renewal Notice 3, will not receive any additional notification from APD. In the event that the MWSA expires, Waiver Support Coordinators (WSCs) will be notified to work with impacted consumers to find an alternative provider and the Service Provider's record will be closed.

Additional Documentation



When responding to a MWSA Renewal Notice, the Service Provider will scan and save a copy of any needed intake documentation to their desktop and attach it to a note. They will create the note with a Note Type of "Intake Documentation" and upload any additional documentation as a single attachment with the corresponding Subtype.

1. Set "Role" = *Service Provider or if applicable, Service Provider Admin - QA* then click **Go**

A screenshot of a web form. The label "Role" is positioned above a dropdown menu. The dropdown menu is currently set to "Service Provider" and has a downward-pointing arrow on its right side. To the right of the dropdown menu is a grey button with the text "GO" in white. A black arrow points from the text "Go" in the list item above to the "GO" button.

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

The screenshot shows a web application interface. At the top, there is a navigation bar with 'File' and 'Reports' tabs. Below this is a 'Quick Search' section with a text input field, a dropdown menu set to 'Providers', and a 'Provider Name' label. A secondary navigation bar contains 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHE'. Below this is a header for 'A TEST Provider (10002)'. A secondary navigation bar includes 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Benefits', 'Linked Providers', 'Aliases', and 'Conditions'. A third navigation bar includes 'Providers', 'Divisions', 'Forms', 'Enrollments', 'Authorizations', 'Notes' (highlighted in yellow), 'Credentials', and 'EVV Scheduling'. Below the navigation bars is a 'Filters' section with two rows of dropdown menus: 'Note Type' (set to 'Equal To'), 'Note Date', and a '+', 'AND', and 'x' button. At the bottom right of the filters are 'Search' and 'Reset' buttons.

3. Click **File > Add Notes**

The screenshot shows a web application interface. At the top, there is a navigation bar with 'File' and 'Reports' tabs. Below this is a yellow button with the text 'Add New Provider Search'. Below the button is a link labeled 'Add Notes' with an arrow pointing to it. Below the link is a button labeled 'Print'.

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

- a. "Division" = APD
- b. "Note Type" = Intake Documentation
- c. "Note Subtype" = May select one of the following as appropriate
 - i. Level II Background Screening
 - ii. Limited Liability Insurance
 - iii. Medicaid Waiver Services Agreement
 - iv. Professional License/Certificate
- d. "Description" = Enter description
- e. "Note" = Enter notes
- f. "Status" = Complete
- g. Click "Add Attachment" and search for the copy of the intake documentation on the user's computer. Click Upload

Notes Details

Division * APD ▾

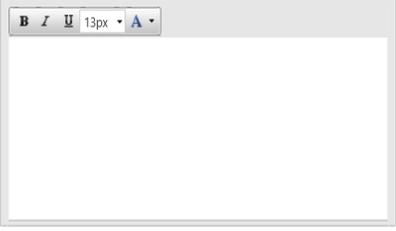
Note By * Reed, Monica ▾

Note Date * 07/24/2018 

Note Type * Intake Documentation ▾

Note Sub-Type Admin Policies ▾

Description Admin Policies 

Note 

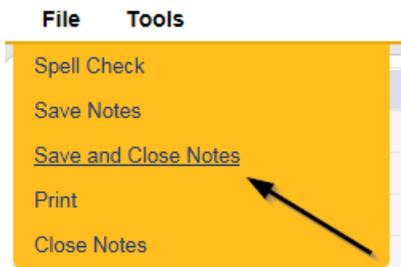
Status * Complete ▾

Date Completed 03/31/2020

Attachments

[Add Attachment](#)

5. Repeat steps 3-4 until all additional documents have been added
6. When finished click **File > Save and Close Notes** and



Sign MWSA



The Service Provider will print the updated MWSA (attached to the note with MWSA Renewal Notice 1) then sign, scan and save an electronic copy to their desktop. They will then attach it to a note back to the Specialist/Liaison.

- Set "Role" = *Service Provider or if applicable, Service Provider Admin - QA* then click **Go**.

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

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

A screenshot of a dashboard navigation menu. The 'MY DASHBOARD' tab is highlighted in yellow. Below it are tabs for 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', 'SCHEDULER', and 'UTILITIES'. Under the 'PROVIDERS' tab, there are two main sections: 'INCIDENTS' and 'PROVIDERS'. The 'INCIDENTS' section has a sub-section 'Inquiry Alert Notes List' with a count of '2' and 'Unread Alert Notes' with a count of '0'. The 'PROVIDERS' section has a sub-section 'Notes' with two items: 'Complete' with a count of '2' and 'Pending' with a count of '12'. Arrows point to the 'MY DASHBOARD' tab and the 'Notes' link.

- Select the **Note Type = Medwaiver Renewal** and **Description = MWSA Renewal Notice 1** and select the completed note via the hyperlink

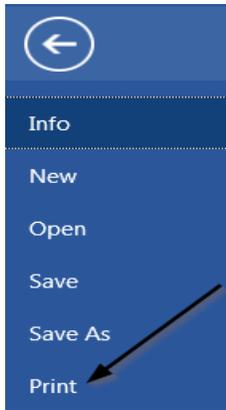
A screenshot showing a search filter and a table of notes. The filter is set to 'Status Equal To Complete AND'. Below the filter, it says '27 Notes record(s) returned - now viewing 1 through 15'. The table has columns: Provider, Note Type, Note Date, Description, Author, and Status. The first row is 'Monica Agency, Medwaiver Renewal, 04/01/2020, Provider Signature, Reed, Monica, Complete'. The second row is 'Monica Agency, Medwaiver Renewal, 04/01/2020, Supervisor Approval, Reed, Monica, Complete'. The third row is 'Monica Agency, Medwaiver Renewal, 04/01/2020, ROM Approval, Reed, Monica, Complete'. The fourth row is 'Monica Agency, Medwaiver Renewal, 04/01/2020, MWSA Renewal Notice 1, Reed, Monica, Complete'. Arrows point to the 'Medwaiver Renewal' and 'MWSA Renewal Notice 1' entries.

Provider	Note Type	Note Date	Description	Author	Status
Monica Agency	Medwaiver Renewal	04/01/2020	Provider Signature	Reed, Monica	Complete
Monica Agency	Medwaiver Renewal	04/01/2020	Supervisor Approval	Reed, Monica	Complete
Monica Agency	Medwaiver Renewal	04/01/2020	ROM Approval	Reed, Monica	Complete
Monica Agency	Medwaiver Renewal	04/01/2020	MWSA Renewal Notice 1	Reed, Monica	Complete

- Click on the attachment for the Blank MWSA within the Medwaiver Renewal/MWSA Renewal Notice 1 note and then click **Open** on the pop-up message box.

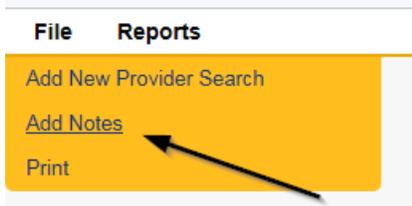
A screenshot of a file download dialog box. The text says 'Do you want to open or save Blank MWSA.docx (50.9 KB) from fwtest.harmonyis.net?'. There are three buttons: 'Open', 'Save', and 'Cancel'. An arrow points to the 'Open' button.

- Select **File > Print** within the Word Document



6. The Service Provider will sign the hard copy, scan and save it to their desktop and then attach it to a note back to the Specialist Liaison.

7. Click **File > Add Notes**



8. In the new Note record, update the following fields:

- j. "Division" = APD
- k. "Note Type" = Medwaiver Renewal
- l. "Note Subtype" = Provider Signature
- m. "Description" = Provider Signature
- n. "Note" = Enter notes
- o. "Status" = Complete
- p. Click "Add Attachment" and search for the copy of the signed MWSA on the user's computer. Click Upload
- q. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* as the Note Recipient
- r. 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 * 04/01/2020 [calendar icon]

Note Type * Medwaiver Renewal ▾

Note Sub-Type Provider Signature ▾

Description Provider Signature

Note

Status * Complete ▾

Date Completed 04/01/2020

Attachments

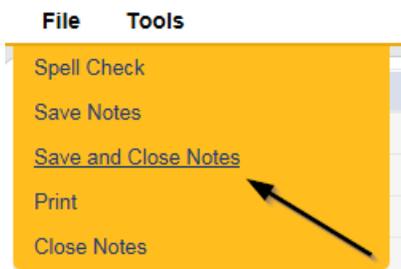
[Add Attachment](#)

Document	Description
MWSA Provider Signed	

Note Recipients

Add Note Recipient: [input field] ... Clear

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



As Needed: Further Documentation Required / Revision Review



The Specialist/Liaison will create a note if the Medwaiver renewal request is incomplete and further documentation is required and send it to the Service Provider.



The Service Provider will provide any requested additional documentation and attach it to a note.

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

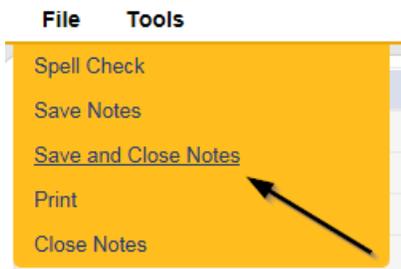
2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes

3. Select the **Note Type = Medwaiver Renewal** and **Description = Further Documentation Required** and select the record via the hyperlink

Provider	Note Type	Note Date	Description	Author	Status
Monica Agency	Expansion Request	03/11/2020	Further Documentation Required	Reed, Monica	Pending
Monica Agency	Medwaiver Renewal	04/01/2020	Further Documentation Required	Reed, Monica	Pending

4. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Revision Review*
 - b. "Description" = Revision Review
 - c. "Note" = Enter notes
 - d. "Status" = Complete
 - e. Click "Add Attachment" and attach any requested supporting documentation. Click Upload
 - f. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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**



ROM Approval



Once the MWSA renewal is approved and the updated MWSA is signed by the ROM, the Specialist/Liaison will save the Provider/ROM signed MWSA to their desktop and then attach it to a note.

1. Set "Role" = *Service Provider or if applicable, Service Provider Admin - QA* then click **Go**.

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

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER UTILITIES

S

INCIDENTS PROVIDERS

Inquiry Alert Notes List

Unread Alert Notes

Notes

Complete

Pending

3. Select the **Note Type = Medwaiver Renewal and Description = ROM Approval** and select the completed note via the hyperlink

Provider	Note Type	Note Date	Description	Author	Status
A TEST Provider	Administrative Complaint	01/29/2018	Word Storage Template	MediD Services	Complete
A TEST Provider	Identity/Identification	03/22/2018	Elter Visit	MediD Services	Complete
A TEST Provider	Alert Notification	03/22/2018	Alert Contact Letter	MediD Services	Complete
A TEST Provider	Initial Registration	10/29/2018		Avigah, Inc	Complete
A TEST Provider	Initial Registration	10/29/2018	apparelment	OKMediD, State	Complete
A TEST Provider	Initial Registration	10/29/2018		Avigah, Inc	Complete
A TEST Provider	Medwaiver/Renewal	07/23/2019	ROM Approval	OKMediD, State	Complete
A TEST Provider	Medwaiver Renewal	07/23/2019	ROM Approval	OKMediD, State	Complete

As Needed: Review Final Enrollment Letter



The Specialist/Liaison if applicable (in instances where there is a new Medicaid ID, a name change occurred or new services have been added, will also send a new note with the Final Enrollment Listing Letter to the Service Provider.

1. Set "Role" = *Service Provider or if applicable, Service Provider Admin - QA* then click **Go**.

Role

Service Provider

GO

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

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER UTILITIES

S

INCIDENTS PROVIDERS

Inquiry Alert Notes List

Unread Alert Notes

Notes

Complete

Pending

3. Select the **Note Type = Medwaiver Renewal** and **Description = Final Enrollment Listing Letter** and select the completed note via the hyperlink

Provider	Note Type	Note Date	Description	Author	Status
A TEST Provider	Administration Complete	01/29/2018	Word Range Template	Rosalyn Mays	Complete
A TEST Provider	Identity/Membership	03/22/2018	Eligibility	Rosalyn Mays	Complete
A TEST Provider	Med Reimbursement	03/22/2018	Adel Contract Letter	Rosalyn Mays	Complete
A TEST Provider	Initial Application	10/29/2018		Allyson Jorg	Complete
A TEST Provider	Initial Application	10/29/2018	apparent	OKWanda Clark	Complete
A TEST Provider	Initial Application	10/29/2018		Allyson Jorg	Complete
A TEST Provider	Medwaiver/Renewal	07/23/2019	Renewal	OKWanda Clark	Complete
A TEST Provider	Medwaiver Renewal	07/23/2019	Final Enrollment Listing Letter	OKWanda Clark	Complete

Updated Credentials



The Service Provider can check the Credentials tab of their provider record to confirm that their MWSA license record has been updated with the new effective and expiration dates.

1. Set "Role" = *Service Provider or if applicable, Service Provider Admin - QA* then click **Go**.

1. Navigate to **Providers > Credentials** tab

2. Select the Filter as Credential = **License** and click Search to select the MWSA record via the hyperlink

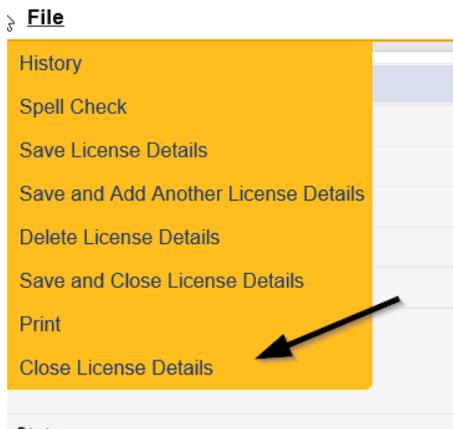
Credential	Type	Credential Number
License	Foster Home	FH12345678
License	MWSA	R335566677

3. Review and confirm the following fields:

- a. Date of Renewal = New Date of MWSA Renewal
- b. Effective Date = New Effective Date
- c. Expiration Date = New Expiration Date
- d. Status = Active
- e. Reason = Renewal
- f. QA Workstream Worker = Specialist/Liaison

License Details	
Credential Type *	License
License Type *	MWSA
Date of Renewal *	<input type="text"/>
Effective Date *	11/01/2018
Expiration Date *	03/06/2019
One-Month	<input type="checkbox"/>
Comment	MWSA Renewal
Status	Active
Reason	Renewal
QA Workstream Worker	<input type="text"/> ... Clear

4. When finished, Click **File > Close License Details**



As Needed: MWSA Expires



If the Service Provider does not respond to any of the Renewal Notices or provide the requested documentation before the expiration date of the MWSA, the MWSA will expire. The Specialist/Liaison will notify the Waiver Workstream Lead, who will work with WSCs to and all authorizations and find alternate providers for impacted consumers. The provider record will be closed, and FMMIS

will be notified. If the Service Provider wishes to provide services again, they will have to reapply.

Chapter 2 | QA- Other Remediation

Generate Non-QI Remediation Letter



If an issue is identified during an APD Audit, AHCA Audit, Medicaid Program Integrity, Medicaid Fraud, Abuse/Neglect, Critical Incident Report, Reportable Incident Report, Medication Error, Complaint, CMS Survey or APD Inspector General Audit and the QA Workstream worker determines that a Plan of Remediation is necessary to resolve the issue, they will generate the remediation letter and create a CAP record.

The Service Provider will respond to the CAP record documenting their corrective action.

Update Item Detail

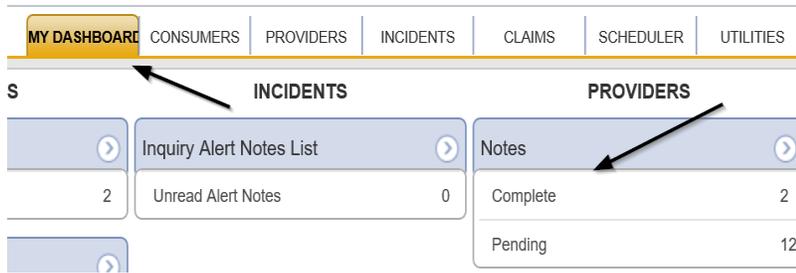


The Service Provider will receive a Non-QIO Remediation letter via a note on their My Dashboard. They will complete any remediation and then document it in the CAP record.

1. Set "Role" = *Service Provider or if applicable, Service Provider Admin - QA* then click **Go**.

A screenshot of a web form. At the top, the word "Role" is written in a bold, sans-serif font. Below it is a dropdown menu with a blue background and white text that says "Service Provider". To the right of the dropdown is a small downward-pointing arrow icon. Further to the right is a grey button with the word "GO" in white capital letters. A black arrow points from the top right towards the dropdown menu.

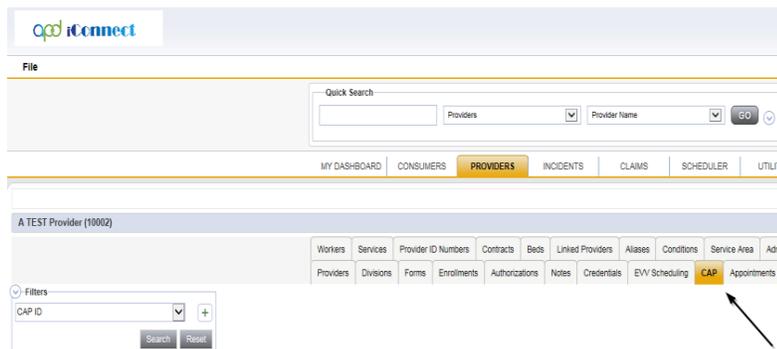
2. Navigate to the **My Dashboard > Providers > Notes > Complete** and click the hyperlink for the Complete notes



3. Select the **Note Type = Plan of Remediation** and **Description = Non QIO Letter** and select the completed note via the hyperlink

Provider	Note Type	Note Date	Description	Author	Status
A TEST Provider	Administrative Complaint	01/29/2018	Word Usage Template	Reed, Monica	Pending
A TEST Provider	Identity/Identification	03/22/2018	Eligible Visit	Reed, Monica	Complete
A TEST Provider	Visit Notification	03/22/2018	Alert Contact Letter	Reed, Monica	Complete
A TEST Provider	Initial Application	10/29/2018		Amogh, Jay	Complete
A TEST Provider	Initial Application	10/29/2018	approval	ORRIS, Tiana	Complete
A TEST Provider	Initial Application	10/29/2018		Amogh, Jay	Complete
A TEST Provider	Medication/Prescription	07/23/2019	Prescription	ORRIS, Tiana	Complete
A TEST Provider	Plan of Remediation	07/23/2019	Non QIO Letter	ORRIS, Tiana	Complete

4. Review the note and the letter to determine what remediation is needed
5. Navigate to the **Providers > CAP** tab



6. Select the appropriate CAP record via the hyperlink

Filters

CAP ID: [dropdown] [Search] [Reset]

— 19 CAP record(s) returned - now viewing 1 through 15 —

CAP ID	QIO Report Number	Date Provider Notified	Status	Number of Alerts	Number of Items	Licensing Worker	POR Worker	Overall Corporate PDR Score
1		02/05/2018	Pending	5	2		Reed, Monica	
2		02/05/2018	Complete		2			
3		02/09/2018	Pending		2			

7. Click the Items link on the left-hand navigation menu

File

CAP

Items

CAP

CAP ID: 1

QIO Report Number:

CAP Type: Plan of Remediation

Date of CAP: 02/01/2018

Date Provider Notified: 02/05/2018

Status: Pending

Number of Alerts: 5

Overall Corporate PDR Score %:

Corporate Compliance Score %:

Corporate Person-Centered Practices Score %:

Sum Total Potential Billing Discrepancies: \$0.00

Comments: test comments

Date Submitted by Provider: 02/05/2018

Date Verified Complete by APD Staff: 02/05/2018

Date POR Approved by QA Workstream Lead as Complete:

POR Worker: Reed, Monica [Details](#)

8. Select an Item via the hyperlink in the list view grid

Item Number	QIO Category	Remediation Type	Standard Not Met	Item Status	Due Date	Complete Date	Worker	Action Type
4455		POR	8.010 (3)	Pending	02/01/2018	02/05/2018	Buck, Jennifer	Regional QA
		Licensing	1	Pending			Reed, Monica	Licensing
	Rights	POR		Complete	10/10/2018	10/12/2018		Alert

9. Enter the Corrective Action Required information and Click Append to Text to Note

Summary

Item ID: 84

Item Number:

Action Type: Alert

Discovery Source: QIO Report

Remediation Type: POR

Employee Involved:

Standard Not Met:

Standard Not Met Description: 0 record(s) returned

Reason Not Met: Search

Item Status: Pending

Potential Billing Discrepancy Amount:

Due Date:

Complete Date:

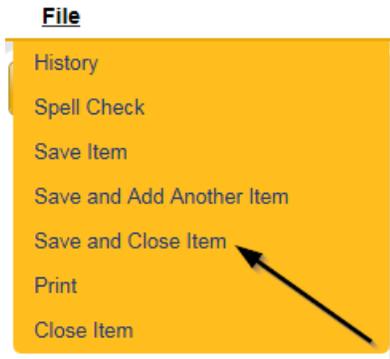
Worker: Clear

Corrective Action Required: New Text Append text

Append Text to Note

Evidence of Completion:

10. When finished, Click File > Save and Close Item



11. Click **File > Close Items**

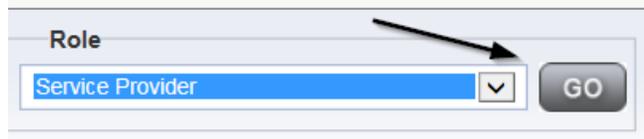


Supporting Documentation

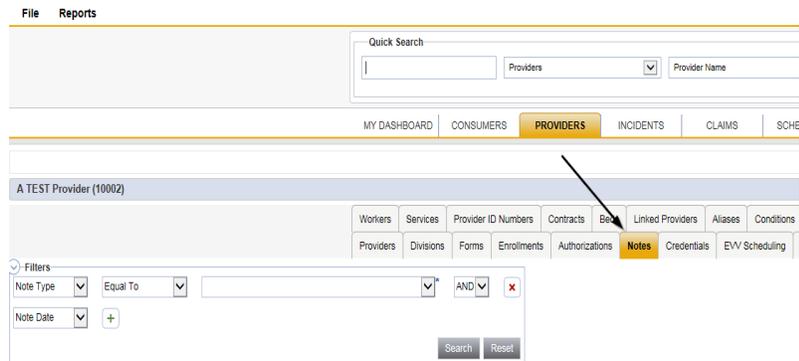


The Service Provider will scan and save a copy of any supporting evidence to their desktop and attach it to a note. They will upload each document as a single attachment to a Note with the corresponding Subtype.

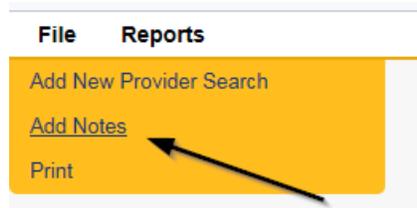
1. Set "Role" = Service Provider then click **Go**



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

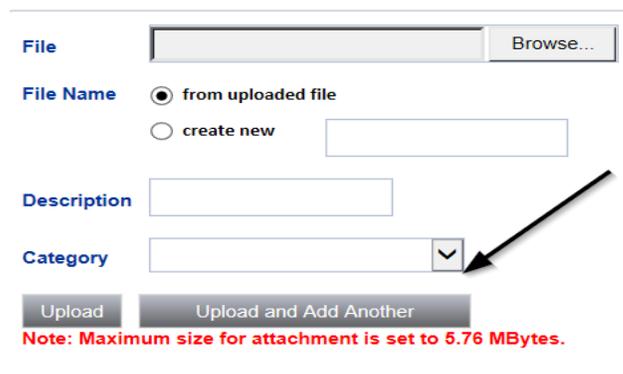


3. Click **File > Add Notes**



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

- a. Division" = APD
- b. "Note Type" = Plan of Remediation
- c. "Note Subtype" = Supporting Documentation
- d. "Description" = Enter description
- e. "Append Text to Note" = Enter notes
- f. "Status" = Pending
- g. Click "Add Attachment" and search for the copy of the supporting documentation on the user's computer. Click Upload and Add Another until finished



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

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 11/15/2019

Note Type * Plan of Remediation

Note Sub-Type Abuse Registry

Description

Note

Status * Complete

Date Completed 11/15/2019

Attachments

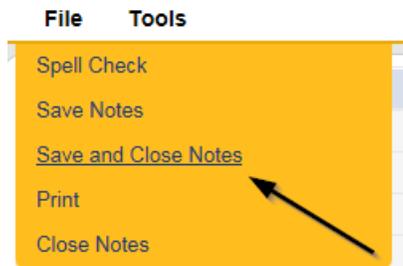
[Add Attachment](#)

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: Further Evidence Required



If the QA Workstream Worker determines that not all POR components are complete and further evidence is required, they will create a note in pending status and may call or visit the Service Provider.

As Needed: Further Evidence Provided



The Service Provider will scan and save a copy of any requested further documentation to their desktop and attach it to the pending note. They will upload each document as an attachment to the pending note.

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 above to the dropdown menu.

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

A screenshot of a dashboard navigation menu. The top row contains tabs: "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULE". Below this, there are three main sections: "CONSUMERS", "INCIDENTS", and "PROVIDERS". Under "CONSUMERS", there is a "Notes" link with a count of 0. Under "INCIDENTS", there is an "Inquiry Alert Notes List" link with a count of 0 and an "Unread Alert Notes" link with a count of 0. Under "PROVIDERS", there is a "Notes" link with a count of 0. Below the "Notes" link, there are two sub-links: "Complete" with a count of 3 and "Pending" with a count of 11. Arrows point from the text above to the "MY DASHBOARD" tab, the "Notes" link under "PROVIDERS", and the "Pending" sub-link.

3. Select the **Note Type = Plan of Remediation and Description = Further Evidence Required** and select the record via the hyperlink

A screenshot of a search results page. At the top, there is a "File Tools" header. Below it is a "Filters" section with a dropdown menu for "Status" set to "Equal To" and "Pending". There are "Search" and "Reset" buttons. Below the filters, it says "5 Notes record(s) returned - now viewing 1 through 5". Below that is a table with the following columns: "Provider", "Note Type", "Note Date", "Description", "Author", and "Status". The table contains one row: "Monica Agency", "Plan of Remediation", "04/06/2020", "Further Evidence Required", "Reed, Monica", and "Pending". Arrows point from the text above to the "Note Type" and "Description" columns, and to the "Pending" status in the table.

4. In the pending Note record, update the following fields:
 - a. "Click Append Text to Note" = Enter notes
 - b. "Status" = *Leave as Pending until all attachments are added then update to Complete*
 - c. Click "Add Attachment" and search for the copy of the further evidence on the user's computer. Click Upload *OR* if multiple documents need to be added then select Upload and Add Attachment. Continue to click Upload and Add Attachment until all required evidence is attached

File

File Name from uploaded file
 create new

Description

Category

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

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

Notes Details

Division *

Note By *

Note Date *

Note Type *

Note Sub-Type

Description

Note

Status *

Date Completed

Attachments

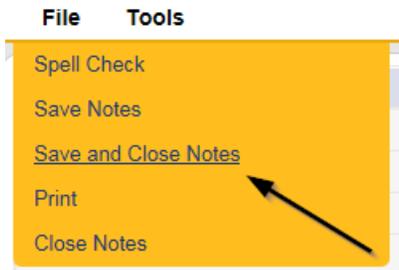
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient:

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



As Needed: Visit Provider



The QA Workstream Worker may decide to visit the Service Provider to discuss the incomplete items. If a visit is made, the QA Workstream Worker can document the visit specifics in a note in complete status that will appear on the Service Provider's My Dashboard. **Note Type = Plan of Remediation, Subtype = Visit to Provider, Description = Visit to Provider.**

CAP Accepted



If the CAP submitted by the Service Provider, the Region QA Workstream Lead will update the pending note with Final Review Approval. The Service Provider will receive this completed note on their My Dashboard.

Additionally the QA Workstream Worker will update the CAP Items as complete, and then update the CAP record to Complete, closing out this instance of remediation.

As Needed: CAP Rejected Note



If the decision is made to reject the CAP, the Service Provider will be notified via a pending note.

As Needed: CAP Revision Note



The Service Provider will scan and save a copy of the supporting documentation to their desktop for the requested information and attach it to the pending CAP Rejected note.

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

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

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

A screenshot of a dashboard navigation menu. The "MY DASHBOARD" tab is highlighted. Below it are tabs for "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULE". Under "PROVIDERS", there are sub-tabs for "Notes", "Complete", and "Pending". The "Pending" sub-tab is selected, and an arrow points to it from the text above.

3. Select the **Note Type = Plan of Remediation and Description = CAP Rejected** and select the record via the hyperlink

A screenshot showing a search filter and a table of notes. The filter is set to "Status" Equal To "Pending". The table has columns: Provider, Note Type, Note Date, Description, Author, and Status. A record is highlighted with arrows pointing to "Plan of Remediation" in the Note Type column and "CAP Rejected" in the Description column.

Provider	Note Type	Note Date	Description	Author	Status
Monica Agency	Plan of Remediation	04/06/2020	CAP Rejected	Reed, Monica	Pending

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

- a. Note Subtype" = *Update to CAP Revised*
- b. "Description" = Update to CAP Revised
- c. "Append Text to Notes" = Enter notes
- d. "Status" = Pending until all attachments are added then update to Complete
- e. Click "Add Attachment" and search for the copy of the documentation on the user's computer. Click Upload and Add Another until finished

File

File Name from uploaded file
 create new

Description

Category

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

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

Notes Details

Division *

Note By *

Note Date *

Note Type *

Note Sub-Type

Description

Note

New Text

13px

Status *

Date Completed

Attachments

[Add Attachment](#)

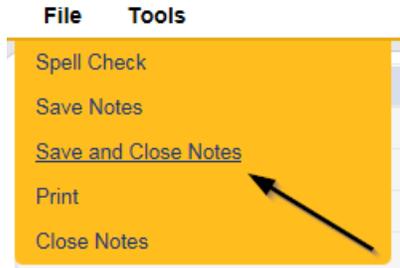
Document **Description**

There are no attachments to display

Note Recipients

Add Note Recipient:

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

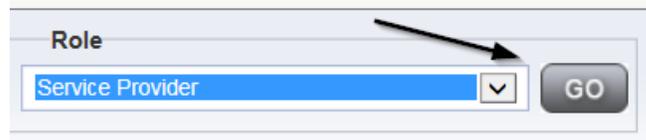


As Needed: CAP Record Revision

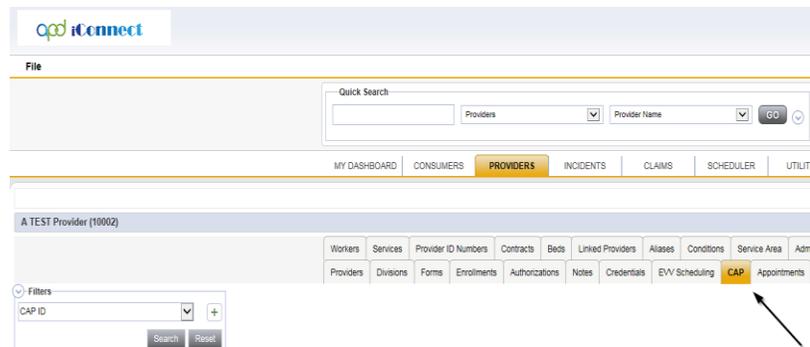


The Service Provider will review the CAP Rejected Note and make the necessary revisions to the CAP record if applicable.

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



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



3. Select the appropriate CAP record via the hyperlink

— 1 CAP record(s) returned - now viewing 1 through 1 —

CAP ID	QIO Report Number	Date Provider Notified	Status	Number of Alerts	Number of Items	Licensing Worker
71		07/09/2018	Pending		1	Richardson, Regina

4. Click the Items link on the left-hand navigation menu

File

CAP

Items

CAP ID: 71

CAP Type: Notice of Non-Compliance

Date of CAP: 07/09/2018

Date Provider Notified: 07/09/2018

Status: Pending

Comments: Licensing Renewal

Date Submitted by Provider:

Date Verified Complete by APD Staff:

Licensing Worker: Richardson, Regina

QA Worker Verified: Worker1, Elizabeth

5. Select an Item via the hyperlink in the list view grid

File

CAP

Items

Filters

Item Number: [dropdown] +

Search Reset

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

Item Number	QID Category	Remediation Type	Standard Not Met	Item Status	Due Date	Complete Date	Worker
		Licensing	1	Pending	02/23/2018		
		Licensing		Pending			

6. Enter the Corrective Action Required information and Click Append to Text to Note

Summary

Item ID: 116

Item Number:

Action Type: Licensing

Discovery Source: Licensing Visit

Remediation Type: Licensing

Employee Involved:

Standard Not Met:

Comments:

Item Status: Pending

Due Date:

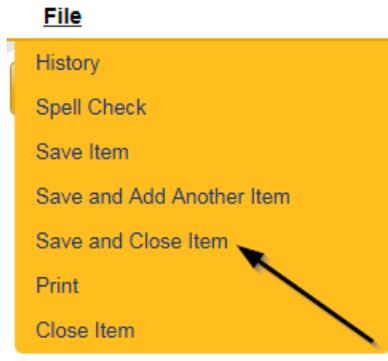
Provider Worker: [dropdown] Clear

Corrective Action Required

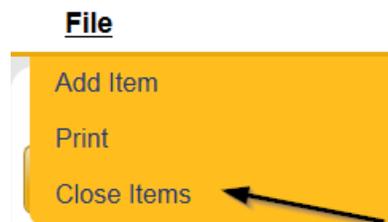
New Text

Append Text to Note

7. When finished, Click File > Save and Close Item



8. Click **File > Close Items**



As Needed: CAP Missed Target Dates



If after reviewing the Corrective Action Plan, the QA Workstream Worker identifies that the CAP target dates have been missed, they will notify the Service Provider via a note. The Service Provider will then have an additional 10 days to resubmit an amended CAP.



The Service Provider will need to proceed to [CAP Revision](#) and update the CAP record after reviewing the CAP Missed Target Dates note.

As Needed: Call to Provider



The QA Workstream Worker may decide to call the Service Provider to discuss the incomplete items. If a call is placed, the QA Workstream Worker can document the call specifics in a note: **Note Type = Plan of Remediation, Subtype = Call to Provider, Description = Call to Provider.**

As Needed: Not Complete



The QA Workstream Worker will add a note if the Provider does not complete the Plan of Remediation and the 90-day clock has expired. The QA Workstream Lead will be notified via this note. The note will be available for review by the ROM and State Office.

Chapter 3 | Complaints

Introduction

Provider complaints are generally received about a Service Provider via phone call or email and after review may generate a complaint letter. There may be violations or “fault” noted in the Provider Complaint or the complaint may be considered “no-fault.” In the event the complaint indicates a violation or fault, the QA Workstream Worker will initiate a CAP record and notify the Service Provider via note.

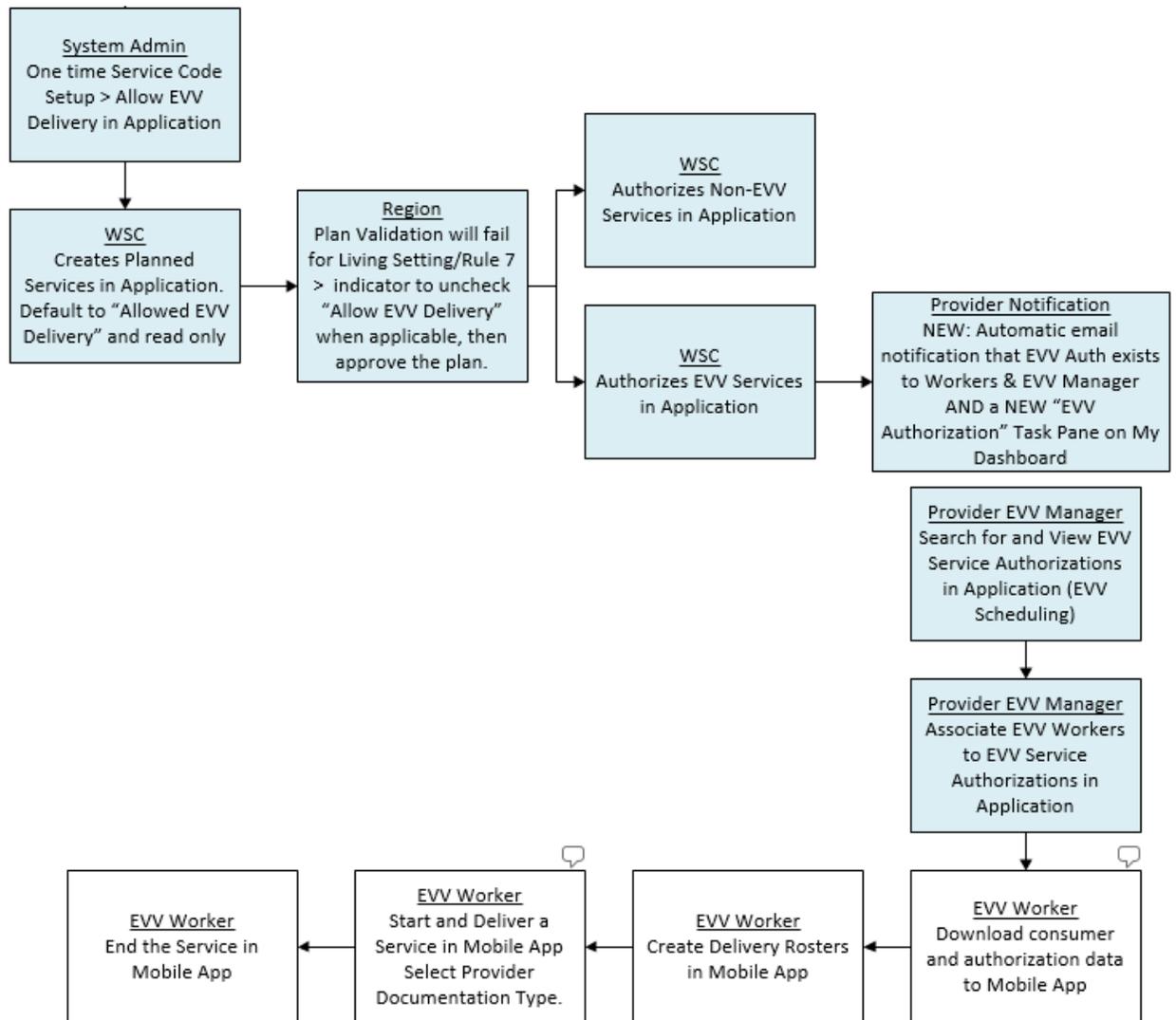
As Needed: Add CAP Record for Violations or Fault

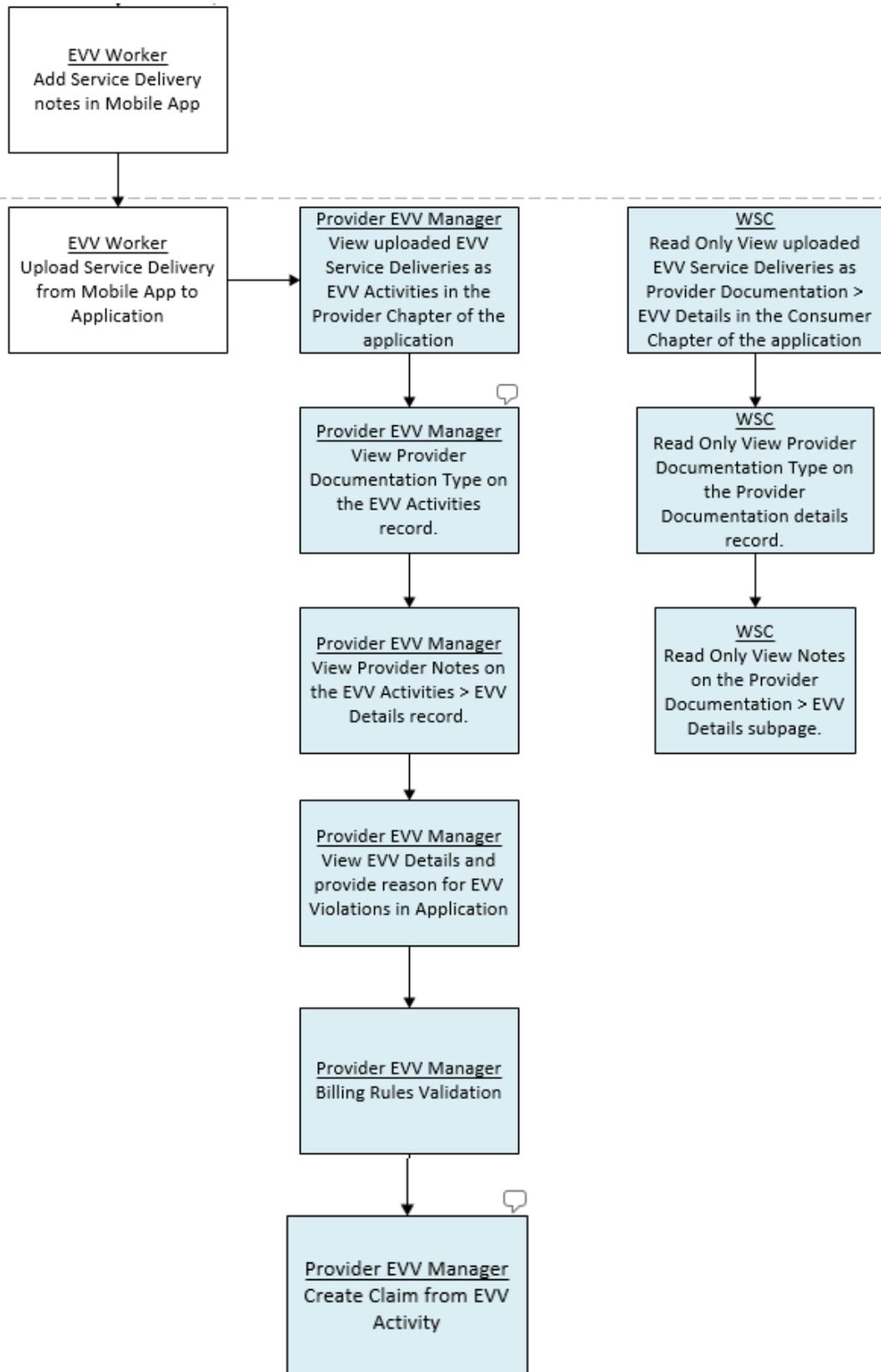


A CAP record will be created ONLY for complaints that include violations or fault and the Provider will be notified via a note. This applies only when a Plan of Remediation (proceed to [Chapter 2](#)) is the recommended action.

Chapter 4 | Electronic Visit Verification (EVV)

Provider EVV Managers will assign EVV workers to deliver EVV services to specific consumers. The EVV worker will use the Mobile Site to record each service delivery. The start date, time, and GPS location will be recorded at the start and stop of each delivery. Completed deliveries will be uploaded to the iConnect application where they will be recorded as EVV Activities. Provider EVV Managers will review the uploaded Activities, and where appropriate, justify any violations before submitting the claim which will be processed in the normal manner.





Users

Users typically include a program supervisor and their staff at the state/agency, a Provider EVV Manager, and a user that reviews EVV Activities and bills them.

1. State users (“APD”)
 - State users primarily interact with EVV-specific functionality in the context of granting exceptions to EVV service deliveries that violate pre-determined criteria (e.g., activity was delivered in an unapproved location) and during QA/QIO activities.
2. Provider EVV Managers (“Providers”)
 - Provider staff work within iConnect and are responsible for
 - Scheduling and/or assigning their EVV workers to deliver EVV services to their consumers
 - Reviewing uploaded/delivered EVV services
 - Justifying/explaining services that violate pre-determined criteria
 - Submitting EVV services that do not have violations (or have justified violations) for payment (convert to claims)
 - Some providers may opt to split these responsibilities among several of their staff
3. Provider EVV Workers (“Workers”)
 - EVV workers are the individual workers at each provider organization that are responsible for going to the consumer’s home and rendering the service. They work exclusively in the Mobile Site and are responsible for:
 - Starting a service delivery
 - Delivering a service
 - Ending the service delivery
 - Adding delivery notes
 - Uploading the completed service delivery to Harmony

EVV Validation Rules

Standard EVV Validation Rules, includes Violations and Billing Rules. Any Violation rules that fail will display in the EVV Details page. Billing rules that fail are visible on Billing Issue report that can be executed from the EVV Activities List, EVV Activities Details page and in the Consumer Activity Details page.

Violations Rules

Rule Name: Allow EVV Delivery

Rule Number: 1

Violation Type/Subtype: EVV Service/Not an EVV Service

Failed Rule Description: This service cannot be delivered via EVV. This may be because the service cannot ever be delivered via EVV, the rendering provider is not authorized to deliver the service via EVV, or the consumer is not authorized to receive the service via EVV.

Note: If this service is an EVV service, and the rendering provider is authorized to deliver EVV services, notify the iConnect Support Desk.

Rule Name: Manual Entry Requires Justification

Rule Number: 2

Violation Type/Subtype: EVV/Manual Entry

Failed Rule Description: The service delivery was not recorded using the Mobile Site.

Rule Name: Service Requires Note

Rule Number: 3

Violation Type/Subtype: Note Required/Service

Failed Rule Description: This service requires a delivery note.

Note: the EVV Within Mobile Site a warning message will display on the Current Deliveries list informing the user that a note is required for the service.

Rule Name: Other Location Requires Note

Rule Number: 4

Violation Type/Subtype: Note Required/Other Location

Failed Rule Description: Non-approved delivery locations require a note.

Rule Name: Enforce Geolocation – No GPS

Rule Number: 5

Violation Type/Subtype: Geolocation/Missing GPS

Failed Rule Description: GPS coordinates could not be obtained for address at which the service delivery was started and/or ended.

Rule Name: Enforce Geolocation – Start

Rule Number: 6

Violation Type/Subtype: Geolocation/Start Address

Failed Rule Description: The address at which the service delivery was started was too far away from the stated delivery address.

Rule Name: Enforce Geolocation – Start Address is Blank

Rule Number 6a

Violation Type/Subtype: Geolocation/Start Address

Failed Rule Description: The address at which the service delivery is blank.

Rule Name: Enforce Geolocation – End

Rule Number: 7

Violation Type/Subtype: Geolocation/End Address

Failed Rule Description: The address at which the service delivery was ended was too far away from the stated delivery address.

Rule Name: Enforce Geolocation – End Address is blank

Rule Number: 7a

Violation Type/Subtype: Geolocation/End Address

Failed Rule Description: The address at which the service delivery was ended is blank.

Billing Rules

Rule Name: Primary Diagnosis Required

Rule Number: 8

Failed Rule Description: A primary diagnosis is required to bill.

Rule Name: Place of Service Required

Rule Number: 9

Failed Rule Description: A place of service is required to bill.

Rule Name: Consumer Gender Required

Rule Number: 10

Failed Rule Description: The consumer must have a gender in order to bill.

Rule Name: Consumer DOB Required

Rule Number: 11

Failed Rule Description: The consumer must have a DOB and the DOB must not be in the future in order to bill.

Rule Name: Consumer Address Required

Rule Number: 12

Failed Rule Description: The consumer must have a complete address (street, city, state, zip code) in order to bill.

Rule Name: Consumer Medicaid ID Required

Rule Number: 13

Failed Rule Description: The consumer must have a Medicaid ID in order to bill. If the consumer does not have/need a Medicaid ID to receive the service, a placeholder/dummy value will still need to be populated. Consult your system administrator or program manager for the appropriate value to use.

Rule Name: Provider Phone Required

Rule Number: 14

Failed Rule Description: The provider must have a phone number in order to bill.

Rule Name: Provider Mailing Address Required

Rule Number: 15

Failed Rule Description: The provider must have a mailing address in order to bill.

Rule Name: Provider EIN Required

Rule Number: 16

Failed Rule Description: The provider must have an EIN / Tax ID in order to bill.

Rule Name: Provider NPI Required

Rule Number: 17

Failed Rule Description: The provide must have an NPI in the Provider > Edit Provider > NPI field in order to bill. If the provider does not have/need an NPI to deliver the service, you will still need to put a populate the field. Consult your system administrator or program manager for the appropriate value to use.

Rule Name: Unresolved Violations

Rule Number: 18

Failed Rule Description: Unresolved violations are associated with this service prevent this service from being Billed.

Rule Name: **Missing Submittal Folder**

Rule Number: 19

Failed Rule Description: The application is not currently configured to process claims. Please ask your system or program administrator to contact Customer Support.

Rule Name: **Missing Sender ID for Rendering Provider**

Rule Number: 20

Failed Rule Description: The rendering provider on the activity is not configured to submit claims. Please contact your system or program administrator and ask them to setup a Sender ID in the provider's Provider ID Numbers tab.

Rule Name: **No Issues - Set Activity to Billable**

Rule Number: 100

Rule Description: If all rules are passed, then the "EVV Billable?" will be set to "Yes" (TRUE/checked) so that the user can convert the activity to a claim.

Authorize EVV Services (APD iConnect Application)

1. WSC's work with consumers to plan and authorize services that can meet the consumer's needs using the planned services, plan validation and authorization functionality in iConnect. This content is covered in the Case Management Training Manual.
2. If a service requires EVV delivery per APD business rules and CMS requirements, the Allow EVV Delivery field will be visible and checked on the Planned Services page. After the plan is approved and passes validation, the authorization is created and will be visible in the Consumer > Auths and Provider > EVV Activities tabs.

File

Non-Taxable	<input type="checkbox"/>
Planned Service Status	<input type="text" value=""/>
Region/State Review Comments (REQUIRED)	On 9/25/2019 at 11:46 AM, Jennifer Buck wrote: region denies this service
	New Text
	Append Text to Note
Corresponding Auth No.	<input type="text" value=""/>
Allow EVV Delivery	<input checked="" type="checkbox"/>

3. Regional staff will have permissions to uncheck the Allow EVV Delivery field, to force a service delivery to be delivered via traditional means rather than EVV for certain living settings.

Searching for and Viewing EVV Service Authorizations (Service Provider record in the APD iConnect Application)

The provider will have select the staff that are responsible for managing the scheduling of EVV services for their organization. The EVV Scheduling tab presents a view of all consumers with an authorized EVV service. The user must also be a worker for the authorized provider to see any records on this tab. The user can use filters to quickly find and see individual or groups of consumers that meet specified criteria and can assign/reassign EVV workers to authorizations.

1. Navigate to the Provider record and click on the EVV Scheduling tab.
2. Specify one or more parameters in the Search filter section at the top of the grid. A likely filter will be Primary EVV Worker Equal to Blank.
3. Click “Search” to apply the filters. The screen will refresh to show only those EVV authorizations that meet the search criteria.

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

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

Filters
Save Filter

Search Filter Save As Default Save As Delete

Primary EVV Worker Blank AND X

iConnect ID +

Search Reset

3 EVV Scheduling record(s) returned - now viewing 1 through 3

iConnect ID	Consumer Name	Consumer Street Address	Consumer City	Consumer State	Consumer Zip Code	Consumer County	Consumer Region	Auth ID	Auth Svc ID	Service Code	Service	Service Start Date	Service End Date	Primary EVV Worker	Worker Start Date	Worker End Date	
10050	Duck,Daisy	9874 Pond Dr.,	MIAMI	FL	33101	MIAMI-DADE		140901	290	T1000:UC	(4161) Private Duty Nursing - LPN	01/02/2020	06/30/2020		01/02/2020	06/30/2020	
10237	Tester,John EVV	123 Home St.,	TAMPA	FL	33601	HILLSBOROUGH	SUNCOAST	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/01/2019	04/01/2020		12/01/2019	04/01/2020	
10172	Sheppard,Violet	123 Florida St.	ALACHUA	FL	32615	ALACHUA	NORTHEAST	140903	292	S5130:UC	(4140) Personal Supports	02/01/2020	06/30/2020		01/07/2020	06/30/2020	

Save a Search Filter:

- The user should save his/her search filters as default so each time he/she views the EVV Scheduling tab, the default filters will be in place and will not have to be set each time.
- Once the Search filters are selected and the search executed, select Save As.
- Enter a Name of the Search Filter and check Set as Default to set this as the default search filter for the user's EVV Activities tab. Leave this unchecked if this should be a saved search filter but NOT the default search filter. Click Save.
- The next time the EVV Scheduling tab is opened, the default search filters will be in place and the user just has to select "Search"

Edit a Saved Search Filter:

- The user can made changes to a previously saved Search filter. Select the Name of the saved search filter from the dropdown that needs to be changed.
- Make the changes and then select Save As.
- You can save the edited filter with a new name or enter the same name as the original saved filter and make sure the "If Filter Name Exists, Overwrite it" is checked.
- Click Save.

Filters

Save Filter

Service Code S5130:UC Search Filter Save As Default Save As Delete

Service Code Equal To S5130:UC AND X

Start Date Greater Than 10/01/2019 AND X

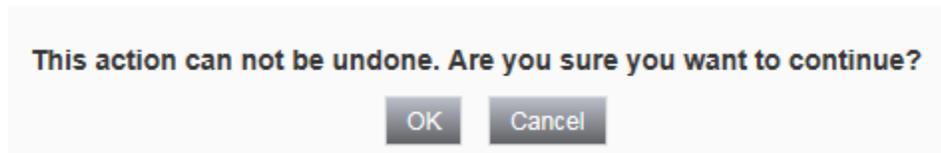
Case No +

Search Reset

Save Search Filter Option As...	
Filter Name *	Service Code S5130:UC
If Filter Name Exists, Overwrite it	<input checked="" type="checkbox"/>
Save As Default	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Delete a Saved Search Filter:

- a. The user can delete a previously saved Search filter. Select the Name of the saved search filter from the dropdown that needs to be deleted. Select the Delete tab. Click OK to the Notification window. The search filter is deleted.



- b. Click on an authorization from the search results grid.
- c. The authorization will open in read-only mode. It is not possible to edit an authorization when it is opened from the EVV Scheduling tab.

Assign/Unassign EVV workers to EVV service authorizations (APD iConnect Application)

Users will authorize EVV services in the normal manner, using the existing planned services > plan validation > authorization functionality. Typically, each EVV authorized service will be assigned a primary and backup worker to limit the number of individuals that can see the consumer and the services they're receiving but doesn't require a supervisor to continually update assignments when primary workers are on vacation or otherwise need coverage by a peer. Provider EVV Managers can associate their EVV workers, who are the individuals that will render the services to consumers, to EVV service authorizations from the EVV Scheduling tab. Assigning an EVV Worker from the EVV Scheduling tab controls which consumers are visible to the workers in the Mobile Site.

1. Navigate to the Provider record and click on the EVV Scheduling tab.
2. If desired, filter to see the desired consumer(s) as described in the previous section.
3. Check the box to the right of each EVV authorization for which an EVV worker needs to be assigned, modified, or removed.
 - a. Checking the box at the top of the grid (listview) will select all service authorizations on the screen.

3 EVV Scheduling record(s) returned - now viewing 1 through 3

iConnect ID	Consumer Name	Consumer Street Address	Consumer City	Consumer State	Consumer Zip Code	Consumer County	Consumer Region	Auth ID	Auth Svc ID	Service Code	Service	Service Start Date	Service End Date	Primary EVV Worker	Worker Start Date	Worker End Date	
10050	Duck,Daisy	9874 Pond Dr.,	MIAMI	FL	33101	MIAMI-DADE		140901	290	T1000:UC	(4161) Private Duty Nursing - LPN	01/02/2020	06/30/2020				<input checked="" type="checkbox"/>
10237	Tester,John EVV	123 Home St.,	TAMPA	FL	33601	HILLSBOROUGH	SUNCOAST	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/01/2019	04/01/2020				<input checked="" type="checkbox"/>
10172	Sheppard,Violet	123 Florida St.,	ALACHUA	FL	32615	ALACHUA	NORTHEAST	140903	292	S5130:UC	(4140) Personal Supports	02/01/2020	06/30/2020				<input checked="" type="checkbox"/>

<< First < Previous Retrieve 15 Records at a time Next > Last >>

4. Select "Assign/Change EVV Worker" from the File menu.

Geographic Agency Provider | EVV Scheduling | Sign Out | Role: APD Main

File Tools

Assign/Change EVV Worker

Print

MY DASHBOARD | CONSUMERS | PROVIDERS | INCIDENTS | CLAIMS | SCHEDULER | UTILITIES | REPORTS

Geographic Agency Provider (10052)

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

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

Filters

Save Filter Search Filter Save As Default Save As Delete

Primary EVV Worker Blank AND

iConnect ID +

Search Reset

3 EVV Scheduling record(s) returned - now viewing 1 through 3

iConnect ID	Consumer Name	Consumer Street Address	Consumer City	Consumer State	Consumer Zip Code	Consumer County	Consumer Region	Auth ID	Auth Svc ID	Service Code	Service	Service Start Date	Service End Date	Primary EVV Worker	Worker Start Date	Worker End Date	
10050	Duck,Daisy	9874 Pond Dr.,	MIAMI	FL	33101	MIAMI-DADE		140901	290	T1000:UC	(4161) Private Duty Nursing - LPN	01/02/2020	06/30/2020				<input checked="" type="checkbox"/>
10237	Tester,John EVV	123 Home St.,	TAMPA	FL	33601	HILLSBOROUGH	SUNCOAST	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/01/2019	04/01/2020				<input checked="" type="checkbox"/>
10172	Sheppard,Violet	123 Florida St.,	ALACHUA	FL	32615	ALACHUA	NORTHEAST	140903	292	S5130:UC	(4140) Personal Supports	02/01/2020	06/30/2020				<input checked="" type="checkbox"/>

<< First < Previous Retrieve 15 Records at a time Next > Last >>

5. The "Assign/Change EVV Worker" dialog box will be displayed.

MY DASHBOARD | CONSUMERS | PROVIDERS | CLAIMS

Pending Provider (10055)

Beds Linked Providers Services

Providers Services Contracts

Filters

Save Filter No previously saved filter found

Case No +

2 EVV Scheduling record(s) returned -

Case No	Consumer	Auth ID	S
10106	Sheppard,John	140895	G9C
10106	Sheppard,John	140897	T10

v8.3.4.1.61725

Assign/Change EVV Worker

Primary EVV Worker
 Backup EVV Worker
 Alternate EVV Worker 1
 Alternate EVV Worker 2
 Alternate EVV Worker 3

Worker

Start Date

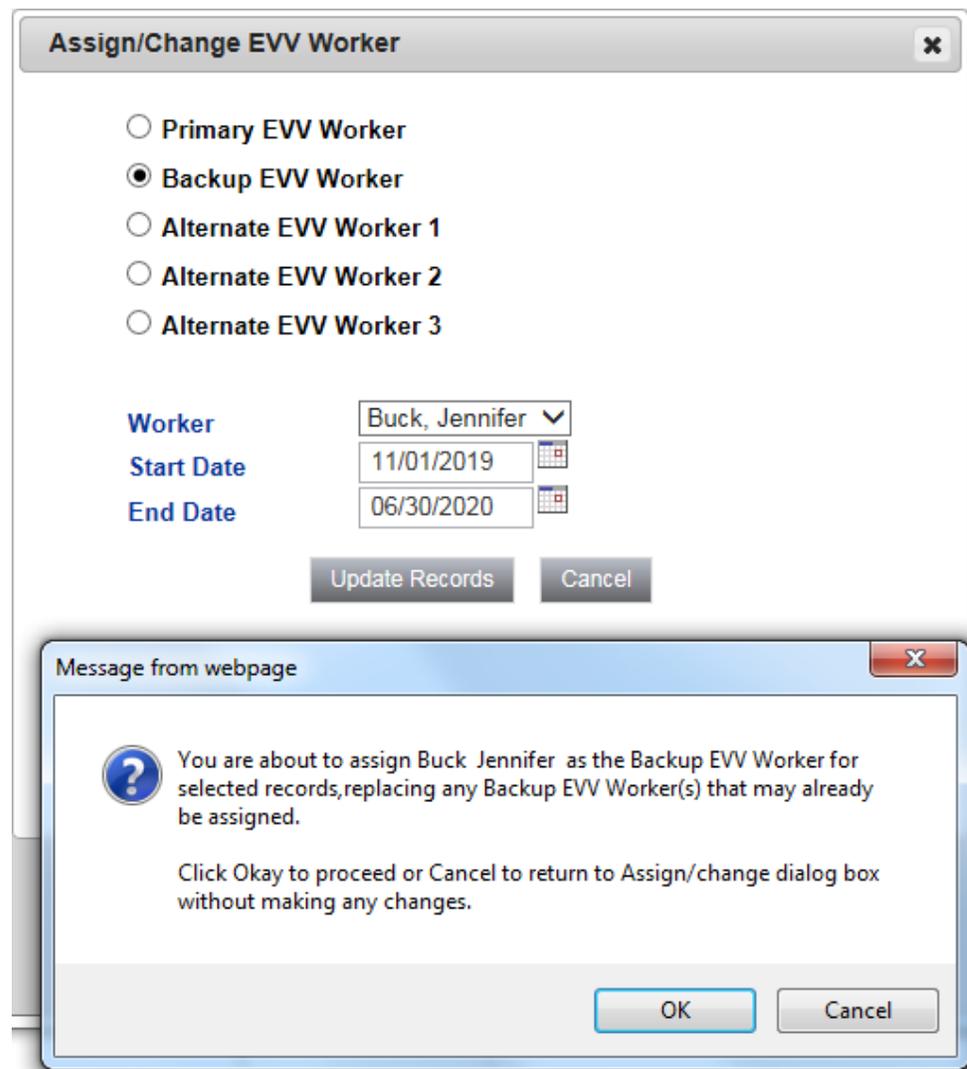
End Date

Update Records Cancel

Worker Start Date	Worker End Date	
11/01/2019	11/30/2020	<input type="checkbox"/>
11/01/2019	06/30/2020	<input type="checkbox"/>

About

6. To assign a worker when one is not already assigned or change the assigned worker from one worker to another, select the type of worker to be assigned/updated.
7. Select the worker to be assigned to the selected records.
8. Enter a Worker Start Date and End Date.
 - a. If dates are populated, they are used to grant or remove visibility to consumer within the Mobile Site.
 - b. If no dates are populated, the assigned EVV workers will always be able to see the consumer in the Mobile Site.
 - c. Visibility of the EVV services in the Mobile Site is dependent on the start date of the service and the current date, not the Worker Start and End dates.
9. Click “Update Records” to assign/change the assigned worker or “Cancel” to return to the EVV Scheduling tab without making any changes.



10. A confirmation message will be displayed. Click “Okay” to proceed or “Cancel” to abort the changes.
11. The system will assign the specified EVV worker to each selected record as the specified worker type. If another worker was already assigned to the record, they will be replaced by the new worker.
12. To remove an EVV worker without adding a replacement
 - a. Select the type of EVV worker (Primary, Back-up, etc.) to be removed.
 - b. Make sure the worker field is blank.
 - c. Click “Update Records” to remove the assigned worker(s) or “Cancel” to return to the EVV Scheduling tab without making any changes.

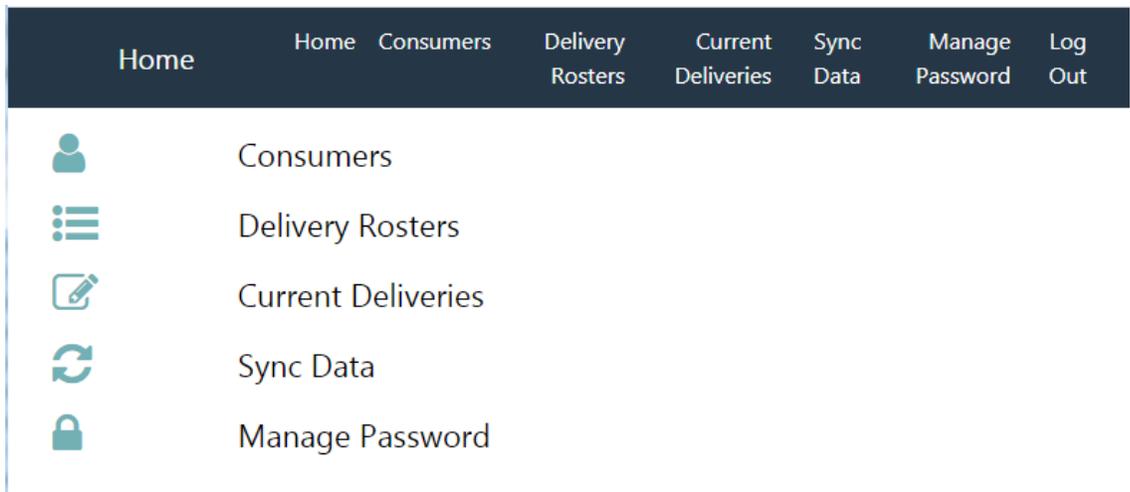
- d. A confirmation message will be displayed. Click “Okay” to proceed or “Cancel” to abort the changes.
- e. The system will remove any existing workers and, if present, their Worker Start and End Dates.

Download/Sync Consumer and Authorization Data (Mobile Site)

EVV workers are responsible for delivering EVV services to the consumer. In most cases, EVV workers will work exclusively in the Mobile Site. The Mobile Site allows EVV workers to:

- Download/Sync appropriate consumer and authorization data
- Create delivery rosters
- Record service deliveries

- Upload completed deliveries to iConnect application
1. To record a service delivery, the Mobile Site must have consumer and authorization data. Workers can sync consumer and authorization data from the iConnect application to their mobile device anytime they have internet connectivity. The sync process downloads all consumer and authorization data that the worker has permission to see to the Mobile Site. It also removes consumer and authorization data that the worker might have been able to see previously but has now lost access. (e.g., worker is no longer an assigned EVV worker for a given consumer.)
 2. Click the Mobile Site link from the Centrifly home page to log in.
 3. Select Sync Data from the Toolbar.

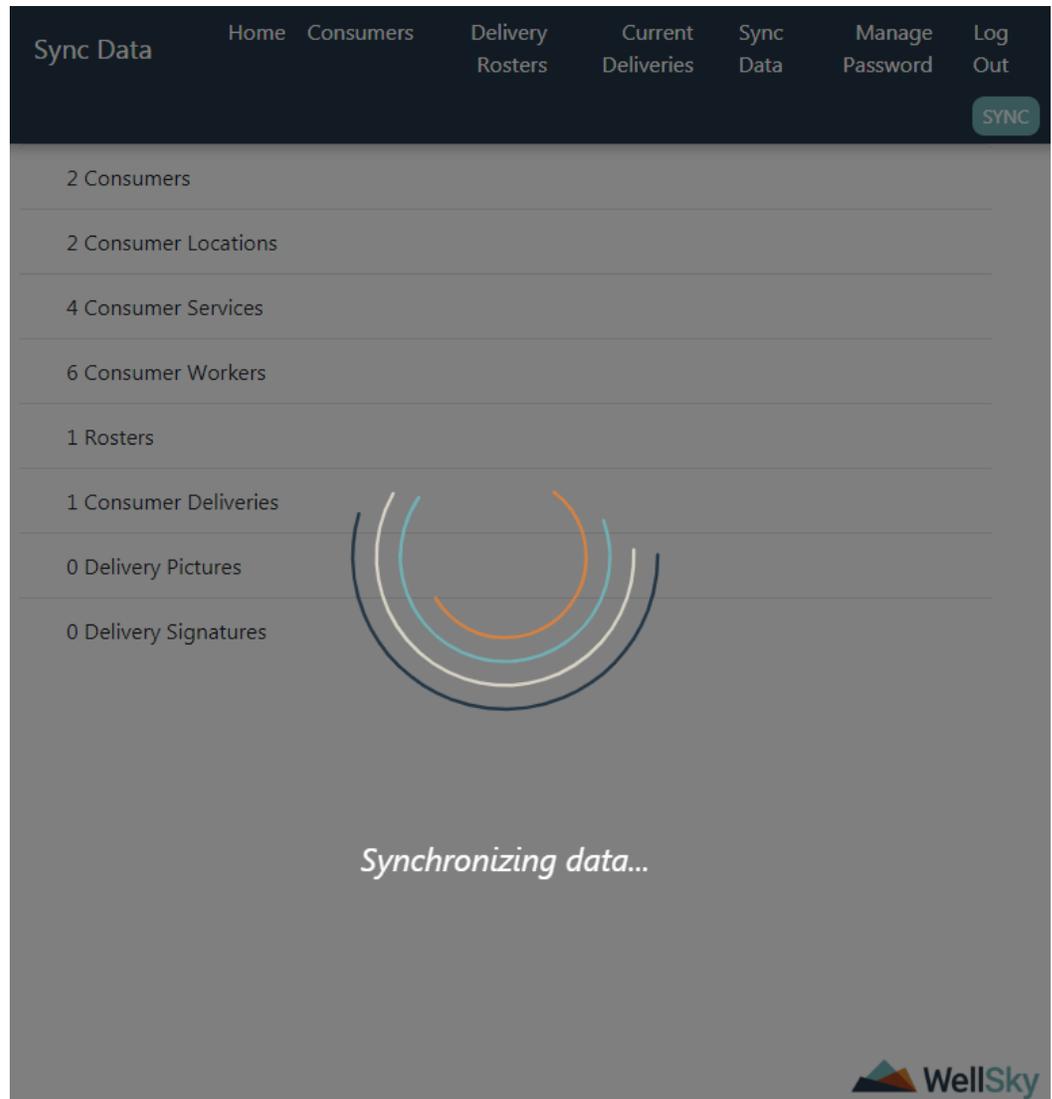


4. Select the Sync link.

Sync Data	Home	Consumers	Delivery Rosters	Current Deliveries	Sync Data	Manage Password	Log Out
2 Consumers							
2 Consumer Locations							
4 Consumer Services							
6 Consumer Workers							
1 Rosters							
1 Consumer Deliveries							
0 Delivery Pictures							
0 Delivery Signatures							

5. The system will:

- a. Download new consumers and their authorization data. New consumers are not automatically added to a delivery roster.
- b. Update existing consumers whose data has been modified in the iConnect application.
- c. Remove consumers and their authorization data for consumers that are no longer associated to the worker.
 - Consumers are also removed from delivery rosters.
 - Service deliveries that have not been uploaded for consumers that are no longer associated to the worker are not deleted. They can still be completed and uploaded.

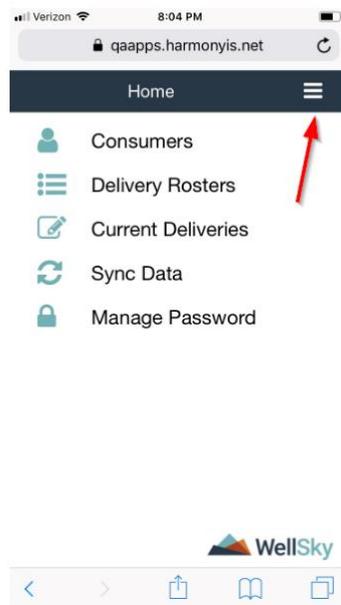


View Consumer Lists (Mobile Site)

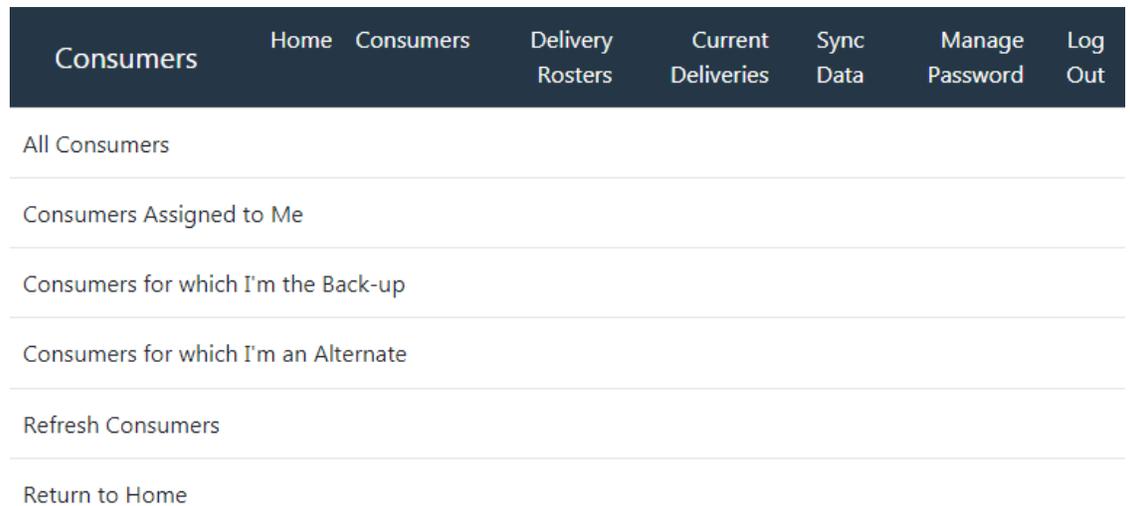
Consumers demographic and authorization data is the basis for EVV service deliveries. Data can be viewed from consumer lists which are based on the relationship of the worker to the consumer or from delivery rosters which are defined by the worker.

1. From the main menu, select “Consumers.”

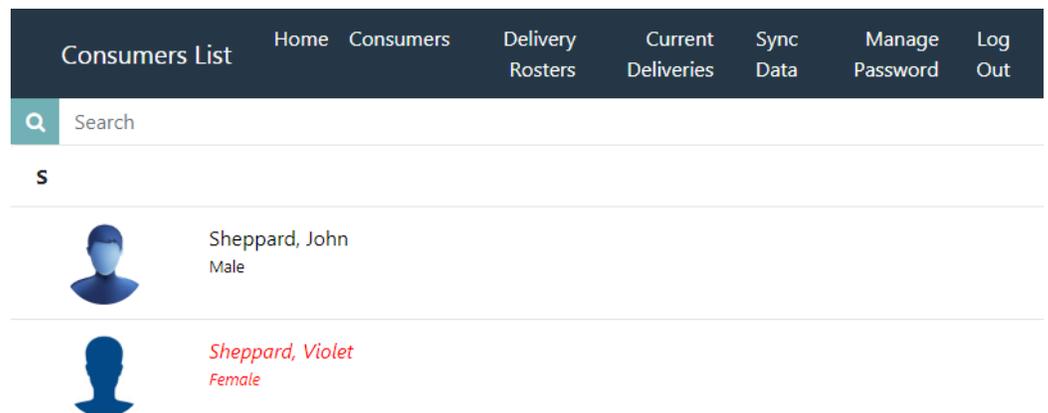
-  Consumers
-  Delivery Rosters
-  Current Deliveries
-  Sync Data
-  Manage Password



2. Select one of the following options:
 - a. All Consumers: System displays all consumers to which the EVV worker has visibility
 - b. Consumers Assigned to Me: System displays all consumers to which the EVV worker is assigned as the Primary EVV Worker
 - c. Consumers for which I'm the Backup: System displays all consumers to which the EVV worker is assigned as the Backup EVV Worker
 - d. Consumers for which I'm an Alternate: System displays all consumers to which the EVV worker is assigned as the Alternate EVV Worker 1, Alternate EVV Worker 2, or Alternate EVV Worker 3



3. Select a consumer from the list.
4. Consumers that appear in a consumer list in red italics are consumers that are not currently assigned to a delivery roster. This helps EVV worker quickly see new consumers that have been assigned to them and need to be added into their delivery route.



Viewing Consumer Details (Mobile Site)

The consumer detail page houses consumer demographic details, special notes, approved delivery locations, approved services, current deliveries, and worker information. This information is most useful for the EVV worker when they get a new consumer or need additional information on a consumer. Information in this area is all read-only. Consumer data cannot be updated from within the Mobile Site. EVV workers can initiate a new service delivery from the consumer detail screen, though most EVV workers will do this from within a delivery roster.

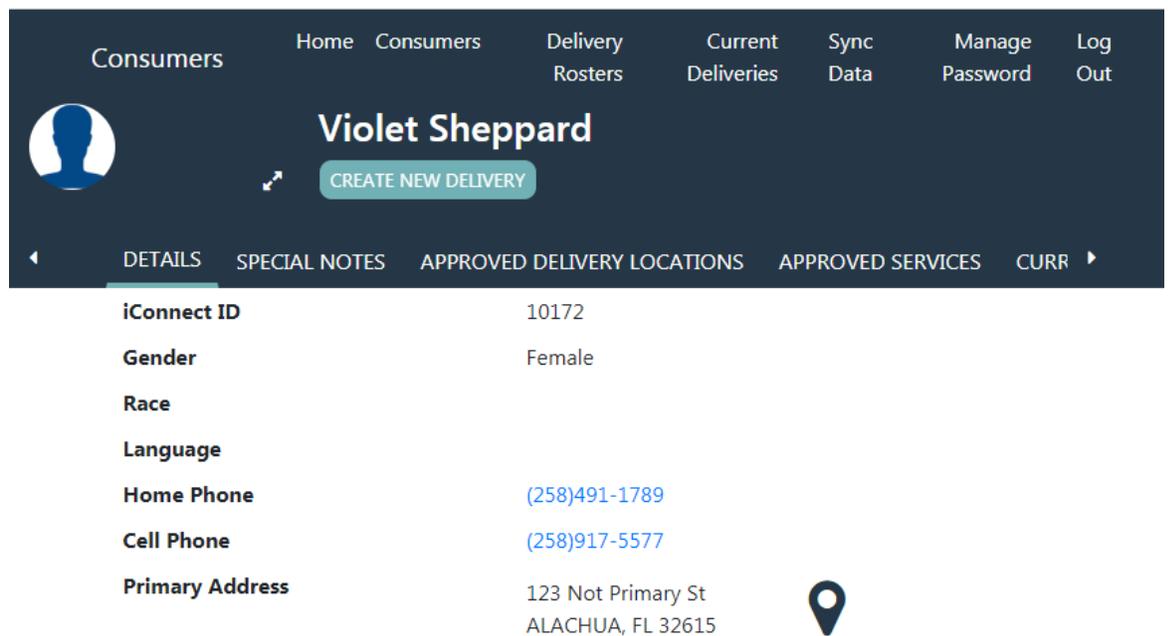
1. From the main menu, select Consumers and then select the appropriate list.
2. Select a consumer from the list.

Details

3. The consumer's Details page will be presented. The name and a photo of the consumer will be visible at the top of the screen. The photo can be used by the EVV worker to confirm that they are delivering a service to the correct consumer.
 - a. The photo shown is from the Consumers > Edit Demographics screen in the iConnect application. The WSC will take this photo. This is not a photo taken by the EVV worker.
 - b. Click on the photo to view a larger version of the photo. Click on the photo again to return to the thumbnail view.
4. To dial the consumer's home or cell phone, click the phone number. Your mobile device will offer to dial the number.

NOTE: This feature may not be available on all devices as each operating system manages this type of control independently from the iConnect EVV Mobile Site.

5. The consumer's residential, primary address will display on the Details page for reference only. The approved delivery locations are not listed on this Details page, they are located on the Approved Delivery Locations page.



The screenshot displays the 'Consumers' section of the iConnect EVV Mobile Site. At the top, there is a navigation bar with links for Home, Consumers, Delivery Rosters, Current Deliveries, Sync Data, Manage Password, and Log Out. Below the navigation bar, the consumer's name 'Violet Sheppard' is prominently displayed next to a profile picture placeholder. A 'CREATE NEW DELIVERY' button is visible next to the name. Below the name, there is a horizontal menu with options: DETAILS (selected), SPECIAL NOTES, APPROVED DELIVERY LOCATIONS, APPROVED SERVICES, and CURR. The main content area shows the following details:

iConnect ID	10172
Gender	Female
Race	
Language	
Home Phone	(258)491-1789
Cell Phone	(258)917-5577
Primary Address	123 Not Primary St ALACHUA, FL 32615

Approved Delivery Locations

6. Click on the "Approved Delivery Locations" menu. The addresses at which the consumer is authorized to receive services are listed. This includes the active, residence address of the consumer, guardian, guardian advocate or parent. The information on this page is read-only.

Consumers Home Consumers Delivery Current Sync Manage Log
Rosters Deliveries Data Password Out

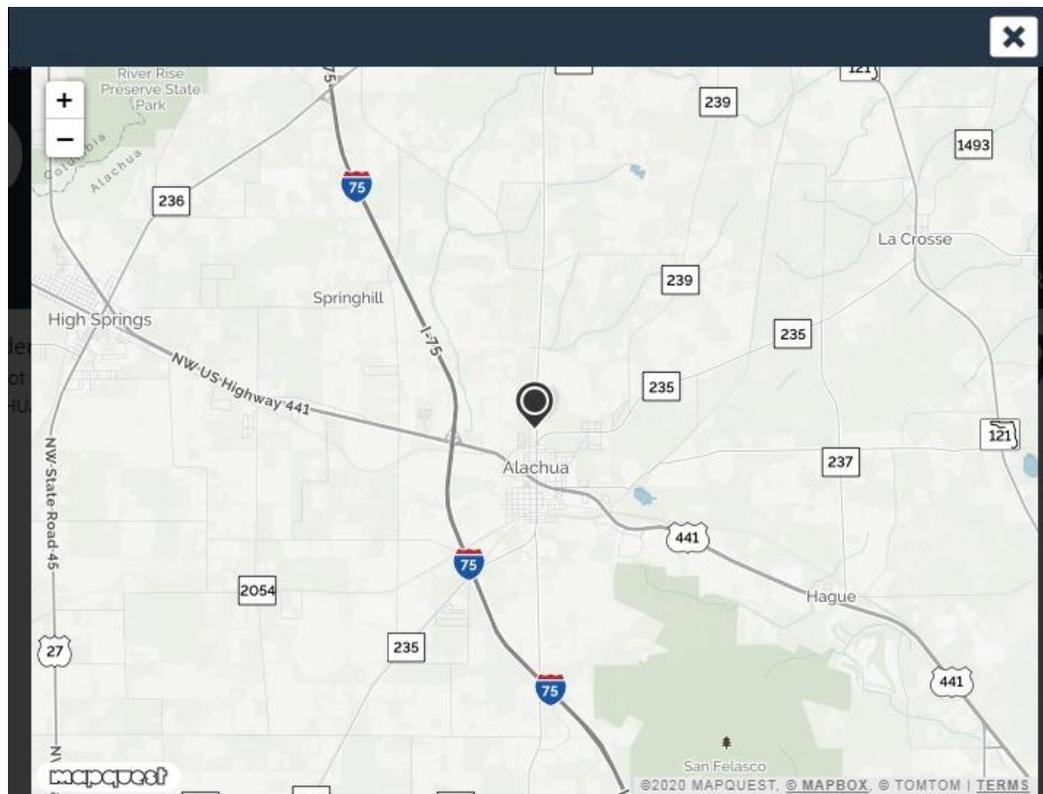
 **Violet Sheppard**
CREATE NEW DELIVERY

DETAILS SPECIAL NOTES **APPROVED DELIVERY LOCATIONS** APPROVED SERVICES CURR

Residence Address (Relation)
123 Not Primary St
ALACHUA, FL 32615



- To view an address on a map, click the map icon in the address field. A map overlay will be displayed.
- Use the “+” and “-” signs or “pinch-zoom” to zoom in and out.
- Use your finger to move the map.
- Click the “X” in the upper right corner to close the map and return to the Approved Delivery Locations page.



Approved Services

- Click on the “Approved Services” menu. The consumer’s EVV service authorizations are listed. The information on this page is read-only.

(4140) Personal Supports (S5130:UC)

01/07/2020 - 01/31/2020

Auth Id: 140905

Total Units: 75

Unit Type: 15 mins

Instructions/Notes:

Current Deliveries

- Click on the “Current Deliveries” menu. Service deliveries for the consumer that have been started and not completed or completed but not yet uploaded to the iConnect application are listed.

Workers

- Click on the “Workers” menu. The EVV workers associated to the consumer are listed. The information on this page is read-only.

Vogeler, Mandi (Backup EVV Worker)

Division: APD
 Worker Cell Phone:

Buck, Jennifer (Primary EVV Worker)

Division: APD
 Worker Cell Phone: [\(111\)111-1111](tel:(111)111-1111)

Buck, Jennifer (Specialist/Liaison)

Division: APD
 Worker Cell Phone: [\(111\)111-1111](tel:(111)111-1111)

Create Delivery Rosters (Mobile Site)

Delivery rosters can be created by the EVV worker to help ensure that they deliver services to all consumers assigned to them. Delivery rosters can only be created from within the Mobile Site. Rosters can be based on several criteria including service, consumer location, and the relationship of the EVV worker to the consumer. For example, if an EVV worker may deliver personal care to consumers in County 1 on Mondays and Thursdays and in County 2 on Tuesdays and Fridays; using service and location in their roster filters, they could create a roster for MTh Personal Care and another for TF Personal Care.

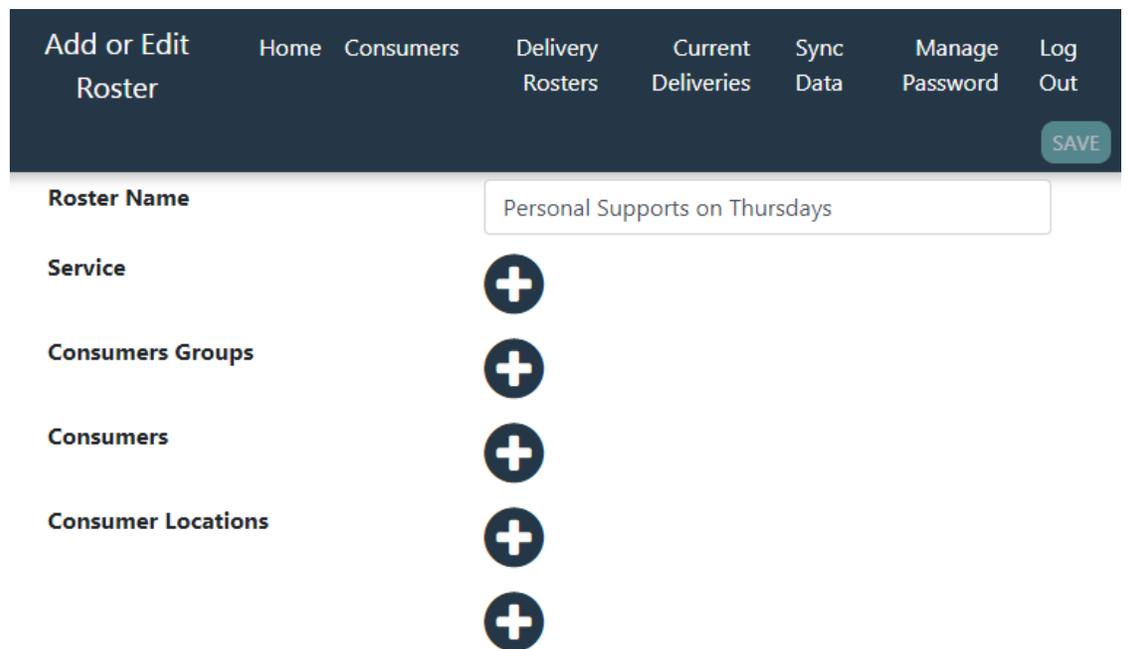
1. From the main menu, select Delivery Rosters.

2. The list of delivery rosters (if any are present) will be displayed.
3. Click the + sign to add a delivery roster.

EVV Test

4. The Add/Edit Roster screen will be displayed.

5. Enter a name for the roster.



Add or Edit Roster Home Consumers Delivery Rosters Current Deliveries Sync Data Manage Password Log Out **SAVE**

Roster Name

Service 

Consumers Groups 

Consumers 

Consumer Locations 



6. To create a roster that shows consumers based on their authorized services, click the Service option.

- a. The Add Services screen will be displayed.
- b. Select one or more services.
- c. Click the check to save and return to Add/Edit Rosters screen.

7. To create a roster that shows consumers based on their relationship to the EVV worker OR to add individual consumers, click the Consumers Groups option.

- a. The Add Consumers screen will be displayed.

- b. To add consumers based on their relationship to the EVV worker, select one or more of the following options:
 - Only Consumers Assigned to Me
 - Only Consumers for which I'm the Backup
 - Only Consumers for which I'm an Alternate Worker

- 8. To create a roster that contains specific consumers, select the Consumers option.
 - a. Select the consumer(s) to add to the roster.



- b. Click the check to save and return to Add/Edit Rosters screen.

- 9. To create a roster that shows consumers based on their county, click the first Consumer Locations option.
 - a. The Add/Edit Consumer Locations screen will be displayed.
 - b. Select one or more of the listed counties.
 - c. Click the check to save and return to Add/Edit Rosters screen.

- 10. To create a roster that shows consumers based on their city, click the first Consumer Locations option.
 - a. The Add/Edit Consumer Locations screen will be displayed.
 - b. Select one or more of the listed cities.
 - c. Click the check to save and return to Add/Edit Rosters screen.

- 11. Click Save to save the roster.

Viewing a Delivery Roster

12. From the main menu, select Delivery Rosters.
13. The list of delivery rosters (if any are present) will be displayed. Click on the appropriate roster.
14. The roster will open and display a list of consumers

Editing a Delivery Roster

15. From the main menu, select Delivery Rosters.
16. The list of delivery rosters (if any are present) will be displayed.
17. Click Edit and select the roster to be edited.
18. Add/remove items as in the same manner used for creating a new roster.
19. Click Save to save the updated roster.

Recording a Service Delivery (Mobile Site)

Recording a service delivery requires the following actions:

1. Initiate a delivery
2. Start and deliver a service
3. End the delivery
4. Add delivery notes
5. Upload delivery to iConnect application

Initiate a Delivery

1. From the main menu, select Consumers and then select the appropriate list.
2. Select a consumer.
3. Click Create New Delivery to display the service delivery screen
OR
4. From the main menu, select Delivery Rosters and then select the appropriate roster.

Consumers

Violet Sheppard

CREATE NEW DELIVERY

DETAILS SPECIAL NOTES APPROVED DELIVERY LOCATIONS APPROVED

iConnect ID 10172

Gender Female

Race

Language

Home Phone (258)491-1789

Cell Phone (258)917-5577

Primary Address 123 Not Primary St
ALACHUA, FL 32615

5. Select a consumer to display the service delivery screen. The consumer's iConnect ID and the start date will auto-populate and cannot be edited.

Select Delivery

Violet Sheppard

START

iConnect ID 10172

Start Date January 28th 2020, 3:48:58 pm

Service +

Location +

6. Select a service by clicking the + icon. Only the consumer's approved services will be shown.

 **Approved Services**

(4140) Personal Supports (S5130:UC)
01/07/2020 - 01/31/2020
Total Units: 75
Unit Type: 15 mins

(4140) Personal Supports (S5130:UC)
02/01/2020 - 06/30/2020
Total Units: 453
Unit Type: 15 mins

- 7. Select the location by clicking the + icon. Only a consumer’s approved locations will be shown.
 - a. If the service is being delivered at an approved location, select the location.

 **Approved Location** 

Residence Address (Relation) 
123 Not Primary St
ALACHUA, FL 32615

Other Location...

Enter location name (e.g., Doctor’s office)
Enter street address
Enter apartment, unit, or suite #
Enter a city name
Enter a state
Type a zipcode

- b. If the service is being delivered at a non-approved location, enter a description (e.g., Doctor’s office) and the full address (street, city, state, zip code.)

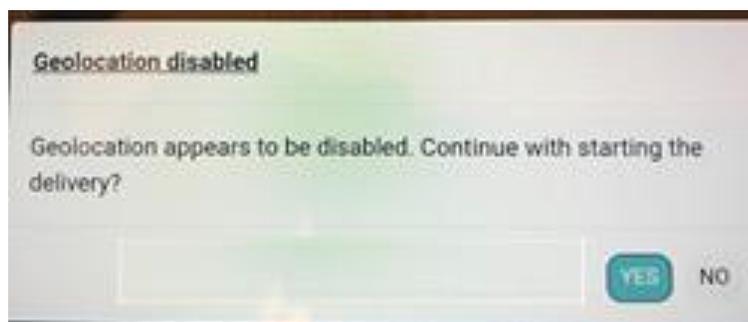
8. The Provider will select the Documentation Type for this service.
9. The selected service and location populate on the Service Delivery page. Click Start.

Select Delivery ☰

Violet Sheppard START

iConnect ID	10172
Start Date	January 28th 2020, 3:48:58 pm
Service	(4140) Personal Supports (S5130:UC) 01/07/2020 - 01/31/2020 <i>Total Units: 75</i> <i>Unit Type: 15 mins</i>
Location	<div style="text-align: center; margin-bottom: 5px;"></div> Residence Address 123 Not Primary St ALACHUA, FL, 32615 <div style="text-align: center; margin-top: 5px;"></div>

10. The system will check if the location services are active on the EVV Worker’s mobile device. If not the EVV Worker will be prompted that Geolocation is disabled and must acknowledge to proceed with the service or click No to enable geolocation before starting the delivery. Service deliveries recorded without geolocation enabled will be marked with a violation when it is uploaded.



- a. Enabling Location Services is different than having internet connectivity and/or access to GPS coordinates. Enabling or “turning on” location services ensures that if connectivity is available, GPS coordinates will automatically be obtained.
11. If the error message “The destination is at a greater distance than the allowable distance threshold. Are you sure you want to proceed anyway?” is displayed, the Mobile Site has detected that the mobile device is outside of the geofence set for the selected service.

Allowable Distance

The destination is at a greater distance than the allowable distance threshold. Are you sure you want to proceed anyway?



- a. Select Yes to continue delivering the service (the service will be marked with a violation when it is uploaded).
- b. Select No to return to the service delivery screen. Either select another location or move closer to the selected location and reinitiate the service delivery.

Start and Deliver a Service

Service deliveries can be recorded in the presence or absence of internet connectivity. If connected, the Mobile Site will automatically capture the date, time, and GPS location of the worker at the start and end of each service delivery. If not connected, the Mobile Site will record the service delivery, but the provider EVV supervisor may be asked to justify or explain the lack of GPS data after the service delivery has been uploaded to the iConnect application and prior to billing.

1. After selecting Start on the Service Delivery, the service delivery screen will update. The Service and Location will all be made read-only.
2. The start date and time will auto-populate and will be read-only.

Service Delivery for Violet Sheppard

☰

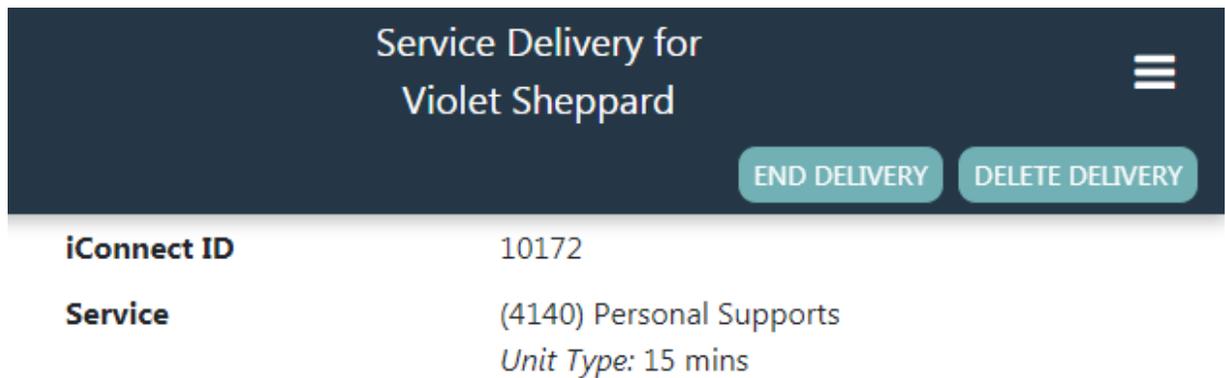
END DELIVERY
DELETE DELIVERY

iConnect ID	10172
Service	(4140) Personal Supports <i>Unit Type: 15 mins</i>
Location	Residence Address 123 Not Primary St ALACHUA, FL, 32615
<u>Delivery Start</u>	
Start Date	01/28/2020
Time	3:58 pm
Location	
Address	2345 Cherrystone Rd Cape Charles, VA, 23310-4037
<u>Delivery Details</u>	
Units Delivered	0.07
Notes	

3. The latitude/longitude of the mobile device is captured and a reverse address lookup will be done. The address where the mobile device is located will be shown. If data is not present, the starting address field will be populated with “Unavailable.”
4. The Units Delivered calculation begins and updates until the service delivery is ended.
5. The service delivery screen will remain open unless you navigate to another screen or the application times out but will now also be accessible from the Current Deliveries section on the main menu or the Current Deliveries section of the Consumer Detail page.
6. If you need to record multiple service deliveries simultaneously (e.g., delivering services using a 1:3 ratio), repeat the above steps for each consumer and/or service.

End the Delivery

1. If not already on the Service Delivery screen, navigate to the Service Delivery screen from one of the options below:
 - a. Option 1: From Main Menu > (shows all deliveries across all consumers)
 - i. Click on Current Deliveries from the main menu.
 - b. Option 2: From Consumer Detail screen (shows deliveries for the selected consumer only)
 - i. Navigate to the appropriate consumer record.
 - ii. Click on Current Deliveries.
2. Select the appropriate delivery.
3. Click End Delivery.



4. The service delivery screen will update. The end time will auto-populate and will be read-only.
5. If the service delivered is time-based, the units delivered will auto-populate and will be read-only.
 - a. If the service is not time-based, enter the units delivered.
6. OPTIONAL: Get the consumer or legal representative's signature
 - a. Click on the + icon next to signature

Time	9:42 am
Location	
Address	957 Meizner Real Ave Brandon, FL, 33511-8808
<u>Delivery End</u>	
Time	9:44 am
Location	
Address	957 Meizner Real Ave Brandon, FL, 33511-8808
<u>Delivery Details</u>	
Units Delivered	0.17
Place of Service	
Notes	
Provider Documentation	
Signature	 

- a. On the new screen that opens, have the consumer/legal representative use their finger/stylus to sign.
- b. Click the ✓



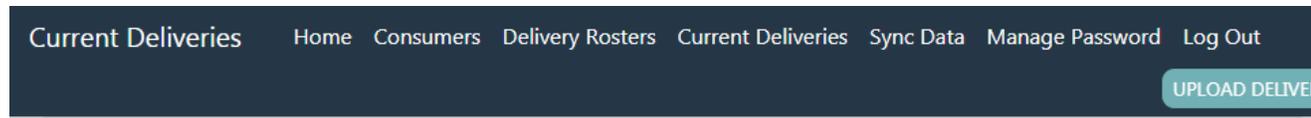
7. You have finished working with this consumer and can complete the remaining steps in your car, or later at your office/home.

c. Remember, the remaining steps must be completed on the same device.

8. If an EVV worker does not click the End Delivery button within 24 hours, the Mobile Site will end the delivery automatically.
 - a. When uploaded, the activity will be flagged with a violation and marked as having been auto-ended.

Add Notes

1. EVV services are configured to require a note. A Service Delivery can be started and ended without adding a Note but the EVV Worker will not be able to upload a Service Delivery without a Note.

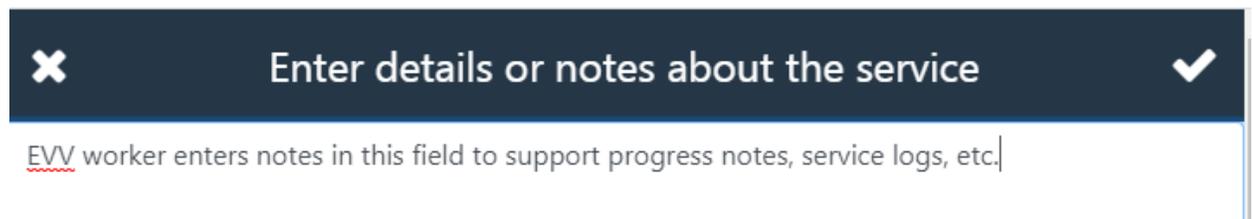


Sheppard, Violet

0.6 units delivered of (4140) Personal Supports from January 28th 2020 03:58:16PM to January 28th 2020 04:07:17PM

 Note is required.

2. From the Service Delivery details page, select the + icon next to the Notes field.
3. Enter the service delivery note.
4. Click the Check icon.



5. The Provider is returned to the Service Delivery details page where the notes are displayed.

iConnect ID	10172
Service	(4140) Personal Supports <i>Unit Type: 15 mins</i>
Location	Residence Address 123 Not Primary St ALACHUA, FL, 32615
<u>Delivery Start</u>	
Start Date	01/28/2020
Time	3:58 pm
Location	
Address	2345 Cherrystone Rd Cape Charles, VA, 23310-4037
<u>Delivery End</u>	
Time	4:12 pm
Location	
Address	2345 Cherrystone Rd Cape Charles, VA, 23310-4037
<u>Delivery Details</u>	
Units Delivered	0.6
Notes	  <p>EVV worker enters notes in this field to support progress notes, service logs, etc.</p>

- The provider can edit the note by selecting the pencil icon, updating the note and then clicking the Check icon again.

Delete the Delivery

- If a Service Delivery was created in error the provider can delete it.
- Any time prior to upload, a service delivery can be deleted. If deleted, it cannot be restored. Deletion should be used sparingly and only in cases where a service delivery was created in error.
- If not already on the Service Delivery screen, navigate to the Service Delivery screen from one of the options below:
 - Option 1: From Main Menu > (shows all deliveries across all consumers)
 - Click on Current Deliveries from the main menu.
 - Option 2: From Consumer Detail screen (shows deliveries for the selected consumer only)

- i. Navigate to the appropriate consumer record.
 - ii. Click on Current Deliveries.
- 4. Select the appropriate delivery.
- 5. Click Delete Delivery.
 - a. Click “Yes” to delete the delivery or “No” to return to the service delivery screen without deleting the record.

Delete Service Delivery

Delete Service Delivery

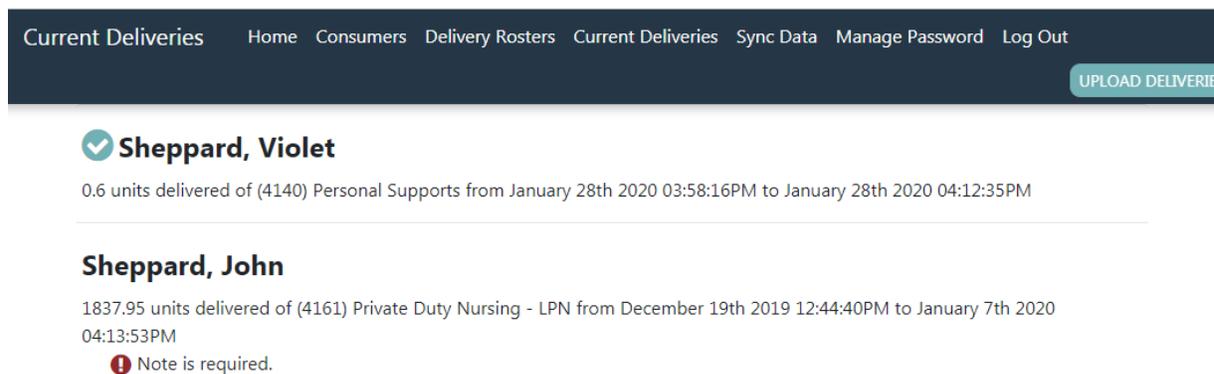


- 6. The service delivery has been deleted.

Upload Delivery to APD iConnect Application

Completed service deliveries will be uploaded to the iConnect application. The Mobile Site will prevent users from uploading deliveries that do not contain all required data.

- 1. Internet connectivity is required to upload service deliveries.**
2. From the main menu, select Current Deliveries. All services deliveries that have been started or completed but not yet uploaded will be displayed.



3. Click Upload Deliveries to upload all completed deliveries.
4. Deliveries can also be uploaded one by one by navigating to the Consumer details page and selecting Current Deliveries to display on that consumer’s deliveries.

Consumers Home Consumers Delivery Rosters Current Deliveries Sync Data Manage Password Log Out

 **Violet Sheppard**

[CREATE NEW DELIVERY](#)

DETAILS SPECIAL NOTES APPROVED DELIVERY LOCATIONS APPROVED SERVICES **CURRENT DELIVERIES** W

(4140) Personal Supports (S5130:UC) - 01/28/2020

- a. Select the delivery to open the Service Delivery details page. Select Upload Delivery.

Service Delivery for Violet Sheppard Home Consumers Delivery Rosters Current Deliveries Sync Data Manage Password Log Out

[UPLOAD DELIVERY](#) [DELETE DELIVERY](#)

iConnect ID	10172
Service	(4140) Personal Supports <i>Unit Type: 15 mins</i>
Location	Residence Address 123 Not Primary St ALACHUA, FL, 32615
<u>Delivery Start</u>	
Start Date	01/28/2020
Time	3:58 pm

5. If there are no issues, the message Upload Successful will be displayed and no additional action is needed.
6. If an internet connection is not detected, the following message will be displayed:

“You must be online to upload deliveries.”

 - a. Connect to the internet and try again.
 - b. If you are sure you are connected to the internet and the error message continues to be displayed, contact your supervisor for assistance.
7. If there are issues with the Service Delivery, typically a note is required but not completed, an error message will be displayed.

Current Deliveries Home Consumers Delivery Rosters Current Deliveries Sync Data Manage Password Log Out

[UPLOAD DELIVERIES](#)

Sheppard, John

1837.95 units delivered of (4161) Private Duty Nursing - LPN from December 19th 2019 12:44:40PM to January 7th 2020 04:13:53PM

 Note is required.

8. To correct missing information, click on the record and add any missing data then upload again by following steps 1-5.

EVV Activities Tab (APD iConnect Application)

Service deliveries that are uploaded to the iConnect application from the Mobile Site are saved as EVV activity records. Provider EVV managers can search for and view individual activities or groups of activities. Searches can be saved so that the EVV manager can quickly call up a variety of lists based on their immediate business need. For example, a provider EVV manager might create and save a series of search filters for activities created by each worker they supervise to allow them ensure that each worker is delivering the services assigned to them in a timely manner and have another saved filter that shows only activities that have unresolved violations.

View EVV Activities

EVV service deliveries are recorded as EVV activities in iConnect. EVV activity records are visible in two locations – the consumer’s record on the Provider Documentation tab and the provider’s record on the EVV Activities tab. Provider EVV Managers will use the EVV Activities tab to review uploaded activities, justify violations, and initiate billing. FL APD staff will likely review activities in the context of QA processes. WSCs may also review EVV activities to ensure that consumers are receiving authorized services as per their support plan.

The standard activity detail page shows basic service delivery information such as start and end times, units delivered, service rendered, and worker. The EVV Details subpage displays EVV-specific information including the stated and actual delivery locations, delivery notes, and any validation requirements that the activity has violated.

1. When viewed from the Consumers > Provider Documentation (Activities) tab, EVV activities are always read-only. Editing of EVV activities to add place of service, must be done from the Provider > EVV Activities tab.

The screenshot displays the 'EVV Details' subpage in the iConnect application. The page is organized into several sections:

- Activity Times:** A table with columns for Start Date, Start Time, End Date, End Time, and Total Minutes. It shows two activity records for 1/28/2020 and 01/28/2020.
- Authorization:** Fields for Auth ID (140905) and PA Number.
- Activity Details:** Fields for Division (APD), Provider (Pending Provider), Worker (Buck, Jennifer), Status (Pending), Delivered Via EVV (Mobile App Upload), EVV Violation(s)?, and Unresolved EVV Violation(s)?.
- Activity Services:** Fields for Service (S5130:UC), Units (0.60), Rate (\$3.62), Secondary Code (S5130:UC), Unit Type (15 mins), and Auth Required (checked).
- Documentation:** A list of documentation items including Annual Report, Daily Attendance Log, Monthly R&B, Progress Note, Quarterly Summary, Service Log, and Trip Log.

File

Provider Documentation

EVV Details

Stated Delivery Address

Address: Residence Address 123 Not Primary St ALACHUA ALACHUA FL 32615

Lat/Long: Lat: -82.49468 Long: 29.80391

Allowable Difference (feet): 500

Start Location

Recorded Lat/Long: -75.9993969, 37.301429299999995

Address: 2345 Cherrystone Rd Cape Charles VA 23310-4037

Actual Difference (feet): 3371328

End Location

Recorded Lat/Long: -75.9993969, 37.301429299999995

Address: 2345 Cherrystone Rd Cape Charles VA 23310-4037

Actual Difference (feet): 0

Delivery Notes

Notes: EVV worker enters notes in this field to support progress notes, service logs, etc.

Delivery Confirmation

Consumer Signature: Unavailable

Consumer Photo: Unavailable

0 record(s) returned

- When viewed from the Providers > EVV Activities tab, select fields are editable based on whether the activity was created via upload from the Mobile Site or manually entered in iConnect.
- Navigate to the provider record and select the EVV Activities tab.

Pending Provider (10055)

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

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

Filters

Save Filter Unresolved Violations Search Filter Save As Default Save As Delete

iConnect ID + Search Reset

11 EVV Activities record(s) returned - now viewing 1 through 11

iConnect ID	Consumer Name	Auth ID	Auth Svc ID	Service Code	Service	Start Date	Start Time	End Date	End Time	Worker	Unresolved Violations?	EVV Billable?
10172	Sheppard,Violet	140905	294	S5130 UC	(4140) Personal Supports	01/28/2020	3:58 PM	01/28/2020	4:12 PM	Buck, Jennifer	No	No
10172	Sheppard,Violet	140905	294	S5130 UC	(4140) Personal Supports	01/15/2020	11:21 AM	01/15/2020	11:22 AM	Buck, Jennifer	No	No
10004	Johnson,Kimmy	140906	296	S5130 UC	(4140) Personal Supports	01/08/2020	9:46 AM	01/08/2020	9:51 AM	Buck, Jennifer	No	No
10004	Johnson,Kimmy	140902	291	T1000 UC	(4161) Private Duty Nursing - LPN	01/06/2020	5:40 PM	01/06/2020	5:47 PM	Buck, Jennifer	No	No
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/19/2019	10:09 AM	12/19/2019	11:07 AM	Buck, Jennifer	No	No
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/19/2019	10:09 AM	12/19/2019	11:18 AM	Buck, Jennifer	Yes	No
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/18/2019	3:23 PM	12/18/2019	3:47 PM	Buck, Jennifer	Yes	No
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/13/2019	1:55 PM	12/19/2019	9:02 AM	Buck, Jennifer	No	No
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/12/2019	11:22 AM	12/12/2019	12:36 PM	Buck, Jennifer	No	No
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	11/19/2019	1:38 PM	11/19/2019	2:05 PM	Buck, Jennifer	No	No
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	11/12/2019	12:20 PM	11/12/2019	12:23 PM	French, Randy	Yes	No

- Click on an activity from the search results grid (listview.) The activity will open.
- If the activity was created via upload from the Mobile Site, most fields on the activity detail and EVV detail pages will be read-only (user will be able to see and justify violations.)

Pending Provider | EVV Activities
Last Updated by j buck
at 1/28/2020 9:30:17 PM

File Reports

EVV Activities

EVV Details

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	
1/28/2020	03:58 PM	1/28/2020	04:12 PM	14	Delete
01/28/2020		01/28/2020			Add

Authorization

Auth ID *	140905	iConnect ID *	10172
PA Number		Consumer First Name *	Violet
Auth Service ID	294	Consumer Last Name *	Sheppard

Activity Details

Division	APD	EVV Billable?	<input type="checkbox"/>
Provider *	Pending Provider	Unresolved EVV Violation(s)?	<input type="checkbox"/>
Worker *	Buck, Jennifer	Status	Pending
Primary Diagnosis		Provider Documentation *	<input type="checkbox"/> Annual Report <input type="checkbox"/> Daily Attendance Log <input type="checkbox"/> Monthly R&B <input type="checkbox"/> Quarterly Summary <input type="checkbox"/> Trip Log
Delivered Via EVV	Mobile App Upload	Attended	<input checked="" type="checkbox"/>

Activity Services

Index/SubObject *	IndexCode Index Description SubObject SubObject Description	Total Cost *	\$2.17
	Central Central Region Waiver iBudget Waiver		
Service *	S5130:UC (4140) Personal Supports	Place of Service *	Home
Units *	0.60		
Secondary Code	S5130:UC	Rate *	\$3.62
Unit Type *	15 mins		

- If the activity was manually entered in the iConnect application, all fields needed to record the activity will be editable.

EVV Activities Search Filters

- Navigate to the provider record and click on the EVV Activities tab.
- Specify one or more parameters in the filter section at the top of the grid (listview.)
- Click Search to apply the filters. The screen will refresh to show only those EVV authorizations that meet the specified criteria.

Pending Provider (10055)

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

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

Filters

Save Filter Unresolved Violations Search Filter Save As Default Save As Delete

iConnect ID +

Search Reset

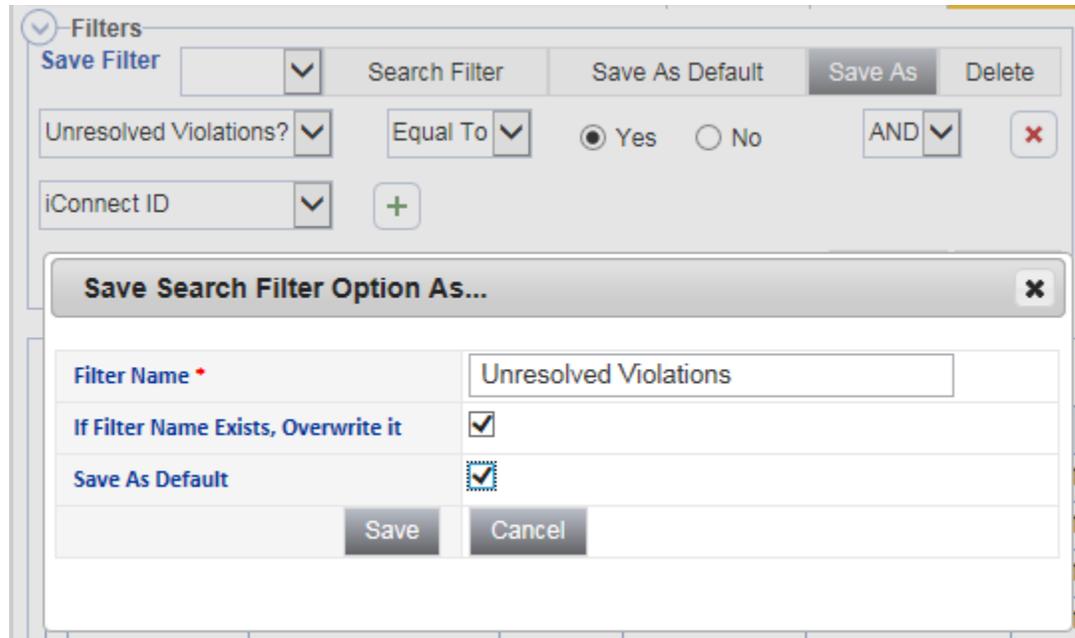
11 EVV Activities record(s) returned - now viewing 1 through 11

iConnect ID	Consumer Name	Auth ID	Auth Svc ID	Service Code	Service	Start Date	Start Time	End Date	End Time	Worker	Unresolved Violations?	EVV Billable?	Billed?	
10172	Sheppard,Violet	140905	294	S5130 UC	(4140) Personal Supports	01/28/2020	3:58 PM	01/28/2020	4:12 PM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10172	Sheppard,Violet	140905	294	S5130 UC	(4140) Personal Supports	01/15/2020	11:21 AM	01/15/2020	11:22 AM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10004	Johnson,Jimmy	140906	296	S5130 UC	(4140) Personal Supports	01/08/2020	9:46 AM	01/08/2020	9:51 AM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10004	Johnson,Jimmy	140902	291	T1000 UC	(4161) Private Duty Nursing - LPN	01/06/2020	5:40 PM	01/06/2020	5:47 PM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/19/2019	10:09 AM	12/19/2019	11:07 AM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/19/2019	10:09 AM	12/19/2019	11:18 AM	Buck, Jennifer	Yes	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/18/2019	3:23 PM	12/18/2019	3:47 PM	Buck, Jennifer	Yes	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/13/2019	1:55 PM	12/19/2019	9:02 AM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/12/2019	11:22 AM	12/12/2019	12:36 PM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	11/19/2019	1:38 PM	11/19/2019	2:05 PM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	11/12/2019	12:20 PM	11/12/2019	12:23 PM	French, Randy	Yes	No	No	<input type="checkbox"/>

- Click Reset to clear all filters and start over

Save a filter:

1. Click Save As.
2. Enter a name for the filter.
3. Check Save As Default if you want the filter to auto-populate with the current criteria when the tab is opened.
4. Click Save to save the filter or Cancel to return to the EVV Activities tab without saving the filter.



Apply a saved filter:

1. Select the appropriate saved search from the Save Filter dropdown in the Filters section of the screen.
2. Click Search Filter to populate the search filter with the saved criteria.
3. Click Search to apply the search criteria.

Edit a saved filter:

1. Select the appropriate saved search from the Save Filter dropdown in the Filters section of the screen.
2. Click Search Filter to populate the search filter with the saved criteria.
3. Edit the filter, adding, changing, or removing criteria as appropriate.

4. Click Save As.
5. Check If Filter Name Exists, Overwrite It.
 - a. Click Save.
 - b. The existing saved search will be updated.
6. Enter a new filter name.
 - a. Click Save.
 - b. The edited filter will be saved with the specified name. The original saved search filter will still exist and will not be updated.

Deleting a saved filter:

1. Select the appropriate saved search from the Save Filter dropdown in the Filters section of the screen.
2. Click Delete.
3. Click OK to confirm the deletion or Cancel to abort the deletion.
4. The filter will be deleted.

Save a saved search filter as default:

1. Select the appropriate saved search from the Save Filter dropdown in the Filters section of the screen.
2. Click Save as Default.
3. The selected filter will be saved as the default filter. The next time the EVV Activities tab is opened, the filter will auto-populate with the criteria of the saved filter.

Save Search Filter Option As...	
Filter Name *	Unresolved Violations
If Filter Name Exists, Overwrite it	<input checked="" type="checkbox"/>
Save As Default	<input checked="" type="checkbox"/>
Save Cancel	

Update EVV Activities

1. Certain data elements need to be defined on each EVV Activity before it can be submitted for claims processing.
2. Navigate to the provider record and select the EVV Activities tab.

Pending Provider (10055)

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

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

Filters
Save Filter Unresolved Violations Search Filter Save As Default Save As Delete

iConnect ID + Search Reset

11 EVV Activities record(s) returned - now viewing 1 through 11

iConnect ID	Consumer Name	Auth ID	Auth Svc ID	Service Code	Service	Start Date	Start Time	End Date	End Time	Worker	Unresolved Violations?	EVV Billable?	Billed?	
10172	Sheppard,Violet	140905	294	S5130 UC	(4140) Personal Supports	01/28/2020	3:58 PM	01/28/2020	4:12 PM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10172	Sheppard,Violet	140905	294	S5130 UC	(4140) Personal Supports	01/15/2020	11:21 AM	01/15/2020	11:22 AM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10004	Johnson,Kimmy	140906	296	S5130 UC	(4140) Personal Supports	01/08/2020	9:46 AM	01/08/2020	9:51 AM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10004	Johnson,Kimmy	140902	291	T1000 UC	(4161) Private Duty Nursing - LPN	01/06/2020	5:40 PM	01/06/2020	5:47 PM	Buck, Jennifer I	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/19/2019	10:09 AM	12/19/2019	11:07 AM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/19/2019	10:09 AM	12/19/2019	11:18 AM	Buck, Jennifer	Yes	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/18/2019	3:23 PM	12/18/2019	3:47 PM	Buck, Jennifer	Yes	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/13/2019	1:55 PM	12/19/2019	9:02 AM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	12/12/2019	11:22 AM	12/12/2019	12:36 PM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	11/19/2019	1:38 PM	11/19/2019	2:05 PM	Buck, Jennifer	No	No	No	<input type="checkbox"/>
10106	Sheppard,John	140897	286	T1000 UC	(4161) Private Duty Nursing - LPN	11/12/2019	12:20 PM	11/12/2019	12:23 PM	French, Randy	Yes	No	No	<input type="checkbox"/>

3. Click on an activity from the search results grid (listview.) The activity will open.
4. Update the following fields:
 - a. Place of Service = select Home, Office or Other
 - b. Diagnosis Code = If it does not auto-populate, add the APD Eligible Diagnosis from the Diagnosis tab of the consumer
 - c. Provider Documentation = these values will populate from the uploaded delivery
 - d. Status = Complete

EVV Activities

Pending Provider | EVV Activities
Last Updated by jibuck
at 1/28/2020 9:30:17 PM

File Reports

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	
1/28/2020	03:58 PM	1/28/2020	04:12 PM	14	Delete
01/28/2020		01/28/2020			Add

Authorization

Auth ID * 140905 iConnect ID * 10172
 PA Number Consumer First Name * Violet
 Auth Service ID 294 Consumer Last Name * Sheppard

Activity Details

Division APD EVV Billable?
 Provider * Pending Provider Unresolved EVV Violation(s)?
 Worker * Buck, Jennifer Status Pending
 Primary Diagnosis Provider Documentation *
 Delivered Via EVV Mobile App Upload Attended

Activity Services

Index/SubObject *	Total Cost *
S5130:UC (4140) Personal Supports	\$2.17

Service * S5130:UC (4140) Personal Supports Place of Service * Home
 Units * 0.60
 Secondary Code S5130:UC Rate * \$3.62
 Unit Type * 15 mins

Manual Entry of EVV Activity

The intent of EVV is to capture service delivery location, start time, and end time at the time and point of delivery. However, there will be situations in which a worker's mobile device fails and service deliveries must be reconstructed and manually entered in the iConnect application as EVV Activities. Manually entered EVV activities require the data elements as activities created within the Mobile Site. The only data that will consistently be missing is GPS location data.

1. Navigate to the provider record and click on the EVV Activities tab.
2. Select Add EVV Activity from the File menu.

File

- Add New Provider Search
- Add EVV Activities
- Bill Selected Items
- Validate Selected Items
- Print

Pending Provider (10055)

Workers Services Provider ID Numbers Contracts Beds Linked Providers Aliases Conditions Service Area Admin Actions
 Providers Divisions **EVV Activities** Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments Provider A

Filters
 Save Filter Search Filter Save As Default Save As Delete

3. The Activity detail page will be displayed.

File

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	
01/29/2020	▼ ▼ ▼	01/29/2020	▼ ▼ ▼		Add

Authorization

Auth ID *	...	iConnect ID *	
PA Number		Consumer First Name *	
Auth Service ID		Consumer Last Name *	

Activity Details

Division		EVV Billable?	<input type="checkbox"/>
Provider *	Pending Provider	Unresolved EVV Violation(s)?	<input type="checkbox"/>
Worker *	Buck, Jennifer	Status	Pending ▼
Primary Diagnosis	...	Provider Documentation *	<ul style="list-style-type: none"> Annual Report Daily Attendance Log Monthly R&B Progress Note Quarterly Summary Service Log Trip Log
Delivered Via EVV	Manual Entry	Attended	<input checked="" type="checkbox"/>

Activity Services

Index/SubObject *		Total Cost *	
Service *		Place of Service *	▼
Units *			
Secondary Code		Rate *	
Unit Type *			

4. Enter the start date and start time. Enter the end date and end time.
5. Click Add.
6. The screen will refresh and auto-calculate the total elapsed time in minutes.

Start Date *	Start Time	End Date *	End Time	Total Minutes	
1/9/2020	01 ▼ 00 ▼ PM ▼	1/9/2020	02 ▼ 30 ▼ PM ▼	90	Delete
01/29/2020	▼ ▼ ▼	01/29/2020	▼ ▼ ▼		Add

7. Click the ellipsis to the right of the authorization field.
8. A dialog box will be presented.
9. Search for and select the appropriate authorization.

Authorization

Auth ID * iConnect ID *

DialogAdvancedSearchPopUp - Internet Explorer

https://fwtest.harmonyis.net/FLAPDSandbox/Dialogs/DialogAdvancedSearchPopUp.aspx?ClientSideControlID=ctrlPageContainer1%24ctI00%24ucCo

Filters

Auth ID Begins With AND

Provider Contains pending AND

Auth Service Status * Equal To Approved AND

Auth ID

9 Auth Search record(s) returned - now viewing 1 through 9

Auth ID	Consumer Name	iConnect ID	Auth Date	Provider	Start Date	End Date	Auth Service Status
140832	Moore Money	10102	09/05/2018	Pending Provider	09/05/2018	06/30/2019	Approved
140834	Harry Potter	10130	09/11/2018	Pending Provider	09/01/2018	09/30/2018	Approved
140871	Alice Sheppard	10053	07/02/2019	Pending Provider	07/01/2018	06/30/2019	Approved

10. The screen will refresh and auto-populate several fields. If the service is time-based, units will also auto-populate.
11. Enter the EVV worker that delivered the service in the Worker field.
12. Status can remain Pending.
13. The Primary Diagnosis will auto populate from the consumer's record if the diagnosis record is in complete status.
14. Select one or more values for Provider Documentation.
15. Delivered via EVV will default to Manual Entry and be read only.
16. Select a Place of Service.
17. From the File menu select Save.
18. The screen will refresh and the EVV Details subpage will be visible.

The screenshot shows the EVV Activities interface. At the top right, it says "Last Updated by jibuck at 2/9/2020 12:23:23 PM". The main header includes "File Reports" and "EVV Activities".

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	
2/1/2020	01:00 PM	2/1/2020	02:30 PM	90	Delete
02/01/2020		02/03/2020			Add

Authorization

Auth ID *	140903	iConnect ID *	10172
PA Number		Consumer First Name *	Violet
Auth Service ID	292	Consumer Last Name *	Sheppard

Activity Details

Division	APD	EVV Billable?	<input type="checkbox"/>
Provider *	Geographic Agency Provider	Unresolved EVV Violation(s)?	<input checked="" type="checkbox"/>
Worker *	Buck, Jennifer	Status	Pending
Primary Diagnosis	Autism	Provider Documentation *	<input type="checkbox"/> Annual Report <input type="checkbox"/> Daily Attendance Log <input type="checkbox"/> Monthly R&B <input type="checkbox"/> Quarterly Summary <input type="checkbox"/> Trip Log

Delivered Via EVV

Manual Entry

Activity Services

Index/SubObject *	<table border="1"> <thead> <tr> <th>IndexCode</th> <th>Index Description</th> <th>SubObject</th> <th>SubObject Description</th> </tr> </thead> <tbody> <tr> <td>Central</td> <td>Central Region</td> <td>Waiver</td> <td>iBudget Waiver</td> </tr> </tbody> </table>	IndexCode	Index Description	SubObject	SubObject Description	Central	Central Region	Waiver	iBudget Waiver	Total Cost *	\$21.72
IndexCode	Index Description	SubObject	SubObject Description								
Central	Central Region	Waiver	iBudget Waiver								
Service *	SS190.UC (4140) Personal Supports	Place of Service *	Home								
Units *	6.00										

19. Click on the EVV Details subpage.
20. In the Stated Delivery Address section, use the ellipsis to select the appropriate address from the list of approved delivery locations.
21. If needed, select address not shown to enter a different location. This manual entry will be flagged with a violation.

EVV Allowable Delivery Locations

Select an address from the list of allowable delivery locations below. If the delivery list is not shown, select "Address not shown" and enter the delivery address

Location	Consumer/Relation	Relation Name	Street 1	Street 2	City	State	Zip Code	Lat/Long
	Guardian	Susan Buck	123 Blue St.		TALLAHASSEE	FL	32301	

Address not shown

Description/label *

Address *

Apt/Suite

City * Clear

State * Clear

Zip Code * Clear

Select

22. The system will automatically determine the latitude and longitude of the selected address.
23. The Start Location and End Location sections will automatically populate with Unavailable.

24. Enter a note.

25. From the File menu, select Save.

The screenshot shows the iConnect EVV Details page. The page title is "EVV Details" and it was last updated by j buck at 2/3/2020 12:28:14 PM. The page is divided into several sections:

- Stated Delivery Address:** Address: Other Location (Approved Location): 2345 Cherrystone Rd., Cape Charles Virginia 23042; iConnect ID: 10172; Lat/Long: [Redacted]; Allowable Difference (feet): 500.
- Start Location:** Recorded Lat/Long: Lat: Unavailable, Long: Unavailable; Address: Unavailable; Actual Difference (feet): [Redacted].
- End Location:** Recorded Lat/Long: Lat: Unavailable, Long: Unavailable; Address: Unavailable; Actual Difference (feet): [Redacted].
- Delivery Notes:** A text area for notes with a character limit of 10,000. The current note is "service provider's delivery notes and progress note details go here. 10,000 character limit." and 1907 characters remain.

Below the notes, there is a message: "3 Violations record(s) returned - now viewing 1 through 3".

Violation Type	Violation SubType	Violation Status	Violation Reason
EVV	Manual Entry	Unresolved	
Note Required	Service	Unresolved	
Note Required	Other Location	Unresolved	

26. The screen will refresh and violations will automatically be created for the manual entry and the other location entry if a delivery address was manually added.

Validate EVV Activities

Standard EVV validation rules include violations and billing rules. Any violations that fail will display on the EVV Details page. Billing rules that fail are visible on Billing Issue report that can be executed from the EVV Activities List, EVV Activities Details page and the Consumer Activity Details page.

1. This validation is completed automatically when the service deliveries are uploaded from the mobile site. The validation of manually added EVV activities must be completed manually.
2. Select the EVV Activities tab on the Provider record.
3. From the list view, add a check to each EVV Activity that needs to be validated, and or select the box at the top to select all.
4. From the **File** menu > select **Validate Selected Items**.

File

- Add New Provider Search
- Add EVV Activities
- Bill Selected Items
- Validate Selected Items
- Print

Providers Provider Name

CONSUMERS **PROVIDERS** INCIDENTS CLAIMS SCHEDULER UTILITIES REPORTS

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

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

Filters

Save Filter Unresolved Violations Search Filter Save As Default Save As Delete

Unresolved Violations? Equal To Yes No AND X

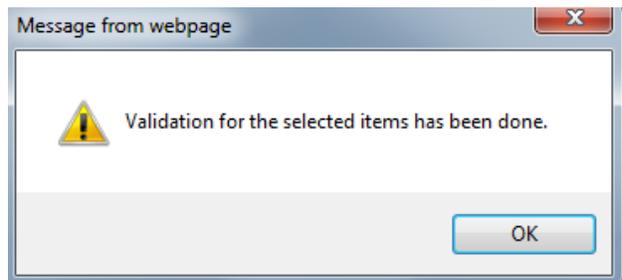
iConnect ID +

Search Reset

8 EVV Activities record(s) returned - now viewing 1 through 8

iConnect ID	Consumer Name	Auth ID	Auth Svc ID	Service Code	Service	Start Date	Start Time	End Date	End Time	Worker	Unresolved Violations?	EVV Billable?	Billed?
10172	Sheppard,Violet	140903	292	S5130.UC	(4140) Personal Supports	02/01/2020	1:00 PM	02/01/2020	2:30 PM	Buck, Jennifer	Yes	No	No <input checked="" type="checkbox"/>
10237	Tester,John EVV	140900	289	T1000.UC	(4161) Private Duty Nursing - LPN	01/08/2020	11:51 AM	01/08/2020	12:07 PM	EVVWorker, Suzie	Yes	No	No <input type="checkbox"/>

5. Notification that the validation is successful displays. Click OK.



6. The Unresolved Violation column on the EVV Activities List View page updates to Yes when violations are present. Violations are visible and must be justified on the EVV Details page. Once violations are justified and revalidated, the Unresolved Violation column updates to No. EVV Violations are described in the [EVV Validation Rules](#) section of this manual.

16 EVV Activities record(s) returned - now viewing 1 through 15

iConnect ID	Consumer Name	Auth ID	Auth Svc ID	Service Code	Service	Start Date	Start Time	End Date	End Time	Worker	Unresolved Violations?	EVV Billable?	Billed?
10237	Tester,John EVV	140900	289	T1000.UC	(4161) Private Duty Nursing - LPN	02/03/2020	7:51 AM	02/03/2020	8:13 AM	EVVWorker, Suzie	No	No	No <input type="checkbox"/>
10172	Sheppard,Violet	140903	292	S5130.UC	(4140) Personal Supports	02/01/2020	1:00 PM	02/01/2020	2:30 PM	Buck, Jennifer	Yes	No	No <input type="checkbox"/>
10237	Tester,John EVV	140900	289	T1000.UC	(4161) Private Duty Nursing - LPN	01/29/2020	10:29 AM	01/29/2020	10:37 AM	EVVWorker, Suzie	No	No	No <input type="checkbox"/>
10237	Tester,John EVV	140900	289	T1000.UC	(4161) Private Duty Nursing - LPN	01/29/2020	11:33 AM	01/29/2020	11:35 AM	EVVWorker, Suzie	No	No	No <input type="checkbox"/>

Justifying Violations (APD iConnect Application)

When a service delivery is uploaded to the iConnect application as an EVV activity, additional validation is applied to ensure that the activity complies with all EVV requirements for that service beyond the validation that was applied in the Mobile Site. When this occurs, the details of the violation(s) are visible on the EVV Details > Violation Detail page. Depending

on the violation and how the service code has been configured, a provider EVV manager may be permitted to provide a justification (explanation) and proceed with billing.

1. Identify activities with violations: Navigate to the Provider record and click on the EVV Activities tab.
2. Use the search filters to isolate activities with violations
 - a. Using a filter of “Unresolved EVV Violation(s)” Equal to Yes will return all activities that have a violation that has not yet been justified.

The screenshot shows a web application interface for EVV Activities. At the top, there are navigation tabs: Workers, Services, Provider ID Numbers, Contracts, Beds, Linked Providers, Aliases, Conditions, Service Area, Admin Actions, Providers, Divisions, **EVV Activities**, Forms, Enrollments, Authorizations, Notes, Credentials, EVV Scheduling, CAP, Appointments, and Provider A. Below the tabs is a 'Filters' section with a 'Save Filter' dropdown set to 'Unresolved Violations?'. The filter criteria are: 'Unresolved Violations?' set to 'Equal To', 'Yes' selected, and 'AND' logic. There is an 'iConnect ID' dropdown with a '+' sign. 'Search' and 'Reset' buttons are at the bottom of the filter panel. Below the filter panel, it says '8 EVV Activities record(s) returned - now viewing 1 through 8'. A table displays the results with columns: iConnect ID, Consumer Name, Auth ID, Auth Svc ID, Service Code, Service, Start Date, Start Time, End Date, End Time, Worker, Unresolved Violations?, EVV Billable?, and Billed?.

iConnect ID	Consumer Name	Auth ID	Auth Svc ID	Service Code	Service	Start Date	Start Time	End Date	End Time	Worker	Unresolved Violations?	EVV Billable?	Billed?
10172	Sheppard,Violet	140903	292	S5130:UC	(4140) Personal Supports	02/01/2020	1:00 PM	02/01/2020	2:30 PM	Buck, Jennifer	Yes	No	No
10237	Tester,John EVV	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	01/08/2020	11:51 AM	01/08/2020	12:07 PM	EVVWorker, Suzie	Yes	No	No
10237	Tester,John EVV	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/19/2019	11:19 AM	12/19/2019	3:56 PM	EVVWorker, Suzie	Yes	No	No
10237	Tester,John EVV	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/18/2019	2:35 PM	12/18/2019	2:44 PM	EVVWorker, Suzie	Yes	No	No
10237	Tester,John EVV	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/18/2019	3:29 PM	12/18/2019	3:44 PM	EVVWorker, Suzie	Yes	No	No
10237	Tester,John EVV	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/18/2019	4:21 PM	12/18/2019	4:22 PM	EVVWorker, Suzie	Yes	No	No
10237	Tester,John EVV	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/11/2019	1:05 PM	12/11/2019	1:05 PM	EVVWorker, Suzie	Yes	No	No

3. Use additional filters such as date or service to further refine the results.
4. Click on an activity in the listview to open the activity detail page.
5. Click on the EVV Details subpage to see the specific violations.

File

EW Activities

EW Details

Stated Delivery Address	
Address	Other Location (Approved Location): 2345 Cherrystone Rd., Cape Charles Virginia 2
iConnect ID	10172
Lat/Long	
Allowable Difference (feet)	500
Start Location	
Recorded Lat/Long	Lat: Unavailable, Long: Unavailable
Address	Unavailable
Actual Difference (feet)	
End Location	
Recorded Lat/Long	Lat: Unavailable, Long: Unavailable
Address	Unavailable
Actual Difference (feet)	
Delivery Notes	
Notes	<p>service provider's delivery notes and progress note details go here. 10,000 character limit.</p> <p>1907 characters remaining</p>

3 Violations record(s) returned - now viewing 1 through 3

Violation Type	Violation SubType	Violation Status	Violation Reason
EW	Manual Entry	Unresolved	
Note Required	Service	Unresolved	
Note Required	Other Location	Unresolved	

6. Click on a violation to see full details.
7. The violation type, subtype, and description are all read-only fields that classify the violation and provider a user-friendly, plain text description of the violation.
8. The status of the violation will be defaulted to “Unresolved”.
9. Change the status to “Unable to justify” if the violation is one that, regardless of justification, cannot be billed.
10. Change the status to “Justified” if the violation can be explained and then billed.
11. Populate the Violation Reason field from the associated dropdown menu.
12. Enter a justification (explanation) in the Violation Comments field.

File

Violation Information	
Violation Type	EVV
Violation SubType	Manual Entry
Violation Description	The service delivery was not recorded using the mobile application.
Violation Status *	Justified
Violation Reason *	Location services unavailable
Violation Comments *	had to manually create the activity because provider dropped phone while delivering service - could not use the screen after that. 1870 characters remaining

- Click File, then Save and Close Violation Detail. The page refreshes and the EVV Details page displays. The violation list view has been updated.

3 Violations record(s) returned - now viewing 1 through 3

Violation Type	Violation SubType	Violation Status	Violation Reason
EVV	Manual Entry	Justified	Location services unavailable
Note Required	Service	Unresolved	
Note Required	Other Location	Unresolved	

- Repeat for each violation associated to the activity. When all violations are resolved, the Unresolved Violations? Indicator will change from Yes to No. The provider may then proceed with scrubbing the activity against the billing rules and once passed, submitting the claim.

Billing EVV Activities (APD iConnect Application)

Once the violations have been addressed, the EVV activity will be validated against the billing rules described in the [EVV Validation Rules](#) section of this manual. Billing rules that fail are visible on Billing Issue report that can be executed from the EVV Activities List, EVV Activities Details page and in the Consumer Activity Details page.

After passing validation, when a provider EVV manager is ready to bill, they select the appropriate activities from the EVV Activities tab and click the Bill Selected Items option. The activities will automatically be converted into claims and submitted to the claims workflow. At this point, they behave and are managed like any other claim in iConnect – results are visible in the Claims grid. iConnect will automatically “lock” (read-only) activity records that are associated with claims that are “in process” (do not have final remittance) or have been approved for payment; conversely, iConnect will “unlock” (editable) activity records associated with denied or voided claims.

1. Navigate to the Provider record and select the EVV Activities tab.
2. Use the search filters to isolate EVV activities that do not have any unresolved violations but have not yet been scrubbed against the billing rules.
 - a. Using a filter of “Unresolved EVV Violation(s)?” Equal to No and “EVV Billable” Equal to No will return all activities that have no unresolved violations and have not yet been scrubbed.
3. Select each activity and the EVV Activity page displays. From the Report menu, select EVV Billing Issues to view the billing rules that must be satisfied before the EVV activity can be submitted as a claim. See the [EVV Validation Rules](#) section for details on the EVV Billing Rules.

Geographic Agency Provider | EVV Activities
Last Updated by j buck
at 2/3/2020 12:23:23 PM

Start Date *	Start Time	End Date *	End Time	Total Minutes	
2/1/2020	01:00 PM	2/1/2020	02:30 PM	90	Delete
02/01/2020		02/04/2020			Add

Authorization

Auth ID *	140903	iConnect ID *	10172
PA Number		Consumer First Name *	Violet
Auth Service ID	292	Consumer Last Name *	Sheppard

4. The EVV Billing Issues report displays in a new window, listing each billing rule the EVV activity does not satisfy. These are issues that the service provider cannot resolve. The APD Regional or State Office staff must be contacted to resolve the issues.



EVV Billing Issues

EVV Billing Issues

Only unresolved violations and billing issues are shown

Case No.	Consumer	EVV Activity Details	Problem(s)
n/a	n/a	n/a	• The provider must have a phone number in order to bill. The provider must have a mailing address in order to bill. The rendering provider on the activity is not configured to submit claims. Please contact your system or program administrator and ask them to setup a Sender ID in the provider's Provider ID Numbers The service delivery was not recorded using the mobile application.

5. Once the EVV activity has no unresolved violations and does not violate any billing rules, it can be billed.
6. From the EVV Activities tab, use the search filters to isolate billable activities.
 - a. Using a filter of “Unresolved EVV Violation(s)?” Equal to No and “Billed” Equal to No will return all activities that no unresolved violations and have not yet been billed.
7. Use additional filters such as date or service to further refine the results.
8. Check the box to the left of each activity to be billed (check the box at the top of the column to select all activities on the screen).
9. Select “Bill Selected Items” from the File menu.


EVV Activities | Sign Out
Role: APD Main

Last Updated by j buck at 2/5/2020 10:57:56 AM

File
 Add New Provider Search
 Add EVV Activities
 Bill Selected Items
 Validate Selected Items
 Print

CONSUMERS **PROVIDERS** INCIDENTS CLAIMS SCHEDULER UTILITIES REPORTS

Workers Services Provider ID Numbers Contracts Beds Linked Providers Aliases Conditions Service Area Admin Actions
 Providers Divisions **EVV Activities** Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments Provider A

Filters
 Save Filter Unresolved Violations Search Filter Save As Default Save As Delete
 iConnect ID + Search Reset

17 EVV Activities record(s) returned - now viewing 1 through 15

iConnect ID	Consumer Name	Auth ID	Auth Svc ID	Service Code	Service	Start Date	Start Time	End Date	End Time	Worker	Unresolved Violations?	EVV Billable?	Billed?
10237	Tester, John EVV	140900	289	T1000.UC	(4161) Private Duty Nursing - LPN	02/03/2020	7:51 AM	02/03/2020	8:13 AM	EVVWorker, Suzie	No	No	No
10237	Tester, John EVV	140900	289	T1000.UC	(4161) Private Duty Nursing - LPN	02/03/2020	12:43 PM	02/03/2020	12:44 PM	EVVWorker, Suzie	No	No	No
10172	Sheppard, Violet	140903	292	S5130.UC	(4140) Personal Supports	02/01/2020	1:00 PM	02/01/2020	2:30 PM	Buck, Jennifer	No	Yes	No

10. The Bill EVV Activities dialog box displays. Enter a batch number. Click Okay.

Bill EVV Activities ✕

You are about to convert the selected EVV Activities to claims.

- If desired, enter a Batch No. and click 'Okay' to submit the claims (Text and/or numbers only; no special characters permitted).
- Click 'Cancel' to cancel the submission and return to the EVV Activities screen.

Batch No.

11. iConnect will convert the selected activities to claims and automatically submit them to the claims workflow.

12. If the provider tries to bill EVV activities that still have violations or outstanding billing rules, the application will not submit the EVV activity to the claims workflow.

Unable to Bill EVV Activities ✕

One or more of the selected activities cannot be billed.

Activities that cannot be billed are those where 'Billable?' = No

EVV Remittance Processes (APD iConnect Application)

Submitted claims are automatically processed and adjudicated. The **Claims** chapter, commonly referred to as the Claims Grid, allows users to view the results of applying the business rules and adjudication, and the current status of claims.

For Waiver services the remittance from FMMIS will automatically be posted in iConnect, though FMMIS will continue to issue the payment requests as they do today. From a business process perspective, this is a change for providers as they previously billed directly to FMMIS.

Use the filter on the Claims grid to isolate the appropriate Claims. It is useful to view the Batch No and Submit Date to verify that Claims that were just submitted conformed to the rules.

- **Claim status** indicates where in the workflow the claim is and is not necessarily a terminal (final) status.
- **Remittance status** indicates if the Claim was paid, denied, or voided and is a terminal (final) status.
- **Claims without a remittance status** are locked and no action can be taken until remittance advice is posted.
- **Claims with a remittance status of Denied** can be corrected and resubmitted.
- **Claims with a remittance status of Paid** can be voided.

Please refer to the Chapters 6 – 9 of this Mini Manual for more information.

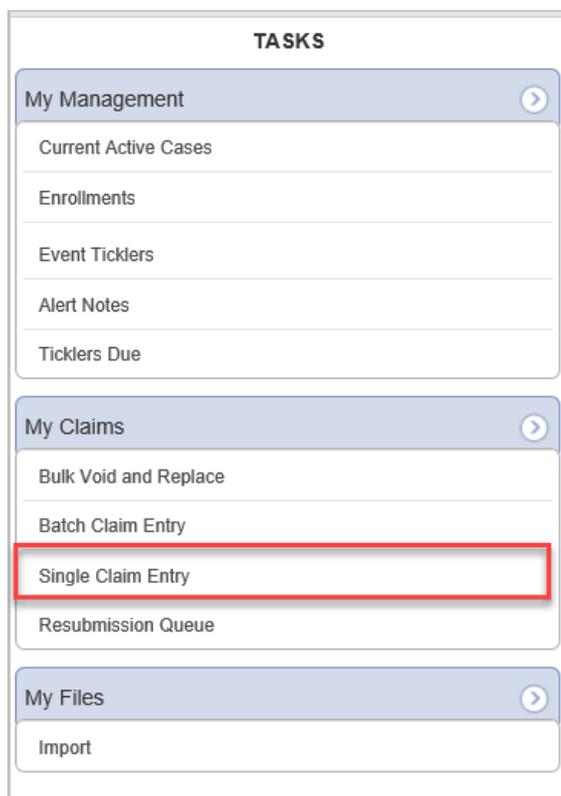
Chapter 6 | Claims Submission

Introduction

APD Providers will have many options for submitting claims via the User Interface (UI) or by using a file upload process. Options that APD may use include: Single Claim Entry, Batch Claim Entry, file upload, and EVV.

Claim Submission using the single Claim Entry (SCE) Screen

1. The Claim Submitter (e.g. Provider or Regional Office Worker) navigates to **My Dashboard**, clicks on the **Single Claim Entry** link in the **My Claims** panel to open a blank claim form.



2. Key the authorization number into the "Authorization" field, OR
3. Click on the **ellipsis** button and search for the appropriate authorization.
4. Select the Authorization record.
 - a. The screen will auto-populate data in the other sections of the screen once an authorization is selected.

5. If the claim needs to be printed to paper CMS-1500 form and mailed, check the “Paper Claim?” checkbox. (This option is available only for Exception claims or claims over a year old.)
6. If rendering provider has not prepopulated, select the appropriate provider from the dropdown.
7. If the service type has not prepopulated, select the appropriate service type from the dropdown.
8. The remaining fields will auto populate and are read-only.
9. If a diagnosis does not auto populate or if the diagnosis needs to be changed, click on the **ellipsis** button and search for the appropriate diagnosis.

10. If the Provider on the Auth is an Agency Provider, select the appropriate Individual WSC Provider from the “Secondary Provider Information” dropdown. The Provider’s Vendor No and Name will auto populate. (All WSC Agency providers must select secondary provider information.)
11. The screen will default to the **Service Line View** to enter service data as individual lines. This view supports claims with multiple service codes (e.g., Supported Employment and Personal Supports Services), OR
12. Click the button next to **Calendar View** to enter service data using a calendar. This view supports claims with a single service code (e.g. Supported Employment). Skip to Step 20.
13. Enter a Start and an End Date.
 - a. Use the same date for the start and end date.
14. Select the **Service Code** using the **ellipsis** button. The list of available services will be filtered by the **Authorization** (if used) and/or the **Service Type** indicated at the claim level.
 - a. The modifiers will auto-complete once the service code is selected.
15. Enter the number of units.
 - a. The cost will auto-calculate.
 - b. Select the month to be billed.

- c. The calendar will automatically default to the previous month but can be adjusted using either the left and right arrows on the calendar or the month and year drop down menus. If the dropdown menus are used, the **Update Calendar** button must be clicked to refresh the calendar.

16. Click the **Add** button to save the service line.

Start Date	End Date	Service	Modifiers	Units	Cost	Place of Service	Diagnosis	
07/01/2018	06/30/2019	92507		12	\$192.24	Home		DELETE

17. Repeat the steps above, adding as many service lines as needed. But clear the service code prior to entering a new service line.

Start Date	End Date	Service	Modifiers	Units	Cost	Place of Service	Diagnosis	
02/03/2020	02/03/2020	T2023	UC	1	\$1,241.54	Other	1	DELETE

18. Enter the number of units delivered.

19. Enter individual dates directly in the Calendar grid.



Tip

Default the entire month by entering the number of units per day in the “Default Units” box and clicking the “Update Calendar” button.

20. To submit the claim, click **File > Submit Claims Entry** or **File > Submit & Add Another Claims Entry**.

opd iConnect

File

- Submit Single Claim Entry
- Spell Check
- Submit & Add Another Single Claim Entry
- Print
- Close Single Claim Entry

Zip * 32504

Phone * (888)888-8811

Tax ID * 12-777777

NPI * XXXXX



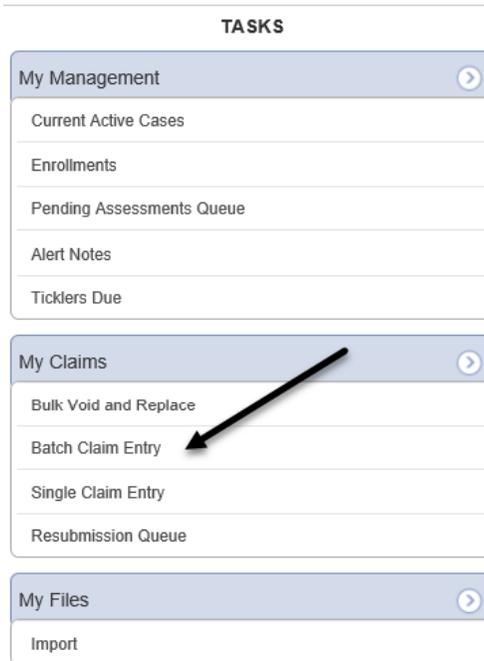
Key Point

Remember to save the Note in “Pending” status so that the recipient can update the Note and route it back to the sender.

- a. Submitted claims are automatically processed, and business rules are applied. Then the claim is routed appropriately.
- b. The system automatically generates a claim for each day of service. This only applies to Calendar view.
- c. When using the Calendar view, if a box in the calendar is left blank (i.e., a service was not delivered on that day), the system automatically skips that day when creating claims.

Claim Submission Using the Batch Claim Entry (BCE) Screen

1. From **My Dashboard**, click on the **Batch Claim Entry** link to open a blank claim form.



2. Select the “Program” and “Service Type.”
3. Select the “Service Code” using the **ellipsis** button.
 - a. Only Consumers with an active authorization during the specified dates of service will be displayed.
4. Enter the “Total Units” (optional). This value is used as a default and can be edited once consumers have been selected. Services with 0 units cannot be saved.
5. The “Batch No” will auto populate with your User ID followed by a number that increments automatically but can be edited or deleted.
6. Click the **Select Matching Consumers** button.
 - a. The system automatically displays all consumers that match the criteria in the header. The total amount to be billed is shown at the bottom of the list view.



Key Point

Batches are specific to a single user; only the user that creates a batch will be able to view, retrieve and edit a single batch.

- 7. Edit or update the service lines as appropriate.
 - a. "Claim #" is the same as "Provider Claim ID" on the Single Claim Entry (SCE) screen and can be used to enter reference, identifier, or tracking names/numbers. These can be used post-submission to quickly find groups of claims



Key Point

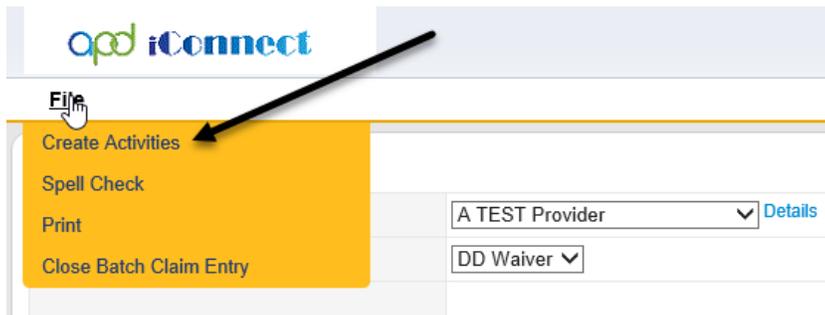
If changes are made to the Provider or Service Type and consumers are reselected, edits made to the service lines will be lost.

- 8. After edits have been completed, click the **Calculate Total** button to update the "Total amount to be billed" (optional).

1 Consumer Record(S) Returned - Now Viewing 1 Through 1

Consumer	Case No	Units Available	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #
Smith, Alan G.	10003	4.0000	1/1/2018	2/1/2018	1	\$148.69	Office	F840	

- 9. Select the "Apply" checkbox for each service that should be included in the batch. Use the checkbox in the header to select all services on the screen.
- 10. Click **File > Create Activities** to save the batch.
 - a. The screen is refreshed and all services that were saved are removed.



- Click the **Edit Un-posted claims** button.
- The screen is refreshed to display all claims in the current batch.

Activity ID	Consumer	Case No	Units Available	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #
116	Smith, Alan G.	10003	3.0000	1/1/2018	2/1/2018	1	\$148.69	Office	F840	

- Edit the service information, as appropriate.
- After edits have been completed, click the **Calculate Total** button to update the “Total Amount to be Billed” field (optional).



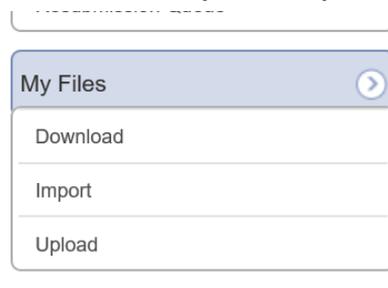
Key Point

Only completed services can be submitted. The system converts the services into Claims which will be visible in the Claims grid.

- Select the “Apply” checkbox in the green header to submit all services on the screen, OR
- Check the “Apply” checkbox next to specific services to submit only those services.
- Click **File > Save & Complete** from the file menu.
- Click **File > Submit Claims** from the file menu.
 - Submitted Claims are automatically processed, pre-adjudicated and routed appropriately.

Claim Submission Using File Upload

- From **My Dashboard > Tasks > My Files > Upload**, click the **Upload** link to display the file upload option.



- Select the correct Provider.
- Click the **Browse...** button to find the Claim (837P) file to be uploaded.
- Click **Upload**. The file will be uploaded to iConnect and will be visible in the Uploaded window.
- Click the red “X” in the upper right of the Upload window to end the upload session.

6. Click the **Download** link to open the “File Upload” option.
 - a. iConnect will issue a 999, which is available for download.
7. Select the correct Provider, if more than one is available.
8. Select the appropriate file and click **Download**.
 - a. Submitted claims are automatically processed and adjudicated.

Chapter 7 | Adjudication and Remittance Advice (RA)

Introduction

The **Claims** chapter, commonly referred to as the “Claims Grid,” allows users to view the results of applying the business rules and adjudication, and the current status of claims. Users can also resubmit denied claims, and void claims paid in error.

For Waiver services the remittance from FMMIS will automatically be posted in iConnect, though FMMIS will continue to issue the payment requests as they do today. From a business process perspective, this is a change for providers as they previously billed directly to FMMIS.

Adjudication Rules

Standard and APD-specific rules are applied to all submitted Claims. Rules ensure that all required data is present, that the content of the claim conforms to APD requirements for payment and determine the appropriate funding source and payer.

If a Claim passes all rules and is a Medicaid claim, iConnect automatically sends the claim to the FMMIS system for final adjudication.



Tip

Claims that must be sent using a CMS-1500 must be printed and mailed to the FMMIS.

If a Claim conforms to all rules and is not a Medicaid claim, the Claim is automatically approved for payment. If the Claim requires review by the Regional Staff, skip to the Payment Voucher section.

If a Claim does not conform to a rule, it is denied by iConnect (and in the case of Medicaid claims, will NOT be sent to the FMMIS).

Adjudication Results/Claim Status

Use the filter on the Claims grid to isolate the appropriate Claims. It is useful to view the **Batch No** and **Submit Date** to verify that Claims that were just submitted conformed to the rules.

- **Claim status** indicates where in the workflow the claim is and is not necessarily a terminal (final) status.
- **Remittance status** indicates if the Claim was paid, denied, or voided and is a terminal (final) status.
- **Claims without a remittance status** are locked and no action can be taken until remittance advice is posted.
- **Claims with a remittance status of Denied** can be corrected and resubmitted.
- **Claims with a remittance status of Paid** can be voided. Skip to Chapter 4, Voids.

Chapter 8 | Resubmit a Claim

Introduction

When a Claim is denied it can be resubmitted, either with the same data, or with slightly modified data.



Key Point

If a different vendor, consumer, or authorization needs to be used, a new Claim must be submitted.

Resubmit a Denied Claim

1. Click the **Claims** chapter and then use the filters to locate the denied Claim you want to work with.
2. With the Claim in the list view, click the flyout menu on the right and select “Resubmit Claim.”

Claim ID	Provider Name	Submit Date	Provider Identifier	Fund Code	Status	Remittance Status	Claim Amount	Paid Amount	Batch No	Claim Status	Excluded from PV Export
336	A TEST Provider	06/22/2018	7777712345	APD	Denied by Harmony	Denied	\$56.12	\$0.00	MVOGELER9	35	
335	A TEST Provider	06/11/2018	7777712345	APD	Denied by Harmony	Denied	\$14.03	\$0.00	ADMIN6	35	
334	A TEST Provider	06/04/2018	7777712345	APD	Denied by Harmony	Denied	\$28.06	\$0.00	ADMIN5	35	
333	A TEST Provider	06/04/2018	7777712345	APD	Denied by Harmony	Denied	\$28.06	\$0.00	ADMIN4	35	
332	A TEST Provider	06/04/2018	7777712345	APD	Denied by Harmony	Denied	\$28.06	\$0.00	ADMIN3	35	
331	A TEST Provider	06/01/2018	7777712345	APD	Denied by Harmony	Denied	\$148.69	\$0.00	MVOGELER8	35	
330	A TEST Provider	06/01/2018	7777712345	APD	Denied by Harmony	Denied	\$148.69	\$0.00	MVOGELER7	35	
329	A TEST Provider	06/01/2018	7777712345	APD	Denied by Harmony	Denied	\$30.00	\$0.00	MVOGELER6	35	

3. A prompt is displayed, “You are about to resubmit this claim, do you wish to continue?” Click **OK**.
4. A **copy** of the original Claim is displayed. Edit the information, as needed.
5. Click **File > Submit Single Claim Entry**.
6. Locate the new Claim and select to review the results.
7. Click on Original Claim Details tab to review the original Claim.

Claim View	
Claim ID	336
Submitter Claim ID	10004
Consumer Name	JOHNSON, KIMMY
Case No.	10004
Original Claim ID	
Batch No	MVOGELER9
Status	Denied by Harmony
Remittance Status	Denied
Auth ID	140680
Claim Status ID	1061
Rule Name	Valid Unit Cost (Exact Match)
EOP Date	
Export Date	

Resubmit an Approved Claim

1. Click the **Claims** chapter and then use the filters to locate the approved claim you want to work with.
2. With the Claim in the list view, click the flyout menu on the right side and select “Resubmit Claim.”

Chapter 9 | Void

Introduction

When a Claim is approved but was paid in error, it can be voided.



Key Point

If a different vendor, consumer, or authorization needs to be used, a new Claim must be submitted.

Void an Approved Claim

1. The claim submitter logs into the application and clicks the **Claims** chapter.
2. Use filters to locate the approved Claim you want to work with.
3. Click on the flyout menu to the right of the claim that needs to be resubmitted and select “Void Claim.”
4. A prompt is displayed: “You are about to void this claim, do you wish to continue?” Click OK.
5. Select the “Claim Void Reason” and then click **Save**.
 - a. A message is displayed that the claim was voided successfully.



Key Point

The void is automatically processed, creating a voider Claim that negates the originally-paid Claim. The voider and original Claim will be linked together.

Chapter 10a | Expansions – Non-WSC Solo to Agency

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: provider indicates what they'd like to expand, completes/submits required documentation and data, APD reviews and either approves or denies request. The differences in the process are in the documentation/data that the provider must submit and the criteria by which they are evaluated. Unique requirements for each expansion type are described in the following section.



The Service Provider will notify the Region that they wish to convert from a Non WSC Solo to an agency via a phone call or email. The Region will direct the Service Provider to complete all tasks, documentation and the Expansion Request form



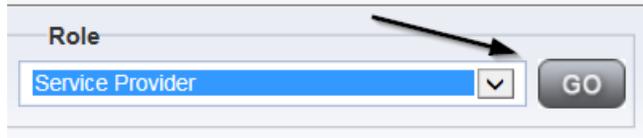
Service Providers will need to complete the Provider Expansion Request form



The Specialist/Liaison will need to review services to ensure the Provider meets qualifications as an Agency

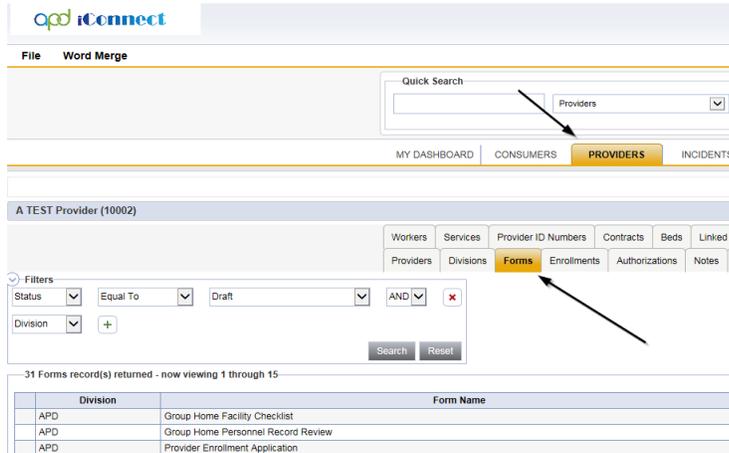
Complete Provider Expansion Request Form

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



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

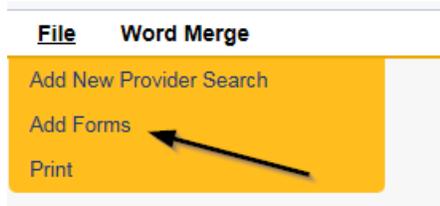
2. Navigate to the **Providers > Forms** tab



A screenshot of the iConnect interface. The "PROVIDERS" tab is selected in the navigation bar. Below it, the "Forms" sub-tab is selected. A table lists forms for "A TEST Provider (10002)".

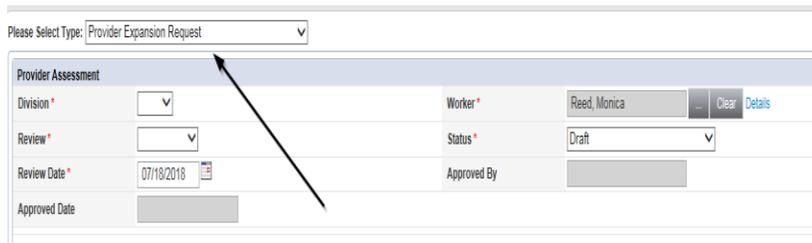
Division	Form Name
APD	Group Home Facility Checklist
APD	Group Home Personnel Record Review
APD	Provider Enrollment Application

3. Click **File > Add Forms**



A screenshot of a "File" menu. The "Add Forms" option 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

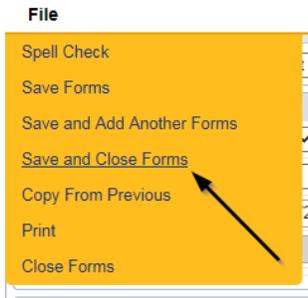


A screenshot of the "Provider Assessment" form. The "Please Select Type:" dropdown is set to "Provider Expansion Request". An arrow points to the dropdown menu.

Division *	<input type="text"/>	Worker *	Reed, Monica	Clear	Details
Review *	<input type="text"/>	Status *	Draft		
Review Date *	07/19/2018	Approved By	<input type="text"/>		
Approved Date	<input type="text"/>				

5. Update the following Header fields:
 - a. "Division" = APD
 - b. "Review" = Initial
 - c. Complete all fields on the Provider Enrollment Application Form

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

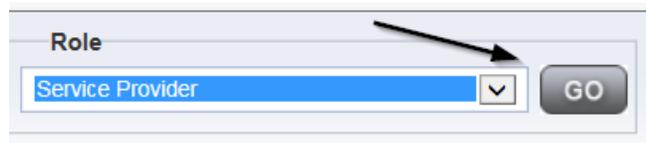


Expansion Intake Documentation Note

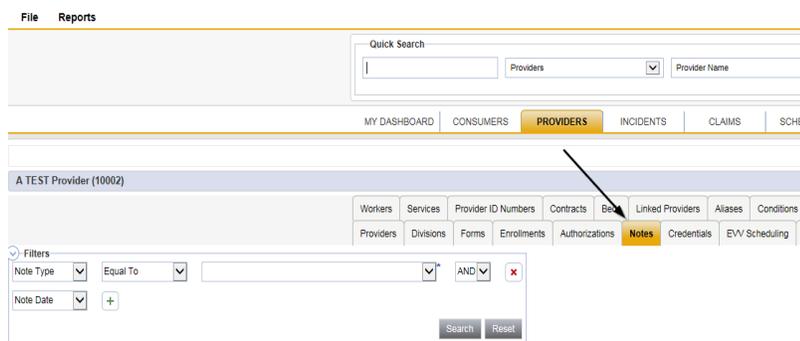


Expansion Intake documentation can include requisite documentation for a qualifying worker. The Service Provider will scan and save a copy of the intake or qualifying worker documentation to their desktop and attach it to a note.

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



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

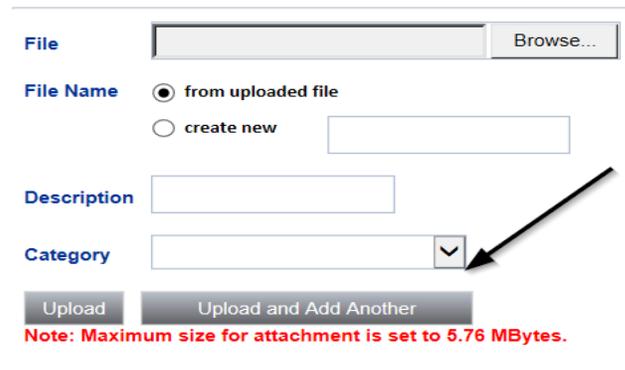


3. Click **File > Add Notes**



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

- a. "Division" = APD
- b. "Note Type" = Expansion Intake
- c. "Note Subtype" = Select as appropriate or Qualifying Worker Documentation (if applicable)
- 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 computer. Click Upload and Add Another until finished



- h. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 02/10/2020

Note Type * Expansion Intake

Note Sub-Type

Description

Note

Status * Complete

Date Completed 02/10/2020

Attachments

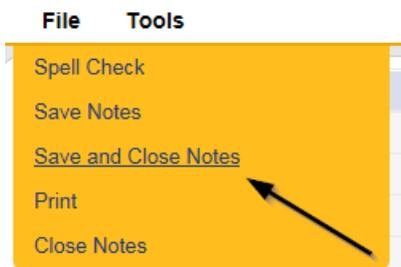
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ...

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



Submit Expansion Request Note



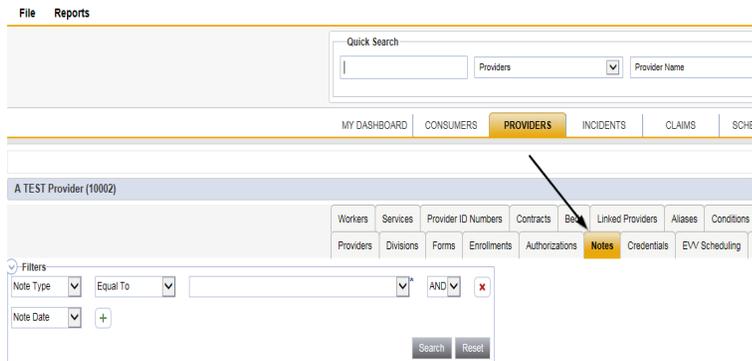
When the Service Provider has completed the expansion request and attached all required intake documentation, they will create a note that the request is submitted

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

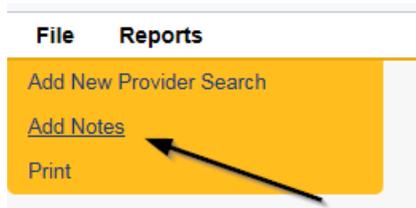
Role

Service Provider

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



3. Click **File > Add Notes**



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

- a. "Division" = APD
- b. "Note Type" = Provider Expansion Request
- c. "Note Subtype" = Ready to Submit
- d. "Description" = Ready to Submit
- e. "Note" = Enter notes
- f. "Status" = Pending
- g. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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 * APD ▾

Note By * Reed, Monica ▾

Note Date * 01/08/2020

Note Type * Provider Expansion Request ▾

Note Sub-Type Ready To Submit ▾

Description

Note

Status * Pending ▾

Date Completed

Attachments

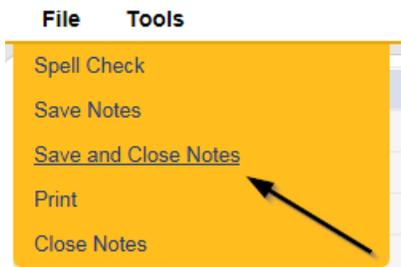
[Add Attachment](#)

Document	Description
Articles of Incorporation	
Drivers License	

Note Recipients

Add Note Recipient: ... Clear

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



Submit Expansion Complete Note



The Specialist/Liaison will review the Provider record, forms and all documentation. If complete, they will update the pending note to inform the Service Provider that the request will be reviewed. This will be done by responding to the pending note the Service Provider submitted. The Specialist/Liaison will update the status of that note to complete. Service Providers will be able to see this note on their My Dashboard in the Complete Notes pane.

As Needed: Further Documentation Required



If the Specialist/Liaison determines more documentation is needed to complete their review of the expansion request, they will create a note in the Provider record to notify the Service Provider that the request is incomplete and further documentation is required.

As Needed: Revision Review



If the Service Provider was notified that further documentation is required, they will review the note and then append the note with the requested information in the Provider record. Each document will be uploaded to this note.

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 "GO" button. An arrow points from the text "click Go" in the previous step to the "GO" button.

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

A screenshot of a dashboard navigation menu. The top row contains "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULE". Below this, there are three main sections: "CONSUMERS", "INCIDENTS", and "PROVIDERS". Under "CONSUMERS", there is a "Notes" link with a count of 0. Under "INCIDENTS", there is an "Inquiry Alert Notes List" link with a count of 0 and an "Unread Alert Notes" link with a count of 0. Under "PROVIDERS", there is a "Notes" link with a count of 3 Complete and 11 Pending. Arrows point from the text "click the hyperlink for the Pending notes" to the "Notes" link in the PROVIDERS section.

3. Select the **Note Type = Provider Expansion Request** and **Description = Further Documentation Required** and select the record via the hyperlink

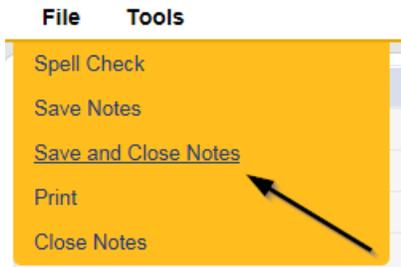
A screenshot of a search filter and a table of notes. The filter shows "Status" set to "Equal To" and "Pending". Below the filter, there is a table with 3 Notes record(s) returned - now viewing 1 through 3. The table has columns: Provider, Note Type, Note Date, Description, Author, and Status. The first row shows: A Test Provider, Provider Expansion Request, 02/26/2020, Further Documentation Required, Reed, Monica, Pending. Arrows point from the text "select the record via the hyperlink" to the "Provider" and "Description" columns.

Provider	Note Type	Note Date	Description	Author	Status
A Test Provider	Provider Expansion Request	02/26/2020	Further Documentation Required	Reed, Monica	Pending

4. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Revision Review*
 - b. "Description" = Revision Review
 - c. "Append Text to Note" = Enter notes
 - d. "Status" = Pending (until all attachments are added and then change to *Complete*)
 - e. Click "Add Attachment" and search for the copy of the supporting documentation on the user's computer. Click Upload and Add Another until finished

- f. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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

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

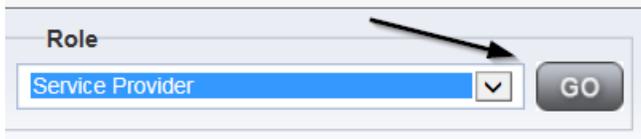


Provider Signed MWSA

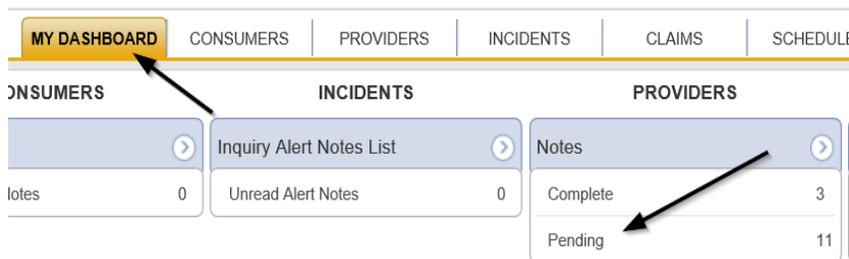


As the region completes their review, they will send the Service Provider a new MWSA via a note. The Service Provider will print out the MWSA, sign, save an electronic copy to their desktop and then attach it back to the pending note in the Provider record.

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



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



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

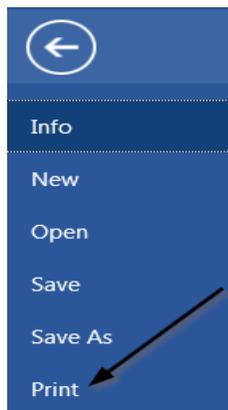
—13 Notes record(s) returned - now viewing 1 through 13—

Provider	Note Type	Note Date	Description	Author	Status
Reed Group Home	Expansion Request	02/25/2020	Progress Note	Reed, Monica	Pending
Reed Group Home	Provider Expansion Request	02/25/2020	MWSA Pending Provider Signature	Reed, Monica	Pending

4. Click on the attachment within the MWSA Pending Provider Signature note and then click **Open** on the pop-up message box.



5. Select **File > Print** within the Word Document



6. The Service Provider will sign the hard copy and attach it to the pending note
7. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Provider Signature*
 - b. "Description" = Provider Signature
 - c. "Append Text to Note" = Enter notes
 - d. "Status" = Update to *Complete*
 - e. Click "Add Attachment" and search for the copy of the Provider signed MWSA on the user's computer. Click Upload
 - f. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* as the Note Recipient
 - g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 11/06/2019

Note Type * Provider Expansion Request

Note Sub-Type ← Provider Signature

Description ←

Note

New Text

B I U 13px A

Append Text to Note

Status * ← Complete

Date Completed 11/06/2019

Attachments

Add Attachment ←

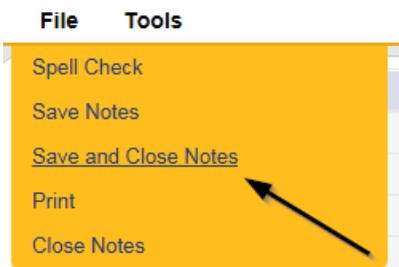
Document | **Description**

There are no attachments to display

Note Recipients

Add Note Recipient: ... Clear

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



Added/Updated Credential Records



If the expansion request is approved, the Specialist/Liaison will need to submit a SARF to APD IT to change the Service Provider from Solo to Agency ID PASS access.



The Specialist/Liaison will then add a new certification record for iBudget Waiver Agency Provider in the Service Provider record. They will also update/end date the iBudget Solo Provider certification record. A new MWSA license record will be added to reflect the dates of the new MWSA.

Final Enrollment Letter Note



Once the Specialist/Liaison receives the ROM signed Final Enrollment Listing Letter, they will create a note to inform the Service Provider of the Provider Expansion Request approval. This note will appear on the Service Provider's My Dashboard in the Completed Notes pane.

The Specialist/Liaison will also update the Expansion Request Form to complete.

As Needed: New Rate Letter Note



The Provider Enrollment Specialist Liaison will create a note for a new rate letter when there is an expansion from solo to agency or agency to solo. The Provider Enrollment Specialist Liaison will generate the New Rate Letter and attach it to a note in iConnect. This note will appear on the Service Provider's My Dashboard in the Completed Notes pane.

NOTE: The effective date of rates is listed on the New Rate Letter. It may not coincide with the dates of the newly signed agreement as the Waiver Workstream will need to work with WSCs to ensure all consumers impacted have an opportunity to update their plans/planned services.

As Needed: Denial Letter Note



If the expansion request is denied, the Specialist/Liaison will attach an electronic copy of the ROM signed Denial letter to a note in the Provider record. The Service Provider can find this note on their My Dashboard in the Completed Notes pane.

As Needed: Expansion Request Abandoned



If the Service Provider stops working on the expansion request for more than 30 days the Specialist/Liaison will close the expansion request as abandoned in the Provider record. The Service Provider will need to reapply if they want to still pursue an Expansion Request.

Chapter 10b | Expansions – Non-WSC Agency to Solo

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: provider indicates what they'd like to expand, completes/submits required documentation and data, APD reviews and either approves or denies request. The differences in the process are in the documentation/data that the provider must submit and the criteria by which they are evaluated. Unique requirements for each expansion type are described in the following section.



The Service Provider will notify the Region that they wish to convert from a Non WSC Agency to a Solo via a phone call or email. The Region will direct the Service Provider to complete all tasks, documentation and the Expansion Request form



Service Providers will need to complete the Provider Expansion Request form as well as remove all employees from their ID PASS account.



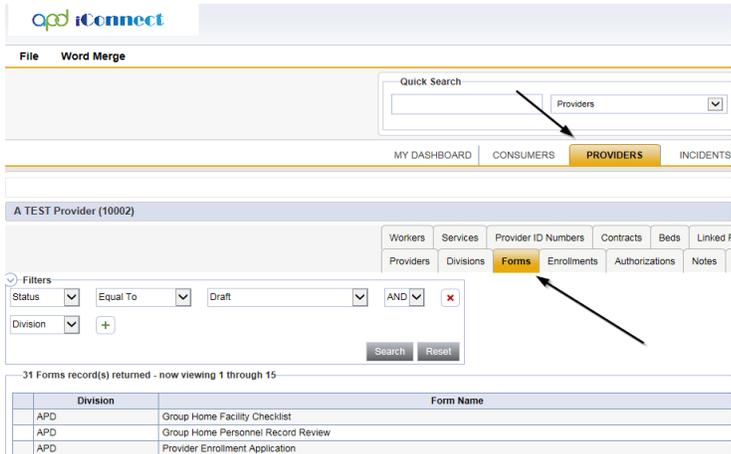
The Specialist/Liaison will need to review services to ensure the Provider meets qualifications as a Solo. All workers will then need to be inactivated on the Provider Agency record.

Complete Provider Expansion Request Form

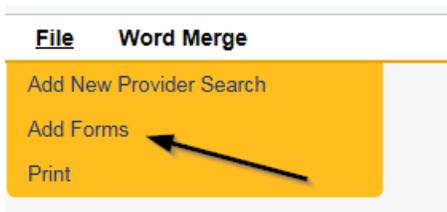
1. Set "Role" = Service Provider then click **Go**

A screenshot of a web form field. The field is labeled "Role" and contains a dropdown menu with "Service Provider" selected. To the right of the dropdown is a grey button labeled "GO". A black arrow points from the text "click Go" in the instruction above to the "GO" button.

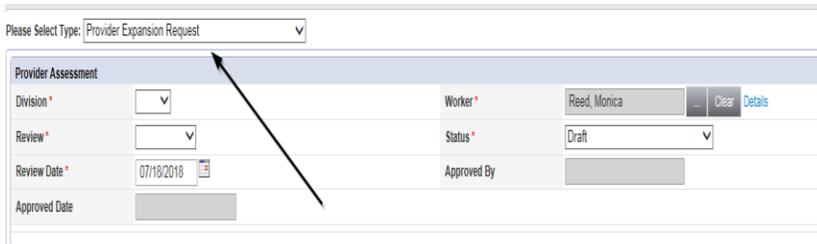
2. Navigate to the **Providers > Forms** tab



3. Click **File > Add Forms**



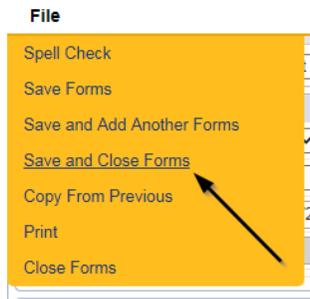
4. Select "Please Select Type" as "Provider Expansion Request" from the drop-down list



5. Update the following Header fields:

- "Division" = APD
- "Review" = Initial
- Complete all fields on the Provider Enrollment Application Form

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

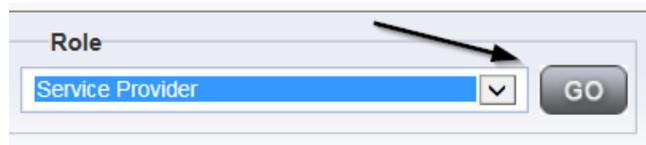


Expansion Intake Documentation Note

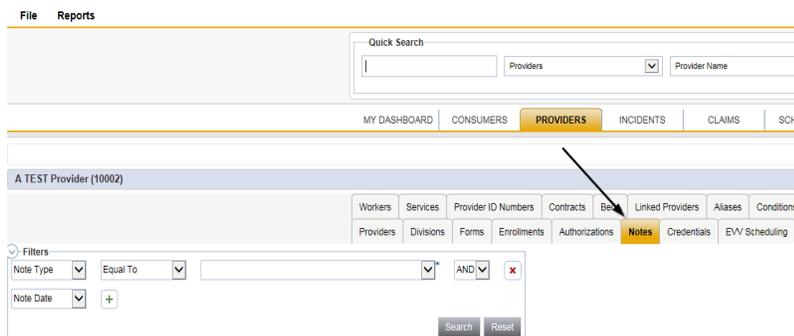


Expansion Intake documentation can include requisite documentation for a qualifying worker. The Service Provider will scan and save a copy of the intake or qualifying worker documentation to their desktop and attach it to a note.

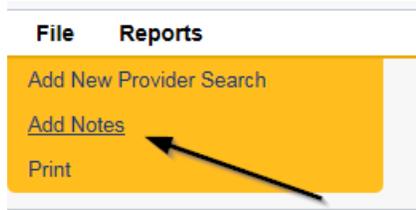
1. Set "Role" = Service Provider then click **Go**



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



3. Click **File > Add Notes**



4. In the new Note record, update the following fields:
- a. "Division" = APD
 - b. "Note Type" = Expansion Intake
 - c. "Note Subtype" = Select as appropriate or Qualifying Worker Documentation (if applicable)
 - 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 computer. Click Upload and Add Another until finished

A screenshot of a file upload form. It has several fields: 'File' with a text box and a 'Browse...' button; 'File Name' with two radio buttons, 'from uploaded file' (selected) and 'create new', followed by a text box; 'Description' with a text box; and 'Category' with a dropdown menu. Below these fields are two buttons: 'Upload' and 'Upload and Add Another'. At the bottom, there is a red note: 'Note: Maximum size for attachment is set to 5.76 MBytes.' A black arrow points to the 'Category' dropdown menu.

- h. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 02/10/2020

Note Type * Expansion Intake ▾

Note Sub-Type

Description

Note

Status * Complete ▾

Date Completed 02/10/2020

Attachments

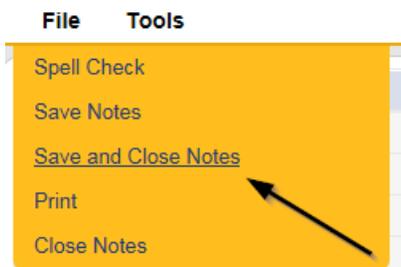
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ...

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



Submit Expansion Request Note



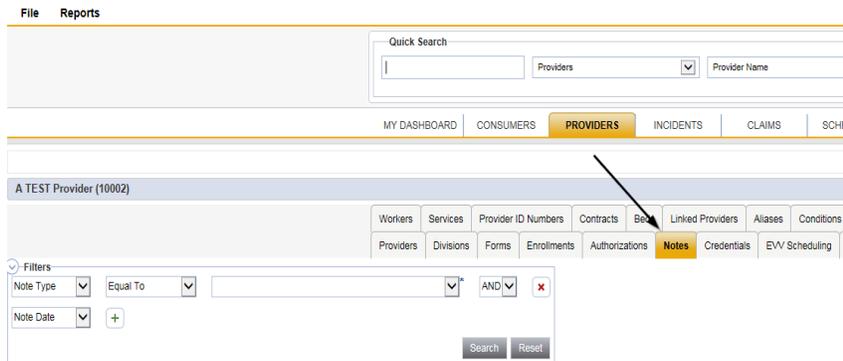
When the Service Provider has completed the expansion request and attached all required intake documentation, they will create a note that the request is submitted

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

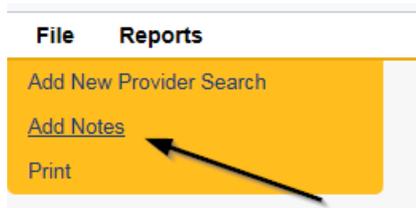
Role

Service Provider ▾

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



3. Click **File > Add Notes**



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

- a. "Division" = APD
- b. "Note Type" = Provider Expansion Request
- c. "Note Subtype" = Ready to Submit
- d. "Description" = Ready to Submit
- e. "Note" = Enter notes
- f. "Status" = Pending
- g. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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 * APD ▾

Note By * Reed, Monica ▾

Note Date * 01/08/2020

Note Type * Provider Expansion Request ▾

Note Sub-Type Ready To Submit ▾

Description

Note

Status * Pending ▾

Date Completed

Attachments

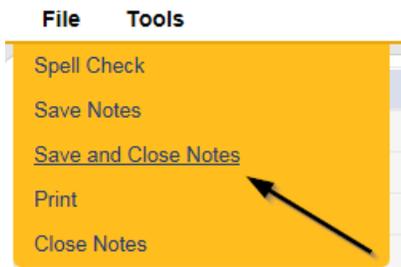
[Add Attachment](#)

Document	Description
Articles of Incorporation	
Drivers License	

Note Recipients

Add Note Recipient: ... Clear

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



Submit Expansion Complete Note



The Specialist/Liaison will review the Provider record, forms and all documentation. If complete, they will update the pending note to inform the Service Provider that the request will be reviewed. This will be done by responding to the pending note the Service Provider submitted. The Specialist/Liaison will update the status of that note to complete. Service Providers will be able to see this note on their My Dashboard in the Complete Notes pane.

As Needed: Further Documentation Required



If the Specialist/Liaison determines more documentation is needed to complete their review of the expansion request, they will create a note in the Provider record to notify the Service Provider that the request is incomplete and further documentation is required.

As Needed: Revision Review



If the Service Provider was notified that further documentation is required, they will review the note and then append the note with the requested information in the Provider record. Each document will be uploaded to this note.

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 above to the "GO" button.

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

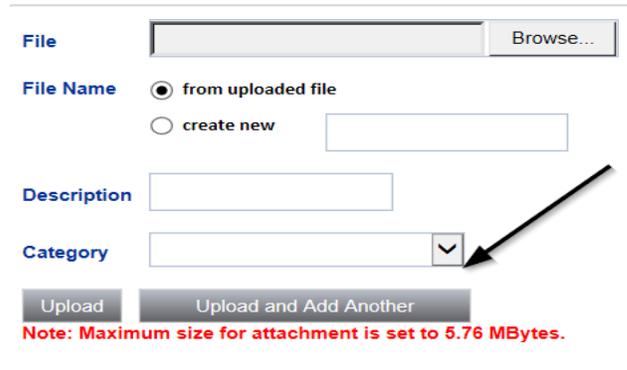
A screenshot of a dashboard navigation menu. The top row contains tabs: "MY DASHBOARD" (highlighted), "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULE". Below this, there are three main sections: "CONSUMERS", "INCIDENTS", and "PROVIDERS". Under "CONSUMERS", there is a "Notes" link with a count of 0. Under "INCIDENTS", there is an "Inquiry Alert Notes List" link with a count of 0 and an "Unread Alert Notes" link with a count of 0. Under "PROVIDERS", there is a "Notes" link with a count of 3 "Complete" and 11 "Pending" notes. Arrows point from the text above to the "MY DASHBOARD" tab, the "Notes" link under "PROVIDERS", and the "Pending" count.

3. Select the **Note Type = Provider Expansion Request** and **Description = Further Documentation Required** and select the record via the hyperlink

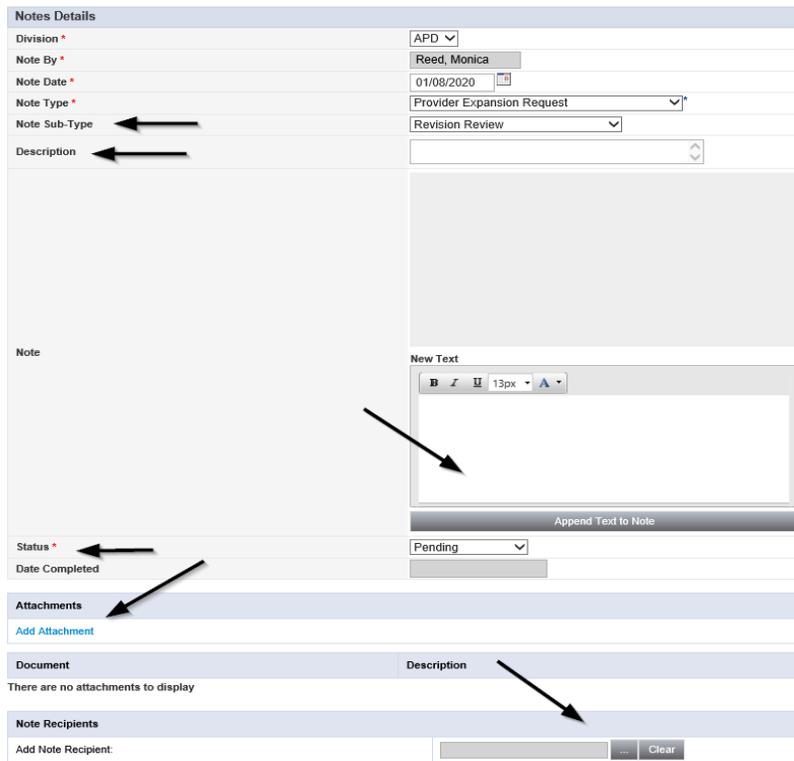
A screenshot of a search filter and a table of notes. The filter shows "Status" set to "Equal To" and "Pending". Below the filter, there is a table with 3 records. The first record is highlighted. Arrows point from the text above to the "Note Type" and "Description" columns of the first record.

Provider	Note Type	Note Date	Description	Author	Status
A Test Provider	Provider Expansion Request	02/26/2020	Further Documentation Required	Reed, Monica	Pending

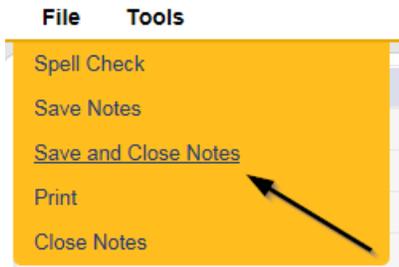
4. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Revision Review*
 - b. "Description" = Revision Review
 - c. "Append Text to Note" = Enter notes
 - d. "Status" = Pending (until all attachments are added and then change to *Complete*)
 - e. Click "Add Attachment" and search for the copy of the supporting documentation on the user's computer. Click Upload and Add Another until finished



- f. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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



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

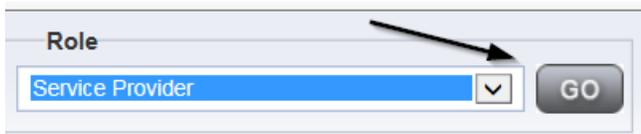


Provider Signed MWSA

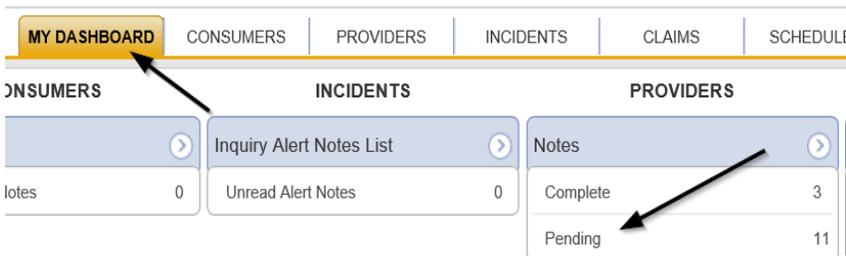


As the region completes their review, they will send the Service Provider a new MWSA via a note. The Service Provider will print out the MWSA, sign, save an electronic copy to their desktop and then attach it back to the pending note in the Provider record.

- Set "Role" = Service Provider 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 = MWSA Pending Provider Signature** and select the pending record via the hyperlink

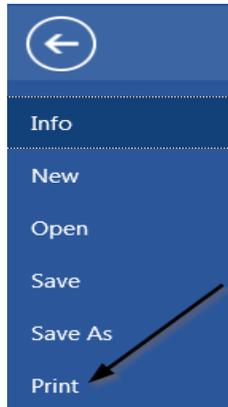
—13 Notes record(s) returned - now viewing 1 through 13—

Provider	NoteType	Note Date	Description	Author	Status
Reed Group Home	Expansion Request	02/25/2020	Progress Note	Reed, Monica	Pending
Reed Group Home	Provider Expansion Request	02/25/2020	MWSA Pending Provider Signature	Reed, Monica	Pending

- Click on the attachment within the MWSA Pending Provider Signature note and then click **Open** on the pop-up message box.



5. Select **File > Print** within the Word Document



6. The Service Provider will sign the hard copy and attach it to the pending note

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

- a. "Note Subtype" = *Update to Provider Signature*
- b. "Description" = Provider Signature
- c. "Append Text to Note" = Enter notes
- d. "Status" = Update to *Complete*
- e. Click "Add Attachment" and search for the copy of the Provider signed MWSA on the user's computer. Click Upload
- f. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* as the Note Recipient
- g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 11/06/2019

Note Type * Provider Expansion Request

Note Sub-Type ← Provider Signature

Description ←

Note

New Text

B I U 13px A

Append Text to Note

Status * ← Complete

Date Completed 11/06/2019

Attachments

Add Attachment ←

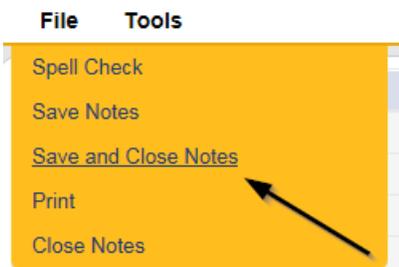
Document Description

There are no attachments to display

Note Recipients

Add Note Recipient: ... Clear

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



Added/Updated Credential Records



If the expansion request is approved, the Specialist/Liaison will need to submit a SARF to APD IT to change the Service Provider from Agency to Solo ID PASS access.



The Specialist/Liaison will then add a new certification record for iBudget Waiver Solo Provider in the Service Provider record. They will also update/end date the iBudget Waiver Agency Provider certification record. A new MWSA license record will be added to reflect the dates of the new MWSA.

Final Enrollment Letter Note



Once the Specialist/Liaison receives the ROM signed Final Enrollment Listing Letter, they will create a note to inform the Service Provider of the Provider Expansion Request approval. This note will appear on the Service Provider's My Dashboard in the Completed Notes pane.

The Specialist/Liaison will also update the Expansion Request Form to complete.

As Needed: New Rate Letter Note



The Provider Enrollment Specialist Liaison will create a note for a new rate letter when there is an expansion from solo to agency or agency to solo. The Provider Enrollment Specialist Liaison will generate the New Rate Letter and attach it to a note in iConnect. This note will appear on the Service Provider's My Dashboard in the Completed Notes pane.

NOTE: The effective date of rates is listed on the New Rate Letter. It may not coincide with the dates of the newly signed agreement as the Waiver Workstream will need to work with WSCs to ensure all consumers impacted have an opportunity to update their plans/planned services.

As Needed: Denial Letter Note



If the expansion request is denied, the Specialist/Liaison will attach an electronic copy of the ROM signed Denial letter to a note in the Provider record. The Service Provider can find this note on their My Dashboard in the Completed Notes pane.

As Needed: Expansion Request Abandoned



If the Service Provider stops working on the expansion request for more than 30 days the Specialist/Liaison will close the expansion request as abandoned in the Provider record. The Service Provider will need to reapply if they want to still pursue an Expansion Request.

Chapter 10c | Expansions – Region to Region

Introduction

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



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

Complete Provider Expansion Request Form

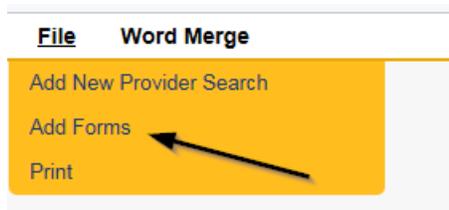
1. Set "Role" = Service Provider then click **Go**

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

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

A screenshot of the iConnect web application. The "PROVIDERS" tab is selected in the navigation bar. Below it, the "Forms" sub-tab is selected. A search filter is applied with "Status" set to "Draft". A table below shows a list of forms, including "Group Home Facility Checklist", "Group Home Personnel Record Review", and "Provider Enrollment Application". A black arrow points to the "Forms" sub-tab.

3. Click **File > Add Forms**



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

5. Update the following Header fields:

- a. "Division" = APD
- b. "Review" = Initial
- c. Complete all fields on the Provider Enrollment Application Form

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



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 desktop and attach it to a note. They will upload all qualifying documents to a single note. The Provider will need to send in a copy of the current MWSA, Business Liability Insurance, Licenses, Qlarant reports and have no outstanding billing discrepancies with AHCA.

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

Role

Service Provider

GO

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

File Reports

Quick Search

MY DASHBOARD CONSUMERS **PROVIDERS** INCIDENTS CLAIMS SCHE

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts **Notes** Linked Providers Aliases Conditions

Providers Divisions Forms Enrollments Authorizations 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 Note record, update the following fields:

- "Division" = APD
- "Note Type" = Expansion Intake
- "Note Subtype" = Select as appropriate
- "Description" = same as subtype
- "Note" = Enter notes
- "Status" = Complete
- Click "Add Attachment" and search for the copy of the supporting documentation on the user's computer. Click Upload and Add Another until finished

File

Browse...

File Name

from uploaded file

create new

Description

Category

Upload Upload and Add Another

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

- h. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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

Notes Details

Division *

Note By *

Note Date *

Note Type *

Note Sub-Type

Description

Note

Status *

Date Completed

- Admin Policies
- Articles of Incorporation
- Current MWSA
- Driver's License
- Education
- General Liability
- Good Moral Character
- Law Check Form
- Org Chart
- Owner Resume
- Provider Services Listings
- Qlarant Review
- References
- Resume
- SS4/W9
- SSN
- Transportation Council Approval
- WSC Pre-Service Training

Attachments

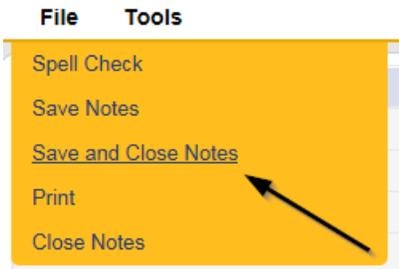
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient:

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



Submit Expansion Request Note

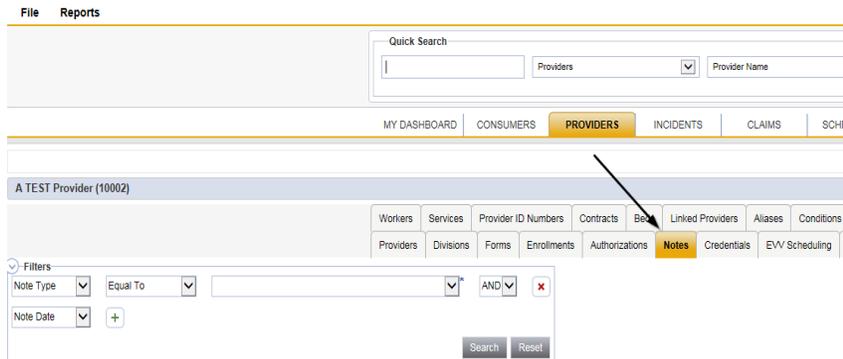


When the Service Provider has completed the expansion request and attached all required intake documentation, they will create a note that the request is submitted and ready for review.

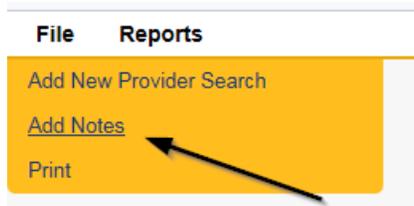
- Set "Role" = Service Provider then click **Go**



- Navigate to the **Providers > Notes** tab



- Click **File > Add Notes**



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

- a. "Division" = APD
- b. "Note Type" = Provider Expansion Request
- c. "Note Subtype" = Ready to Submit
- d. "Description" = Enter description
- e. "Note" = Enter notes
- f. "Status" = Pending
- g. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

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

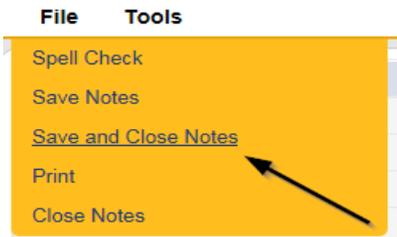
- Division: APD
- Note By: Reed, Monica
- Note Date: 01/08/2020
- Note Type: Provider Expansion Request
- Note Sub-Type: Ready To Submit
- Description: (empty)
- Note: (empty text area)
- Status: Pending
- Date Completed: (empty)

Below the form is an 'Attachments' section with a table:

Document	Description
Articles of Incorporation	
Drivers License	

Below the attachments is a 'Note Recipients' section with an 'Add Note Recipient' field and a 'Clear' button. An arrow points to the ellipsis button next to the 'Add Note Recipient' field.

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



Submit Expansion Complete Note



The Specialist/Liaison will review the Provider record, forms and all documentation. If complete, they will update the pending note to inform the Service Provider that the request will be reviewed. This will be done by responding to the pending note the Service Provider submitted. The Specialist/Liaison will update the status of that note to complete. Service Providers will be able to see this note on their My Dashboard in the Complete Notes panel.

As Needed: Further Documentation Required



If the Specialist/Liaison determines more documentation is needed to complete their review of the expansion request, they will create a note in the Provider record to notify the Service Provider that the request is incomplete and further documentation is required.

As Needed: Revision Review



If the Service Provider was notified that further documentation is required, they will review the note and then append the note with the requested information in the Provider record. Each document will be uploaded to this note.

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

Role
Service Provider [v] GO

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

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Notes 0
Inquiry Alert Notes List 0
Unread Alert Notes 0
Notes Complete 3
Pending 11

3. Select the **Note Type = Provider Expansion Request** and **Description = Further Documentation Required** and select the record via the hyperlink

Filters
Status Equal To Pending AND
Status +
Search Reset

3 Notes record(s) returned - now viewing 1 through 3

Provider	Note Type	Note Date	Description	Author	Status
A Test Provider	Provider Expansion Request	02/26/2020	Further Documentation Required	Reed, Monica	Pending

4. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Revision Review*
 - b. "Description" = Revision Review
 - c. "Append Text to Note" = Enter notes
 - d. "Status" = Pending (until all attachments are added and then change to *Complete*)
 - e. Click "Add Attachment" and search for the copy of the supporting documentation on the user's computer. Click Upload and Add Another until finished

File [] Browse...

File Name from uploaded file
 create new []

Description []

Category [] [v]

Upload Upload and Add Another

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

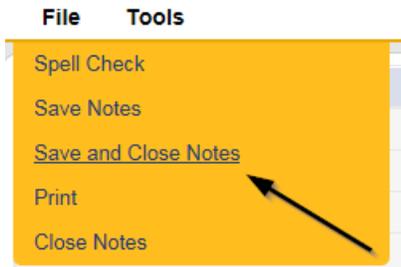
- f. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* as the Note Recipient

g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

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

- Notes Details** (Section Header)
- Division ***: APD
- Note By ***: Reed, Monica
- Note Date ***: 01/08/2020
- Note Type ***: Provider Expansion Request
- Note Sub-Type**: Revision Review (indicated by an arrow)
- Description**: (indicated by an arrow)
- Note**: (Large text area)
- New Text**: (Rich text editor with 'Append Text to Note' button)
- Status ***: Pending (indicated by an arrow)
- Date Completed**: (indicated by an arrow)
- Attachments**: Add Attachment (indicated by an arrow)
- Document**: Description (indicated by an arrow)
- Note Recipients**: Add Note Recipient: [input field] [button] Clear (indicated by an arrow)

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



Provider Notification of Approval



If the expansion is approved, the Specialist/Liaison will notify the Provider via a note. The note will appear on the Service Provider's My Dashboard in the Completed Notes pane.

Add Service Area



The Specialist/Liaison will update the Service Area of the Service Provider's record to include the new region.

As Needed: Denial Letter Note



If the expansion request is denied, the Specialist/Liaison will attach an electronic copy of the ROM signed Denial letter to a note in the Provider record. The Service Provider can find this note on their My Dashboard in the Completed Notes pane.

As Needed: Expansion Request Abandoned



If the Service Provider stops working on the expansion request for more than 30 days the Specialist/Liaison will close the expansion request as abandoned in the Provider record. The Service Provider will need to reapply if they want to still pursue an Expansion Request.

Chapter 10d | Expansions – Service

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: provider indicates what they'd like to expand, completes/submits required documentation and data, APD reviews and either approves or denies request. The differences in the process are in the documentation/data that the provider must submit and the criteria by which they are evaluated. Unique requirements for each expansion type are described in the following section.



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



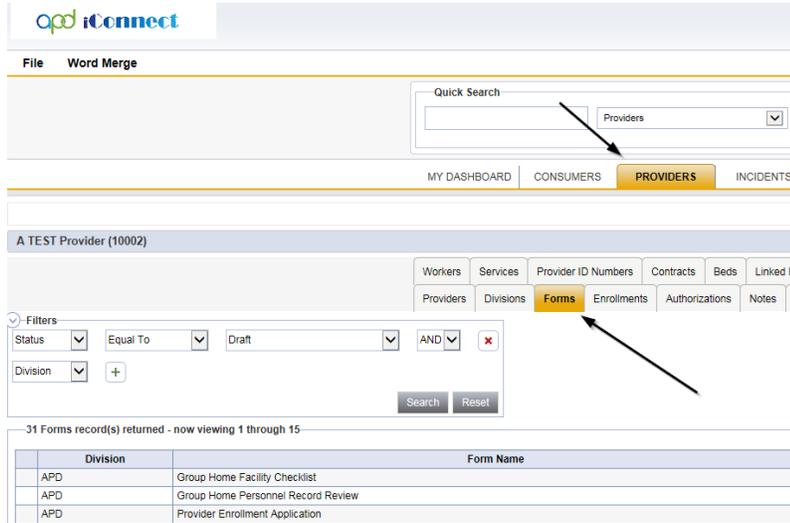
Service Providers will need to send APD IT the list of Qualifying worker records that need to be created in iConnect for the requested expansion services if they don't currently have a worker record. The worker will need to login in order for their worker record to be created.

Complete Provider Expansion Request Form

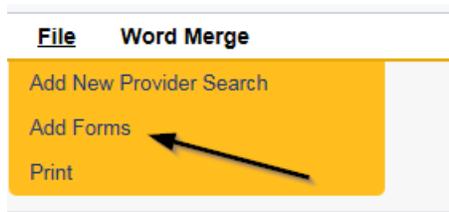
1. Set "Role" = Service Provider then click **Go**

A screenshot of a web form field labeled "Role". The field is a dropdown menu with "Service Provider" selected and highlighted in blue. A black arrow points to the dropdown arrow icon. To the right of the dropdown is a grey button with the text "GO" in white capital letters.

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



3. Click **File > Add Forms**



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



5. Update the following Header fields:

- "Division" = APD
- "Review" = Initial
- Complete all fields on the Provider Enrollment Application Form

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

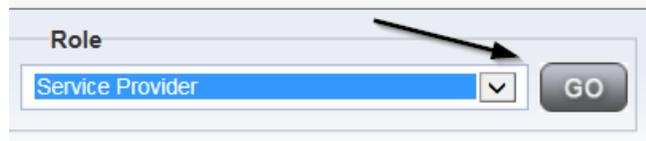


Expansion Intake Documentation Note

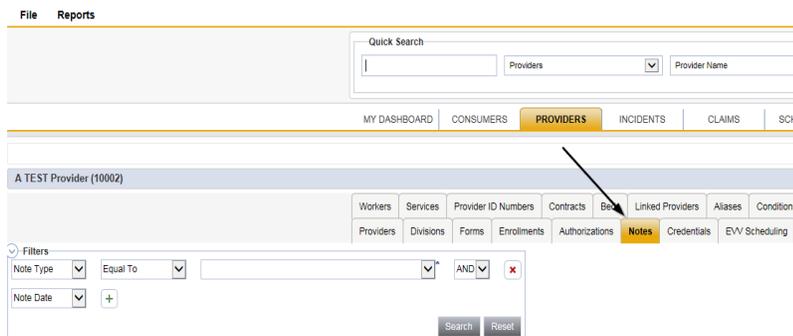


Expansion Intake documentation can include requisite documentation for a qualifying worker. The Service Provider will scan and save a copy of the intake or qualifying worker documentation to their desktop and attach it to a note. They will upload all qualifying documents to a single note. The Provider will need to send in a copy of the current MWSA, Business Liability Insurance, Licenses, Qlarant reports and have no outstanding billing discrepancies with AHCA.

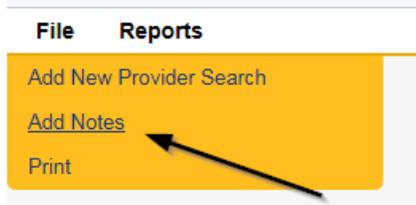
1. Set "Role" = Service Provider then click **Go**



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

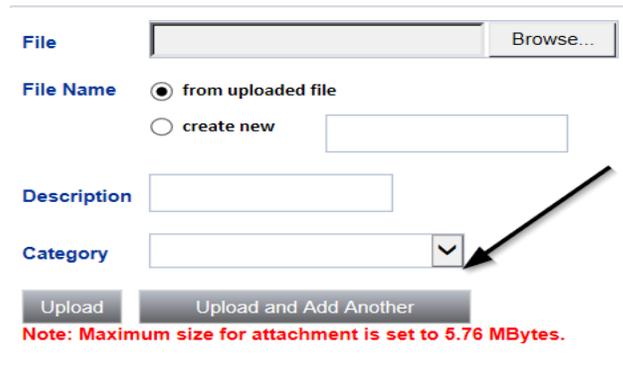


3. Click **File > Add Notes**



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

- a. "Division" = APD
- b. "Note Type" = Expansion Intake
- c. "Note Subtype" = Select as appropriate
- d. "Description" = Enter description
- e. "Note" = Enter notes
- f. "Status" = Complete
- g. Click "Add Attachment" and search for the copy of the supporting documentation on the user's computer. Click Upload and Add Another until finished

A screenshot of a form titled 'Add Attachment'. It contains the following fields: 'File' with a text input and a 'Browse...' button; 'File Name' with radio buttons for 'from uploaded file' (selected) and 'create new' (with an adjacent text input); 'Description' with a text input; and 'Category' with a dropdown menu. Below these fields are two buttons: 'Upload' and 'Upload and Add Another'. A red note at the bottom states: 'Note: Maximum size for attachment is set to 5.76 MBytes.' A black arrow points to the 'Category' dropdown menu.

- h. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 07/18/2018

Note Type * Expansion Intake ▾

Note Sub-Type

Description

Note

Status *

Date Completed

Attachments

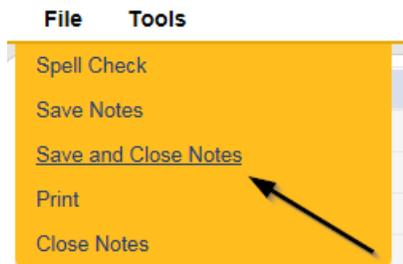
Add Attachment

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ... Clear

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

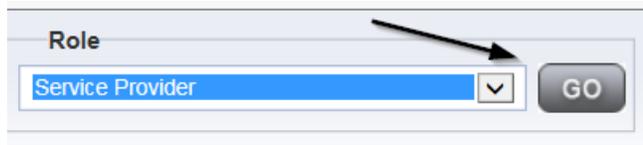


Submit Expansion Request Note



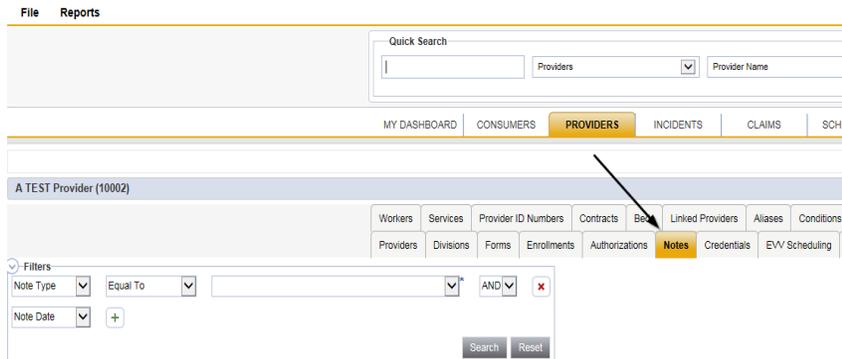
When the Service Provider has completed the expansion request and attached all required intake documentation, they will create a note that the request is submitted

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



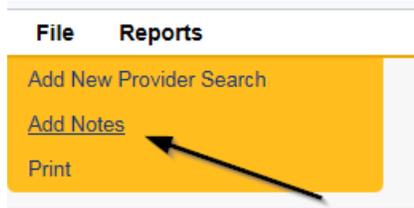
A screenshot of a web form. At the top, the word "Role" is displayed. Below it is a dropdown menu with "Service Provider" selected. To the right of the dropdown is a grey button with the text "GO" in white. An arrow points from the top right towards the dropdown menu.

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



A screenshot of a software application interface. At the top, there are tabs for "File" and "Reports". Below this is a "Quick Search" section with a search box and two dropdown menus labeled "Providers" and "Provider Name". A navigation bar contains tabs for "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHE". The "PROVIDERS" tab is active. Below the navigation bar, there is a header for "A TEST Provider (10002)". A sub-navigation bar contains tabs for "Workers", "Services", "Provider ID Numbers", "Contracts", "Benefits", "Linked Providers", "Aliases", and "Conditions". The "Notes" tab is active. Below this is a "Filters" section with dropdown menus for "Note Type" and "Note Date", and a search box. At the bottom, there are "Search" and "Reset" buttons. An arrow points from the "Notes" tab in the sub-navigation bar towards the "Filters" section.

3. Click **File > Add Notes**



A screenshot of a software application interface. At the top, there are tabs for "File" and "Reports". Below this is a yellow menu bar with the following options: "Add New Provider Search", "Add Notes", and "Print". An arrow points from the right side towards the "Add Notes" option.

4. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Provider Expansion Request
 - c. "Note Subtype" = Ready to Submit
 - d. "Description" = Enter description
 - e. "Note" = Enter notes
 - f. "Status" = Pending
 - g. Click "Add Attachment" and search for the copy of the document on the user's computer. Click Upload
 - h. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 01/08/2020

Note Type * Provider Expansion Request ▾

Note Sub-Type Ready To Submit ▾

Description

Note

Status * Pending ▾

Date Completed

Attachments

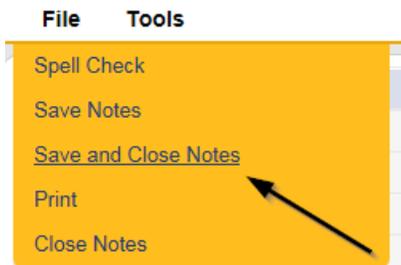
[Add Attachment](#)

Document	Description
Articles of Incorporation	
Drivers License	

Note Recipients

Add Note Recipient: ... Clear

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



Submit Expansion Complete Note



The Specialist/Liaison will review the Provider record, forms and all documentation. If complete, they will update the pending note to inform the Service Provider that the request will be reviewed. This will be done by responding to the pending note the Service Provider submitted. The Specialist/Liaison will update the status of that note to complete. Service Providers will be able to see this note on their My Dashboard in the Complete Notes pane.

As Needed: Further Documentation Required



If the Specialist/Liaison determines more documentation is needed to complete their review of the expansion request, they will create a note in the Provider record to notify the Service Provider that the request is incomplete and further documentation is required.

As Needed: Revision Review



If the Service Provider was notified that further documentation is required, they will review the note and then append the note with the requested information in the Provider record. Each document will be uploaded to this note.

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 "GO" button. An arrow points from the text "click Go" in the previous step to the "GO" button.

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

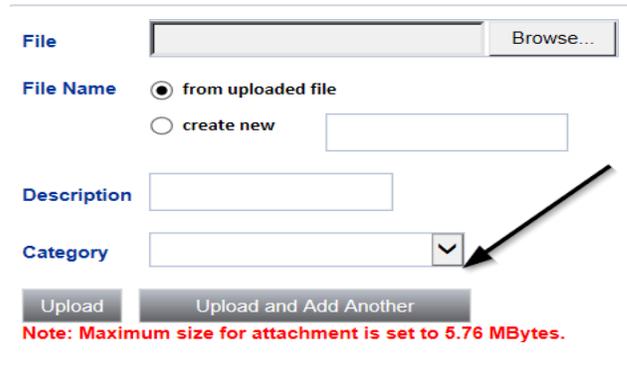
A screenshot of a dashboard navigation menu. The menu items are "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULE". Below the menu, there are three main sections: "CONSUMERS", "INCIDENTS", and "PROVIDERS". The "PROVIDERS" section has a "Notes" link with a right-pointing arrow. Below the "Notes" link, there are two rows: "Complete" with a count of 3, and "Pending" with a count of 11. Arrows point from the text "click the hyperlink for the Pending notes" to the "Notes" link and the "Pending" row.

3. Select the **Note Type = Provider Expansion Request** and **Description = Further Documentation Required** and select the record via the hyperlink

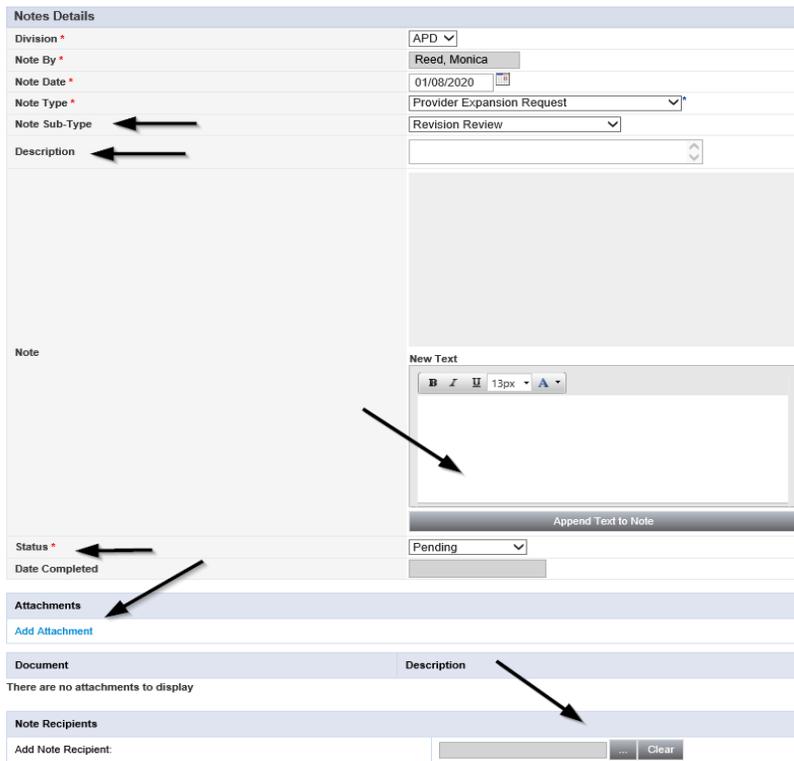
A screenshot of a search filter and a table of notes. The filter shows "Status" set to "Equal To" and "Pending". Below the filter, there is a table with 3 columns: "Provider", "Note Type", "Note Date", "Description", "Author", and "Status". The table has one row with the following data: "A Test Provider", "Provider Expansion Request", "02/26/2020", "Further Documentation Required", "Reed, Monica", and "Pending". Arrows point from the text "select the record via the hyperlink" to the "Provider", "Note Type", "Description", and "Status" columns.

Provider	Note Type	Note Date	Description	Author	Status
A Test Provider	Provider Expansion Request	02/26/2020	Further Documentation Required	Reed, Monica	Pending

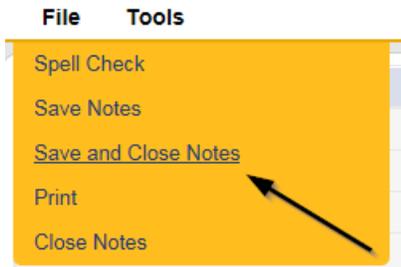
4. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Revision Review*
 - b. "Description" = Revision Review
 - c. "Append Text to Note" = Enter notes
 - d. "Status" = Pending (until all attachments are added and then change to *Complete*)
 - e. Click "Add Attachment" and search for the copy of the supporting documentation on the user's computer. Click Upload and Add Another until finished



- f. Click the ellipsis on the "Add Note Recipient" to add the *Specialist/Liaison* 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



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



Provider Notification of Approval



If the expansion is approved, the Specialist/Liaison will notify the Provider via a note. The note will appear on the Service Provider's My Dashboard in the Completed Notes pane.

Add New Services



The Specialist/Liaison will add new services. On the Services tab of the Service Provider's record.

Final Enrollment Letter Note



Once the Specialist/Liaison receives the ROM signed Final Enrollment Listing Letter, they will create a note to inform the Service Provider of the Provider Expansion Request approval. This note will appear on the Service Provider's My Dashboard in the Completed Notes pane.

The Specialist/Liaison will also update the Expansion Request Form to complete.

As Needed: Denial Letter Note



If the expansion request is denied, the Specialist/Liaison will attach an electronic copy of the ROM signed Denial letter to a note in the Provider record. The Service Provider can find this note on their My Dashboard in the Completed Notes pane.

As Needed: Expansion Request Abandoned



If the Service Provider stops working on the expansion request for more than 30 days the Specialist/Liaison will close the expansion request as abandoned in the Provider record. The Service Provider will need to reapply if they want to still pursue an Expansion Request.

