



State of Florida
Agency for Persons with Disabilities

iConnect
Residential Planning Training Manual
Version 4 6/04/2024

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Residential Planning

Introduction

The consumer, legal representative, or other member of the consumers circle of supports have identified that there is a potential need for residential placement and will reach out to the Waiver Support Coordinator (WSC) or the Pre-Enrollment Workstream Worker to begin the Residential Planning process.

1. Residential Planning Process

The Residential Planning process includes the following steps:

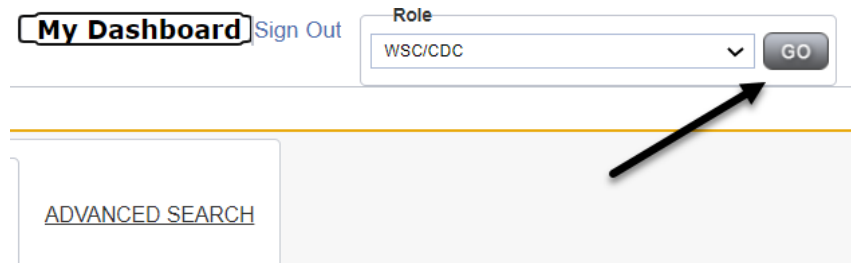
- A. Complete the Residential Referral form.
- B. Residential Referral review
- C. Generate Bed Availability report to find optional placements.
- D. Review list of potential placements with Consumer/Legal Rep/Family
- E. Consumer Placement

A. Complete the Residential Referral form

The consumer or member of the consumer's circle of supports identifies a potential need for residential placement and contacts the WSC. The WSC will complete the residential referral form and send a note to the State Office Residential Intake Specialist & Region Residential Planning Coordinator (RRPC) to begin the process.

Role(s): WSC/CDC and Region Pre-Enrollment Workstream Worker

1. To begin, log into iConnect and set Role = WSC/CDC or Region Pre-Enrollment Workstream Worker. Click **Go**.



The screenshot shows a user interface with a navigation bar. On the left, there is a 'My Dashboard' button and a 'Sign Out' link. On the right, there is a 'Role' dropdown menu currently set to 'WSC/CDC' and a 'GO' button. A black arrow points to the 'GO' button. Below the navigation bar, there is a section titled 'ADVANCED SEARCH'.

2. To add a Form, navigate to the Consumer's record and click Forms > File > Add Forms.
3. Select **Residential Referral Form**. Update the following fields:
 - a. Review = As Needed
 - b. Review Date = defaults to today's date
 - c. Division = defaults to APD
 - d. Worker = defaults to self
 - e. Status = Pending
 - f. Program/Provider = WSCs will select the name of their employer (Qualified Organization). Pre-Enrollment Workstream will leave this field blank.
 - g. Complete the fields in the form.

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h. From the **File** menu, select **Save**

The screenshot shows the iConnect web application interface. At the top left is the iConnect logo, and at the top right is the date and time: 3/22/2023 9:27 AM. Below the header is a navigation menu with 'File' selected. A dropdown menu shows 'Please Select Type: Residential Referral Form'. The main content area is titled 'Consumer Forms' and contains several input fields: 'Review' (As Needed), 'Review Date' (03/22/2023), 'Division' (APD), 'Approved By' (empty), 'Worker' (Vogeler, Mandi), 'Status' (Pending), and 'Provider/Program' (1 CARE LLC). Below this is a blue header for 'RESIDENTIAL REFERRAL FORM'. A note states: 'This form should be used for group home and / or Intermediate Care Facility (ICF) requests'. There are two search sections: 'Consumer withdraws referral request for placement.' and 'Placement Request For?' (APD Licensed Facility), both showing '0 record(s) returned'. There are also fields for 'State Office Residential Intake Specialist:' and 'Region Residential Planning Coordinator:' with search buttons.

4. Using the Note icon on the saved form, the WSC will create a Note. The Note Details page displays. Update the following fields:

This screenshot is a zoomed-in view of the 'Consumer Forms' section of the Residential Referral Form. It shows the 'Review' (As Needed), 'Review Date' (03/22/2023), and 'Division' (APD) fields. The 'Approved By' field is empty. A yellow note icon with a red ribbon is located next to the 'Note' field, and a black arrow points to it from the left.

- Program/Provider = WSCs will select the name of their employer (Qualified Organization). Pre-Enrollment Workstream will leave this field blank.
- Cost Plan Review Note? = No
- Note Type = Facility Placement
- Sub Type = Residential Planning Request
- Status = Pending
- Attachments = All documents needed for a referral packet.

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- g. Recipient = State Office Residential Intake Specialist & Region Residential Planning Coordinator (RRPC)
5. From the **File** menu, select **Save and Close Note**

The screenshot shows the 'Notes' form in the iConnect system. The 'Notes Details' section includes dropdown menus for Division (APD), Note By (Viguer, Mandi), Note Date (3/22/2023), Program/Provider, Note Type (Facility Placement), and Note Sub-Type (Residential Planning Request). There is a text area for Description and a 'Note' field. A tooltip is displayed over the Description field with the text 'Attach all documents needed for a referral packet.' Below the form are sections for Attachments and Note Recipients. The Note Recipients table shows one recipient: Viguer, Mandi, with Date Sent 3/22/2023 and Status Unread.

6. The Waiver Support Coordinator will monitor My Dashboard for Notes sent from the APD regional and state office team inquiring for additional information and respond appropriately.
 - a. If a request for additional information is received proceed to [WSC Responds to the request for additional information](#) section.

B. Residential Referral Review

The State Office Residential Intake Specialist will review the residential referral packet.

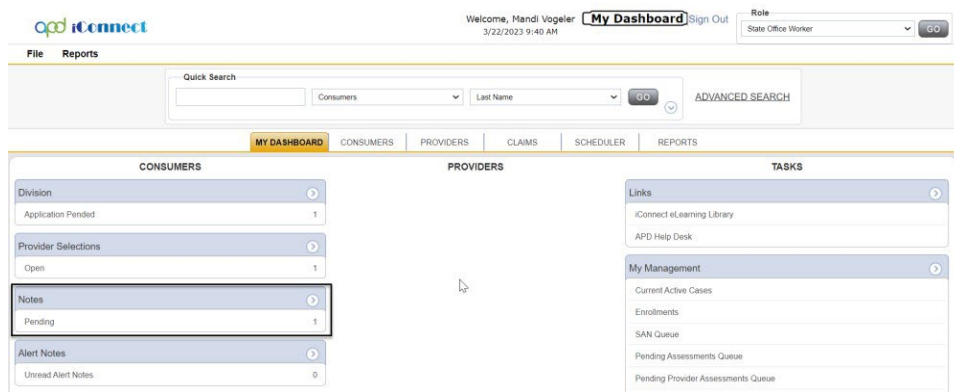
Role(s): State Office Worker

1. To begin, log into iConnect and set Role = State Office Worker. Click **Go**.

The screenshot shows the 'My Dashboard' header in the iConnect system. It includes a 'Sign Out' link and a 'Role' dropdown menu currently set to 'State Office Worker'. A 'GO' button is next to the dropdown. A black arrow points to the 'GO' button. Below the header is an 'ADVANCED SEARCH' button.

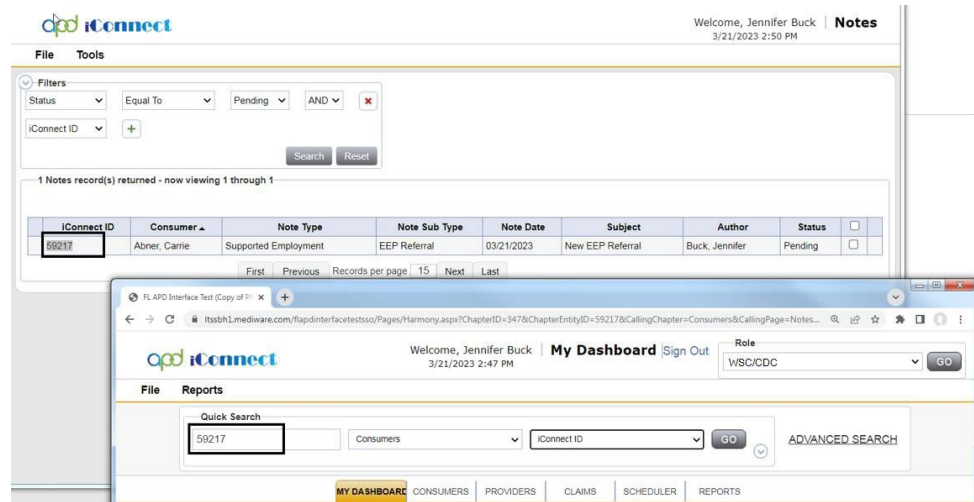
2. The State Office worker will monitor **My Dashboard** for incoming notes. Select the **Consumer > Pending > Notes** queue.

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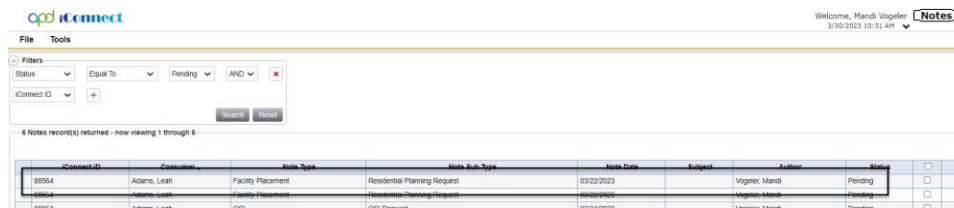


Tip

Navigate quickly from the My Dashboard > Notes queue to the consumer's record by copying the iConnect ID from the Notes queue and pasting it into the Consumer > Quick Search. The Note queue window will remain open for convenience.



3. Click on the note to review the details. The WSC also completed the Residential Planning Form.



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4. Navigate to the Consumer's record and click on the Forms tab. Select the Residential Planning Form from the list and open it to review the details. Verify the correct RRPC is on the Residential Referral form.
 - a. Update RRPC if missing or incorrect.
 - b. Status = Pending
 - c. From the **File** menu, select **Save and Close**

The screenshot shows the 'iConnect' web application interface for a 'Residential Referral Form'. The top navigation bar includes the 'iConnect' logo and a 'Forms' tab. Below the navigation bar, there is a 'File' menu and a dropdown for 'Please Select Type: Residential Referral Form'. The main form area is titled 'Consumer Forms' and contains several input fields: 'Review' (set to 'As Needed'), 'Review Date' (03/22/2023), 'Division' (APD), 'Worker' (Vogele, Mandi), 'Status' (Pending), 'Provider/Program', and 'Approved Date'. Below this, a blue header reads 'RESIDENTIAL REFERRAL FORM' with a note: 'This form should be used for group home and / or Intermediate Care Facility (ICF) requests'. The form includes sections for 'Consumer withdraws referral request for placement.', 'Placement Request For?' (with a dropdown for 'APD Licensed Facility' and a search result of '0 record(s) returned'), 'State Office Residential Intake Specialist:', and 'Region Residential Planning Coordinator:'. A green bar at the bottom of the form is labeled 'CONSUMER INFORMATION'.

5. Review the Residential Referral form for completion. If the referral is complete, proceed to next section.
 - a. If not complete, the State Office Residential Intake Specialist will respond to the Pending note and details what needs to be completed.
 - i. Note Type = Facility Placement
 - ii. Note Subtype = Residential Planning Request
 - iii. Note = Append text to the note detailing incomplete information
 - iv. Status = Pending
 - v. Recipient = WSC
 - b. From the **File** menu, select **Save and Close Note**
6. The WSC will monitor pending Notes on My Dashboard and respond to the request for additional information by appending text to the Note and Attaching additional documentation to the Note with Note Subtype = Facility Placement and Subtype = Residential Planning Request.
7. The State Office Residential Intake Specialist will also review the referral for Forensic Involvement and minors under 12.

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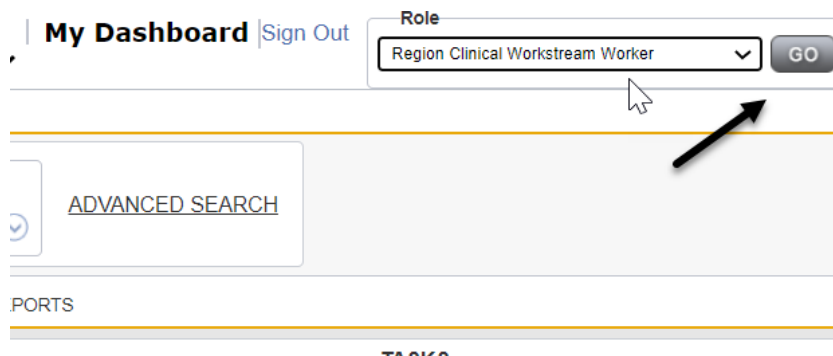
8. If there is Forensic Involvement; skip to [Forensic Involvement](#). If not, proceed to C. Bed Availability Report generated to identify potential .
9. If the Consumer is a Minor under 12, skip to [Consumer Placement of a Minor under 12](#). If Not, proceed to C. Bed Availability Report generated to identify potential

C. Bed Availability Report generated to identify potential placements.

Roles: Regional Clinical Workstream Worker, WSC/CDC, and Service Provider

Once the State Office worker completes his/her review of the Residential Referral Form and determines there is not forensic involvement and the referral does not involve a minor, the Region Residential Planning Coordinator will proceed with the residential planning process. The Bed Availability report is located under the Reports menu on My Dashboard

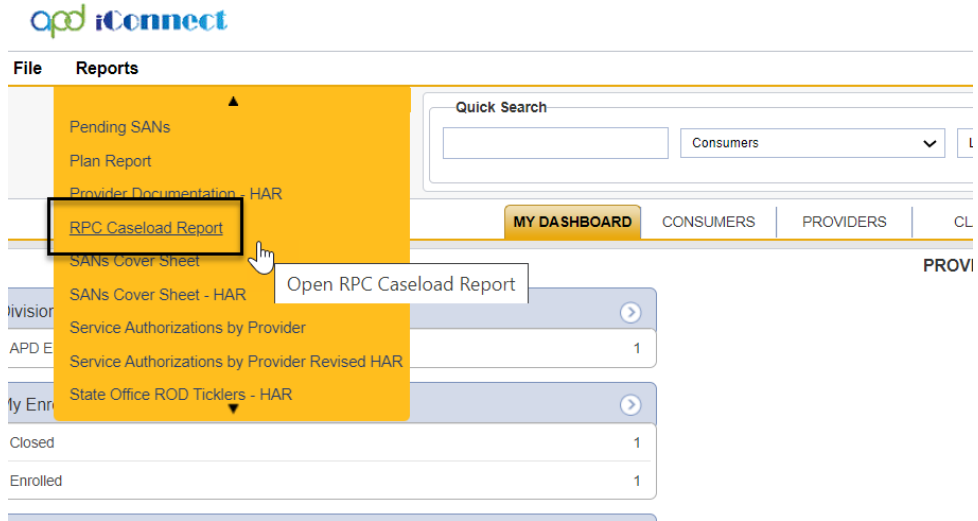
1. To begin, log into iConnect and set Role = Region Clinical Workstream Worker. Click **Go**.



The screenshot shows the top navigation bar of the iConnect system. On the left, there is a 'My Dashboard' link and a 'Sign Out' button. To the right, there is a 'Role' dropdown menu currently set to 'Region Clinical Workstream Worker' and a 'GO' button. A mouse cursor is positioned over the dropdown menu, and a black arrow points to the 'GO' button. Below the navigation bar, there is a section for 'ADVANCED SEARCH' and a 'PORTS' section.

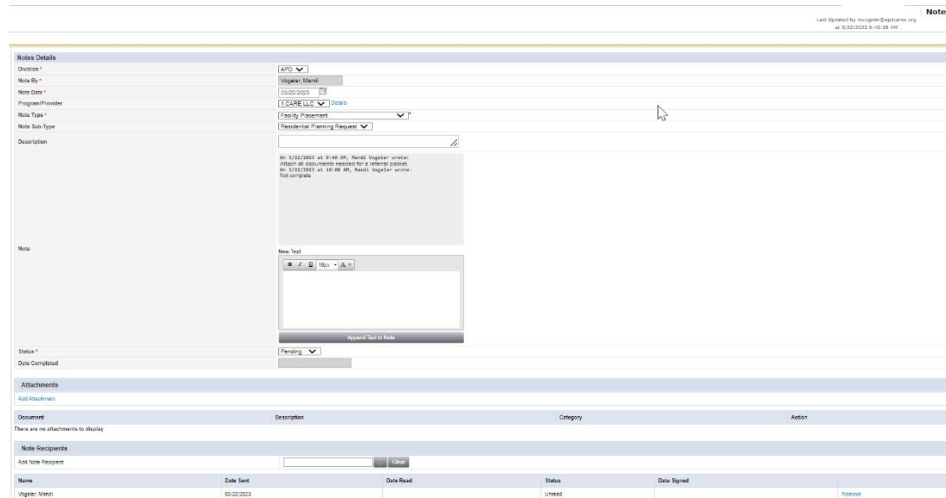
2. The RRPC generates the RPC Caseload Report daily to determine if there are any new referrals.
 - a. Navigate to the My Dashboard screen, click the Reports menu, and locate the RPC Caseload Report

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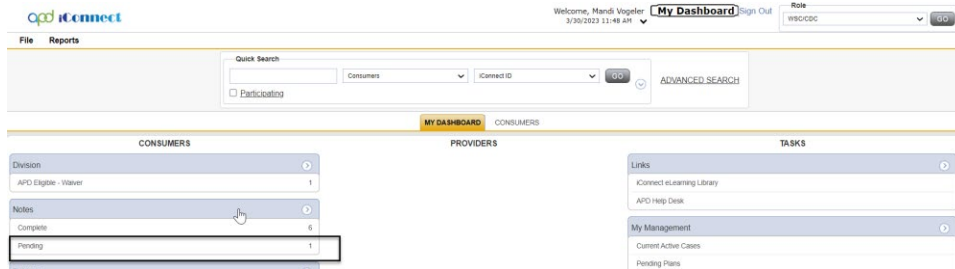
NOTE: The RRPC is also a note recipient on the Residential Planning Request Note from the WSC

3. Review the Residential Referral form for completion. If the referral is complete, proceed to next section.
 - a. If not complete, within 2 business days the RPC will respond to the Pending note and details what needs to be completed.
 - i. Note Type = Facility Placement
 - ii. Note Subtype = Residential Planning Request
 - iii. Note = Append text to the note detailing incomplete information
 - iv. Status = Pending
 - v. Recipient = WSC
 - b. From the **File** menu, select **Save and Close Note**

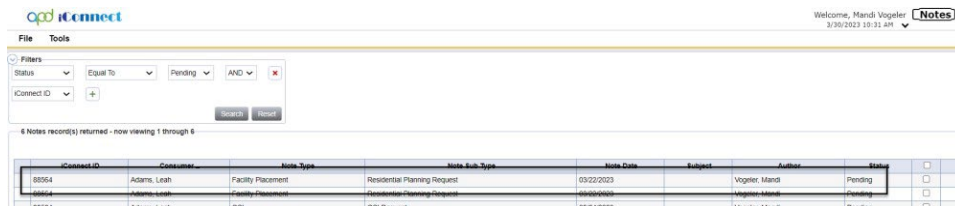


WSC Responds to the request for additional information.

1. The WSC will monitor **My Dashboard** for incoming notes. Select the **Consumer > Pending > Notes** queue.



- a. Locate a note with
 - i. Note Type = Facility Placement and
 - ii. Note Subtype = Residential Planning Request
2. Click on the note to review the details. The WSC will document his/her findings and attaches any incorrect or missing information in the pending note.



Tip

Navigate quickly from the My Dashboard > Notes queue to the consumer's record by copying the iConnect ID from the Notes queue and pasting it into the Consumer > Quick Search. The Note queue window will remain open for convenience.

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The screenshot displays the iConnect web application interface. The top navigation bar includes the iConnect logo, the user name 'Welcome, Jennifer Buck', the date '3/21/2023 2:50 PM', and the 'Notes' section. Below the navigation bar, there is a 'File' menu and a 'Tools' section. The 'Filters' section shows a search criteria of 'Status Equal To Pending AND iConnect ID'. A table below the filters displays one record with the following details:

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Pending

Below the table, there are navigation buttons for 'First', 'Previous', 'Records per page 15', 'Next', and 'Last'. The bottom portion of the screenshot shows a 'My Dashboard' section with a 'Quick Search' field containing '59217', a dropdown menu set to 'Consumers', and an 'iConnect ID' dropdown. The 'MY DASHBOARD' menu item is highlighted at the bottom of the page.

3. After clicking on the note from the **My Dashboard > Notes** queue the Note Details page displays. Update the following fields:
 - a. Note = summary of any missing or incomplete documentation.
 - b. Status = Pending
 - c. Note Recipient = State Office Worker (Respond to the SO Intake Specialist or the RRPC by including the person as a note recipient)
 - d. From the **File** menu, select **Save and Close Notes**.

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Notes Details

Division * APD

Note By * Vogeler, Mandi

Note Date * 03/22/2023

Program/Provider

Note Type * Facility Placement

Note Sub-Type Residential Planning Request

Description

Note

On 3/22/2023 at 11:07 AM, Mandi Vogeler wrote:
Attached packet

New Text

Attached missing or incomplete documentation

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category
There are no attachments to display		

Note Recipients

Add Note Recipient: [] [Clear]

Name	Date Sent	Date Read	Status
Vogeler, Mandi	03/22/2023	03/30/2023	Read

4. If the Consumer is a Minor under 12, proceed to [Consumer Placement of a Minor under 12](#)

5. RRPC will navigate to **My Dashboard** and from the top navigation bar, use the Reports menu dropdown to generate the Bed Availability Report.

WellSky iConnect

File Reports

- 393.11 Annual Tracking
- 916 Monthly Tracking
- APD Service Authorizations
- Bed Availability**
- ICF Waiver Transition Rep
- Missing Provider Selection - HAR
- Pending Notes - Consumers HAR
- Pending SANs
- Plan Report
- Provider Documentation - HAR
- Closed
- Enrolled

Open Bed Availability

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHE

PROVIDERS

Quick Search

Consumers Last Name

6. Identify placement options within 3 days of receipt or 7 days of ROM approval.

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- From the Consumers record, Click on the **Notes** tab. From the **File** menu, select **Add Note**. The Notes Details page displays. Update the following fields:
 - Note Type = Provider Facility Referral
 - Note Sub-Type = leave blank
 - Referred Provider = name of the provider the referral is being sent to.
 - Status = Pending
 - Attachment = Referral Packet
 - Recipient = Provider
 - From the **File** menu, select **Save and Close Note**

Note: Create a separate note for each provider.

The screenshot shows the 'Notes Details' page in the iConnect system. The form is populated with the following information:

- Division: APD
- Note By: Vogeler, Mandi
- Note Date: 03/22/2023
- Program/Provider: [Blank]
- Note Type: Provider Facility Referral
- Note Sub-Type: [Blank]
- Referred Provider: I CARE HEALTH CARE SERVICES LLC
- Description: Attach referral packet
- Status: Pending
- Date Completed: [Blank]

Below the form, there are sections for 'Attachments' (no attachments displayed) and 'Note Recipients' (one recipient: Vogeler, Mandi, Date Sent: 3/22/2023, Status: Unread).

Provider reviews and responds to the referral.

- The Provider will be able to access the Note record via their **My Dashboard**. Select the **Consumer > Pending > Notes** queue. Select the record from the list to view the note from the RRPC.

The screenshot shows the 'My Dashboard' in the iConnect system. The dashboard is divided into several sections:

- Navigation:** MY DASHBOARD (selected), CONSUMERS, PROVIDERS, CLAIMS
- CONSUMERS:** A list of notes with the following counts:
 - Application Pending: 1
 - Notes: 2 (highlighted)
 - Alert Notes: 0
 - Unread Alert Notes: 0
- TASKS:** A list of links and management options:
 - LINKS: iConnect eLearning Library, APD Help Desk
 - My Management: Current Active Cases, Pending Plans, Tickets Due, Medication Administration Record

- Click on the note to review the details.

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Connect ID	Customer	Note Type	Note Sub-Type	Note Date	Subject	Author	Status
18854	Adams, Leah	Provider Referral Request		03/30/2023		Vogler, Mandi	Pending

3. Provider will review referral information and responds to Pending note indicating their interest.
 - a. Updates Sub-Type to “I’m Interested” or “I’m Not Interested”
 - b. Status = Pending
 - c. Recipient = RRPC
 - d. From the **File** menu, select **Save and Close Note**

Note: Status must remain in Pending otherwise the RRPC will be unable to add the WSC as the recipient in the next step.

Notes Details

Division * APD

Note By * Vogler, Mandi

Note Date * 03/22/2023

Note Type * Provider Facility Referral

Note Sub-Type * I'm Interested

Referral Provider * WELLSKY - CASPER COMMERCIAL SERVICES, LLC

Description * Are you interested?

Note * I'm Interested

Status * Pending

Date Completed

4. If the Provider is not interested, the process ends for that provider.
5. If the Provider is interested, they will wait for the WSC to contact them.

RRPC communicates interested provider information to WSCs

1. RRPC will notify the WSC of the interested provider by adding them as a note recipient to the Provider Facility Referral note.

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- a. Note Type = Provider Facility Referral
- b. Note Sub-Type = I'm Interested
- c. Status = Complete
- d. Recipient = WSC
- e. From the **File** menu, select **Save and Close Note**

The screenshot shows the iConnect system interface for creating a note. The form is titled 'Notes Details' and includes the following fields:

- Note ID: [Empty]
- Note Date: [Empty]
- Program Provider: [Empty]
- Note Type: Provider Facility Referral
- Note Sub-Type: I'm Interested
- Referral Provider: CARE HEALTH CARE SERVICES LLC
- Description: In 2023/2023 on 5/22/23, WSC, Health Navigator worker, [Empty]
- Note: [Empty]
- Status: Complete
- Date Completed: 05/22/2023

Below the form, there is an 'Attachments' section and a table for 'Attachments' with columns for Description, Category, and Action. At the bottom, there is a table for 'Notes' with columns for Name, Date Sent, Date Read, Status, Date Typed, and Review.

D. WSC reviews potential placements with Consumer/Legal Representative/Family

Role(s): WSC/CDC, Region Pre-Enrollment Workstream Worker, Region Clinical Workstream Worker, and ROM/DRM,

1. Log into iConnect and set Role = WSC/CDC or Region Pre-Enrollment Workstream Worker. Click **Go**.
2. WSC will monitor **My Dashboard** for incoming notes. Select the **Consumer > Complete > Notes** queue.

The screenshot shows the iConnect system interface for the 'My Dashboard'. The dashboard displays a list of notes under the 'CONSUMERS' tab. The notes are categorized by status: Open, Complete, Pending, and Not Notes. The 'Complete' status is highlighted. The dashboard also includes a 'LINKS' section with links to Consumer Learning Library, APD Help Desk, My Management, Current Active Cases, Enrollments, SWS Queue, Pending Assessment Queue, and Pending Provider Assessments Queue.

3. WSC shares list of interested provider(s) with consumer, legal representative, family.
 - a. Consumer may request an interview or tour of provider's facility.

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- b. WSC will coordinate any requested interviews or tours with the Provider
 - c. Consumer/Legal Rep/Family makes a choice.
4. Navigate to the **Provider Documentation** tab of the Consumer's record and document in a Progress note on the Consumer's record.

The screenshot displays the Cerner EHR interface for the 'Provider Documentation' tab. The top section, 'Activity Times', includes fields for Start Date, End Date, and Start Minutes. Below this is the 'Authorization' section with fields for Auth ID and PI Number. The 'Activity Details' section contains fields for Order, Provider, Status, and Progress. The 'Activity Services' section includes fields for Service, Units, Rate, Secondary Code, and Unit Type. The 'Documentation' section features a 'Person Contacted/Member' field, a 'Progress Note' text area with a 'Add progress note here' button, and a 'Follow Up' field. At the bottom, there is a 'Provider Documentation Type' dropdown menu with options like 'Other', 'Residential Agency', 'Admission/Discharge', 'Plan of Care', 'Care Plan', 'Discharge Planning', and 'Discharge Summary/Referral'.

- a. If yes, skip to step 11 in [Transition call for minors, IB/BF, or inter-region transfer](#) section.
 - b. In no, proceed to next step.
5. From the consumer's **Forms** tab, review the **Residential Referral form** to determine if the consumer is a minor, IB/BF, or inter-region transfer.

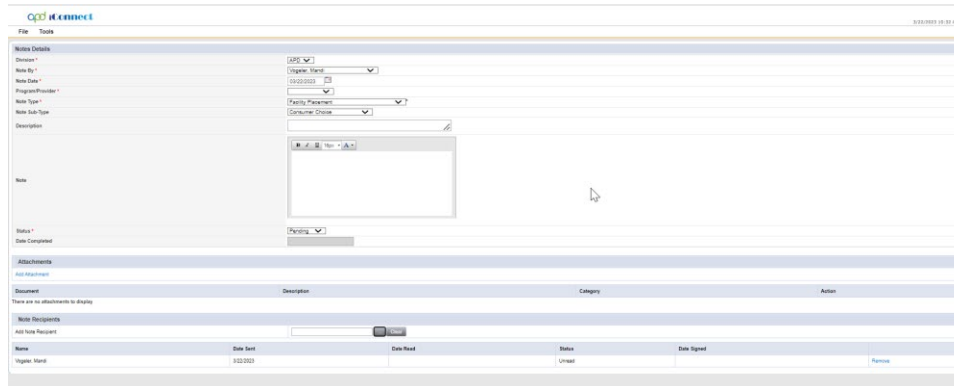
Transition call

If the consumer is **not** a minor, IB/BF, or inter-region transfer, the WSC will proceed with the transition call.

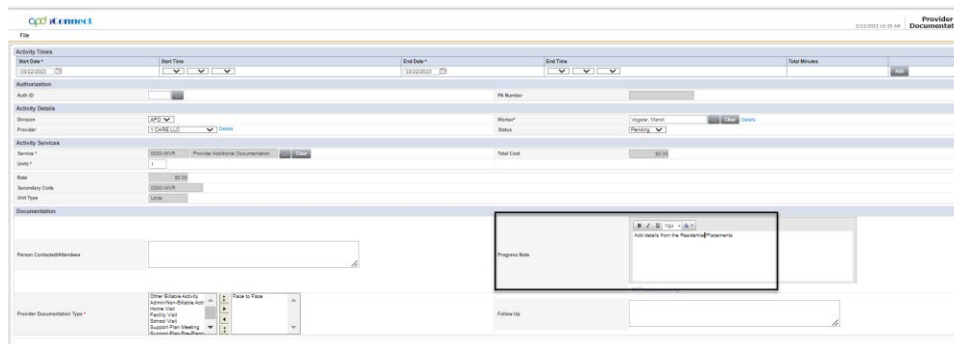
1. Notify the region of the Consumers Choice by adding a note. from the consumer's **Notes** tab, from the **File** menu, select **Add Note**. Update the following fields:
 - a. Note Type = Facility Placement
 - b. Note Sub-Type = Consumer Choice
 - c. Status = Pending
 - d. Recipient = RRPC
 - e. From the **File** menu, select **Save and Close Note**

Note: This note is just information only, no response is needed from the RRPC.

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2. WSC schedules and facilitates transition call for standard Residential Habilitation placements.
3. WSC will document the outcome of the transition call in a WSC Progress Note. Navigate to the **Provider Documentation** tab to add Progress Note.



- a. Navigate to the **Forms** tab and select the Residential Placement Transition Call Checklist form.
- b. Review = As Needed
- c. Review Date = Current Date
- d. Worker = Self
 - i. Provider/Program = WSCs will select the name of their employer (Qualified Organization)
- e. Status = Complete
- f. Complete fields in the form.
- g. From the **File** menu, select **Save and Close**

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The screenshot shows the 'Residential Placement Transition Call' form. At the top, there's a 'Consumer Form' section with fields for Review, Review Date, Decision, Approved By, Status, Program, and Approved Date. Below this is the 'Residential Placement Transition Call' section with a dropdown for WSC. The 'Prior to Initial Meeting' section contains several text input fields for A.1.a through A.1.g, 2.a, and 2.b. The 'Needed Supports and Services' section has a list of support categories like Environmental Support, Adaptive Equipment, etc. The 'Individuals Who Will Need to be Involved in Transition Meetings' section has a list of individuals like Individual, Individual's Family, Support staff, etc.

4. If Consumer Placement was accepted. The WSC will then update the Consumer Choice note as placement accepted.
 - a. Status = Complete
 - b. Recipient = RRPC
 - c. Update to Read
 - d. From the **File** menu, select **Save and Close Note**The RRPC will proceed with the [Residential Referral Form is completed](#) section.

The screenshot shows the 'Notes Details' form. It has a 'Notes Details' section with fields for Note ID, Note By, Note Date, Program/Provider, Note Type, Note Sub-Type, and Description. Below this is a 'Note Text' section with a text area and a 'New Text' button. The 'Status' section has a dropdown menu. The 'Date Completed' section has a date field. The 'Attachments' section has a table with columns for Attachment, Description, Category, and Action. The 'Note Recipients' section has a table with columns for Name, Date Sent, Date Read, Status, Date Signed, and Name.

Transition call for minors, IB/BF, or inter-region transfers

Role(s): Region Clinical Workstream Worker and ROM/DROM

If Consumer is a minor under 12, IB/BF or inter-region transfer, the WSC will notify the RRPC of the Consumers Choice via note.

1. On the **Consumers** record, click on the **Notes** tab. From the **File** menu, select **Add Note**.
 - a. Note Type = Facility Placement
 - b. Note Sub-Type = Consumer Choice
 - c. Description = Name of Group Home Selected
 - d. Status = Pending
 - e. Recipient = RRPC
 - f. From the **File** menu, select **Save and Close Note**

The screenshot shows the 'Add Note' form in the system. The form includes the following fields and options:

- Note Type:** Facility Placement
- Note Sub-Type:** Consumer Choice
- Description:** (Text area)
- Status:** Pending
- Recipient:** RRPC

The form also includes a 'File' menu with options like 'Add Note', 'Save and Close Note', and 'Cancel'.

2. The RRPC will monitor **My Dashboard** for incoming notes. Select the **Consumer > Pending > Notes** queue.

The screenshot shows the 'My Dashboard' with the 'CONSUMERS' section expanded. The 'Notes' section is expanded, showing the following data:

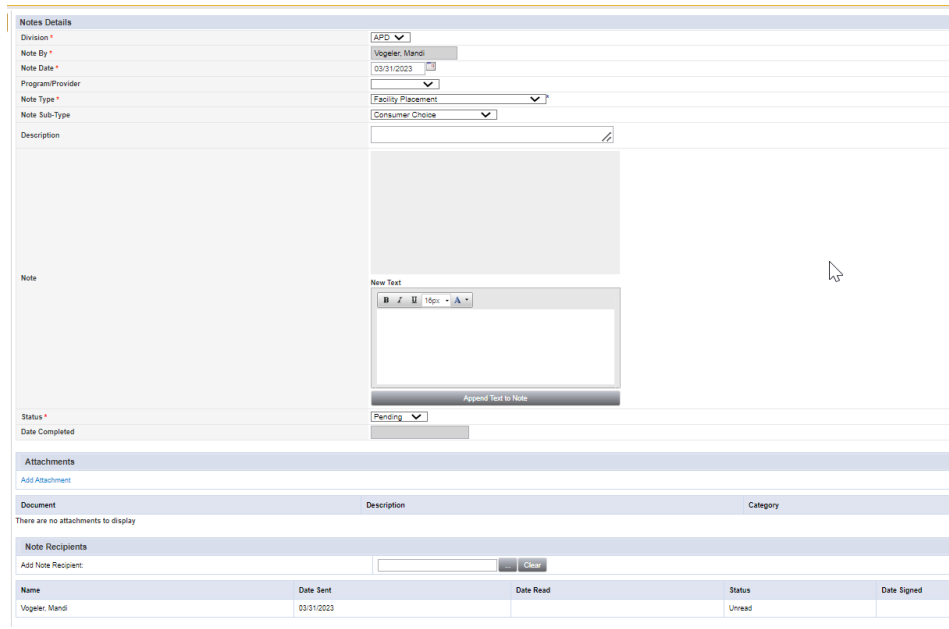
Notes	Count
Complete	6
Pending	1

The 'Pending' note is highlighted, and a mouse cursor is pointing at it.

3. Click on the Pending Consumer Choice note and add ROM/DROM(s) as Note recipient(s).
 - a. Note Type = Facility Placement
 - b. Note Sub-Type = Consumer Choice
 - c. Note = include narrative re transition call.
 - d. Status = Pending
 - e. Recipient = ROM/DROM

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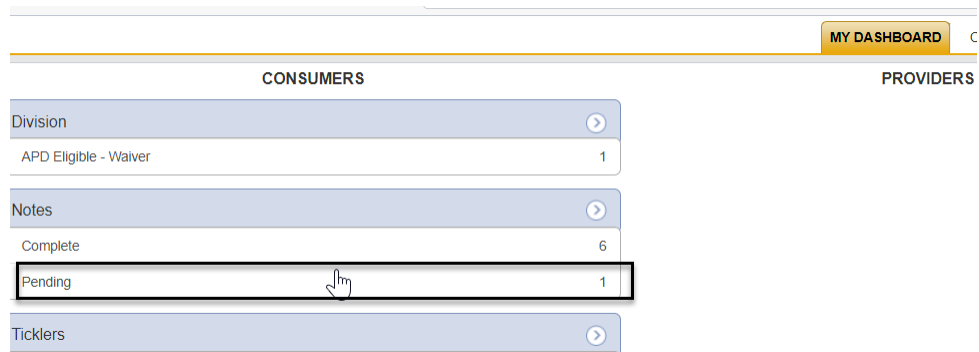
- i. For inter-regional transfers, include the originating and receiving ROM/DROM as note recipients.



Document	Description	Category
There are no attachments to display		

Name	Date Sent	Date Read	Status	Date Signed
Vogeler, Mandi	03/31/2023		Unread	

4. ROM/DROM(s) will monitor **My Dashboard** for incoming notes. Select the **Consumer > Pending > Notes** queue.



Category	Count
Division	1
Notes	6
Pending	1
Ticklers	

5. Outside of iConnect, within 3 business days, the receiving Region will schedule a Transition Call with provider, WSC, Consumer/Legal Rep/Family, Waiver Lead.
 - a. If the individual is moving from one region to another, the receiving region should initiate the WSC selection process.

- b. The ROM/DROM or designee assigned to facilitate the Transition call will document the call using the Transition Call

Residential Planning

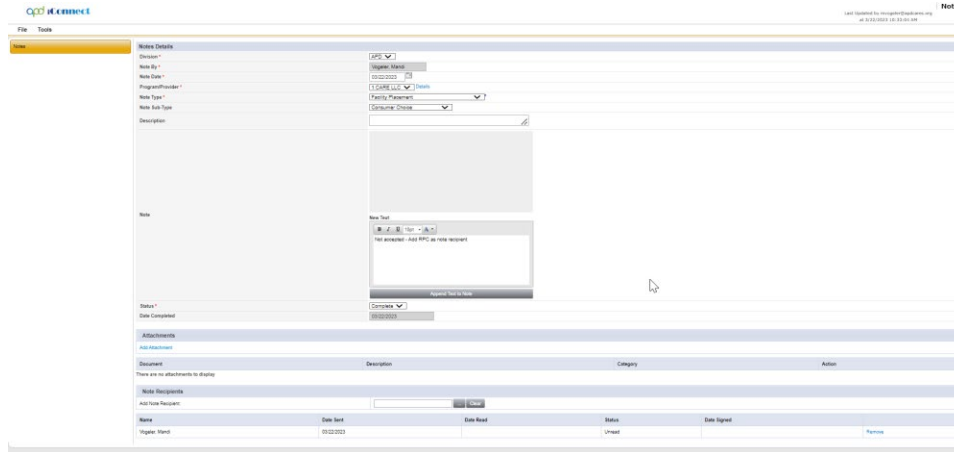
Checklist form found in iConnect. In the Consumers record, navigate to the **Forms** tab and from the **File** menu, select **Add Form**. Select the Residential Placement Transition Call Checklist.

- a. Complete the fields in the form and in the header.
- b. Status = Complete
- c. From the **File** menu, select **Save and Close Forms**.

The screenshot shows the iConnect software interface for the Residential Placement Transition Call Checklist form. The form is titled "Residential Placement Transition Call Checklist" and is currently in the "Prior to Initial Meeting" stage. The form is divided into several sections: "Consumer Forms" (with fields for Review Date, Division, and Approval By), "Residential Placement Transition Call Checklist" (with a dropdown for "Please Select Type"), "Prior to Initial Meeting" (with sections for A.1.a Consent/Living Situation, A.1.b Requests for transition, A.1.c Requests/Required being education, A.1.d Preferences, A.1.e Legal/Court Restrictions, 2.a Preferences, and 2.b Consents), "Identify Supports and Services" (with a table for Environmental Supports, Physical Supports, Behavioral Supports, Legal Supports, Financial Supports, and Other), and "Identify Individuals Who Will Need to Be Involved in Transition Meetings" (with a table for Individual, Individual's Family, Support Staff, and Other). The form is currently empty, and a mouse cursor is visible over the form area.

- c. Navigate to the Notes tab and select the Pending Consumer Choice note from the list view.
- d. If Consumer Placement was accepted, the ROM/DROM or their designee will update the Consumer Choice note as placement accepted.
 - i. Status = Complete
 - ii. Recipient = RRPC and WSC (to proceed with the next steps)
 - iii. Update to Read
 - iv. From the **File** menu, select **Save and Close Note**

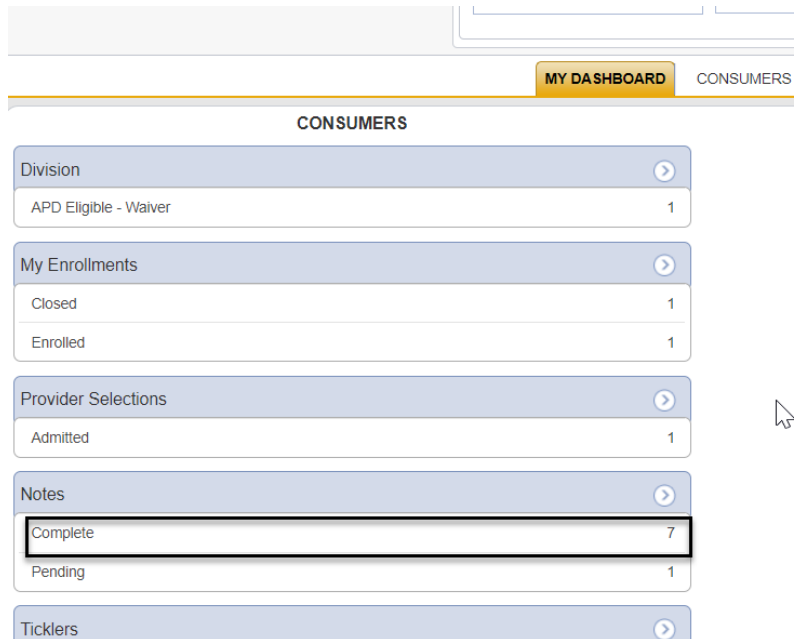
Residential Planning



The RRPC will proceed with the [Residential Referral Form is completed](#) section.

Residential Referral Form is completed.

1. The RRPC will monitor their **My Dashboard** for incoming notes. Select the **Consumer > Complete > Notes** queue.



2. Navigate to the Consumers record and click on the Forms tab and select the Pending Residential Referral form from the list view.

- Update "Date this Referral is Complete" at the bottom of the form.
- Status = Complete

Residential Planning

The screenshot shows the iConnect software interface. At the top left is the iConnect logo. At the top right, it says 'Forms' and 'Last Updated by mvogeler@apdcares.org at 3/22/2023 11:33:11 AM'. Below the logo are tabs for 'File', 'Reports', and 'Word Merge'. The 'File' menu is open, showing options: History, Duplicate Assessment, Spell Check, Save Forms, Save and Close Forms (highlighted with a red box and a mouse cursor), Print, Close Forms, and Suncoast. Below the menu is a list of counties: Miami-Dade, Monroe, Henry, Hillsborough, Lee, Manatee, Pasco, Pinellas, and Sarasota. A green bar indicates 'ATTACHMENTS - Group Home Requests'. Below that, a list of document types is shown: Support Plan* (required for all except CBC), Individual Education Plan* (for minors), Case Plan* (CBC), Shelter Order* (CBC), Behavior Assessments* (for IB/BF clients only), LRC Recommendations* (for IB/BF clients only), and Critical Medical Reports. At the bottom, a blue bar says 'APD State Office / MCM only:' and a date field shows 'Date this referral is complete: 03/22/2023'.

c. From the **File** menu, select **Save and Close**

3. WSC will monitor their **My Dashboard** for incoming notes and pick up tasks in the [Consumer Placement](#) section.

The screenshot shows the iConnect software interface. At the top left is the iConnect logo. At the top right, it says 'Welcome, Mandi Vogeler' and 'My Dashboard' with a 'Sign Out' button. Below the logo are tabs for 'File' and 'Reports'. A search bar is visible with 'Consumers' selected. Below the search bar are tabs for 'CONSUMERS', 'MY DASHBOARD', and 'PROVIDERS'. The 'MY DASHBOARD' tab is active, showing a table with columns for 'CONSUMERS', 'PROVIDERS', and 'TASKS'. The 'CONSUMERS' column shows 'APD Engle - Waiver' with a count of 1 and 'Notes' with a count of 6. The 'PROVIDERS' column is empty. The 'TASKS' column shows 'Links' with 'iConnect eLearning Library' and 'APD Help Desk', and 'My Management' with 'Current Active Cases' and 'Pending Plans'. A red arrow points to the 'Notes' row in the 'CONSUMERS' column.

Consumer Placement

The Waiver Support Coordinator will create a provider selection for the Licensed home, Update the Bed Information and proceed with adding a planned service for the Rehab Service Provider to issue an authorization for service provision.

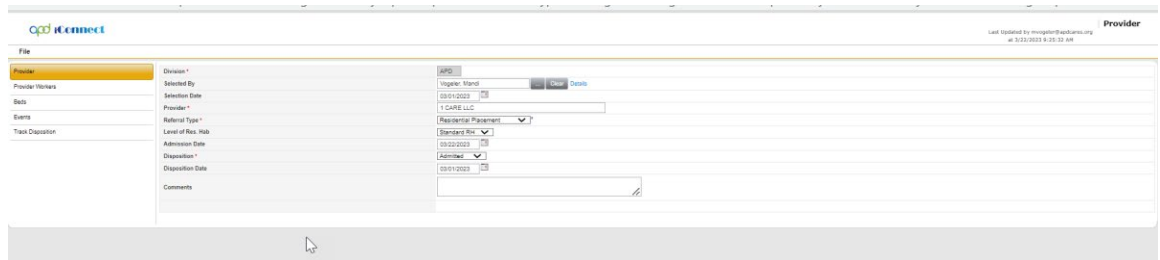
IMPORTANT: WSCs must navigate to the Demographics tab and change the living setting 24 hours prior to adding Residential Habilitation Services to the Cost Plan. If the living setting is not updated timely, it will cause errors when completing the Plan Validation.

Role(s): WSC/CDC

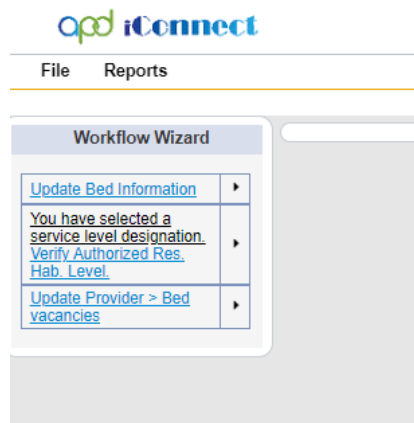
1. On date of Admission, the WSC will add a Provider Selection record for Licensed home **(Not Parent Corporation)**. See the Case Management Training manual for creating Provider Selection records. Update the following fields:

Residential Planning

- a. Division = Defaults to today
- b. Selected By = Defaults to self
 1. Selected Date = Defaults to today
 2. Provider = Search for and select the name of the Licensed Home
- c. Referral Type = Residential Placement
- d. Level of Res Hab = Select the level
- e. Admission Date = Date of Admission
- f. Disposition = Admitted
- g. Disposition Date = Defaults to today
- h. From the **File** menu: click **Save**



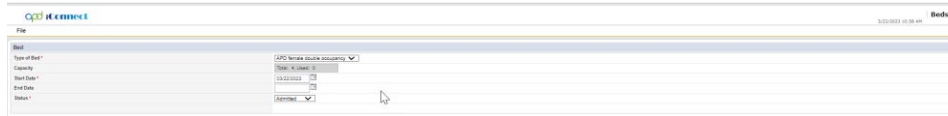
2. When Provider Selection record is saved with Referral Type = Residential Placement and Disposition = Admitted, a tickler is triggered to remind the WSC to update vacancies based on new admission. If Level of Res Hab field does not equal "Standard RH", a third tickler will fire to view the Consumers Authorization.
 - a. Update Bed Information
 - b. You have selected a service level designation/Verify Authorized Res Hab Level



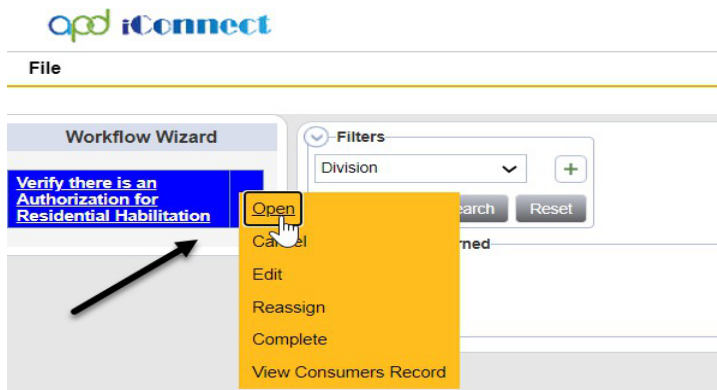
- c. To address the "Update Bed Information" tickler, within the open Provider Selection record, click on the Beds subpage
- d. Type of Bed = select from the drop-down menu
- e. Start Date = Date of Admission

Residential Planning

- f. Status = Admitted
- g. From the **File** menu, select **Save and Close**

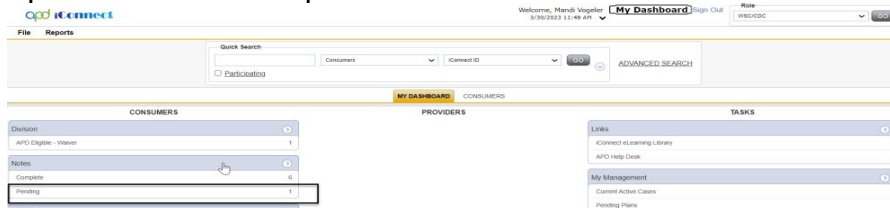


3. If the individual has any existing Residential Placement provider selection records, the WSC will close them at this time. Open the Provider Selection record and update the following field:
 - a. Disposition = Closed
 - b. From the **File** menu, select **Save and Close**
4. Select the next tickler to view the Authorization list view. If an Authorization for Residential Habilitation does not exist, go to that Consumers current Plan, and create an Authorization. Refer to the Case Management Training Guide for details on creating Authorizations.



Consumer Placement Not Accepted

1. If Consumer Placement was NOT accepted. The WSC will navigate to the Note tab and update the Consumer Choice note as placement not accepted.



2. Refer back to [C. Bed Availability Report generated to identify potential](#), until Consumer is placed.

2. Forensic Involvement

Continued from page 7. If the Consumer has Forensic Involvement

Role(s): State Office Worker

1. The State Office worker will create a note to the Facilities Coordinator. Navigate to the consumers record and select the Notes tab. From the File menu, select Add Note.
 - a. Note Type = Forensic
 - b. Sub Type = Involuntary Commitment Order
 - c. Status = Complete
 - d. Note Recipient = Facilities Coordinator
 - e. From the **File** menu, select **Save and Close Note**

The screenshot shows the 'Notes Details' form in the iConnect system. The form is divided into several sections: 'Notes Details', 'Attachments', and 'Note Recipients'. The 'Notes Details' section contains the following fields: Division (APD), Note By (Vogler, Mandi), Note Date (8/22/2023), Program/Provider, Note Type (Forensic), Note Sub-Type (Involuntary Commitment Order), Description, Note, Status (Complete), and Date Completed (8/22/2023). The 'Attachments' section is currently empty. The 'Note Recipients' section shows a table with one recipient: Vogler, Mandi, with a Date Sent of 8/22/2023, Date Read, Status of Unread, Date Signed, and a Remove button.

2. Facilities Coordinator follows 393.11 Involuntary Admission to Residential Services Process and this process ends.

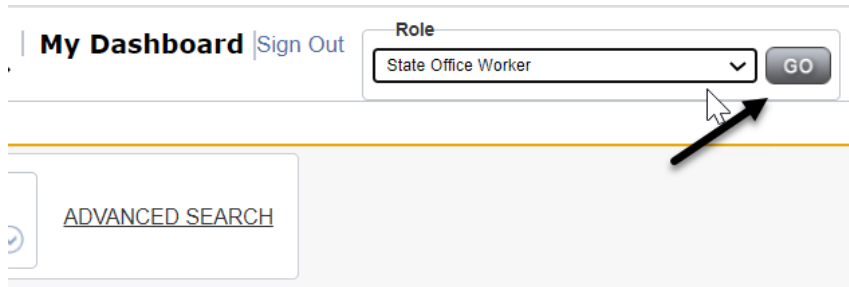
3. Consumer Placement of a Minor under 12

Continued from page 13. If the Consumer is a Minor under 12, the State Office Worker notifies the Regional Operations Manager (ROM) or Deputy Regional Operations Manager (DROM) in Residential Planning Request note. The ROM/DROM will respond within two business days whether the referral is approved or denied.

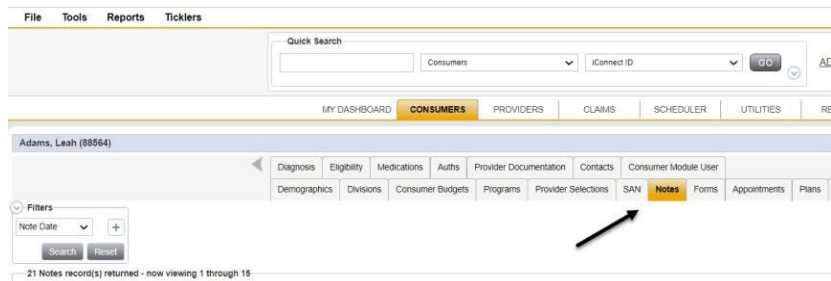
Role(s): State Office worker, Clinical Workstream, ROM/DROM

Residential Planning

1. To begin, log into iConnect and set Role = State Office Worker. Click **Go**.



2. Navigate to the Consumer's record and click on the **Notes** tab.



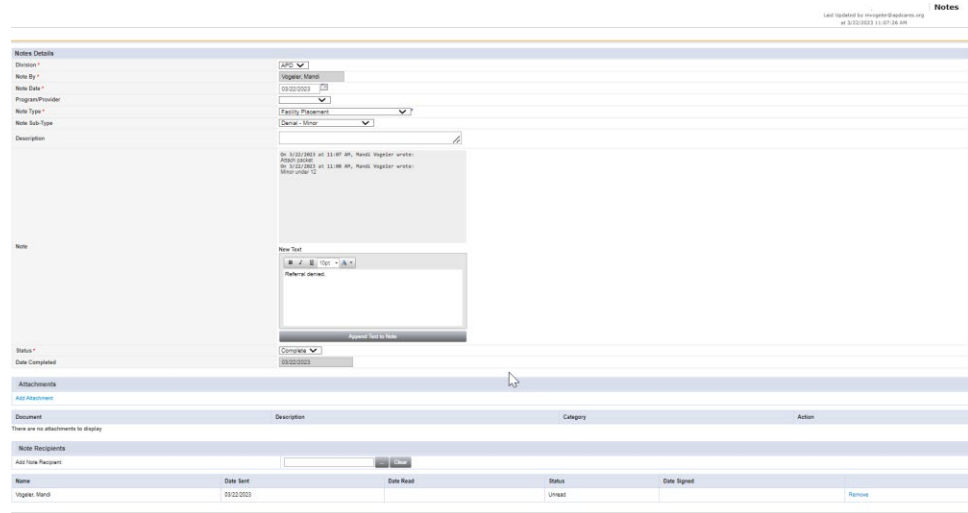
3. Open the Facility Placement Note with the Note Subtype of Residential Planning Request and update the following fields:
 - a. Sub Type = Minor Placement
 - b. Attachments = All documents needed for a referral packet.
 - c. Note Recipient = ROM/DROM
 - d. From the **File** menu, select **Save and Close Note**

Residential Planning

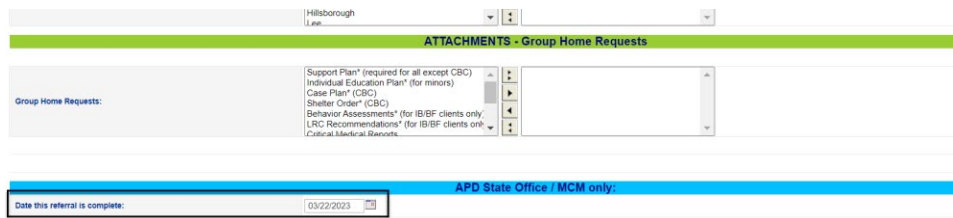
2. Referral is to be reviewed and approved within 2 business day.
3. If the Referral was approved, the ROM/DROM will respond to the Note indicating approval. Update the following fields:
 - a. Status = Complete
 - b. Recipient = RRPC
 - c. From the **File** menu, select **Save and Close Note**
 - d. The RRPC will proceed with section C. Bed Availability Report generated to identify potential .

4. If Referral was denied, the ROM/DROM will respond to the note indicating denial. Update the following fields:
 - a. Note Type = Facility Placement
 - b. Note Sub-Type = Denial - Minor
 - c. Status = Complete
 - d. Recipient = WSC, State Office Intake, RRPC, Waiver Lead (who will share with Liaison/SAN review if necessary)

e. From the **File** menu, select **Save and Close Note**



5. Navigate to the **Forms** Tab. Open the Residential Referral Form. Update the “Date this Referral is Complete” field on the Residential Referral form found at the bottom of the form.
 - i. Status = Complete
 - ii. From the **File** menu, select **Save and Close**



4. Consumer Withdraws their Referral Request

If the Consumer decides that they want to withdraw their referral the Waiver Support Coordinator (WSC) updates the Residential Referral form. This could occur anytime during the Residential Planning process.

Role: WSC/CDC & Region Waiver Lead

1. The WSC updates the Residential Referral form. Navigate to the **Consumers** record and click on the **Forms** tab. From the list view, select the current Residential Referral form.
 - a. Update question Consumer Withdraws Referral Request for Placement = Yes
 - b. Status = Pending

Residential Planning

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

The screenshot shows the 'Residential Referral Form' interface. At the top, there is a navigation bar with 'File', 'Reports', and 'Word Merge' menus. The main form area is titled 'Residential Referral Form' and contains several input fields: 'Review' (set to 'As Needed'), 'Review Date' (03/22/2023), 'Division' (APD), 'Worker' (Vogeler, Mandi), 'Status' (Pending), and 'Provider/Program'. There are 'Clear' and 'Details' buttons. Below the form, a blue banner reads 'RESIDENTIAL REFERRAL FORM'. A note states: 'This form should be used for group home and / or Intermediate Care Facility (ICF) requests'. A dropdown menu for 'Consumer withdraws referral request for placement.' is set to 'Yes'. Below that, 'Placement Request For?' is set to 'APD Licensed Facility' and shows '0 record(s) returned'. At the bottom, there is a field for 'State Office Residential Intake Specialist:'.

2. Updating the Consumer Withdraws Referral Request for Placement as Yes and saving the form will trigger a WFW to the Secondary worker.

Note: Waiver Lead for Residential Planning; Pre-Enrollment Support Coordinator or the Waiver Support Coordinator for ICF Admission.

- a. Consumer Withdraws Referral Request for Placement
 - i. Instructs the Waiver Lead to reassign to the RRPC or ICF Coordinator
- b. Add Date Referral Complete on the Residential Referral Form
- c. Close all Facility Placement and Provider Facility Referral or ICF notes.

The screenshot shows the 'Workflow Wizard' interface. At the top, there is a navigation bar with 'File' and 'Reports' menus. The main area is titled 'Workflow Wizard' and contains a list of steps: 'Consumer Withdraws Referral Request for Placement.', 'Add Date Referral Complete on the Residential Referral Form.', and 'Close all Facility Placement and Provider Facility Referral or ICF notes.'. The first step is selected. On the right side, there is a 'Workflow Wizard' button. The background is a light gray color.

3. Waiver Lead will monitor their **Tickler** queue from **My Dashboard**. Navigate to the **My Dashboard** and find the **Consumers** section. Scroll down to the **Ticklers** panel and click into the linked number of outstanding Ticklers to access the Tickler Queue:

Residential Planning

Consumers

MY DASHBOARD CONSUMERS

CONSUMERS

- Division: Application Pended (1)
- Provider Selections: Admitted (1)
- Notes: Complete (2), Pending (2)
- Ticklers: Ticklers (4)

- From here, use the multi-variable search to find the Tickler to open it. Click **Search**

File

Welcome, Mandi Vogler 3/30/2023 2:59 PM Ticklers

Filters: Status Equal To New AND x

iConnect ID +

Apply Alert Days Before Due

Search Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Adams, Leah	88564	Add Date Referral Complete on the Residential Referral Form.	03/23/2023	03/22/2023		New	Vogler, Mandi
Adams, Leah	88564	Close all Facility Placement and Provider Facility Referral or ICF notes.	03/23/2023	03/22/2023		New	Vogler, Mandi
Adams, Leah	88564	Update Bed Information	03/23/2023	03/23/2023		New	Vogler, Mandi
Adams, Leah	88564	Verify there is an Authorization for Residential Rehabilitation	03/23/2023	03/23/2023		New	Vogler, Mandi
Adams, Leah	88564	Update Bed vacancies	03/23/2023	03/23/2023		New	Vogler, Mandi
Adams, Leah	88564	Verify Authorized Res. HMO Level	03/23/2023	03/23/2023		New	Vogler, Mandi

- The Waiver Lead will reassign the Tickler to the RRPC or ICF Coordinator and the tickler will be removed from the user's Tickler Queue.

File

Filters: Status Equal To New AND x

iConnect ID +

Apply Alert Days Before Due

Search Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Adams, Leah	88564	Add Date Referral Complete on the Residential Referral Form.	03/23/2023	03/22/2023		New	Vogler, Mandi
Adams, Leah	88564	Close all Facility Placement and Provider Facility Referral or ICF notes.	03/23/2023	03/22/2023		New	Vogler, Mandi
Adams, Leah	88564	Update Bed Information	03/23/2023	03/23/2023		New	Vogler, Mandi
Adams, Leah	88564	Verify there is an Authorization for Residential Rehabilitation	03/23/2023	03/23/2023		New	Vogler, Mandi
Adams, Leah	88564	Update Bed vacancies	03/23/2023	03/23/2023		New	Vogler, Mandi
Adams, Leah	88564	Verify Authorized Res. HMO Level	03/23/2023	03/23/2023		New	Vogler, Mandi

- The RRPC or ICF Coordinator will monitor their **Tickler** queue from **My Dashboard**.

Residential Planning

The screenshot shows the 'My Dashboard' interface with the following data:

CONSUMERS	PROVIDERS	TASKS
Division APD Eligible - Waiver: 3 My Enrollments Enrolled: 1 Provider Selections Open: 3 WSC - Selected: 1 Notes Complete: 1 Ticklers (highlighted) Ticklers: 9	Notes Complete: 16 Pending: 5 Ticklers Ticklers: 30	Links IConnect eLearning Library APD Help Desk My Management Current Active Cases Enrollments SAN Queue Pending Assessments Queue Pending Provider Assessments Queue Pre-Enrollment DOD Open/Close Open List Provider Credentials Queue Pending Plans

7. The RRPC will add the Date Referral Complete on the Residential Referral Form. Update the following fields:
 - a. Status = Complete
 - b. From the **File** menu, select **Save and Close**

Note: The ICF Coordinator will not update form to Complete

The screenshot shows the 'Forms' screen with the following details:

- File Menu:** History, Duplicate Assessment, Spell Check, Save Forms, **Save and Close Forms** (highlighted), Print, Close Forms, Suncoast.
- Attachments - Group Home Requests:**
 - Miami-Dade
 - Monroe
 - Henry
 - Hillsborough
 - Lee
 - Manatee
 - Pasco
 - Pinellas
 - Sarasota
- Group Home Requests:**
 - Support Plan* (required for all except CBC)
 - Individual Education Plan* (for minors)
 - Case Plan* (CBC)
 - Shelter Order* (CBC)
 - Behavior Assessments* (for IB/BF clients only)
 - LRC Recommendations* (for IB/BF clients only)
 - Critical Medical Reports
- APD State Office / MCM only:**
 - Date this referral is complete: 03/22/2023

8. **RRPC:** Close all Facility Placement and Provider Facility Referral notes. **ICF Coordinator:** Close ICF notes. Update the following fields:
 - a. Note = Consumer withdrew referral request
 - b. Status = Complete
 - c. Recipients = none
 - d. From the **File** menu, select **Save and Close Note**

Residential Planning

Notes
Last Updated by rmcgovern@medtronic.org at 3/22/2023 11:07:38 AM

Notes Details

Status: Archived
 Note ID:
 Note Date: 03/22/2023
 Program/Provider:
 Note Type:
 Note Sub-Type:
 Description:
 Note:
 Status:
 Date Completed: 03/22/2023

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient

9. RRPC/ICF Coordinator will mark tickler as complete.

3/30/2023 3:08 PM

File

Filters: Equal To AND

Apply Alert Days Before Due

24 Ticklers record(s) returned - now viewing 1 through 13

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Adams, Leah	88564	Add Date Referral Complete on the Residential Referral Form.	03/22/2023	03/22/2023		New	View Cancel
Adams, Leah	88564	Close All Facility Placement and Provider Facility Referral or ICF	03/22/2023	03/22/2023		New	View Edit
Adams, Leah	88564	Update Bed Information	03/23/2023	03/23/2023		New	View Reassign
Adams, Leah	88564	Verify there is an Authorization for Residential Habitation	03/23/2023	03/23/2023		New	View Complete
Adams, Leah	88564	Update Bed vacancies	03/23/2023	03/23/2023		New	View Assign
Adams, Leah	88564	Verify Authorized Res. Hab. Level	03/23/2023	03/23/2023		New	View Assign Consumers Record
Adams, Leah	88564	Update Bed Information	03/23/2023	03/23/2023		New	View Assign
Adams, Leah	88564	Update Provider's Bed Information	03/23/2023	03/23/2023		New	View Assign