State of Florida
Agency for Persons with Disabilities

APD iConnect
Residential Planning Training Manual Version 3
05/09/23

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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 WaitList Workstream Worker to begin the Residential Planning process.

1. Residential Planning Process

The Residential Planning process includes the following steps:

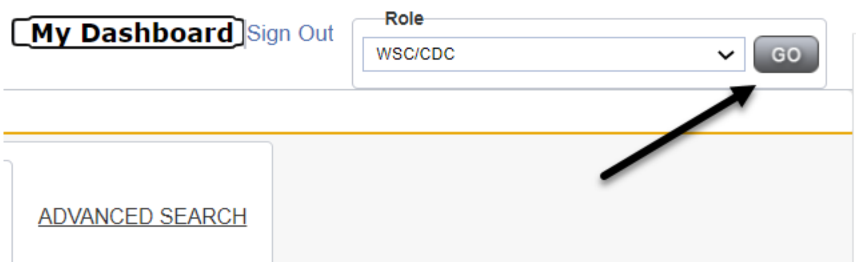
A. Complete the Residential Referral form.
B. Residential Referral review
C. Generate Bed Availability report to find optional placements.
D. Review list of potential placements with Consumer/Legal Rep/Family
E. Consumer Placement

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.

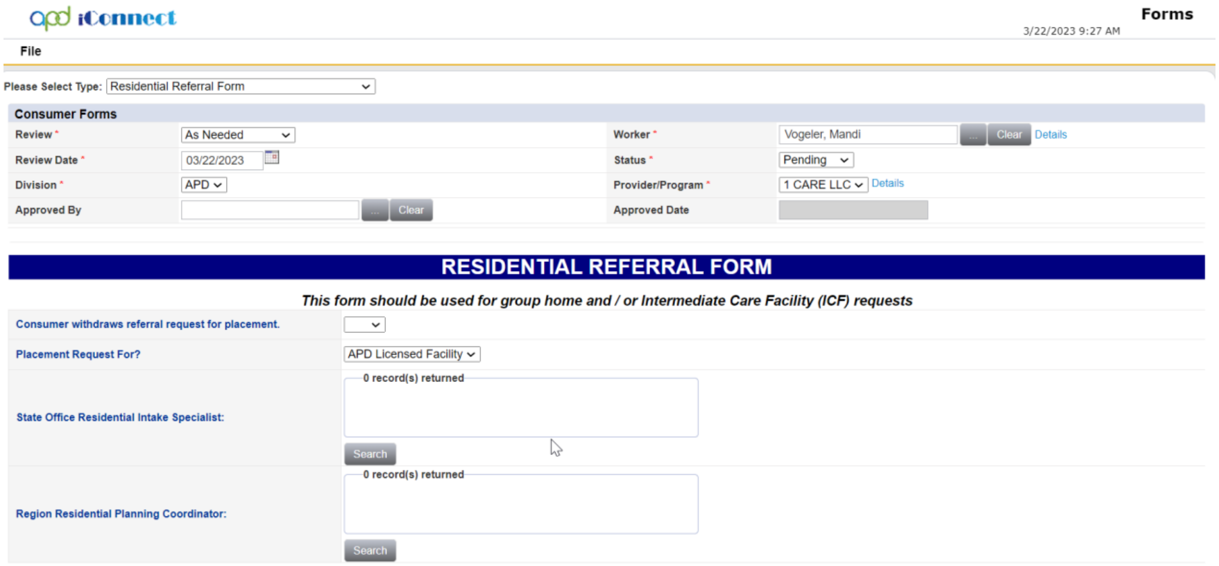
Role(s): WSC/CDC and Region Waiting List Workstream Worker

1. To begin, log into APD iConnect and set Role = WSC/CDC or Region Waiting List Workstream Worker. Click **Go.**

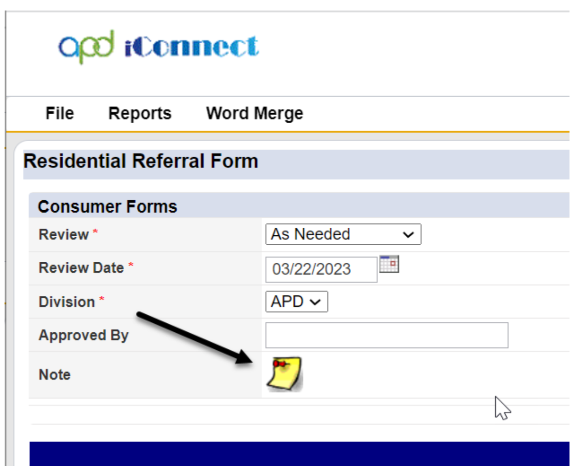


2. To add a Form, navigate to the Consumer's record and click Forms > File > Add Forms.
3. Select **Residential Referral Form**. Update the following fields:
    a. Review = As Needed
    b. Review Date = defaults to today's date
    c. Division = defaults to APD
    d. Worker = defaults to self
   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

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



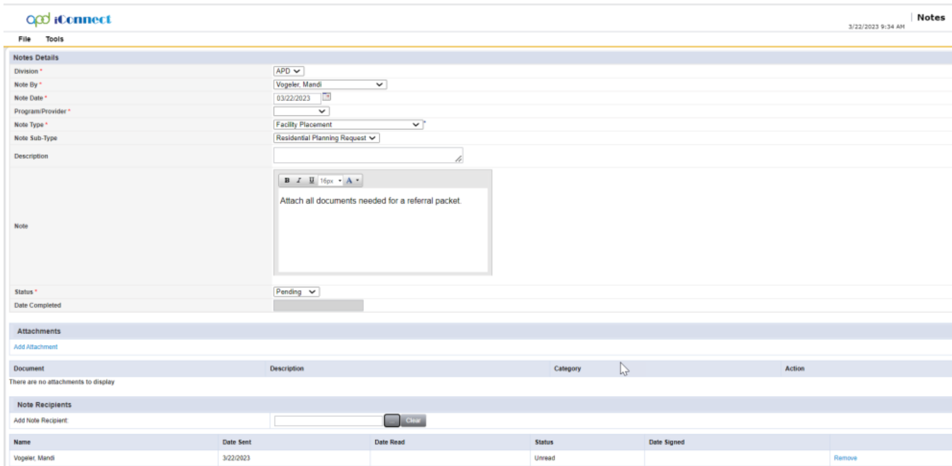
4. Using the Note icon on the saved form, the WSC will create a Note. The Note Details page displays. Update the following fields:



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

    g. Recipient = State Office Residential Intake Specialist & Region Residential Planning Coordinator (RRPC)

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



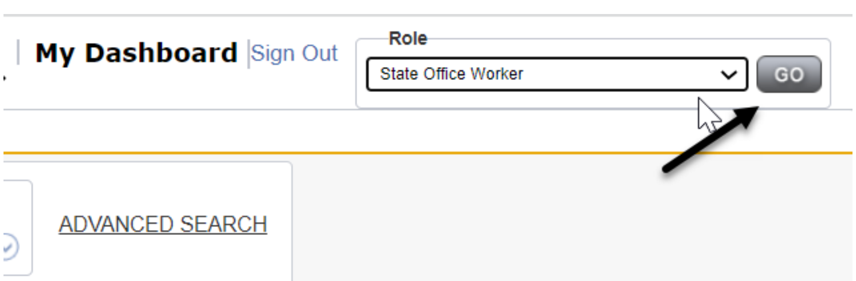
6. The Waiver Support Coordinator will monitor My Dashboard for Notes sent from the APD regional and state office team inquiring for additional information and respond appropriately.
    a. If a request for additional information is received proceed to [WSC Responds to the request for additional information](#)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

B. Residential Referral Review

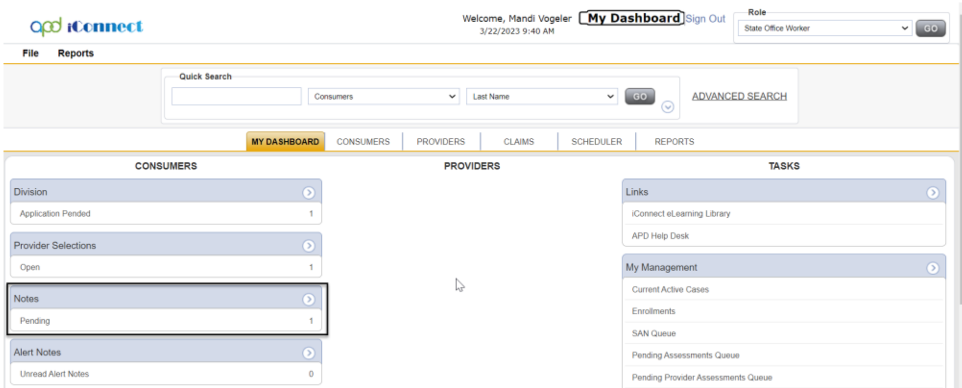
The State Office Residential Intake Specialist will review the residential referral packet.

Role(s): State Office Worker

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

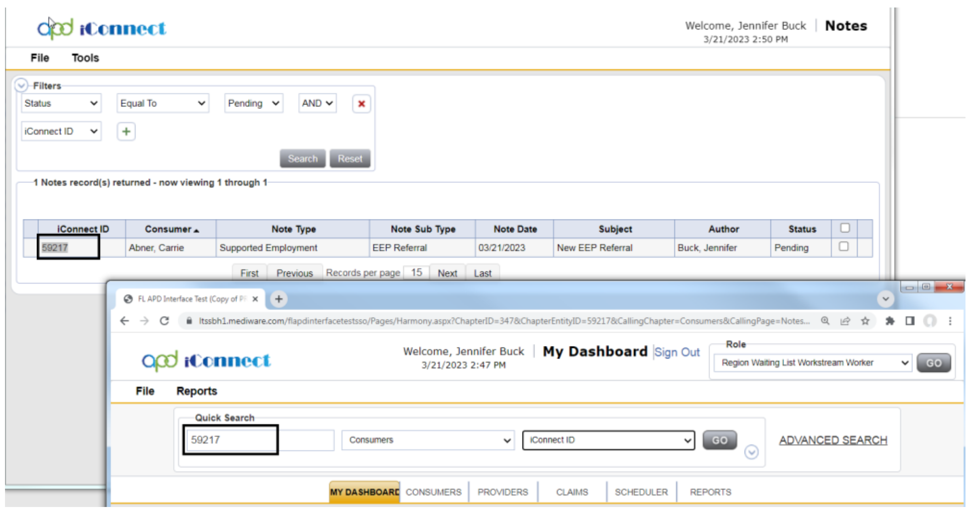


2. The State Office worker will monitor **My Dashboard** for incoming notes. Select the **Consumer** > **Pending** > **Notes** queue.

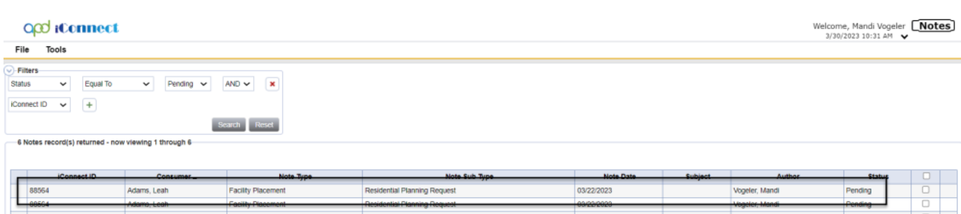


Tip

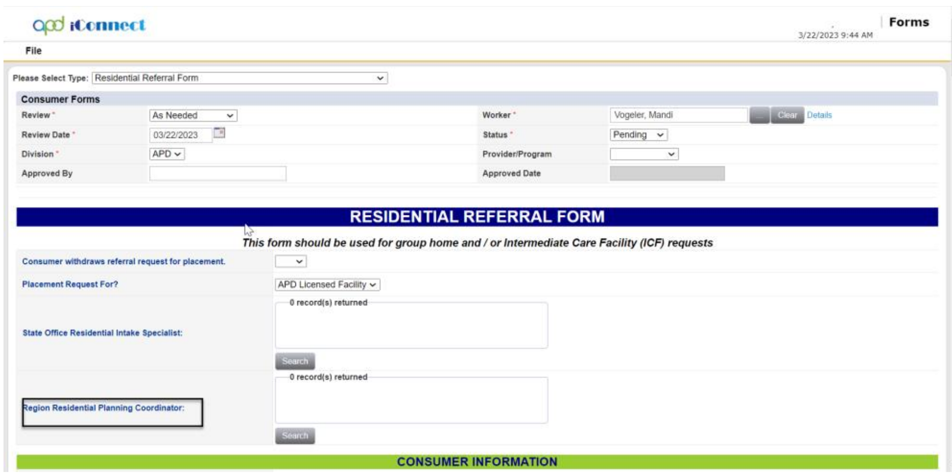
Navigate quickly from the My Dashboard > Notes queue to the consumer’s record by copying the iConnect ID from the Notes queue and pasting it into the Consumer > Quick Search. The Note queue window will remain open for convenience.



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



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**



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.

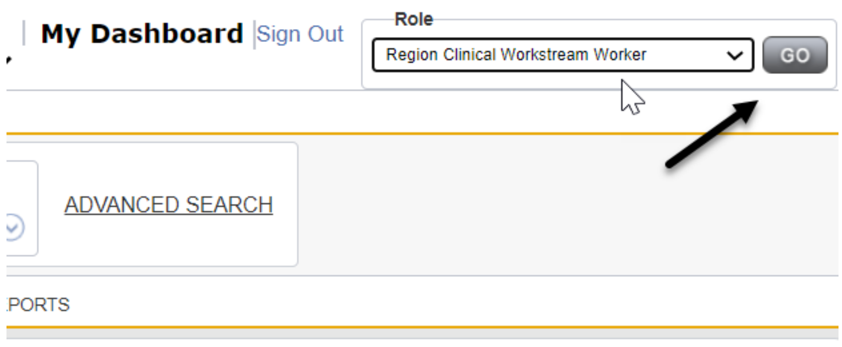
8. If there is Forensic Involvement; skip to Forensic Involvement. If not, proceed to C. Bed Availability Report generated to identify potential .
9. If the Consumer is a Minor under 12, skip to Consumer Placement of a Minor under 12. If Not, proceed to C. Bed Availability Report generated to identify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

C. Bed Availability Report generated to identify potential placements.

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

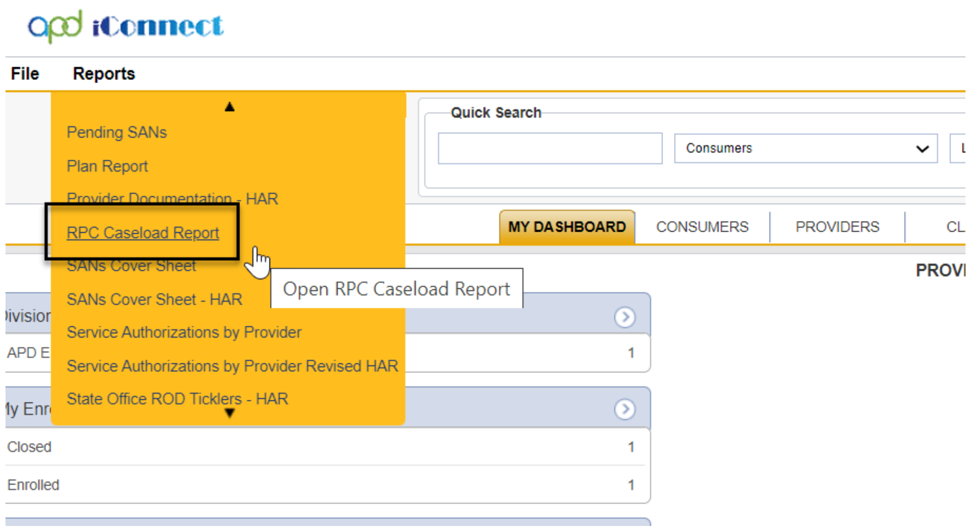
Once the State Office worker completes his/her review of the Residential Referral Form and determines there is not forensic involvement and the referral does not involve a minor, the Region Residential Planning Coordinator will proceed with the residential planning process. The Bed Availability report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

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



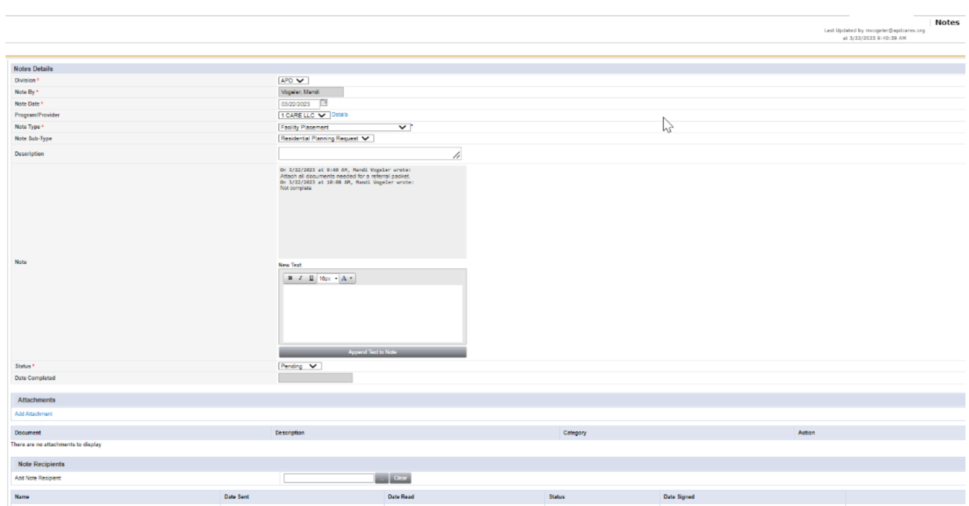
2. The RRPC generates the RPC Caseload Report daily to determine if there are any new referrals.

    a. Navigate to the My Dashboard screen, click the Reports menu, and locate the RPC Caseload Report



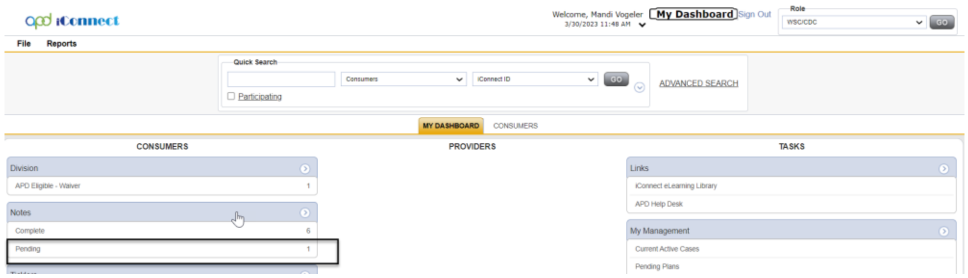
NOTE: The RRPC is also a note recipient on the Residential Planning Request Note from the WSC

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**



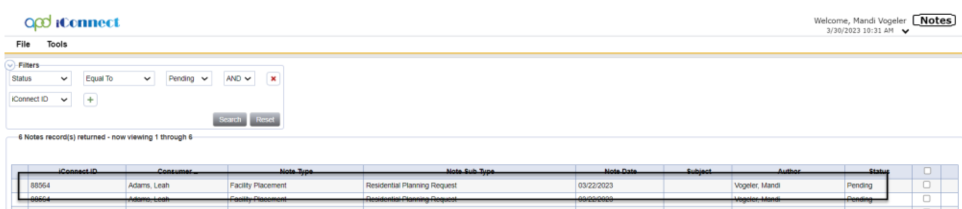
WSC Responds to the request for additional information.

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



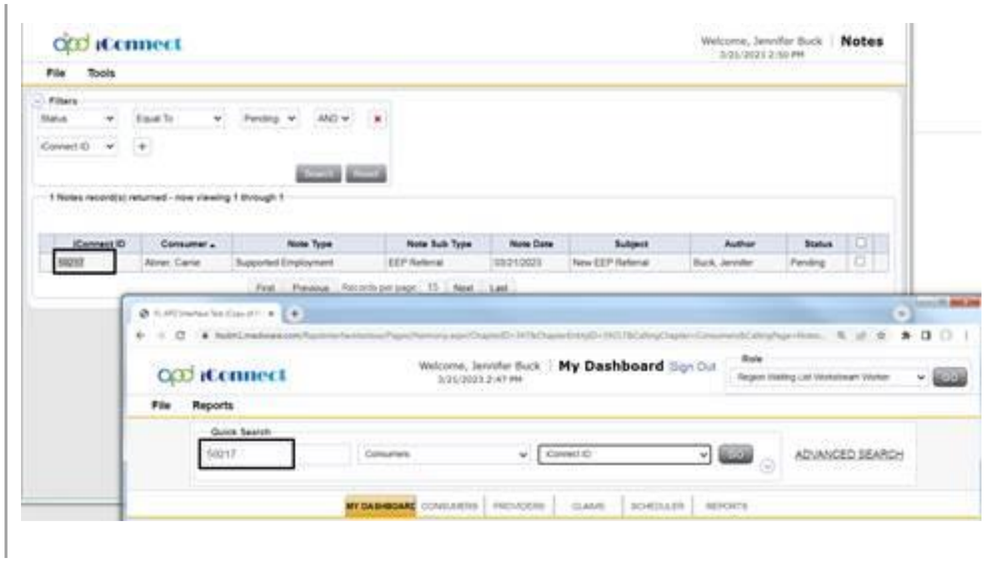
   a. Locate a note with
      i. Note Type = Facility Placement and
      ii. Note Subtype = Residential Planning Request

5. 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.

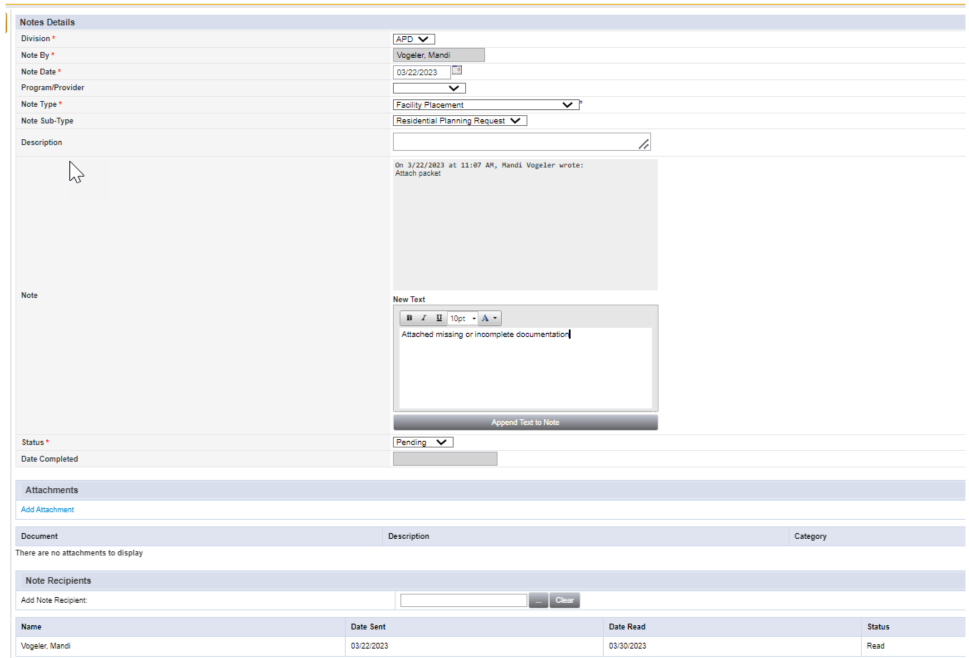


Tip

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.

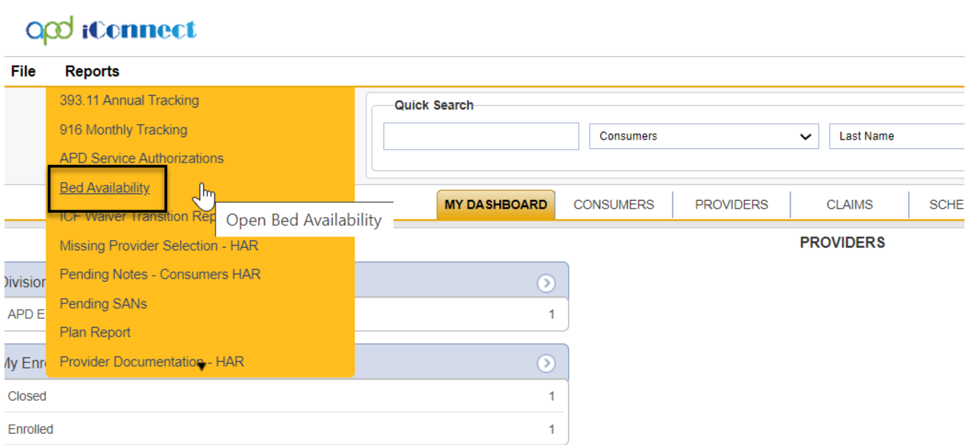


6. After clicking on the note from the **My Dashboard** > **Notes** queue the Note Details page displays. Update the following fields:
    a. Note = summary of any missing of incomplete documentation.
    b. Status = Pending
    c. Note Recipient = State Office Worker (Respond to the SO Intake Specialist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



7. If the Consumer is a Minor under 12, proceed to **Consumer Placement of a Minor under 12**

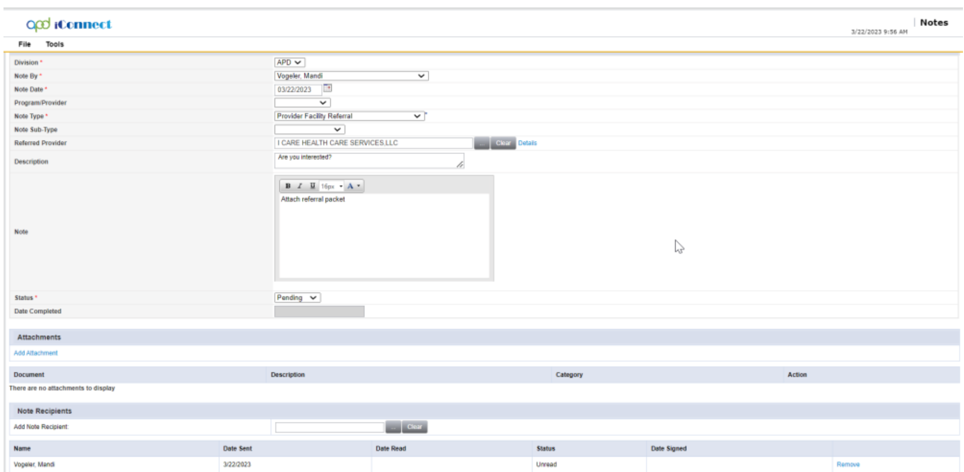
8. RRPC will navigate to **My Dashboard** and from the top navigation bar, use the Reports menu dropdown to generate the Bed Availability Report.



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

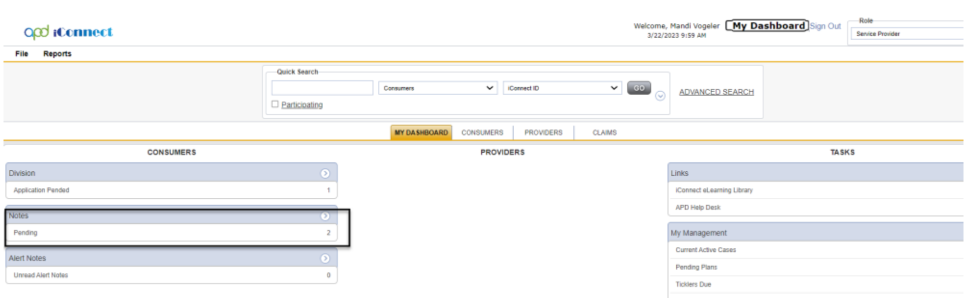
10. From the Consumers record, Click on the **Notes** tab. From the **File** menu, select **Add Note**. The Notes Details page displays. Update the following fields:
    a. Note Type = Provider Facility Referral
    b. Note Sub-Type = leave blank
    c. Referred Provider = name of the provider the referral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

    Note: Create a separate note for each provider.

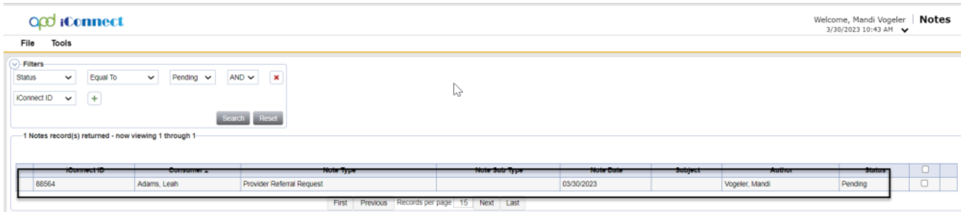


Provider reviews and responds to the referral.

11. 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.

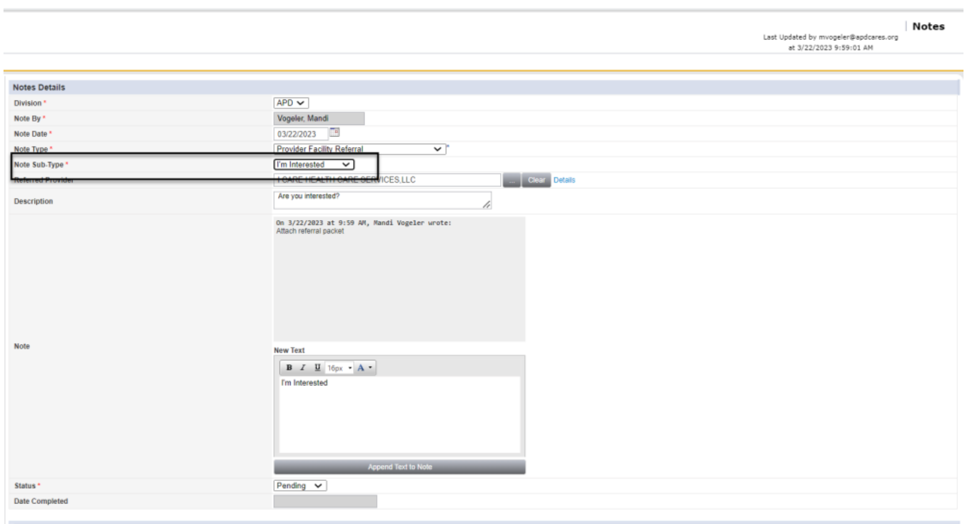


12. Click on the note to review the details.



13. 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.



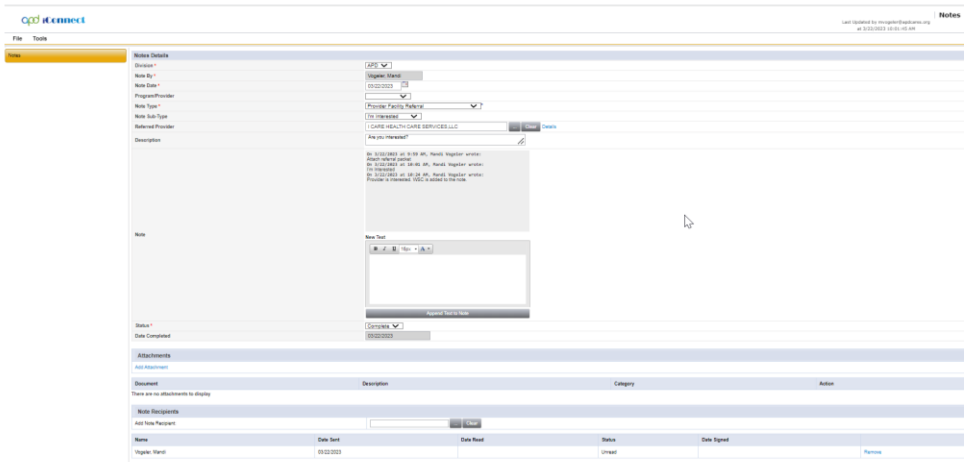
14. If the Provider is not interested, the process ends for that provider.

15. If the Provider is interested, they will wait for the WSC to contact them.

RRPC communicates interested provider information to WSCs

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

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**

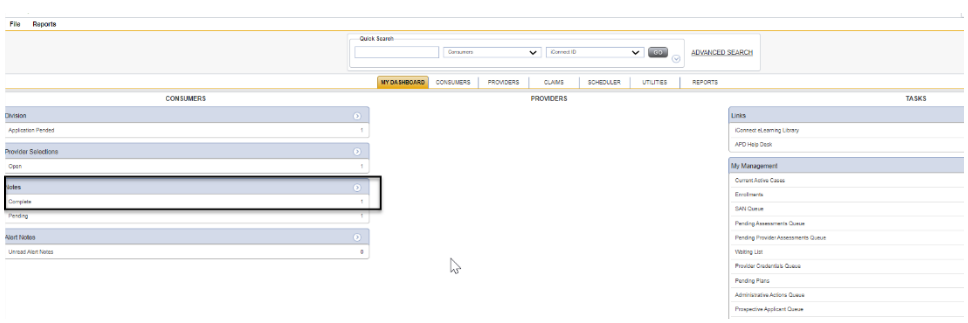


D. WSC reviews potential placements with Consumer/Legal Representative/Family

Role(s): WSC/CDC, Region Waiting List Workstream Worker, Region Clinical Workstream Worker, and ROM/DROM,

1. Log into APD iConnect and set Role = WSC/CDC or Region Waiting List Workstream Worker. Click **Go.**

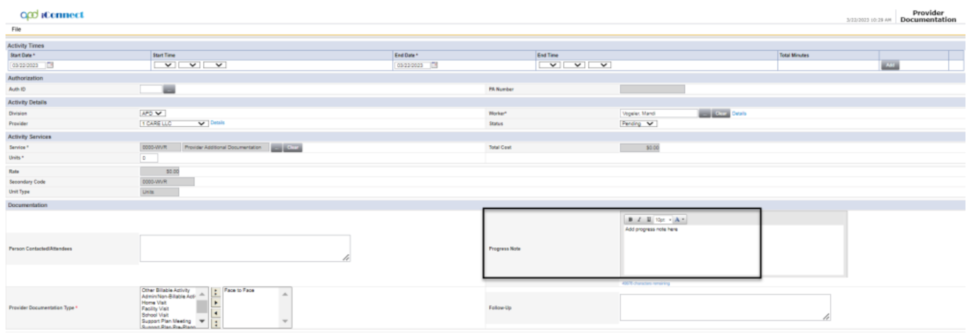
2. WSC will monitor **My Dashboard** for incoming notes. Select the **Consumer** > **Complete** > **Notes** queue.



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.
   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.



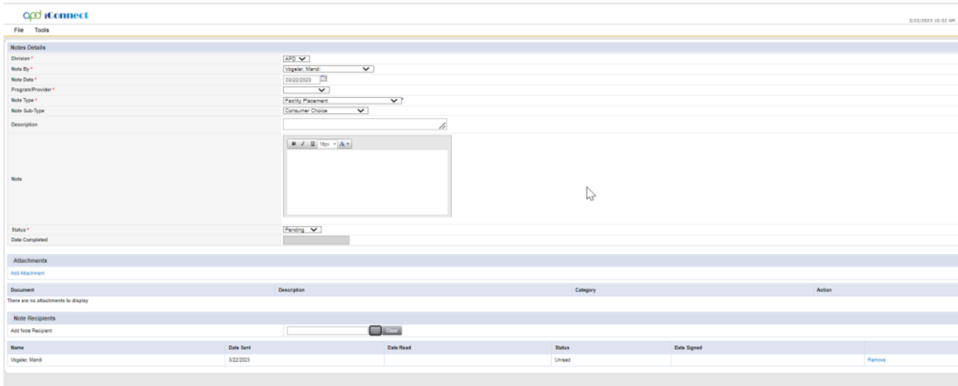
5. From the consumer's **Forms** tab, review the **Residential Referral form** to determine if the consumer is a minor, IB/BF, or inter-region transfer.
   a. If yes, skip to step 11 in Transition call for minors, IB/BF, or inter-region transfer section.
   b. In no, proceed to next step.

Transition call

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

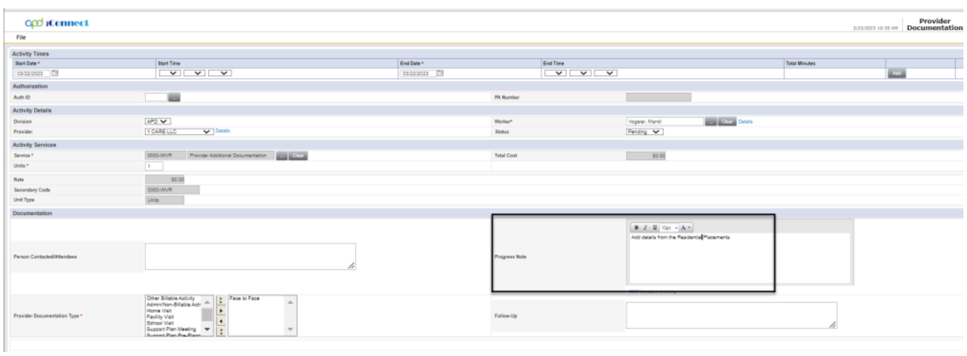
6. Notify the region of the Consumers Choice by adding a note. from the consumer's **Notes** tab, from the **File** menu, select **Add Note**. Update the following fields:
   a. Note Type = Facility Placement
   b. Note Sub-Type = Consumer Choice
   c. Status = Pending
   d. Recipient = RRPC
   e. From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

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

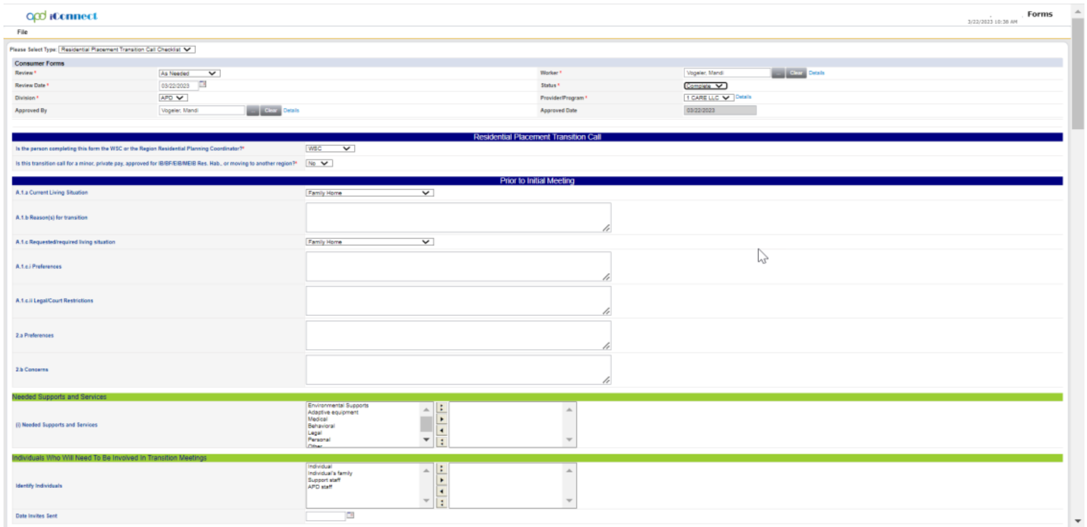


7. WSC schedules and facilitates transition call for standard Residential Habilitation placements.

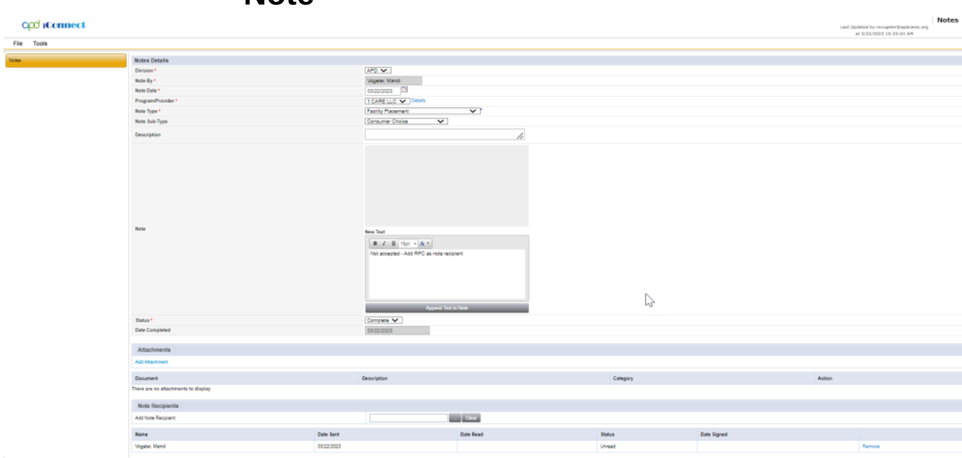
8. WSC will document the outcome of the transition call in a WSC Progress Note. Navigate to the **Provider Documentation** tab to add Progress Note.



9. Navigate to the **Forms** tab and select the Residential Placement Transition Call Checklist form.
    a. Review = As Needed
    b. Review Date = Current Date
    c. Worker = Self
    d. 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**



10. If Consumer Placement was accepted. The WSC will then update the Consumer Choice note as placement accepted.
    i. Status = Complete
    ii. Recipient = RRPC
    iii. Update to Read
    iv. From the **File** menu, select **Save and Close Note**



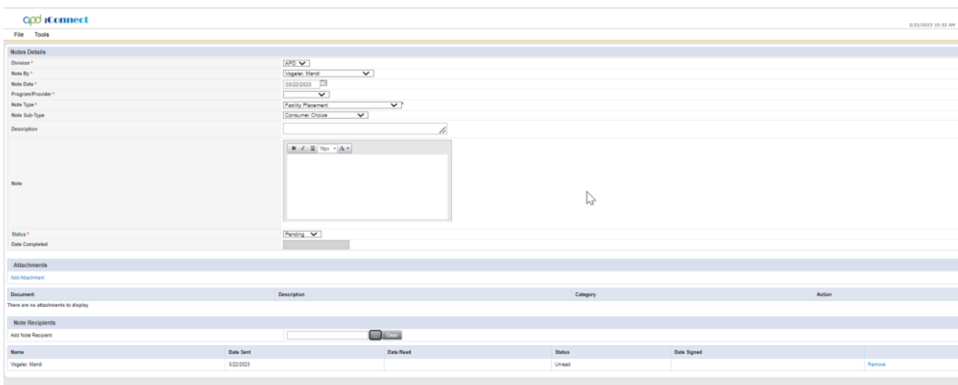
The RRPC will proceed with the Residential Referral Form is completed section.

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

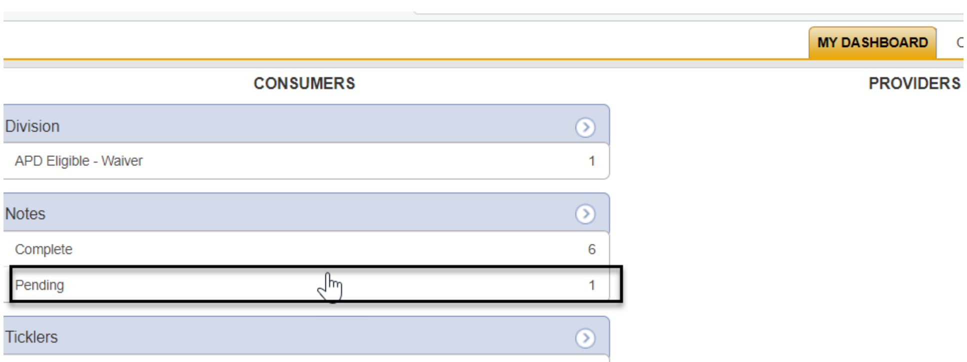
Role(s): Region Clinical Workstream Worker and ROM/DROM

11. 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.

12. 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**

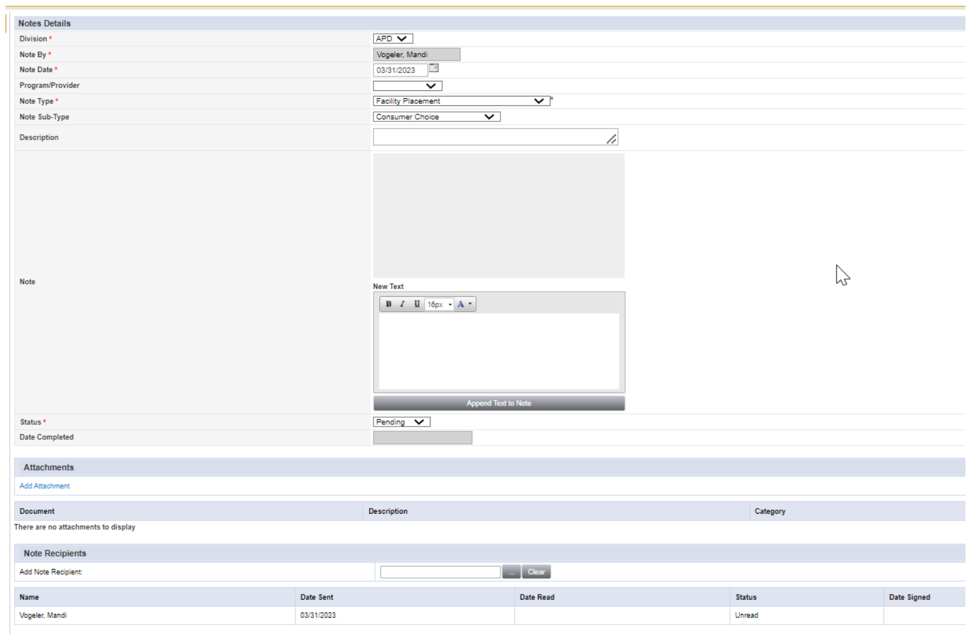


13. The RRPC will monitor **My Dashboard** for incoming notes. Select the **Consumer** > **Pending** > **Notes** queue.

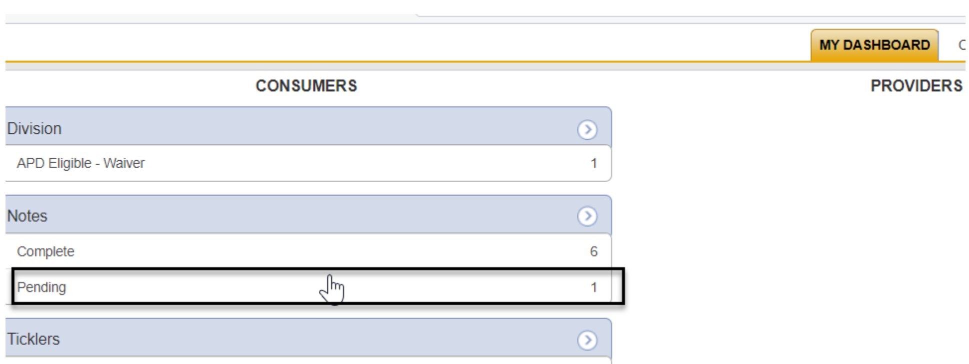


14. Click on the Pending Consumer Choice note and add ROM/DROM(s) as Note recipient(s).
    a. Note Type = Facility Placement
    b. Note Sub-Type = Consumer Choice
    c. Note = include narrative re transition call.
    d. Status = Pending
    e. Recipient = ROM/DROM

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



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

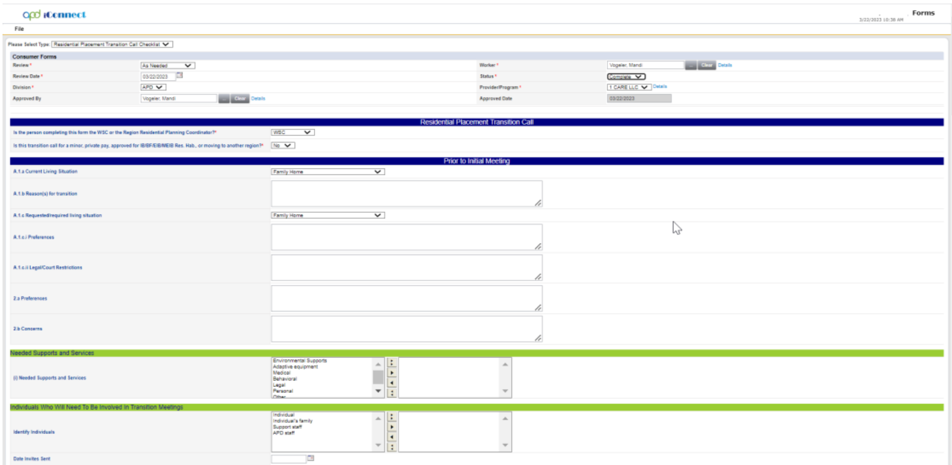


16. Outside of iConnect, within 3 business days, the receiving Region will schedule a Transition Call with provider, WSC, Consumer/Legal Rep/Family, Waiver Lead.
    a. If the individual is moving from one region to another, the receiving region should initiate the WSC selection process.

17. The ROM/DROM or designee assigned to facilitate the Transition call will document the call using the Transition Call Checklist form found in APD 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.

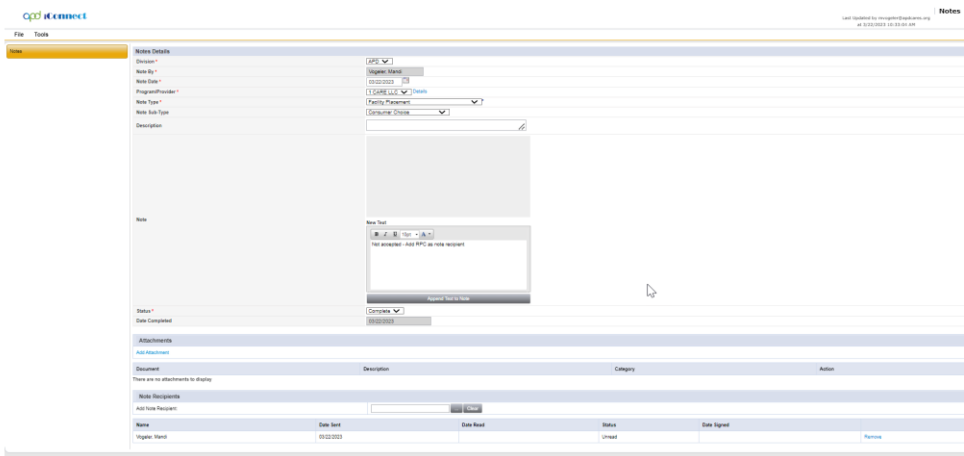
   a. Complete the fields in the form and in the header.
   b. Status = Complete
   c. From the **File** menu, select **Save and Close Forms**.



18. Navigate to the Notes tab and select the Pending Consumer Choice note from the list view.

19. If Consumer Placement was accepted, the ROM/DROM or their designee will update the Consumer Choice note as placement accepted.

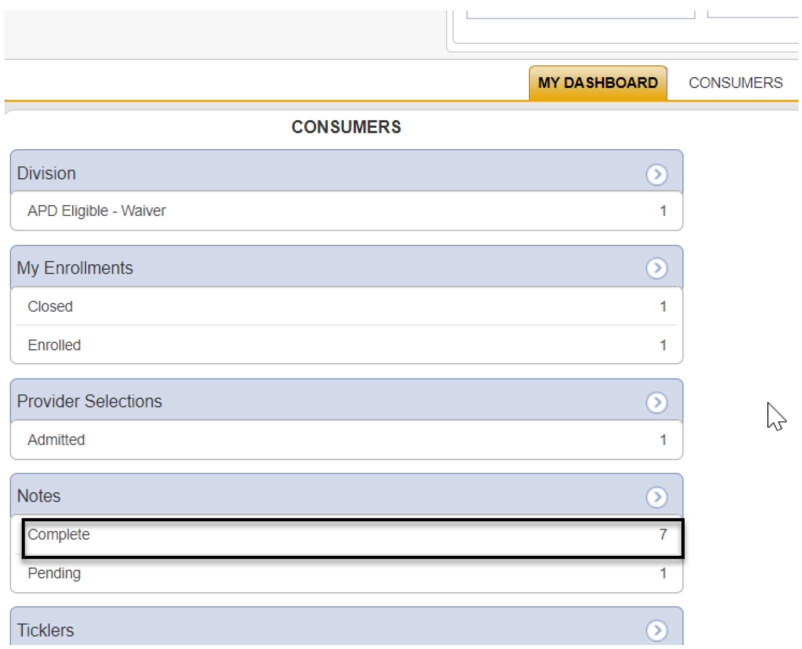
      i. Status = Complete
      ii. Recipient = RRPC and WSC (to proceed with the next steps)
      iii. Update to Read
      iv. From the **File** menu, select **Save and Close Note**



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

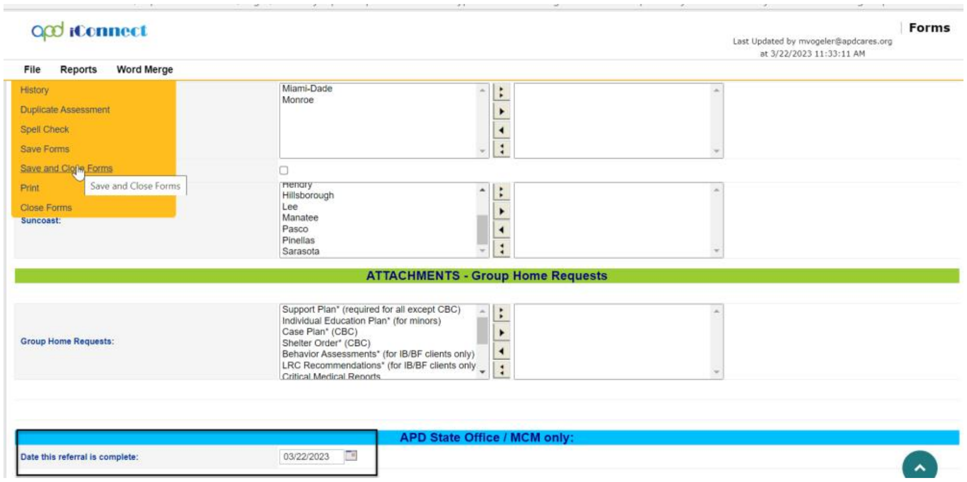
Residential Referral Form is completed.

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



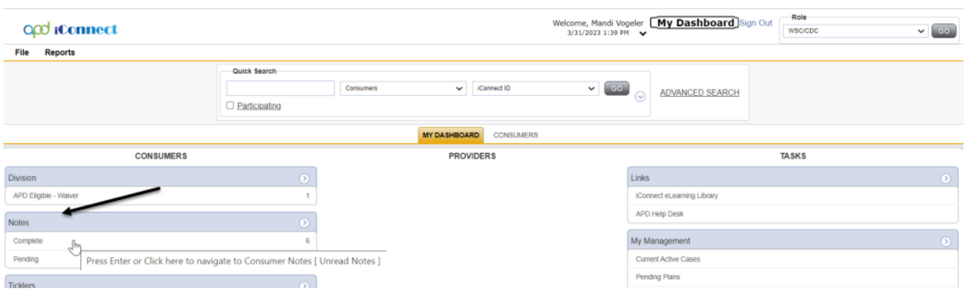
21. Navigate to the Consumers record and click on the Forms tab and select the Pending Residential Referral form from the list view.
    a. Update "Date this Referral is Complete" at the bottom of the form.

b. Status = Complete



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

22. WSC will monitor their **My Dashboard** for incoming notes and pick up tasks in the Consumer Placement section.



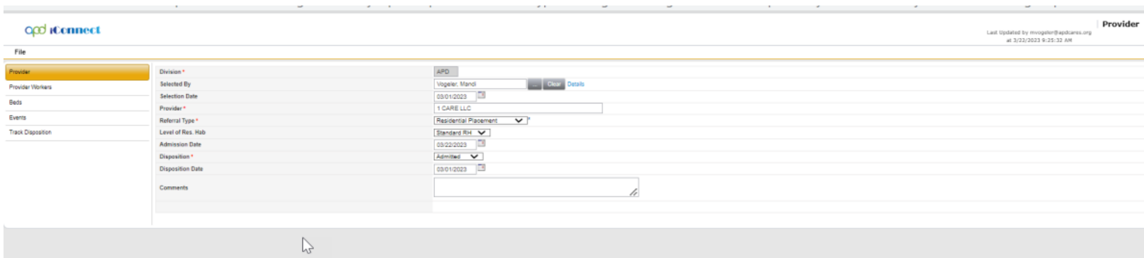
E. Consumer Placement

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.

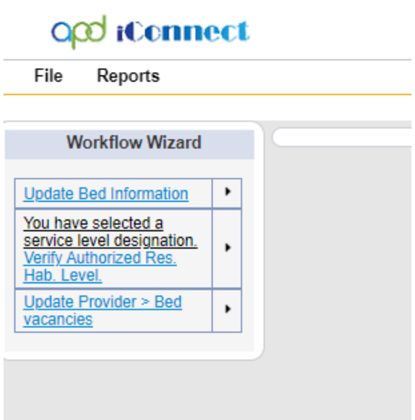
Role(s): WSC/CDC

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:
   a. Division = Defaults to today
   b. Selected By = Defaults to self
   c. Selected Date = Defaults to today

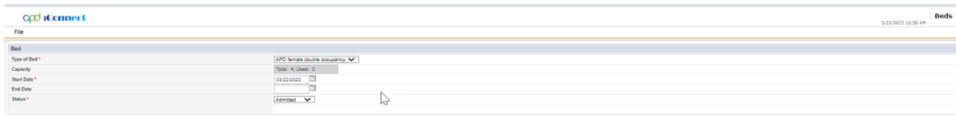
d. Provider = Search for and select the name of the Licensed Home
e. Referral Type = Residential Placement
f. Level of Res Hab = Select the level
g. Admission Date = Date of Admission
h. Disposition = Admitted
i. Disposition Date = Defaults to today
j. From the **File** menu: click **Save**



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

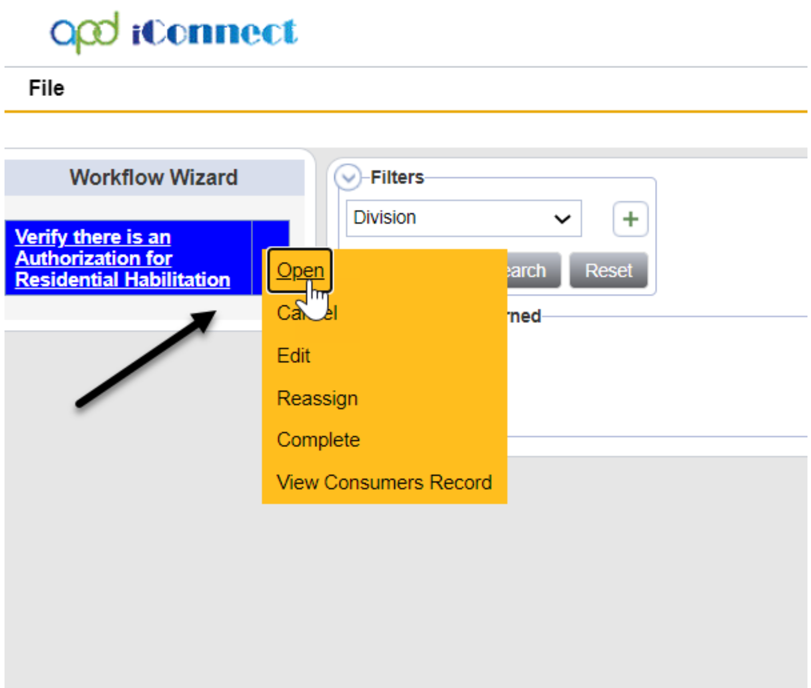


3. To address the “Update Bed Information” tickler, within the open Provider Selection record, click on the Beds subpage
   a. Type of Bed = select from the drop-down menu
   b. Start Date = Date of Admission
   c. Status = Admitted
   d. From the **File** menu, select **Save and Close**



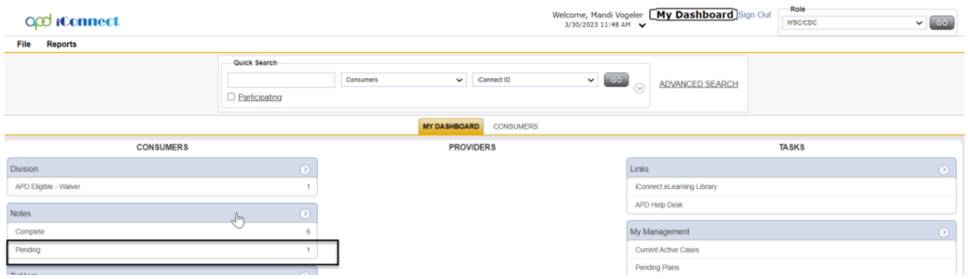
4. If the individual has any <u>existing</u> Residential Placement provider selection records, the WSC will close them at this time. Open the Provider Selection record and update the following field:
    a. Disposition = Closed
    b. From the **File** menu, select **Save and Close**

5. 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

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



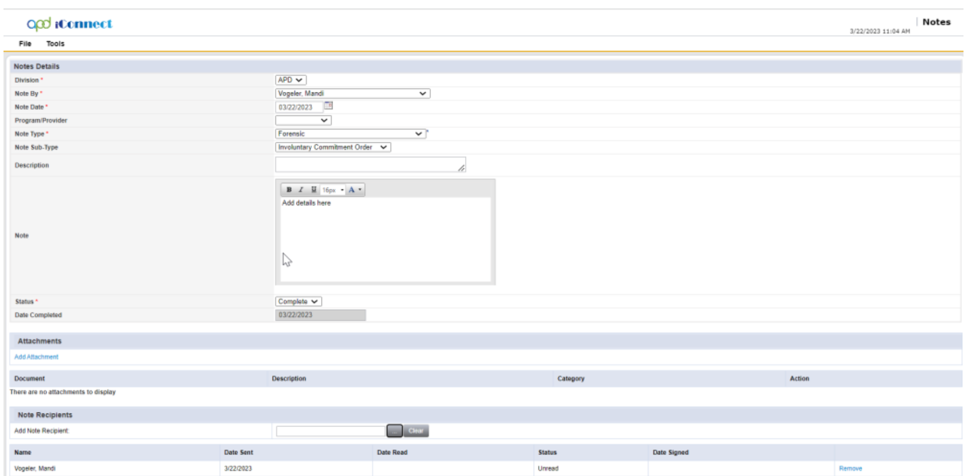
7. Refer back to [C. Bed Availability Report generated to identify potential ,] until Consumer is placed.

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**



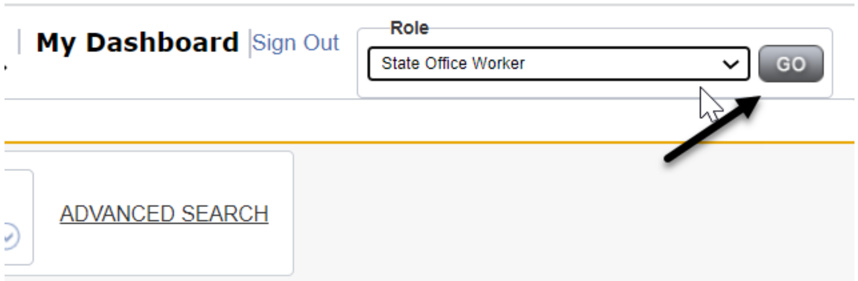
2. Facilities Coordinator follows 393.11 Involuntary Admission to Residential Services Process and this process ends.

3. Consumer Placement of a Minor under 12

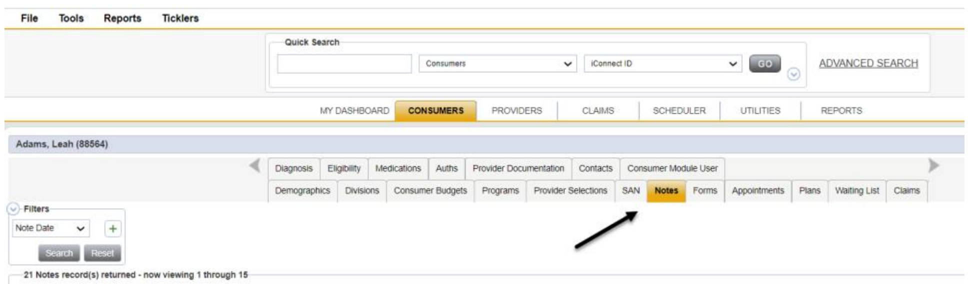
Continued from page 13. If the Consumer is a Minor under 12, the State Office Worker notifies the Regional Operations Manager (ROM) or Deputy Regional Operations Manager (DROM) in Residential Planning Request note. The ROM/DROM will respond within two business days whether the referral is approved or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

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

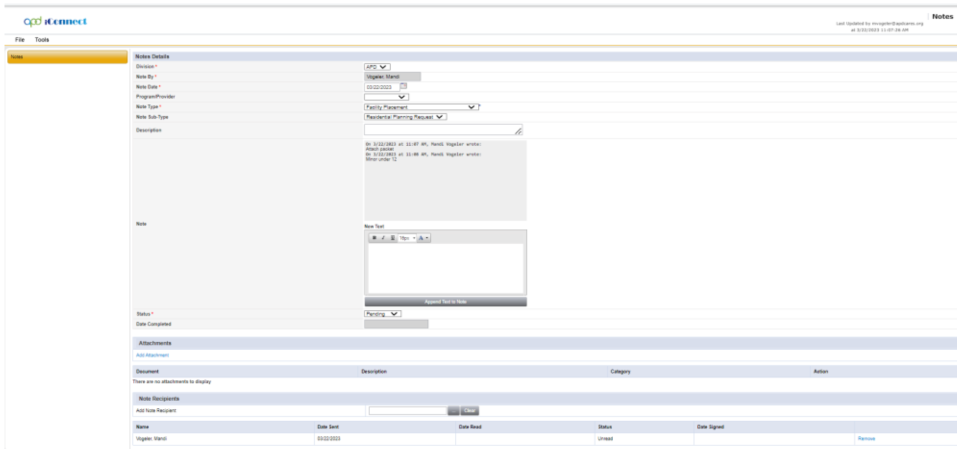
1. To begin, log into APD iConnect and set Role = State Office Worker. Click **Go.**



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

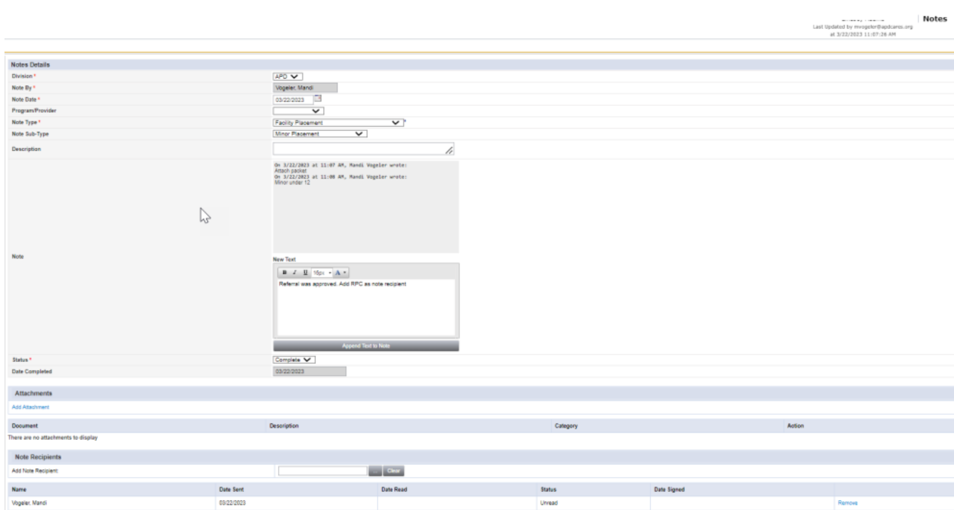


3. Open the Facility Placement Note with the Note Subtype of Residential Planning Request and update the following fields:
    a. Sub Type = Minor Placement
    b. Attachments = All documents needed for a referral packet.
    c. Note Recipient = ROM/DROM
    d. From the **File** menu, select **Save and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



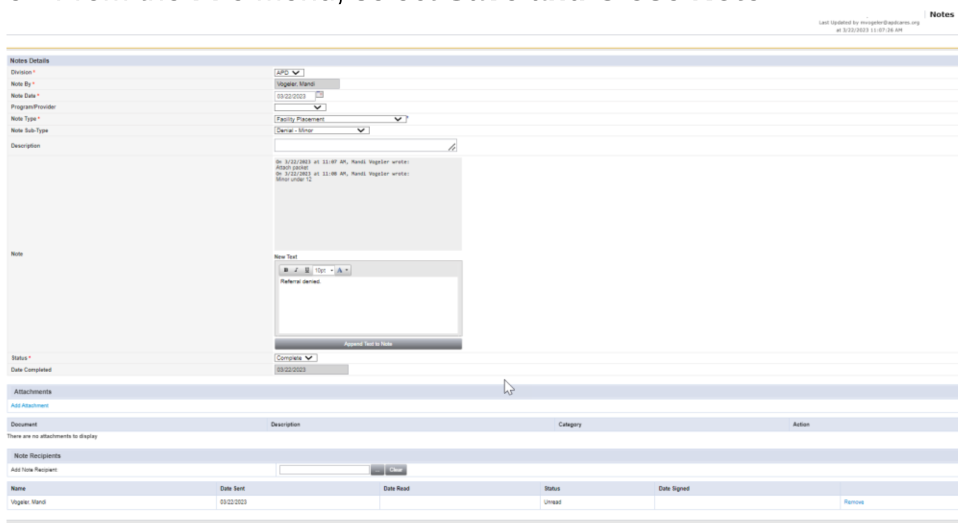
2. Referral is to be reviewed and approved within 2 business day.

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 .

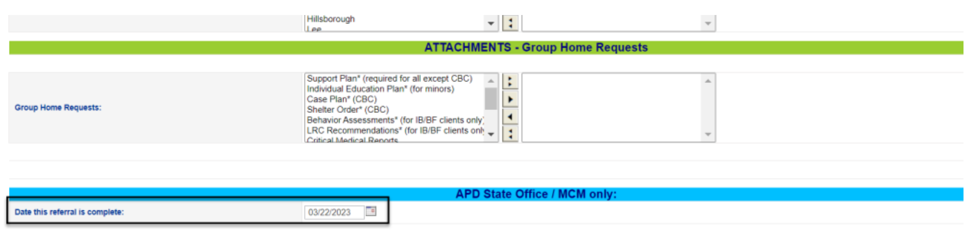


4. If Referral was denied, the ROM/DROM will respond to the note indicating denial. Update the following fields:
    a. Note Type = Facility Placement
    b. Note Sub-Type = Denial - Minor
    c. Status = Complete
    d. Recipient = WSC, State Office Intake, RRPC, Waiver Lead (who will share with Liaison/SAN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



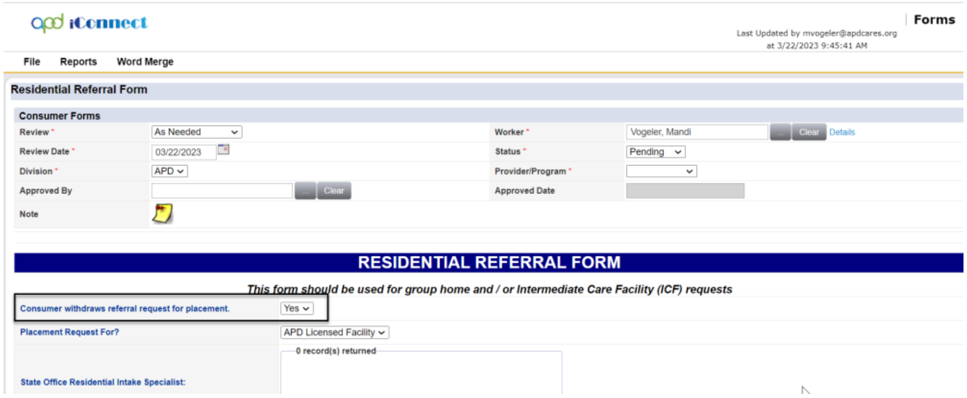
4. Consumer Withdraws their Referral Request

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

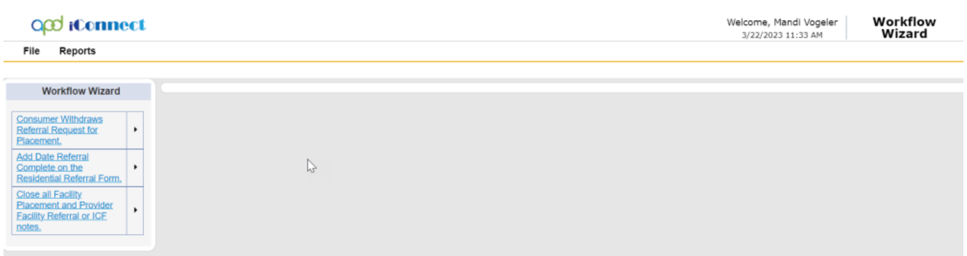
c. From the **File** menu, select **Save and Close Form**



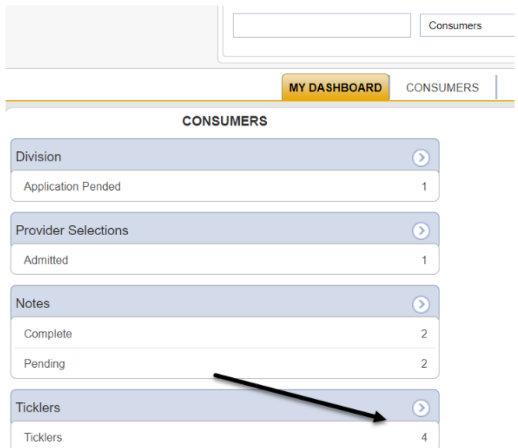
2. Updating the Consumer Withdraws Referral Request for Placement as Yes and saving the form will trigger a WFW to the Secondary worker.

   Note: Waiver Lead for Residential Planning; Waiting List Support Coordinator or the Waiver Support Coordinator for ICF Admission.

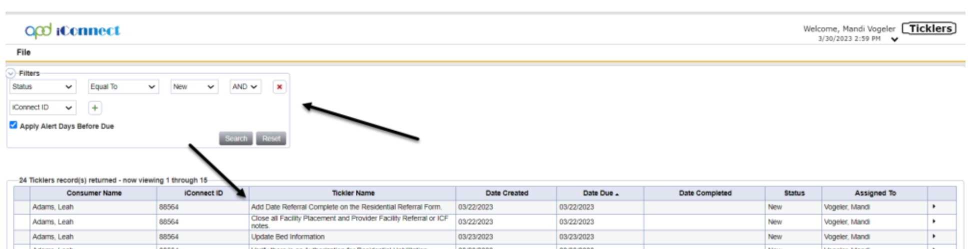
   a. Consumer Withdraws Referral Request for Placement
      i. Instructs the Waiver Lead to reassign to the RRPC or ICF Coordinator
   b. Add Date Referral Complete on the Residential Referral Form
   c. Close all Facility Placement and Provider Facility Referral or ICF notes.



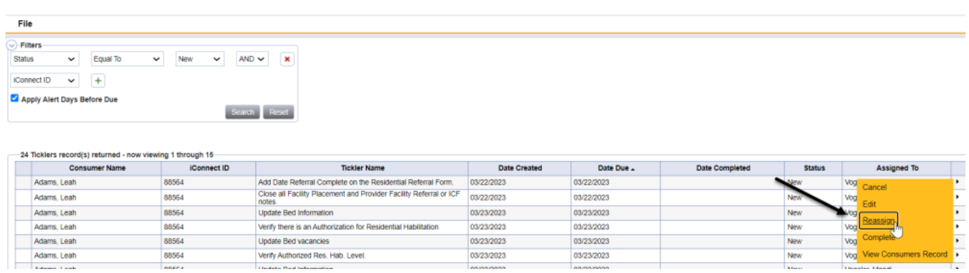
3. Waiver Lead will monitor their **Tickler** queue from **My Dashboard**. Navigate to the **My Dashboard** and find the **Consumers** section. Scroll down to the **Ticklers** panel and click into the linked number of outstanding Ticklers to access the Tickler Queue:



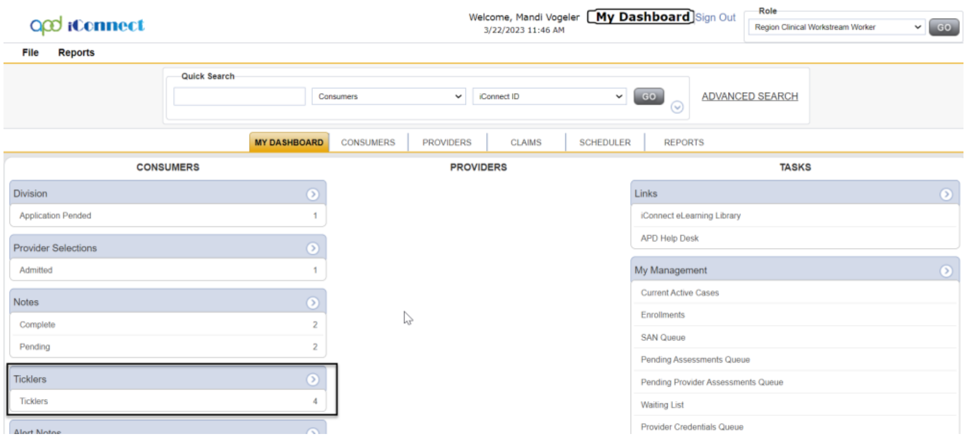
4. From here, user the multi-variable search to find the Tickler to open it. Click **Search**



5. 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.

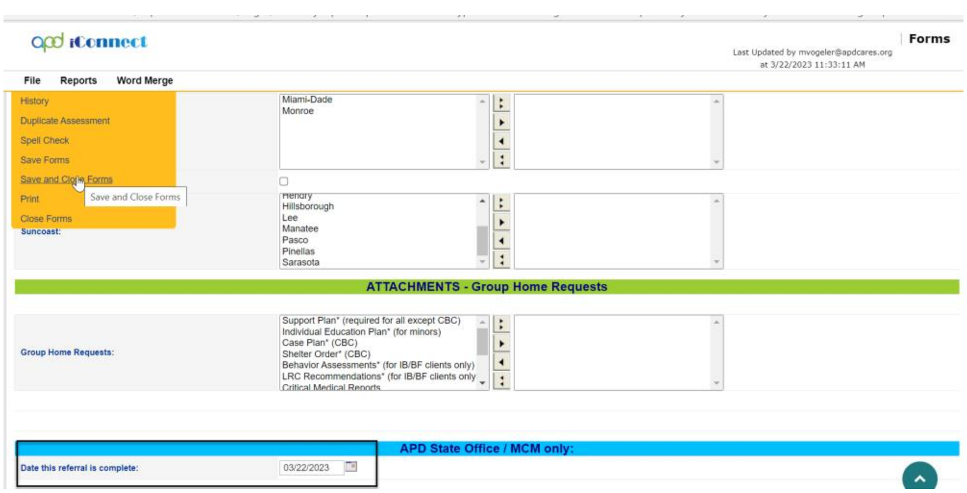


6. The RRPC or ICF Coordinator will monitor their **Tickler** queue from **My Dashboard**.



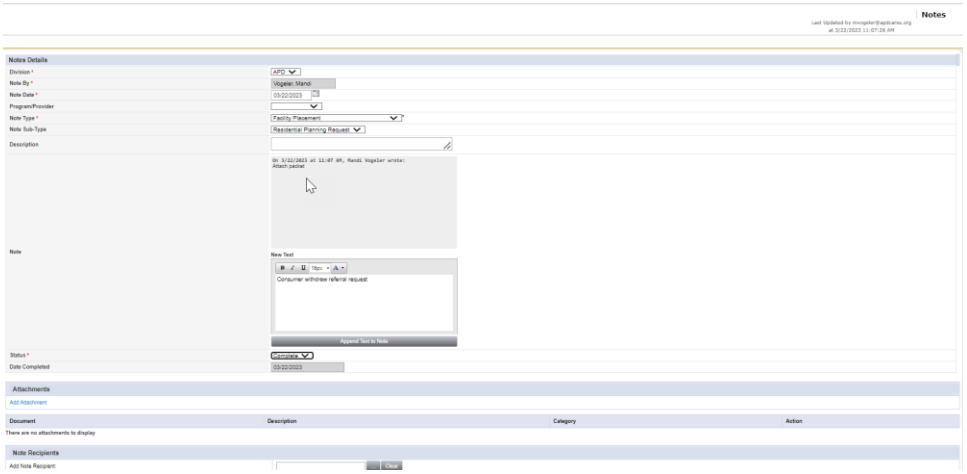
7. The RRPC will add the Date Referral Complete on the Residential Referral Form. Update the following fields:
    a. Status = Complete
    b. From the **File** menu, select **Save and Close**

    Note: The ICF Coordinator will not update form to Complete



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



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