



State of Florida
Agency for Persons with Disabilities

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

Table of Contents

Introduction..... 3

1. Residential Planning Process 4

 A. Complete the Residential Referral form..... 4

 B. Residential Referral Review 6

 C. Bed Availability Report generated to identify potential placements. 9

 WSC Responds to the request for additional information. 11

 Provider reviews and responds to the referral. 14

 RRPC communicates interested provider information to
 WSCs..... 15

 D. WSC reviews potential placements with Consumer/Legal
 Representative/Family 16

 Transition call 17

 Transition call for minors, IB/BF, or inter-region transfers..... 19

 E. Consumer Placement 24

 Consumer Placement Not Accepted 26

2. Forensic Involvement..... 28

3. Consumer Placement of a Minor under 12 28

4. Consumer Withdraws their Referral Request 31

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 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**.



The screenshot shows a user interface for APD iConnect. At the top left, there is a 'My Dashboard' button and a 'Sign Out' link. To 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 role selection, there is a section labeled '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). Waiting List Workstream will leave this field blank.
 - g. Complete the fields in the form.

Residential Planning

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 logo is a 'File' menu. The main content area is titled 'Residential Referral Form' and contains a 'Consumer Forms' section with the following fields: Review (As Needed), Review Date (03/22/2023), Division (APD), Approved By (blank), Worker (Vogeler, Mandi), Status (Pending), and Provider/Program (1 CARE LLC). Below this is a blue header for 'RESIDENTIAL REFERRAL FORM' and a subtitle: 'This form should be used for group home and / or Intermediate Care Facility (ICF) requests'. The form includes search boxes for 'Consumer withdraws referral request for placement', 'Placement Request For?' (APD Licensed Facility), 'State Office Residential Intake Specialist:', and 'Region Residential Planning Coordinator:'. Each search box shows '0 record(s) returned' and has a 'Search' button.

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 'Residential Referral Form' interface. It shows the 'Consumer Forms' section with fields for Review (As Needed), Review Date (03/22/2023), Division (APD), and Approved By. A yellow note icon is visible 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). Waiting List 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.

Residential Planning

- 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 APD iConnect interface for creating or editing a note. The 'Notes Details' section includes dropdown menus for Division (APD), Note By (Vogler, Mandi), Note Date (03/22/2023), Program/Provider, Note Type (Facility Placement), and Note Sub-Type (Residential Planning Request). The Description field contains the text 'Attach all documents needed for a referral packet.' The Status is set to 'Pending'. Below the details are sections for Attachments (no attachments displayed) and Note Recipients (one recipient, Vogler, Mandi, with a status of '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.

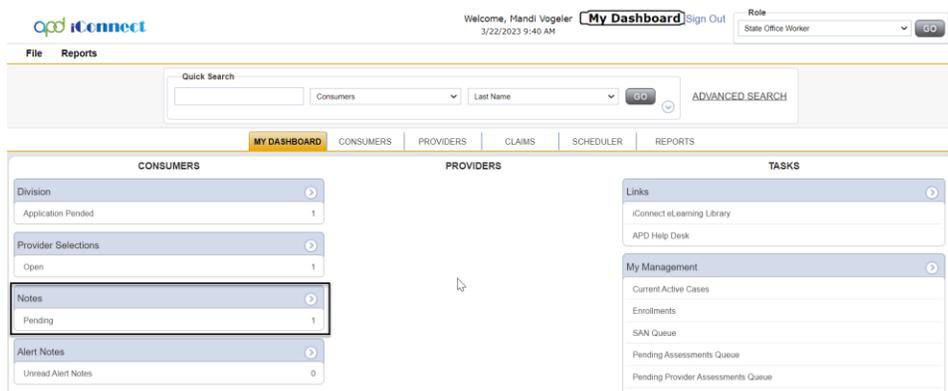
Role(s): State Office Worker

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

The screenshot shows the APD iConnect 'My Dashboard' interface. The 'Role' dropdown menu is set to 'State Office Worker' and the 'GO' button is highlighted with a black arrow. Below the dashboard header is an 'ADVANCED SEARCH' button.

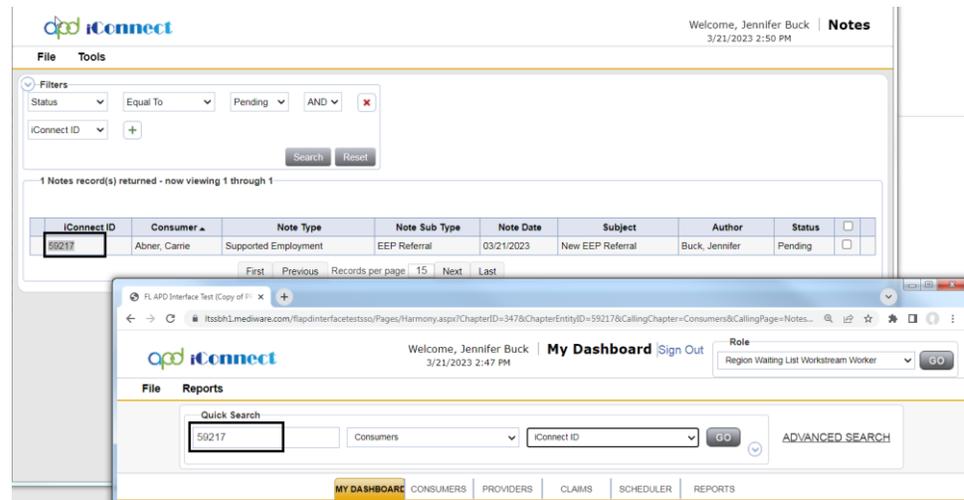
2. The State Office worker will monitor **My Dashboard** for incoming notes. Select the **Consumer > Pending > Notes** queue.

Residential Planning

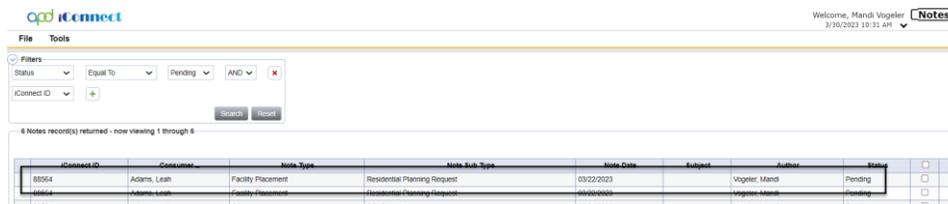


Tip

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.



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



Residential Planning

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. At the top, there is a 'File' menu and a 'Forms' tab. The main content area is titled 'RESIDENTIAL REFERRAL FORM' and includes a sub-header: 'This form should be used for group home and / or Intermediate Care Facility (ICF) requests'. The form contains several sections: 'Consumer Forms' with fields for Review (As Needed), Review Date (03/22/2023), Division (APD), Worker (Vogeler, Mandi), Status (Pending), Provider/Program, and Approved Date. Below this, there are search fields for 'Placement Request For?' (APD Licensed Facility), 'State Office Residential Intake Specialist:', and 'Region Residential Planning Coordinator:'. Each search field shows '0 record(s) returned'. 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.

Residential Planning

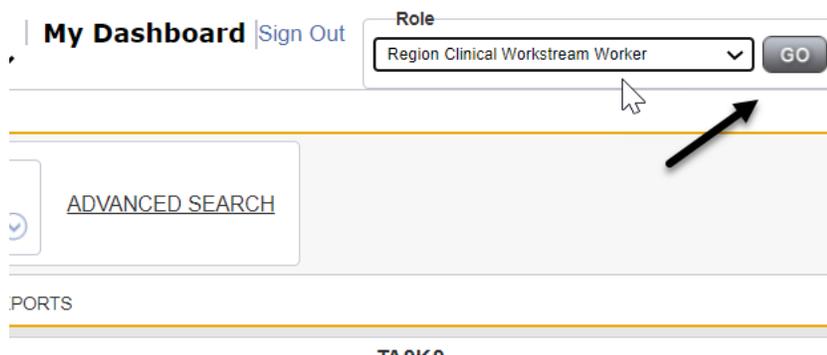
8. If there is Forensic Involvement; skip to [Forensic Involvement](#). If not, proceed to C. Bed Availability Report generated to identify potential .
9. If the Consumer is a Minor under 12, skip to [Consumer Placement of a Minor under 12](#). If Not, proceed to C. Bed Availability Report generated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

C. Bed Availability Report generated to identify potential placements.

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

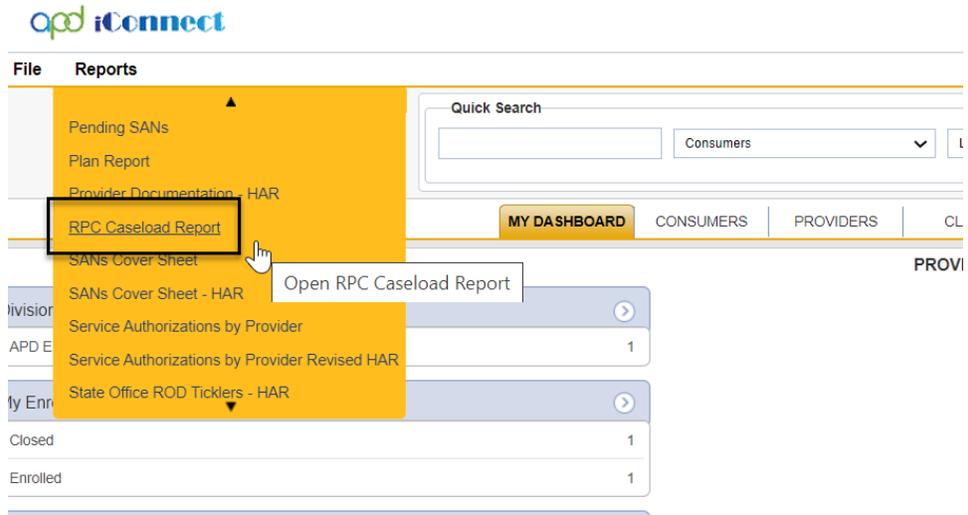
Once the State Office worker completes his/her review of the Residential Referral Form and determines there is not forensic involvement and the referral does not involve a minor, the Region Residential Planning Coordinator will proceed with the residential planning process. The Bed Availability report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



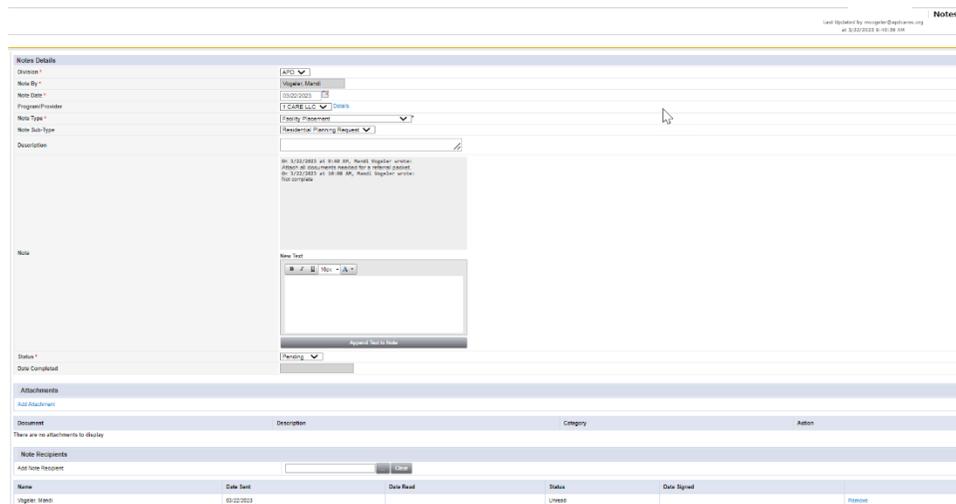
2. The RRPC generates the RPC Caseload Report daily to determine if there are any new referrals.
 - a. Navigate to the My Dashboard screen, click the Reports menu, and locate the RPC Caseload Report

Residential Planning



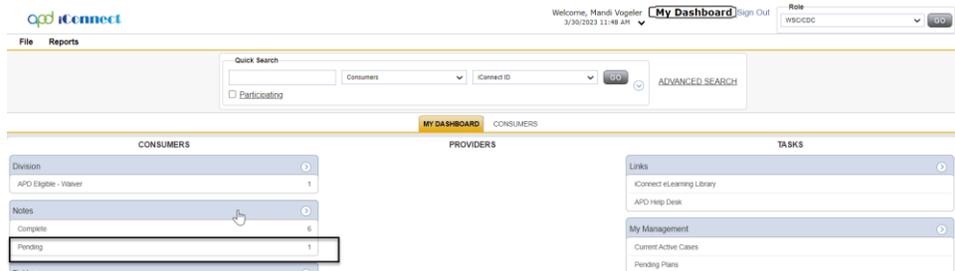
NOTE: The RRPC is also a note recipient on the Residential Planning Request Note from the WSC

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**

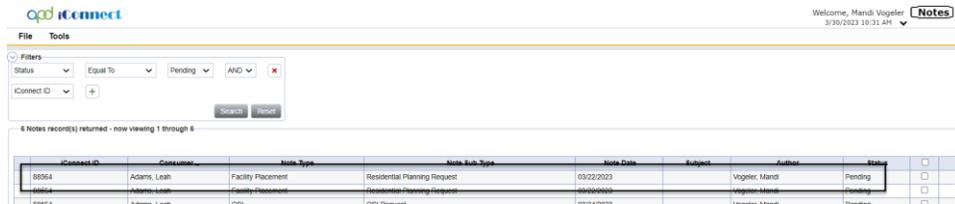


WSC Responds to the request for additional information.

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



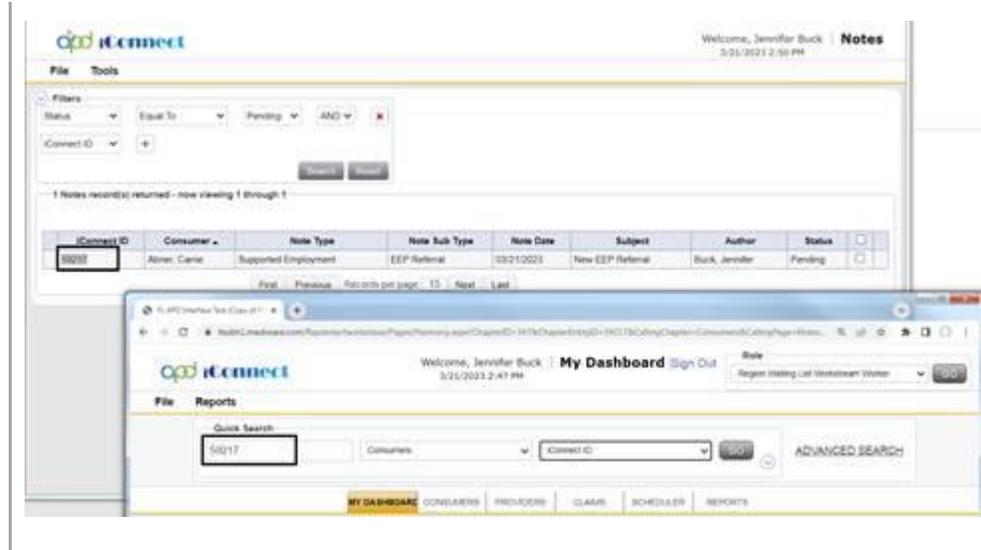
- a. Locate a note with
 - i. Note Type = Facility Placement and
 - ii. Note Subtype = Residential Planning Request
5. Click on the note to review the details. The WSC will document his/her findings and attaches any incorrect or missing information in the pending note.



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.

Residential Planning



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 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**.

Residential Planning

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.

Residential Planning

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:
- 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 includes the following fields:

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

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

Document	Description	Category	Action
There are no attachments to display			

At the bottom, there is a 'Note Recipients' table:

Name	Date Sent	Date Read	Status	Date Signed	Action
Vogeler, Mandi	3/22/2023		Unread		Remove

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.

The screenshot shows the 'My Dashboard' for a Service Provider. The dashboard includes a navigation menu with 'CONSUMERS', 'PROVIDERS', and 'CLAIMS'. Under 'CONSUMERS', there is a 'Notes' queue with 2 items. The 'Notes' queue is highlighted, and the 'Pending' status is also highlighted.

Division	Count
Application Pending	1
Notes	2
Alert Notes	0
Unread Alert Notes	1

12. Click on the note to review the details.

Residential Planning

iConnect ID	Consumer	Note Type	Note Sub-Type	Note Date	Subject	Author	Status
86564	Adams, Leah	Provider Referral Request		03/30/2023		Vogeler, Mandi	Pending

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.

Notes Details

Division: APC

Note By: Vogeler, Mandi

Note Date: 03/22/2023

Note Type: Provider Facility Referral

Note Sub-Type: **I'm Interested**

Recipient Provider: RRPC - Residential Planning Services LLC

Description: Are you interested?

Note: I'm Interested

Status: Pending

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.

Residential Planning

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

The screenshot shows the 'Notes' form in APD iConnect. The form is titled 'Notes Details' and includes the following fields and values:

- Note ID: [blank]
- Note By: [blank]
- Note Date: [blank]
- Program/Provider: [blank]
- Note Type: Provider Facility Referral
- Note Sub-Type: I'm Interested
- Referral Provider: CARE HEALTH CARE SERVICES LLC
- Description: [Text describing a referral to a facility]
- Note: [Text describing the note]
- Status: Complete
- Date Completed: 05/03/2023

There are sections for 'Attachments' and 'Note Recipients' at the bottom of the form.

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,

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

The screenshot shows the 'My Dashboard' in APD iConnect. The dashboard has a search bar at the top and a navigation menu on the left. The 'CONSUMERS' tab is selected, and the 'Notes' queue is highlighted. The 'Notes' queue shows a list of notes with columns for 'Status' and 'Date Recd'. The 'Notes' queue is currently empty.

- WSC shares list of interested provider(s) with consumer, legal representative, family.

Residential Planning

- 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.

The screenshot shows the CPOD connect software interface. The top right corner displays the date and time as 3/22/2023 10:28 AM and the current tab as Provider Documentation. The interface is divided into several sections: Activity Times, Authorization, Activity Details, Activity Services, and Documentation. The Documentation section is highlighted, and a red box is drawn around the Progress Note field, which contains the text "Add progress note here". Below the Progress Note field, there is a "Follow Up" field. The left sidebar contains various navigation options, including "Other Available Activity" and "Add to Page".

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.

Residential Planning

The screenshot shows the 'Notes' tab in the WellSky Connect system. The form includes the following fields:

- Disease: [GPE]
- Note By: [Ingrid, Ingrid]
- Note Date: [02/22/2023]
- Program Provider: [Priority Placement]
- Note Type: [General Note]
- Note Sub-Type: [General Note]
- Description: [Text area with file upload icon]
- Note: [Text area]
- Note Status: [Pending]
- Date Completed: [Date field]

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

Document	Description	Category	Action
There are no attachments to display.			

At the bottom is a 'Note Recipients' table:

Name	Date Sent	Date Read	Status	Date Signed	Action
Viggo, Mand	02/22/2023		Unread		Remove

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.

The screenshot shows the 'Provider Documentation' tab in the WellSky Connect system. The form includes the following fields:

- Activity Times: Start Time, End Time, End Date, End Time, Date Modified
- Authorization: Auth ID, PR Number
- Activity Details: Disease, Provider, Worker, Status, Title Code
- Activity Services: Service, Units, Rate, Recurrence Code, Unit Type
- Documentation: Person Contact/Member, Progress Note (highlighted with a red box), Follow-up
- Provider Documentation Type: [Dropdown menu]

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**

Residential Planning

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

Residential Planning

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**

The screenshot shows the 'Add Note' form in the iConnect system. The form is titled 'Add Note' and includes several dropdown menus and text fields. The 'Note Type' is set to 'Facility Placement' and the 'Note Sub-Type' is set to 'Consumer Choice'. The 'Status' is set to 'Pending' and the 'Recipient' is set to 'RRPC'. The 'Description' field is empty. A 'Save and Close Note' button is located at the bottom right of the form. Below the form, there is a table with columns for 'Name', 'Date Sent', 'Date Read', 'Status', and 'Date Signed'. The table contains one row with the name 'Viggo, Mand', 'Date Sent' of '6/22/2013', and 'Status' of 'Unread'.

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

The screenshot shows the 'My Dashboard' interface. At the top right, there is a 'MY DASHBOARD' button. Below it, there are two main tabs: 'CONSUMERS' and 'PROVIDERS'. Under the 'CONSUMERS' tab, there is a list of categories with counts: 'Division' (1), 'Notes' (6), 'Pending' (1), and 'Ticklers' (1). The 'Pending' category is highlighted with a mouse cursor. The 'Notes' category is also highlighted with a mouse cursor.

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

Residential Planning

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

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

15. 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	

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

Residential Planning

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 a web-based form titled "Residential Placement Transition Call Checklist". At the top, there's a "Forms" tab and a "File" menu. The form is divided into several sections:

- Consumer Forms:** Includes fields for Name (dropdown), Status (dropdown), Review Date (calendar), Division (dropdown), and Approved By (text input).
- Residential Placement Transition Call Checklist:** Includes a dropdown for "WSC" and a "Click to Initial Meeting" button.
- Enter to Initial Meeting:** Includes a dropdown for "Entry Note" and several text input fields.
- Residential Support and Services:** Includes a dropdown for "(I) Respite Support and Services" and a list of services: Environmental Systems, Medical Assistance, Personal Care, and Other.
- Identify Individuals:** Includes a dropdown for "Individual" and a list of individuals: Residential Placement Transition Call Checklist and Other.

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**

Residential Planning

Name	Date Sent	Date Read	Status	Date Signed	Review
Miguel Herra	03/22/2023		Unread		

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.

Category	Count
Division	1
My Enrollments	2
Provider Selections	1
Notes	7
Ticklers	1

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.

Residential Planning

b. Status = Complete

The screenshot shows the iConnect Forms interface. At the top, the logo 'iConnect' is on the left, and 'Last Updated by mvogeler@apdcares.org at 3/22/2023 11:33:11 AM' is on the right. Below the logo is a 'File Reports Word Merge' menu. The 'File' menu is open, showing options: History, Duplicate Assessment, Spell Check, Save Forms, Save and Close Forms (highlighted), Print, Close Forms, and Suncoast. The main area shows a list of forms with columns for 'Miami-Dade Monroe', 'Henry Hillsborough Lee Manatee Pasco Pinellas Sarasota', and a third column. Below this is a green bar labeled 'ATTACHMENTS - Group Home Requests'. Underneath, there is a list of attachments including 'Support Plan*', 'Individual Education Plan*', 'Case Plan* (CBC)', 'Shelter Order* (CBC)', 'Behavior Assessments*', 'LRC Recommendations*', and 'Critical Medical Reports'. At the bottom, a blue bar contains the text 'APD State Office / MCM only:' and a date field 'Date this referral is complete: 03/22/2023'.

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.

The screenshot shows the iConnect My Dashboard interface. At the top, the logo 'iConnect' is on the left, and 'Welcome, Mandi Vogeler 3/31/2023 1:39 PM' is on the right. Below the logo is a 'File Reports' menu. The main area has a 'Quick Search' bar with 'Consumers' selected and a 'Connect ID' field. Below this is a 'MY DASHBOARD' section with three tabs: 'CONSUMERS', 'PROVIDERS', and 'TASKS'. The 'CONSUMERS' tab is active, showing a table with columns for 'Division', 'Notes', and 'Ticklers'. The 'Division' column has 'APD Eligible - Waiver' with a count of 1. The 'Notes' column has 'Complete' with a count of 6 and 'Pending' with a count of 6. A tooltip says 'Press Enter or Click here to navigate to Consumer Notes [Unread Notes]'. The 'TASKS' tab is also visible, showing a table with columns for 'Links' and 'My Management'. The 'Links' column has 'iConnect eLearning Library' and 'APD Help Desk'. The 'My Management' column has 'Current Active Cases' and 'Pending Plans'.

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

Residential Planning

- 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**

The screenshot shows the opd iConnect web application interface. The top navigation bar includes the logo and the text "Provider". Below the navigation bar is a "File" menu. The main content area is a form for a "Provider Selection" record. The form includes fields for "Selected By" (Vogler, Mandi), "Selection Date" (03/01/2023), "Provider" (11 CARE LUG), "Referral Type" (Residential Placement), "Level of Res. Hab" (Standard RH), "Admission Date" (03/22/2023), "Disposition" (Admitted), and "Disposition Date" (03/01/2023). There is also a "Comments" field. The form is displayed in a table-like structure with a grid background.

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

The screenshot shows the opd iConnect web application interface. The top navigation bar includes the logo and the text "File Reports". Below the navigation bar is a "Workflow Wizard" dialog box. The dialog box contains three items in a list, each with a right-pointing arrow:

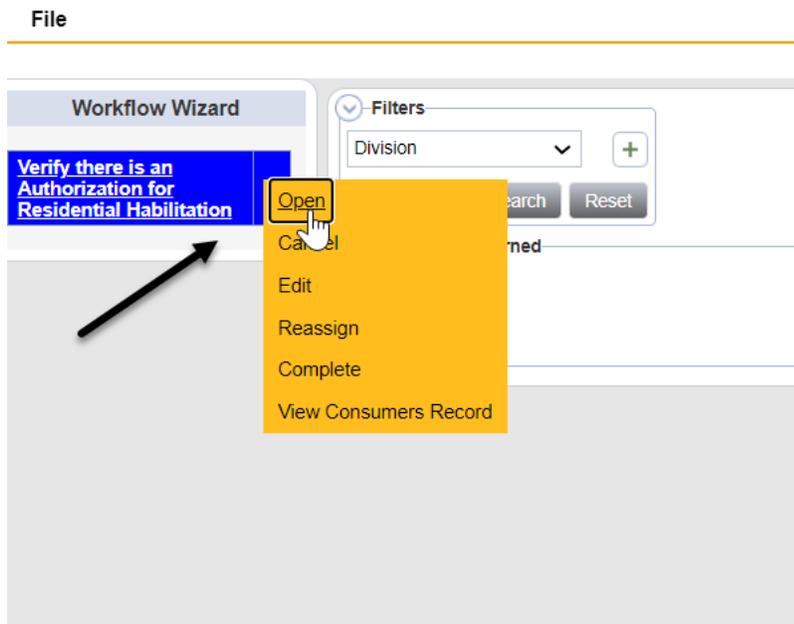
- [Update Bed Information](#)
- [You have selected a service level designation. Verify Authorized Res Hab Level.](#)
- [Update Provider > Bed vacancies](#)

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**

Residential Planning



4. 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**
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.

Residential Planning

The screenshot shows the 'iConnect' My Dashboard interface. At the top, there is a navigation bar with the logo, user information (Welcome, Mandi Vogeler, 3/30/2023 11:49 AM), and a 'My Dashboard' link. Below this is a search bar with a 'Quick Search' section containing a search input, a dropdown menu set to 'Consumers', and a 'Go' button. There is also a 'Participating' checkbox and an 'ADVANCED SEARCH' link. The main content area is divided into three columns: 'CONSUMERS', 'PROVIDERS', and 'TASKS'. The 'CONSUMERS' column has three expandable sections: 'Division' (showing 'APO Eligible - Waiver' with a count of 1), 'Notes' (showing 'Complete' with a count of 8), and 'Pending' (showing a count of 1). The 'PROVIDERS' column is currently empty. The 'TASKS' column has three expandable sections: 'Links' (showing 'iConnect eLearning Library' and 'APO Help Desk'), 'My Management' (showing 'Current Active Cases' and 'Pending Plans'), and another empty section.

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**

The screenshot displays the iConnect software interface for creating a note. The 'Notes Details' section includes the following fields: Division (APD), Note By (Vogler, Mandi), Note Date (3/22/2023), Program/Provider, Note Type (Forensic), Note Sub-Type (Involuntary Commitment Order), Description (with a text area and a 'Add details here' tooltip), Status (Complete), and Date Completed (3/22/2023). Below this is an 'Attachments' section with an 'Add Attachment' button and a table with columns for Document, Description, Category, and Action. The 'Note Recipients' section has an 'Add Note Recipient' button and a table with columns for Name, Date Sent, Date Read, Status, Date Signed, and a Remove button.

Document	Description	Category	Action
There are no attachments to display			

Name	Date Sent	Date Read	Status	Date Signed	
vogler, Mandi	3/22/2023		Unread		Remove

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

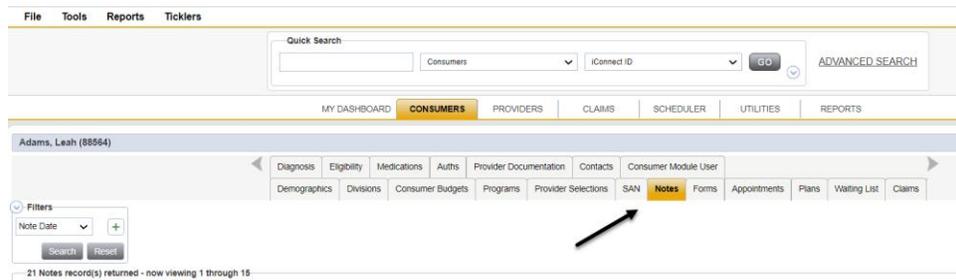
Residential Planning

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



The screenshot shows the top navigation bar of the APD iConnect system. On the left, there is a "My Dashboard" link and a "Sign Out" link. To the right, there is a "Role" dropdown menu currently set to "State Office Worker". Next to the dropdown is a "GO" button. A black arrow points to the "GO" button. Below the navigation bar, there is a section for "ADVANCED SEARCH" with a magnifying glass icon.

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



The screenshot shows the consumer record for Leah Adams (88564). The top navigation bar includes "File", "Tools", "Reports", and "Ticklers". Below this is a "Quick Search" section with a search box, a "Consumers" dropdown, an "iConnect ID" dropdown, and a "GO" button. A "MY DASHBOARD" section contains tabs for "CONSUMERS", "PROVIDERS", "CLAIMS", "SCHEDULER", "UTILITIES", and "REPORTS". The "CONSUMERS" tab is active. Below the tabs, there is a navigation bar for the consumer record with tabs for "Diagnosis", "Eligibility", "Medications", "Auths", "Provider Documentation", "Contacts", "Consumer Module User", "Demographics", "Divisions", "Consumer Budgets", "Programs", "Provider Selections", "SAN", "Notes", "Forms", "Appointments", "Plans", "Waiting List", and "Claims". The "Notes" tab is highlighted with a yellow background and a black arrow. A "Filters" section on the left shows "Note Date" with a dropdown and "Search" and "Reset" buttons. At the bottom, it says "21 Notes record(s) returned - now viewing 1 through 15".

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

Notes Details

Division: [dropdown]

Note By: [dropdown]

Note Date: 03/22/2023

Program/Provider: [dropdown]

Note Type: Facility Placement

Note Sub-Type: Residential Planning/Reserve

Description: On 3/22/2023 at 11:07 AM, Heidi Ingelster wrote: [text area]
On 3/22/2023 at 11:08 AM, Heidi Ingelster wrote: [text area]

Note: [text area]

Status: Pending

Date Completed: [text area]

Attachments

Note Recipients

Name	Date Sent	Date Read	Status	Date Signed	Remove
Ingelster, Heidi	03/22/2023		Unread		Remove

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 .

Notes Details

Division: [dropdown]

Note By: [dropdown]

Note Date: 03/22/2023

Program/Provider: [dropdown]

Note Type: Facility Placement

Note Sub-Type: Minor Placement

Description: [text area]

Note: Referral was approved. Add RRPC as note recipient

Status: Complete

Date Completed: 03/22/2023

Attachments

Note Recipients

Name	Date Sent	Date Read	Status	Date Signed	Remove
Ingelster, Heidi	03/22/2023		Unread		Remove

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**

The screenshot shows a 'Notes Details' form. At the top right, there is a 'Notes' tab and a timestamp 'Last Modified by: mcm@apd.wa.gov on 3/22/2023 11:07:28 AM'. The form fields are as follows:

- Division: APD
- Note ID: [Blank]
- Note Date: 03/22/2023
- Program Provider: [Blank]
- Note Type: Facility Placement
- Note Sub-Type: Detour - Merge
- Description: [Blank]
- Note: [Blank]
- Status: Complete
- Date Completed: 03/22/2023
- Attachments: [Blank]
- Note Recipients: [Blank]
- Note Recipients Table:

Name	Date Sent	Date Read	Status	Date Signed	Remove
Vigilante, Ward	03/22/2023		Unread		Remove

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**

The screenshot shows the 'ATTACHMENTS - Group Home Requests' section. The attachments list includes:

- 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

Below the attachments list, there is a field for 'Date this referral is complete' with the value 03/22/2023. A blue bar at the bottom indicates 'APD State Office / MCM only:'.

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 in the opd iConnect system. The top navigation bar includes 'File', 'Reports', and 'Word Merge'. The main form area is titled 'Residential Referral Form' and contains several fields: 'Review' (As Needed), 'Review Date' (03/22/2023), 'Division' (APD), 'Worker' (Vogeler, Mandi), 'Status' (Pending), and 'Provider/Program'. A 'Note' field is also present. Below the form, a blue banner reads 'RESIDENTIAL REFERRAL FORM'. A message states: 'This form should be used for group home and / or Intermediate Care Facility (ICF) requests'. A dropdown menu is set to 'Yes' for 'Consumer withdraws referral request for placement.'. Below that, 'Placement Request For?' is set to 'APD Licensed Facility' with '0 record(s) returned'. The bottom of the form includes 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; 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.

The screenshot shows the 'Workflow Wizard' interface in the opd iConnect system. The top navigation bar includes 'File', 'Reports', 'Welcome, Mandi Vogeler', and 'Workflow Wizard'. 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.'.

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

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 Vogeler 3/30/2023 2:59 PM **Ticklers**

Filters: Status Equal To New AND IConnect ID Apply Alert Days Before Due

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	03/22/2023	03/22/2023		New	Vogeler, Mandi
Adams, Leah	88564	Close all Facility Placement and Provider Facility Referral or ICF notes	03/22/2023	03/22/2023		New	Vogeler, Mandi
Adams, Leah	88564	Update Bed Information	03/23/2023	03/23/2023		New	Vogeler, Mandi
Adams, Leah	88564	Verify there is an Authorization for Residential Habitation	03/23/2023	03/23/2023		New	Vogeler, Mandi
Adams, Leah	88564	Update Bed vacancies	03/23/2023	03/23/2023		New	Vogeler, Mandi
Adams, Leah	88564	Verify Authorized Res. Hld. Level	03/23/2023	03/23/2023		New	Vogeler, 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 IConnect ID Apply Alert Days Before Due

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	03/22/2023	03/22/2023		New	Vogeler, Mandi
Adams, Leah	88564	Close all Facility Placement and Provider Facility Referral or ICF notes	03/22/2023	03/22/2023		New	Vogeler, Mandi
Adams, Leah	88564	Update Bed Information	03/23/2023	03/23/2023		New	Vogeler, Mandi
Adams, Leah	88564	Verify there is an Authorization for Residential Habitation	03/23/2023	03/23/2023		New	Vogeler, Mandi
Adams, Leah	88564	Update Bed vacancies	03/23/2023	03/23/2023		New	Vogeler, Mandi
Adams, Leah	88564	Verify Authorized Res. Hld. Level	03/23/2023	03/23/2023		New	Vogeler, Mandi

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

Residential Planning

The screenshot shows the 'iConnect' My Dashboard interface. At the top, it says 'Welcome, Mandi Vogeler' and '3/22/2023 11:46 AM'. There are links for 'My Dashboard' and 'Sign Out', and a 'Role' dropdown set to 'Region Clinical Workstream Worker'. Below the navigation bar, there are tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'CLAIMS', 'SCHEDULER', and 'REPORTS'. The 'CONSUMERS' tab is active, showing a summary of various categories:

- Division: Application Pended (1)
- Provider Selections: Admitted (1)
- Notes: Complete (2), Pending (2)
- Ticklers: Ticklers (4) - This row is highlighted with a red box.

 On the right side, there are sections for 'Links' (iConnect eLearning Library, APD Help Desk) and 'My Management' (Current Active Cases, Enrollments, SAN Queue, Pending Assessments Queue, Pending Provider Assessments Queue, Waiting List, Provider Credentials Queue).

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 'iConnect' Forms menu. The 'File' menu is open, and 'Save and Close Forms' is highlighted. Other options include 'History', 'Duplicate Assessment', 'Spell Check', 'Save Forms', 'Print', and 'Close Forms'. The 'Suncoast' section is also visible. Below the menu, there are sections for 'Attachments - Group Home Requests' and 'Group Home Requests'. At the bottom, there is a field for 'Date this referral is complete:' with the value '03/22/2023' and a calendar icon. A blue bar at the bottom right says 'APD State Office / MCM only:'.

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 msqster@adatum.org at 03/23/2023 11:07:26 AM

Notes Details

Division: [AFS]

Note ID: [Single Note]

Note Date: 03/22/2023

Program/Provider: []

Note Type: [Facility Placement]

Note Sub-Type: [Observation/Planning Request]

Description: On 3/12/2023 at 12:07 PM, Resid. Registrar wrote:
 Attach order

Note: [New Text]

Status: [Complete]

Date Completed: 03/22/2023

Attachments

Add Attachment

Documents

There are no attachments to display

Description	Category	Action
-------------	----------	--------

Note Assignments

Add Note Recipient

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

3/30/2023 3:08 PM

File

Filters: Status: [v] Equal To: [v] New: [v] AND: [v]

iConnect ID: [v] +

Apply Alert Days Before Due

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.	03/22/2023	03/22/2023		New	WV
Adams, Leah	88564	Close all Facility Placement and Provider FACILITY Referral or ICF Referrals	03/22/2023	03/22/2023		New	WQ
Adams, Leah	88564	Update Bed Information	03/23/2023	03/23/2023		New	WQ
Adams, Leah	88564	Verify there is an Authorization for Residential Habilitation	03/23/2023	03/23/2023		New	WQ
Adams, Leah	88564	Update Bed vacancies	03/23/2023	03/23/2023		New	WQ
Adams, Leah	88564	Verify Authorized Res. Hab. Level	03/23/2023	03/23/2023		New	WQ
Adams, Leah	88564	Update Bed Information	03/23/2023	03/23/2023		New	WQ
Adams, Leah	88564	Update Provider - Bed vacancies	03/23/2023	03/23/2023		New	WQ