

Chapter 14 | WSC Reassignment

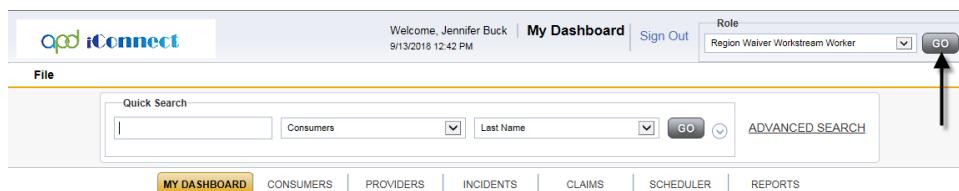
Introduction

In some instances, a change in the assigned Waiver Support Coordinator is warranted. These instances can be initiated by the Consumer, the WSC, or circumstances that were generated a need for the change. This Chapter outlines the required steps to reassign WSCs for an individual Consumer or a group of Consumers.

Reassignment Notification

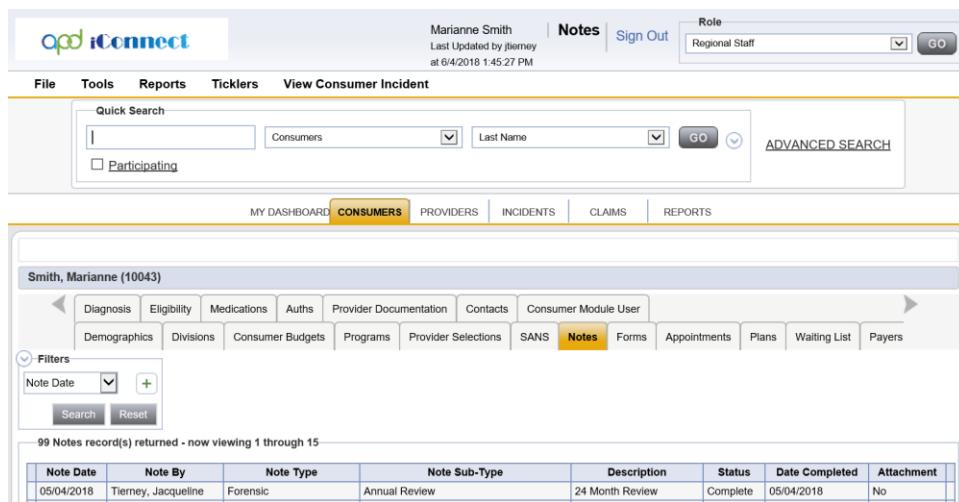
Consumer notifies the local regional office of his/her desire to change Waiver Support Coordinators. Upon receiving a notification of a Consumers desire to change Waiver Support Coordinators, Region Staff initiate the process by adding a Note in APD iConnect.

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



The screenshot shows the APD iConnect interface. At the top, there is a 'Welcome, Jennifer Buck | My Dashboard | Sign Out' bar. Below it, a 'Role' dropdown is set to 'Region Waiver Workstream Worker'. A large black arrow points upwards to the 'GO' button, which is highlighted in grey. The main dashboard area includes a 'Quick Search' bar with fields for 'Last Name' and a 'GO' button, and a 'File' menu. Below the search bar are tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', 'SCHEDULER', and 'REPORTS'.

2. Navigate to the Consumers record and click the **Notes** tab > click **File > Add Notes**.



The screenshot shows the APD iConnect interface for a specific consumer record. At the top, the consumer's name 'Marianne Smith' and last updated date '9/13/2018 12:42 PM' are displayed. A 'Notes' tab is selected, and a 'File' menu is open with an arrow pointing to the 'Add Notes' option. The main consumer record page includes tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'REPORTS'. Below the tabs, there is a 'Filters' section with a 'Note Date' dropdown and a 'Search' button. The notes section shows a table with 99 records, with the first one being '05/04/2018 Tierney, Jacqueline Forensic Annual Review 24 Month Review Complete 05/04/2018 No'.

3. The Note Details page is displayed. Update the following fields:
 - a. Division = APD
 - b. Note Type = WSC Change Request
NOTE: WSC and Service Providers cannot see this Note Type
 - c. Note Subtype = Consumer Requested Selection Form Sent
 - d. Note recipient = click the **ellipsis** to search for and select Waiver Workstream Lead worker record.
 - e. Status = Complete
 - f. Attach all supporting documentation

A screenshot of the apd iConnect software interface. The top navigation bar includes the apd iConnect logo, a user profile for Alice Sheppard (5/4/2018 12:28 PM), and a 'Notes' tab. Below the navigation is a 'File' and 'Tools' menu. The main content area is titled 'Notes Details'. It contains the following fields with data and validation messages:

- Division *: APD
- Note By *: Buck, Jennifer
- Note Date *: 05/04/2018
- Program/Provider: (dropdown menu)
- Note Type *: WSC Change Request
- Note Sub-Type: Consumer Requested Selection Form Sent
- Description: sent the form to the consumer
- Note: (large text area)
- Status *: Complete
- Date Completed: 05/04/2018

Arrows from the list items point to the Note Type, Note Sub-Type, and Status fields.

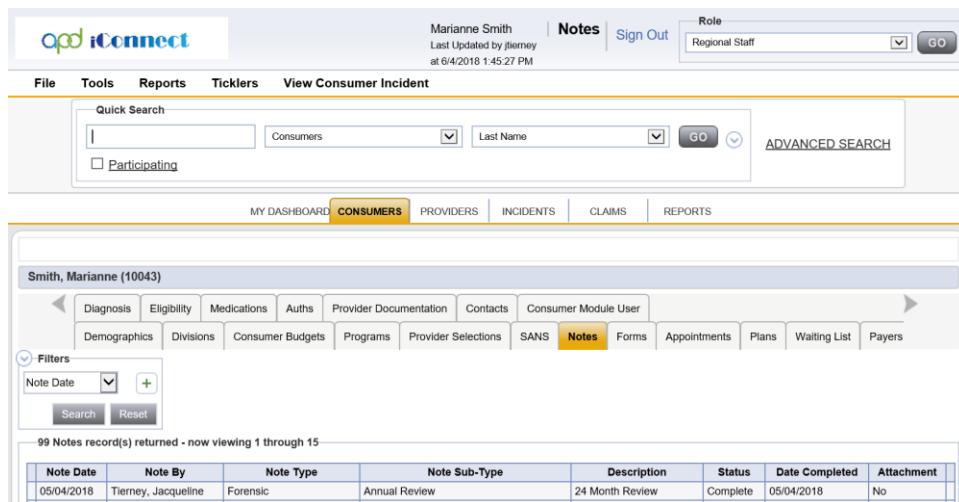
4. Click **File > Save and Close Notes**
5. The WSC Selection Form and other supporting documents will be printed and mailed to the Consumer.

WSC Selection – New Agency/Provider

The Consumer notifies the local regional office of his/her newly selected Waiver Support Coordinator agency or solo provider. Upon receiving the notification, the Region Staff will add a Note in APD iConnect to begin the reassignment process.

New WSC Selected - Add a Note

1. To begin, log into APD iConnect and set Role = Region Waiver Workstream Worker or Lead. Click **Go**.
2. Navigate to the Consumers record and click the **Notes** tab > click **File > Add Notes**.



The screenshot shows the APD iConnect interface. At the top, there is a header with the APD iConnect logo, the user's name 'Marianne Smith', the 'Notes' tab (which is highlighted in yellow), a 'Sign Out' link, and a 'Role' dropdown set to 'Regional Staff'. Below the header is a navigation bar with links for 'File', 'Tools', 'Reports', 'Ticklers', and 'View Consumer Incident'. The 'CONSUMERS' tab is currently selected. Underneath the navigation bar is a search bar with fields for 'Quick Search' (containing 'Consumers'), 'Last Name' (containing 'Smith'), and a 'GO' button. There is also an 'ADVANCED SEARCH' link. The main content area displays a consumer record for 'Smith, Marianne (10043)'. The 'Notes' tab is highlighted in yellow. Below the tabs are buttons for 'Filters', 'Note Date' (with a dropdown menu), 'Search', and 'Reset'. The table below shows 99 notes returned, with the first 15 listed. The columns in the table are: Note Date, Note By, Note Type, Note Sub-Type, Description, Status, Date Completed, and Attachment. The first note in the table is: '05/04/2018 Tierney, Jacqueline Forensic Annual Review 24 Month Review Complete 05/04/2018 No'.

3. The Note Details page is displayed. Update the following fields:
 - a. Division = APD
 - b. Note Type = WSC Selection
 - c. Note Subtype = WSC Transfer – Agency
 - d. Status = Complete
 - e. Attach all supporting documentation

apd iConnect

Alice Sheppard | Notes
5/4/2018 12:39 PM

File Tools

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 05/04/2018

Program/Provider

Note Type * **WSC Selection**

Note Sub-Type **WSC Transfer - Agency**

Description

Consumer requested to change WSC agencies

Note

Status * Complete

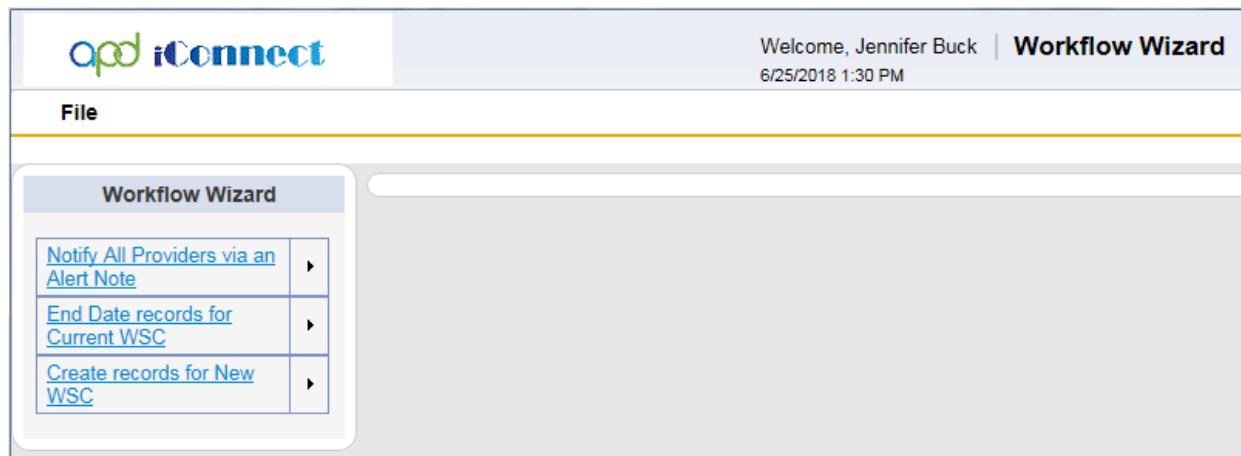
Date Completed 05/04/2018

4. Click **File > Save and Close Notes**.
5. Upon saving the Note, a Workflow Wizard will trigger with the following Ticklers for the User.
 - a. Notify all Providers via an Alert Note
 - b. End date records for current WSC
 - c. Create records for New WSC
6. The actions to take for each are listed in the following sections.

Notify All Providers via an Alert Note

The Consumer has notified the local regional office of his/her newly selected Waiver Support Coordinator and the Region Waiver Workstream Lead has created a Note in the section above to begin the reassignment process. This note triggers a Workflow Wizard with a tickler to Notify All Providers via and Alert Note.

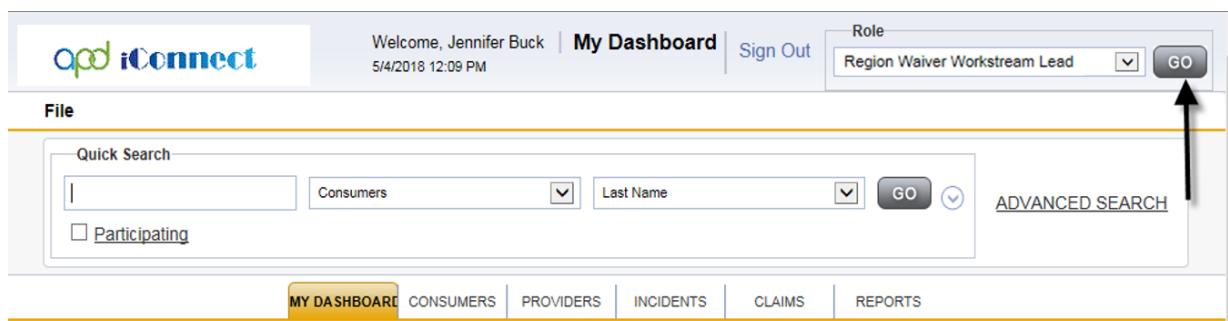
1. To begin, the user would have just saved the WSC Selection Note and triggered the Workflow Wizard. The ticklers are displayed in a new window. Click the tickler to Open it.



Workflow Wizard

Notify All Providers via an Alert Note	>
End Date records for Current WSC	>
Create records for New WSC	>

2. The ticklers are also visible via My Dashboard at any time. To begin log into APD iConnect and set Role = Region Waiver Workstream Lead. Click **Go**.



Welcome, Jennifer Buck | **My Dashboard** | Sign Out

Role
Region Waiver Workstream Lead

GO

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS REPORTS

3. 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.
Click **Search**

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Sheppard, Alice	10053	Create records for New WSC	05/04/2018	05/04/2018		New	Buck, Jennifer
Sheppard, Alice	10053	End Date records for Current WSC	05/04/2018	05/04/2018		New	Buck, Jennifer
Sheppard, Alice	10053	Notify All Providers via an Alert Note	05/04/2018	05/04/2018		New	Buck, Jennifer



Tip

When searching for a future Tickler, remember to clear the check box next to **Apply Alert Days Before Due** prior to clicking **Search**.

5. Click the **Notify All Providers via an Alert Note** tickler to Open it. The Notes Detail page displays.
6. Update the following fields:
 - a. Division = APD
 - b. Note Type = WSC Selection
 - c. Note Subtype = Notification of WSC Change
 - d. Note = Add the message you want the providers to see each time they login into the account.
 - e. Status = Alert

Workflow Wizard

Set the note status to "Alert"

Notify All Providers via an Alert Note

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 05/04/2018

Program/Provider

Note Type * **WSC Selection**

Note Sub-Type Notification of WSC Change

Description

Add the message you want the providers to see each time they login into the account.

Note

Status * **Alert**

Date Completed

7. Click **File > Save Notes**. The Tickler is marked as complete.

Welcome, Jennifer Buck | **Workflow Wizard**

5/4/2018 2:24 PM

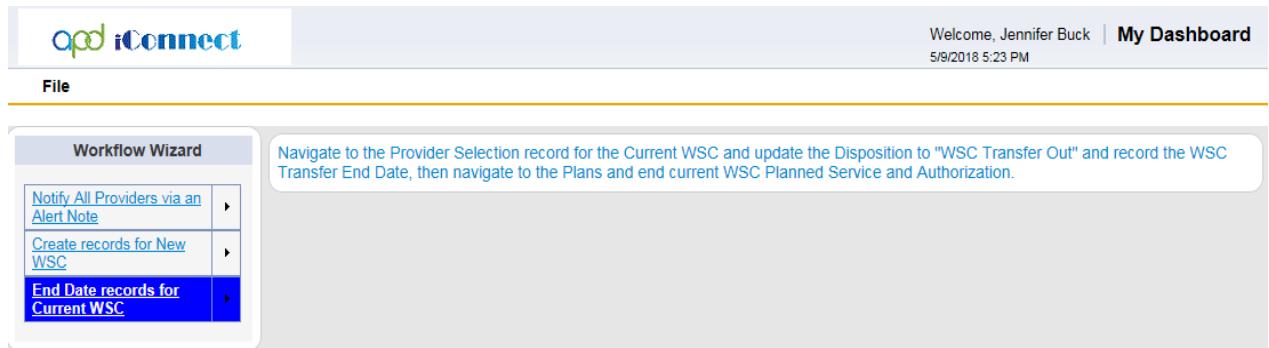
File

Workflow Wizard

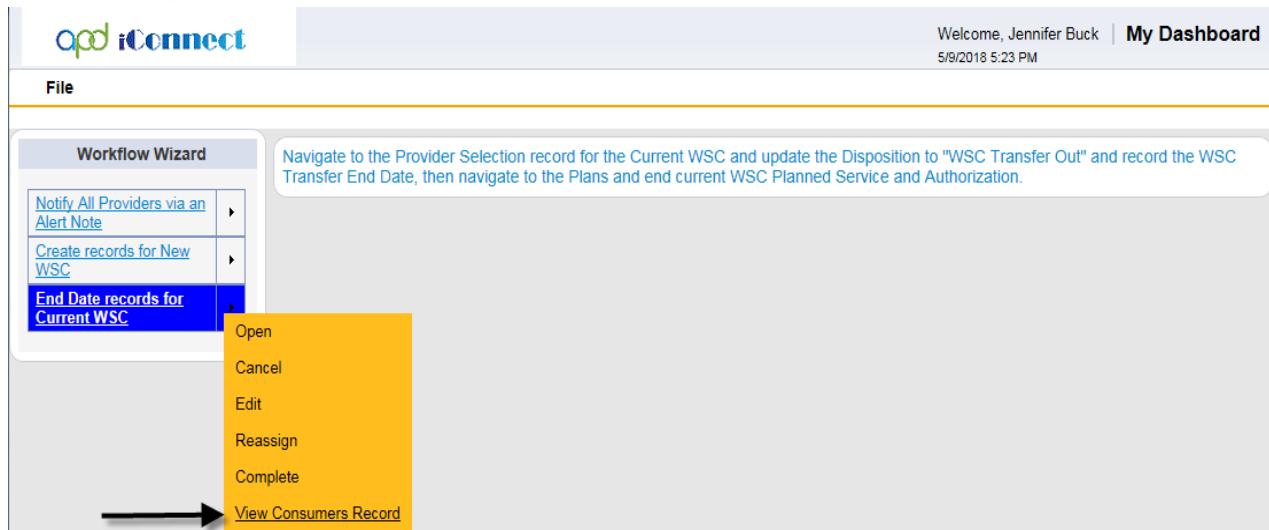
Notify All Providers via an Alert Note

End Date Records for Current WSC

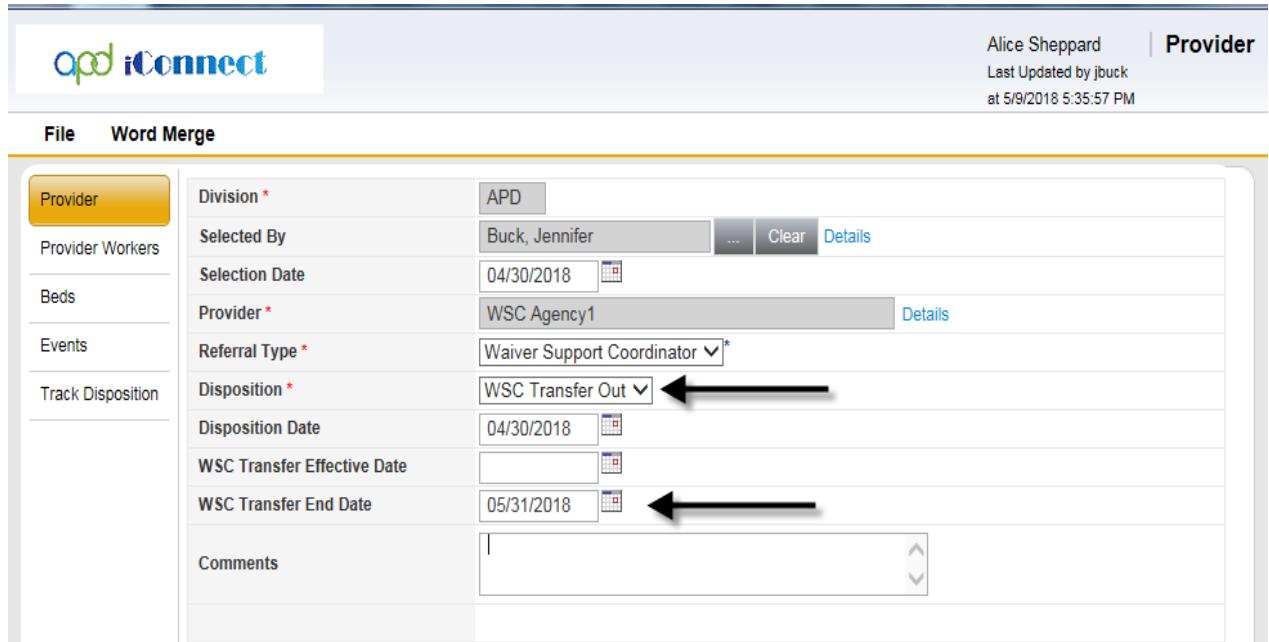
1. Return to the Workflow Wizard and find the Tickler called **End Date Records for Current WSC** tickler.
2. If the person receiving the tickler is not the Waiver Liaison assigned to the current WSC, hover over the arrow next to the Tickler to click **Reassign** to reassign it to the correct person.
3. Otherwise, click to open the Tickler. The following message displays:



4. Users can click the **View Consumer Record** option from the tickler flyout menu to navigate quickly to the Consumer record from the tickler or can complete a quick Search to navigate to the consumer's record.

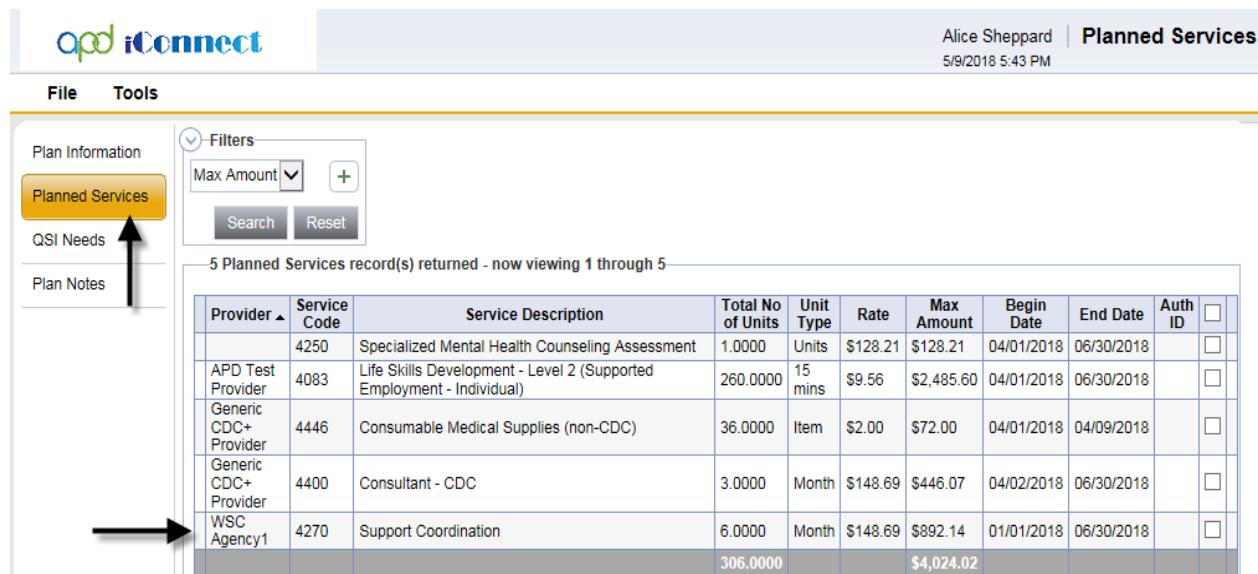


5. Click the **Provider Selection** tab. From the list view grid, select the applicable WSC Provider Agency record. The provider detail page displays.
6. Update the following fields:
 - a. Disposition = WSC Transfer Out
 - b. Disposition Date = enter date the Disposition was changed
 - c. WSC Transfer End Date = enter the end date (last day of the month)



The screenshot shows the qpd iConnect software interface. The top navigation bar includes 'File' and 'Word Merge'. The left sidebar has tabs for 'Provider' (which is selected and highlighted in yellow), 'Provider Workers', 'Beds', 'Events', and 'Track Disposition'. The main content area displays provider selection details. The 'Division *' field is set to 'APD'. The 'Selected By' field shows 'Buck, Jennifer' with a 'Details' button. The 'Selection Date' is '04/30/2018'. The 'Provider *' field is 'WSC Agency1' with a 'Details' button. The 'Referral Type *' is 'Waiver Support Coordinator'. The 'Disposition *' field is set to 'WSC Transfer Out' (with an arrow pointing to it). The 'Disposition Date' is '04/30/2018'. The 'WSC Transfer Effective Date' field is empty. The 'WSC Transfer End Date' field is set to '05/31/2018' (with an arrow pointing to it). The 'Comments' field is empty. The top right corner shows the user 'Alice Sheppard' and the date 'Last Updated by jbuck at 5/9/2018 5:35:57 PM'.

7. Click **File > Save and Close Provider**
8. Continue with the second part of the message tickler, to end date the Current WSC Planned Service and Authorization.
9. Click the **Plan** tab. Select the APD waiver Plan to open the Plan Details page. Click the **Planned Services** subpage.



apd iConnect

File Tools

Plan Information

Planned Services (highlighted with a yellow box and an upward arrow)

QSI Needs

Plan Notes

Filters

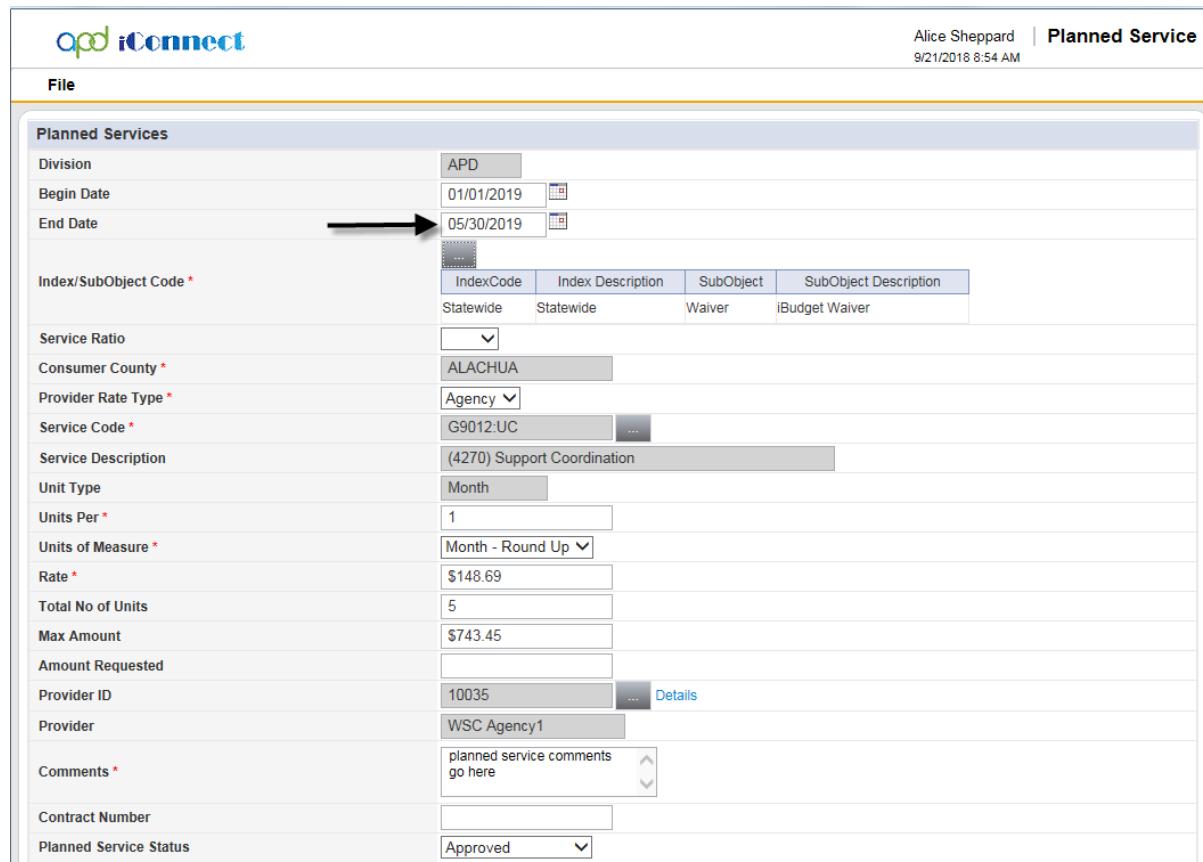
Max Amount

5 Planned Services record(s) returned - now viewing 1 through 5

Provider	Service Code	Service Description	Total No of Units	Unit Type	Rate	Max Amount	Begin Date	End Date	Auth ID	<input type="checkbox"/>
APD Test Provider	4250	Specialized Mental Health Counseling Assessment	1.0000	Units	\$128.21	\$128.21	04/01/2018	06/30/2018		<input type="checkbox"/>
Generic CDC+ Provider	4083	Life Skills Development - Level 2 (Supported Employment - Individual)	260.0000	15 mins	\$9.56	\$2,485.60	04/01/2018	06/30/2018		<input type="checkbox"/>
Generic CDC+ Provider	4446	Consumable Medical Supplies (non-CDC)	36.0000	Item	\$2.00	\$72.00	04/01/2018	04/09/2018		<input type="checkbox"/>
Generic CDC+ Provider	4400	Consultant - CDC	3.0000	Month	\$148.69	\$446.07	04/02/2018	06/30/2018		<input type="checkbox"/>
WSC Agency1	4270	Support Coordination	6.0000	Month	\$148.69	\$892.14	01/01/2018	06/30/2018		<input type="checkbox"/>
			306.0000			\$4,024.02				

10. Select the Support Coordination planned service to open the details page.

11. Change the End Date. The page refreshes and the totals update.



apd iConnect

File

Planned Services

Division

Begin Date

End Date

Index/SubObject Code *

IndexCode	Index Description	SubObject	SubObject Description
Statewide	Statewide	Waiver	iBudget Waiver

Service Ratio

Consumer County *

Provider Rate Type *

Service Code *

Service Description

Unit Type

Units Per *

Units of Measure *

Rate *

Total No of Units

Max Amount

Amount Requested

Provider ID

Provider

Comments *

Contract Number

Planned Service Status

12. Click **File > Save and Close Planned Service**.

13. A notification displays for the user that the planned service is out of sync with the authorization. The changes to the planned service must also be made to the authorization.

apd iConnect

John Sheppard | **Planned Service**
Last Updated by jbuck
at 9/21/2018 12:26:12 PM

File

Planned Service

Planned Services

Division	APD
Begin Date	07/01/2018
End Date	09/22/2018
Index/SubObject Code *	IndexCode Index Description SubObject SubObject Description
	SunCoast SunCoast Region Waiver iBudget Waiver
Service Ratio	
Consumer County *	BAKER
Provider Rate Type *	Agency
Service Code *	G9012:UC
Service Description	(4270) Support Coordination
Unit Type	Month
Units Per *	1.00
Units of Measure *	Month - Round Up
Rate *	\$148.69
Total No of Units	3.0000
Max Amount	\$446.07
Amount Requested	
Corresponding Auth No.	219
Provider ID	10035 Details
Provider	WSC Agency1
Comments *	planned service comments
Contract Number	
Planned Service Status	Approved

14. To do so, select the **Planned Services** subpage.

15. Click the checkbox next to the planned service that was updated.

16. Click **File > Update Authorization**. A success notification window displays, and the authorization is updated.

File Tools

Add Planned Service
Create Authorization(s)
Print
Update Authorization(s)
Close Planned Services

Search

Pending Services record(s) returned - now viewing 1 through 4

Provider	Service Code	Service Description	Unit Type	Rate	Max Amount	Amount Requested	Total No of Units	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County	<input type="checkbox"/>
Pending Provider	H0043:UC:SC	(4175) Residential Rehabilitation - Live In	Day	\$129.08	\$84,357.48		731.0000	07/01/2018	06/30/2020	Solo	1.1	BAKER	<input type="checkbox"/>
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$446.07		3.0000	07/01/2018	09/30/2018	Agency		BAKER	<input checked="" type="checkbox"/>
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,764.28		12.0000	07/01/2018	06/30/2019				<input type="checkbox"/>
WSC Agency2	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,764.28		12.0000	07/01/2018	06/30/2019				<input type="checkbox"/>
\$86,372.11												758.0000	

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

17. The authorization details can be viewed by selecting the + next to the edited planned service or from the Authorization tab.

File Tools

Plan Information

Planned Services

CSI Needs

Plan Notes

Filters

Max Amount

Search Reset

4 Planned Services record(s) returned - now viewing 1 through 4

Provider	Service Code	Service Description	Unit Type	Rate	Max Amount	Amount Requested	Total No of Units	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County
Pending Provider	H0043:UC:SC	(4175) Residential Habilitation - Live In	Day	\$129.00	\$94,357.46	731.0000	07/01/2018	06/30/2020	Solo	1.1	BAKER	
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$446.07	3.0000	07/01/2018	09/22/2018	Agency		BAKER	
Auth ID	Auth Svc ID	Auth Start Date	Auth End Date	Auth Status	Auth Svc Start Date	Auth Svc End Date	Auth Svc Status	Auth Svc EDI Status				
140841	219	07/01/2018	09/22/2018	Approved	07/01/2018	09/22/2018	Approved	Ready to Send				
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28	12.0000	07/01/2018	06/30/2019				
WSC Agency2	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28	12.0000	07/01/2018	06/30/2019				
					\$98,372.11	758.0000						

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

apd iConnect

Alice Sheppard
Last Updated by jbuck
at 5/9/2018 5:22:54 PM

File Reports Ticklers View Consumer Incidents

Sheppard, Alice (10053)

Diagnosis Eligibility Medications **Auths** Provider Documentation Contacts Consumer Module User

Demographics Divisions Programs Provider Selections Notes Forms Appointments Plans Waiting List Payers Legal Issues

Filters

Auth Service EDI Status Equal To Ready to Send AND

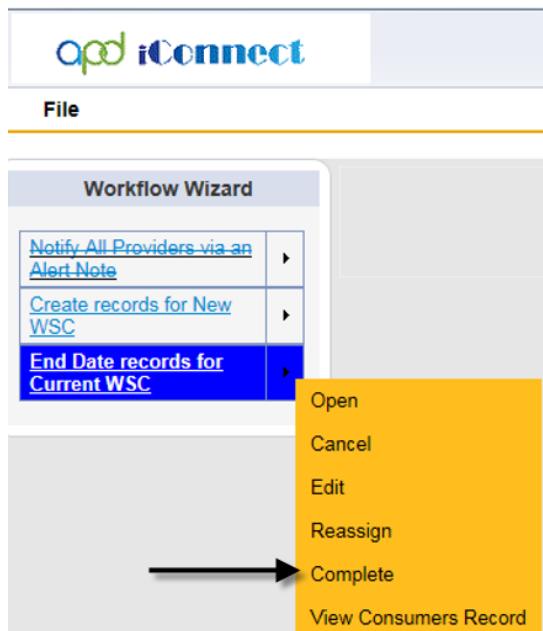
Division +

Search Reset

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

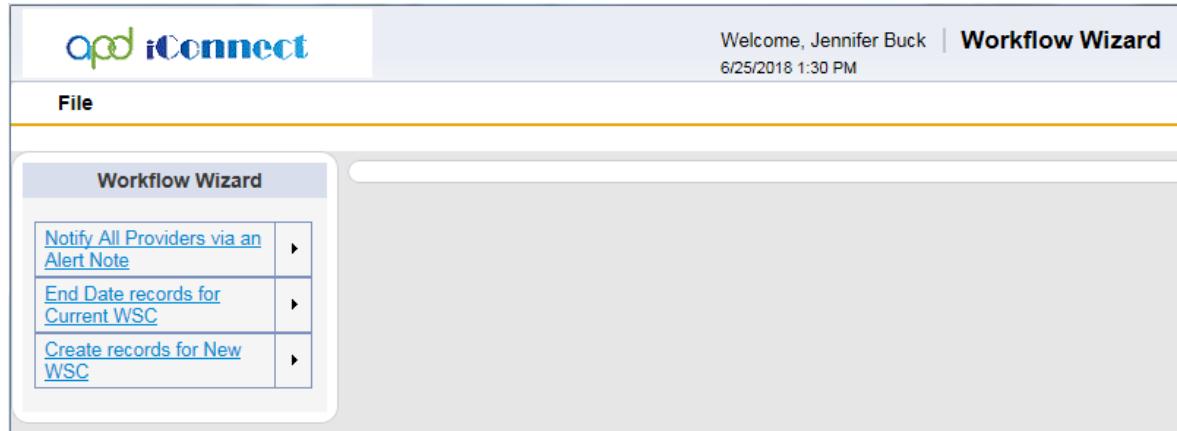
Division	Provider	PA Number	Auth ID	Start Date	End Date	Status	Cancelled
APD	WSC Agency1		140676	04/01/2018	06/30/2018	Approved	No
APD	APD Test Provider		140675	04/01/2018	06/30/2018	Approved	No
APD	A Test Provider		140669	04/01/2018	06/30/2018	Approved	No

18. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

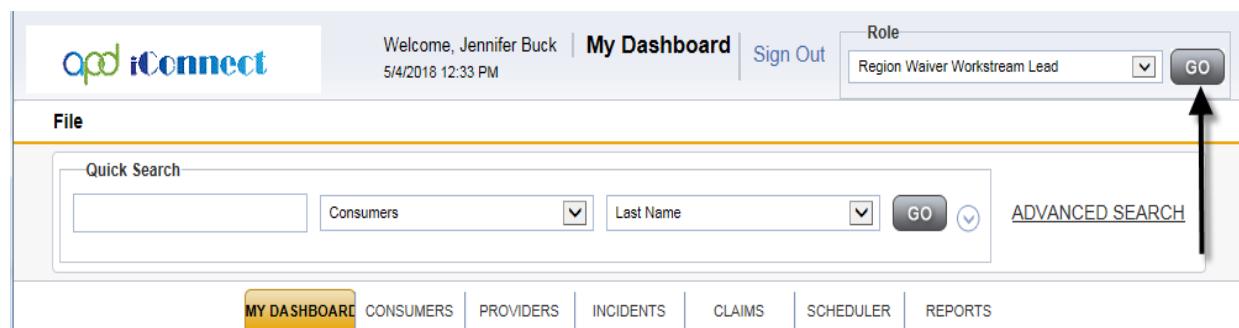


Create Records for New WSC

1. To begin, the user would have just saved the WSC Selection Note and triggered the Workflow Wizard. The user will be prompted to create new Provider Selection records for the new WSC and later change the Primary Worker to the new WSC (real time.) The user will also be prompted to end date the Provider Selection Record and Authorization for the current WSC and later close the current WSC Provider Record (real time.)
2. The ticklers are displayed in a new window. Click the tickler to Open it.



3. The ticklers are also visible via My Dashboard at any time. To begin log into APD iConnect and set Role = Region Waiver Workstream Lead. Click Go.



4. 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.

5. From here, user the multi variable search to find the Tickler.
Click **Search**

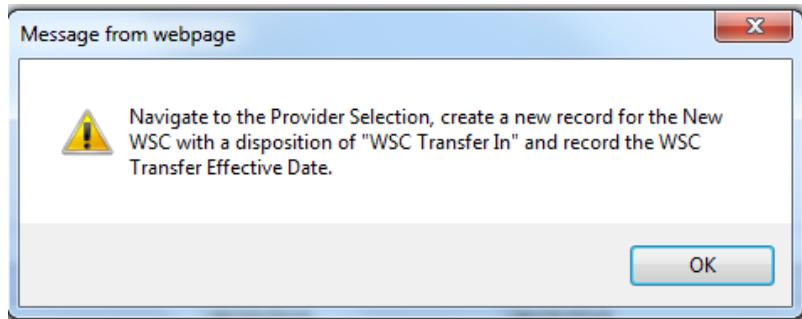
Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Sheppard, Alice	10053	Create records for New WSC	05/04/2018	05/04/2018		New	Buck, Jennifer
Sheppard, Alice	10053	End Date records for Current WSC	05/04/2018	05/04/2018		New	Buck, Jennifer
Sheppard, Alice	10053	Notify All Providers via an Alert Note	05/04/2018	05/04/2018		New	Buck, Jennifer



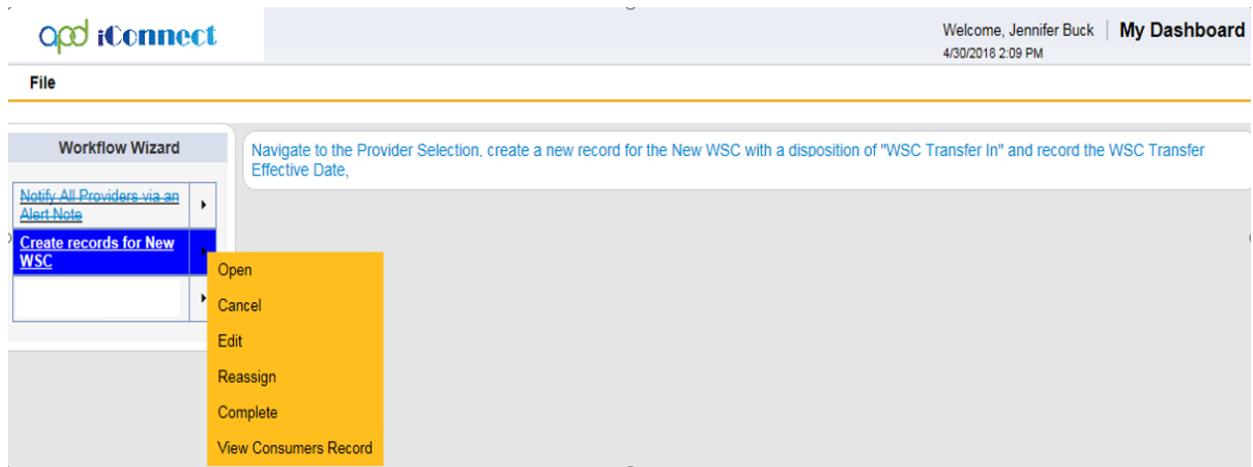
Tip

When searching for a future Tickler, remember to clear the check box next to *Apply Alert Days Before Due* prior to clicking **Search**.

6. Find the Tickler called. **Create records for New WSC** tickler to open it.
 - a. If the person receiving the tickler is not the Waiver Liaison assigned to the current WSC, hover over the arrow next to the Tickler to click **Reassign** to reassign it to the correct person.
 - b. Otherwise, click to open the Tickler. The following message displays:



7. To complete the Tickler, click the **View Consumer Record** option from the tickler flyout menu to navigate quickly to the Consumer record from the tickler or can complete a quick Search to navigate to the consumer's record.



8. Click the **Provider Selections** tab.
9. Click **File > Add Provider**. The Provider Selection Detail page opens.

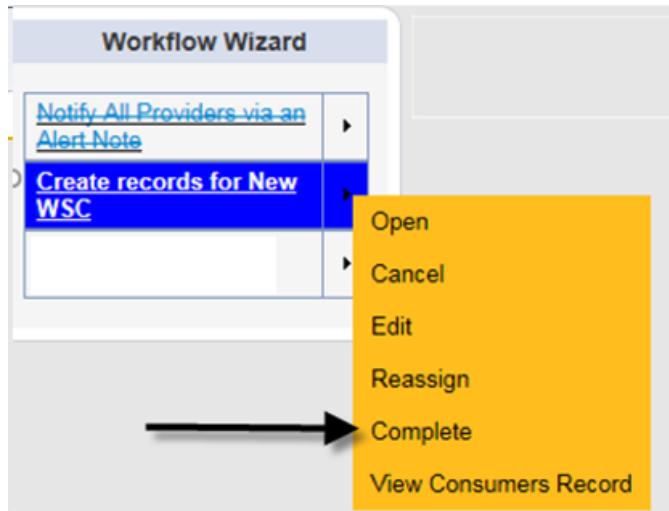
The screenshot shows the 'Provider' section of the apd iConnect Case Management Module. The 'Provider' field is highlighted with a black arrow pointing to it. The 'Provider Worker' field is also highlighted with a black arrow pointing to it. A double-headed arrow points to the 'WSC Transfer Effective Date' field, which is set to 05/01/2018.

10. Update the following fields:

- a. Division = default to APD
- b. Selected by = defaults to Self
- c. Selection date = defaults to today
- d. Provider = select the ellipsis to search for and select the new WSC Agency
- e. Referral Type = Waiver Support Coordinator
- f. Disposition = WSC Transfer In
- g. Disposition Date = defaults to today
- h. Provider Worker = search for and select the new WSC Worker.
- i. WSC Transfer Effective Date = enter the effective date of the transfer

11. Click **File > Save and Close Provider**.

12. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.



Add a new Planned Service for the new WSC, validate and create the authorization

1. Upon saving the Provider Selection Record with a Disposition = WSC Transfer In, a Workflow Wizard will trigger for the user with three Ticklers.
 - a. Add a new Planned Service for the new WSC, validate and create the Authorization.
 - b. On the effective date, update Primary Worker on the Division record to the new WSC
 - c. On the effective date, close Previous WSC's Provider Selection Record by changing the disposition to Closed. The end date and WSC-Transfer Out disposition were updated on the previous WSC's Provider Selection record in an earlier step for tracking purposes. This tickler is for the WSC to close the Previous WSC Provider Selection record which removes access to the consumer's record for the previous WSC.
2. From the open Workflow Wizard window click the **Add a new Planned Service for the new WSC, validate and create the authorization** tickler. The Plans list view displays.

The screenshot shows the APD iConnect interface. On the left, a sidebar titled 'Workflow Wizard' contains a blue box with the text: 'Add a new Planned Service for the new WSC, validate and create the Authorization'. Below this are two links: 'On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.' and 'On the Effective Date update the Primary Worker on the Division record to the new WSC'. On the right, a 'Filters' section is shown with a dropdown for 'Division' and buttons for 'Search' and 'Reset'. Below the filters, a table displays '3 Plans record(s) returned - now viewing 1 through 3'. The table has columns: Division, Program, Cost Plan Creation Date, Closed Date, Worker, Status, Cost Plan Begin Date, and Cost Plan End Date. The data is as follows:

Division	Program	Cost Plan Creation Date	Closed Date	Worker	Status	Cost Plan Begin Date	Cost Plan End Date
APD	APD Waiver	09/10/2018		Buck, Jennifer	Draft	07/01/2018	06/30/2020
APD		06/01/2018		Buck, Jennifer	Draft		
APD	APD Waiver	04/01/2018		Buck, Jennifer	Draft	07/01/2018	06/30/2020

3. Click the APD waiver Plan. The Plan Information page displays.
4. Click the **Planned Services** subpage.

The screenshot shows the APD iConnect interface with the 'Planned Services' subpage selected. On the left, a sidebar has three buttons: 'Plan Information' (highlighted in yellow), 'Planned Services' (highlighted in yellow with an arrow pointing to it), and 'QSI Needs'. On the right, a 'Filters' section is shown with a dropdown for 'Max Amount' and buttons for 'Search' and 'Reset'. Below the filters, a table displays '5 Planned Services record(s) returned - now viewing 1 through 5'. The table has columns: Provider, Service Code, Service Description, Total No of Units, Unit Type, Rate, Max Amount, Begin Date, End Date, and Auth ID. The data is as follows:

Provider	Service Code	Service Description	Total No of Units	Unit Type	Rate	Max Amount	Begin Date	End Date	Auth ID
	4250	Specialized Mental Health Counseling Assessment	1.0000	Units	\$128.21	\$128.21	04/01/2018	06/30/2018	
APD Test Provider	4083	Life Skills Development - Level 2 (Supported Employment - Individual)	260.0000	15 mins	\$9.56	\$2,485.60	04/01/2018	06/30/2018	
Generic CDC+ Provider	4446	Consumable Medical Supplies (non-CDC)	36.0000	Item	\$2.00	\$72.00	04/01/2018	04/09/2018	

5. Click **File > Add Planned Service**.
6. A new Planned Service record opens. Update the following fields:
 - a. Fiscal Year Choose the applicable fiscal year.
NOTE: Fiscal Years in APD iConnect are in yyyy format. This is different than the yy – yy FY format APD is used to. For example: 20 – 21 FY = 2021 in APD iConnect.
 - b. Begin Date Enter the begin and End dates as the dates of service.
 - c. End Date Enter the begin and End dates as the dates of service.

NOTE: The Start and End Dates of a Planned Service must be within the Cost Plan Begin and End Dates located on the Plan Information page.

- d. Index/SubObject Code: The ISO is an APD iConnect term that defines which 'bucket of money' the service is being paid from Statewide and by region.
 - WSCs will select their regional ISO, not 'Statewide.'
- e. Service Ratio: Select the correct ratio only if the service contains a ratio
- f. County: pulls from the consumer demographic page
- g. Geographic Differential: Select Geographic, Non-geographic or Monroe
- h. Provider Rate Type: Select Solo or Agency
- i. Service Code: Search for and select the service code.
- j. Unit Type auto populates when service code selected
- k. Unit Per Enter the identified number of units per period.
 - i. This value will vary depending on the service selected and can vary with time of year.
- l. Unit of Measure
- m. Total No of Units will auto-populate
- n. Provider ID: Search for and select the service provider if known at the time the planned service is added. If not known, can select Pending Provider. A valid provider must be selected before creating an authorization.
- o. Rate will auto populate and depending on the service code may or may not be editable.
- p. Max Amount will auto populate once the service code, rate and provider have been selected.
- q. Amount Requested = used by the Lead when the amount requested does not equal the amount approved
- r. Authorization Notes/Comments = enter notes. This is a required field. Text in this field will be visible on the Auth Service and printed authorization.
- s. Contract Number = enter if applicable.
- t. Non-Taxable = check if applicable.
- u. Planned Service Status = Proposed.

Planned Services

Division: APD
Fiscal Year: 2021
Begin Date: 07/01/2020
End Date: 06/30/2021

Index/SubObject Code *	IndexCode	Index Description	SubObject	SubObject Description
Central	Central Region	Waiver	iBudget Waiver	

Service Ratio:

Consumer County: Miami-Dade
Geographic Differential: Geographic
Provider Rate Type: Solo
Service Code: G9012:UC
Service Description: (4270) Support Coordination

Unit Type: Month
Units Per: 1
Units of Measure: Month - Round Up
Total No of Units: 12
Provider ID: 14988
Provider: A Test Provider
Rate: \$148.69
Max Amount: \$1,784.28
Amount Requested:

WSC comments visible on the authorization

Authorization Notes/Comments *

7. Click **File > Save and Close Planned Service.**

8. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

Workflow Wizard

John Sheppard | **Plans**
9/13/2018 3:14 PM

File

Filters

Division:

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

Program	Cost Plan Creation Date	Closed Date	Worker	Status	Cost Plan Begin Date	Cost Plan End Date
Waiver	09/10/2018		Buck, Jennifer	Draft	07/01/2018	06/30/2020
Waiver	06/01/2018		Buck, Jennifer	Draft		
Waiver	04/01/2018		Buck, Jennifer	Draft	07/01/2018	06/30/2020

Add a new Planned Service for the new WSC, validate and create the Authorization

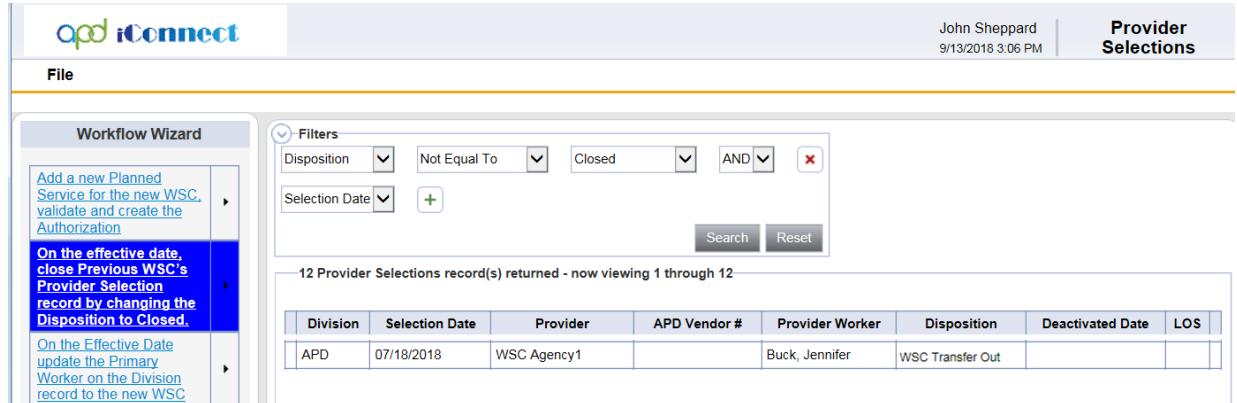
On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.

On the Effective Date update the Primary Worker on the Division record to the new WSC

Open **Cancel** **Edit** **Reassign** **Complete** **View Consumers Record**

Close Previous WSC's Provider Selection Record

1. Upon saving the Provider Selection Record with a Disposition = WSC Transfer In, a Workflow Wizard will trigger for the user with the following Ticklers to complete on the effective date of the new WSC. Similar ticklers were completed earlier when an end date was added to the Previous WSC's Provider Selection record for tracking purposes, but these ticklers are closing the records, removing access for the previous WSC.
 - a. On the effective date, update Primary Worker on the Division record to the new WSC. This tickler will trigger immediately but the user should not complete it until the effective date because the changes are effective immediately.
 - b. On the effective date, close Previous WSC's Provider Selection Record by changing the disposition to Closed. The end date was added to the previous WSC's Provider Selection record in an earlier step. This tickler is for the WSC to close the Previous WSC Provider Selection record. This tickler will trigger immediately but the user should not complete it until the effective date because the changes are effective immediately.
 - c. Add a new Planned Service for the new WSC, validate and create the Authorization.
2. Click the **On the effective date Close Previous WSC's Provider Selection Record by changing the Disposition to Closed** tickler. The Provider Selection list view displays.



The screenshot shows the iConnect software interface. At the top, there is a header with the iConnect logo, the date (9/13/2018 3:06 PM), and a 'Provider Selections' link. Below the header, the 'Workflow Wizard' is open, showing a list of tasks. The second task in the list is highlighted in blue and has a yellow border, indicating it is the current step being viewed. The task text is: 'On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.' To the right of the Workflow Wizard, the 'Provider Selections' list view is displayed. It includes a 'Filters' section with dropdowns for 'Disposition' (set to 'Not Equal To' 'Closed') and 'Selection Date'. Below the filters is a search bar and a 'Reset' button. The list view shows 12 Provider Selection records returned, with the first record visible in a table format. The table columns are: Division, Selection Date, Provider, APD Vendor #, Provider Worker, Disposition, Deactivated Date, and LOS. The first record in the table is: APD, 07/18/2018, WSC Agency1, (empty), Buck, Jennifer, WSC Transfer Out, (empty).

3. Click the previous WSC Provider Selection Record. The Details page displays. Update the following fields:
 - a. Disposition = Closed

b. Disposition Date = defaults to current date but can be edited

apd iConnect

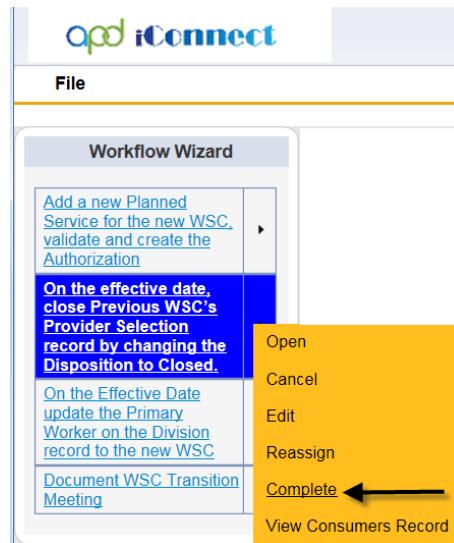
Alice Sheppard | Provider
Last Updated by jbuck
at 5/9/2018 5:13:40 PM

File Word Merge

Provider	Division *	APD
Provider Workers	Selected By	Buck, Jennifer
Beds	Selection Date	04/30/2018
Events	Provider *	WSC Agency1
Track Disposition	Referral Type *	Waiver Support Coordinator
	Disposition *	Closed
	Disposition Date	04/30/2018
	WSC Transfer Effective Date	05/09/2018
	WSC Transfer End Date	
	Comments	
	Deactivated Date	05/09/2018

4. Click **File > Save and Close Provider**

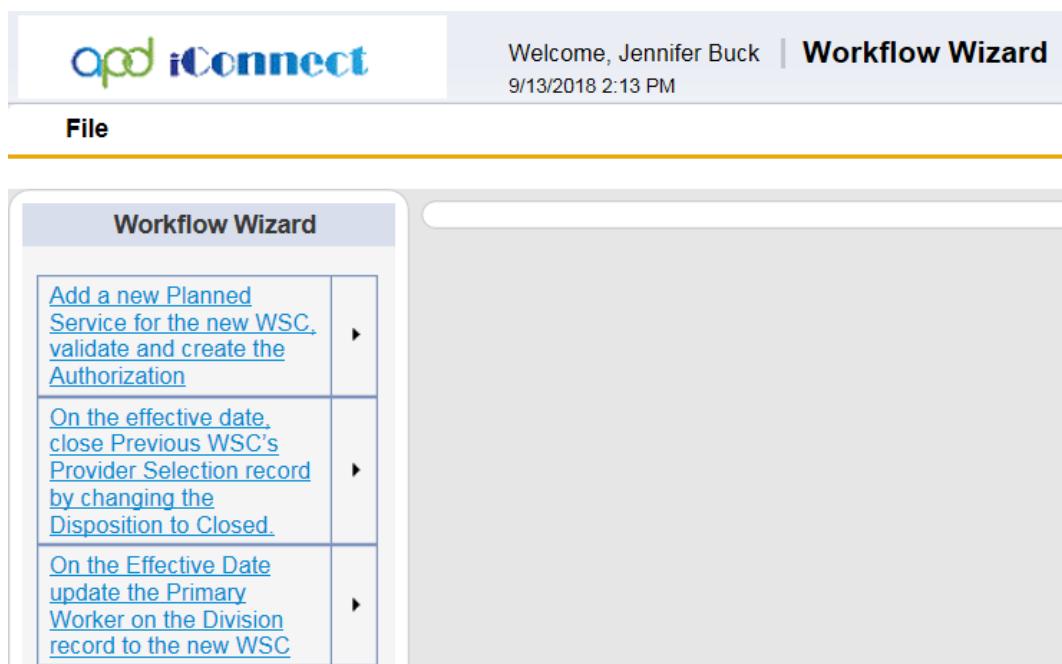
5. Navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.



Update the Primary Worker

Upon saving the Provider Selection Record with a Disposition = WSC Transfer In, a Workflow Wizard will trigger for the user with the following Ticklers to complete on the effective date of the new WSC. Similar ticklers were completed earlier when an end date was added to the Previous WSC's Provider Selection record, but these ticklers are closing the records, removing access for the previous WSC.

- a. On the effective date, update Primary Worker on the Division record to the new WSC. This tickler will trigger immediately but the user should not complete it until the effective date because the change is effective immediately.
- b. On the effective date, close Previous WSC's Provider Selection Record by changing the disposition to Closed. The end date was added to the previous WSC's Provider Selection record in an earlier step. This tickler is for the WSC to close the Previous WSC Provider Selection record. This tickler will trigger immediately but the user should not complete it until the effective date because the change is effective immediately.
- c. Add a new Planned Service for the new WSC, validate and create the Authorization.



The screenshot shows the 'Workflow Wizard' interface. At the top, the 'apd iConnect' logo is on the left, and the text 'Welcome, Jennifer Buck | Workflow Wizard' and '9/13/2018 2:13 PM' are on the right. Below the header, a 'File' menu is visible. The main area is titled 'Workflow Wizard' and contains three listed steps:

- [Add a new Planned Service for the new WSC, validate and create the Authorization](#)
- [On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.](#)
- [On the Effective Date update the Primary Worker on the Division record to the new WSC](#)

1. Click the **On the Effective date, update Primary Worker** tickler. The Division list view displays.

Workflow Wizard

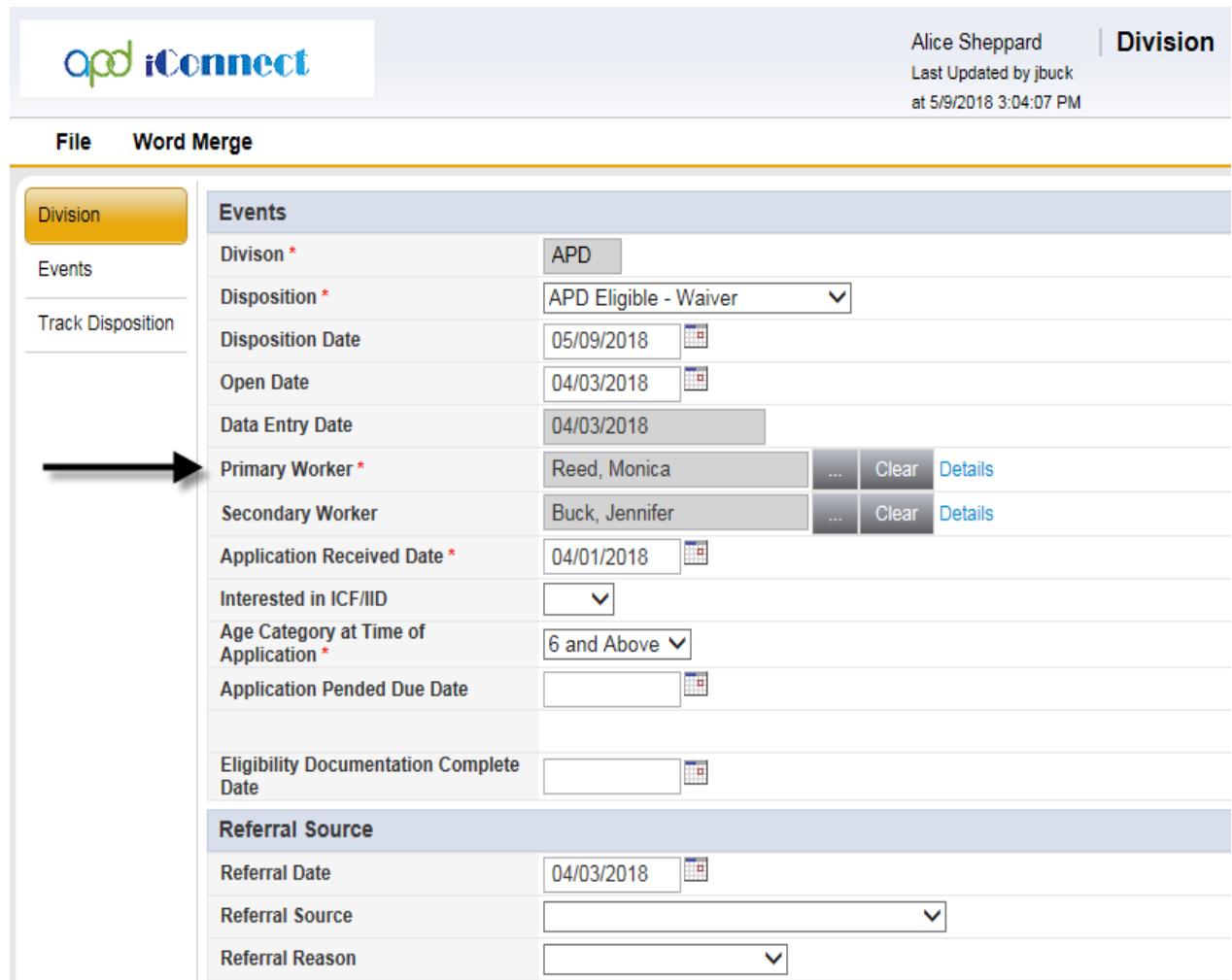
Filters

Division	Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
FOR	Forensic Open	Buck, Jennifer		08/03/2018		41
APD	APD Eligible - Non Waiting List	Buck, Jennifer	Buck, Jennifer	05/23/2018		113

2. Click the **APD Eligible – Waiver** Division record. The Division details page opens. Update the following fields:
 - a. Primary Worker = select the ellipsis to search for and select the new WSC Worker.
 - b. A notification will display informing the user changing the Primary Worker on the Division record will reassign all pending assessments, authorizations, plans, and ticklers from the old WSC to the new WSC. Click **OK** to accept.

Changing the primary worker will update the worker designated on all pending assessments, authorizations, plans, plan reviews, ticklers, placements, payments, and any child-linked openclose records. Do you want to continue?

OK **Cancel**



Events

Divison *	APD
Disposition *	APD Eligible - Waiver
Disposition Date	05/09/2018
Open Date	04/03/2018
Data Entry Date	04/03/2018
Primary Worker *	Reed, Monica
Secondary Worker	Buck, Jennifer
Application Received Date *	04/01/2018
Interested in ICF/IID	
Age Category at Time of Application *	6 and Above
Application Pended Due Date	
Eligibility Documentation Complete Date	

Referral Source

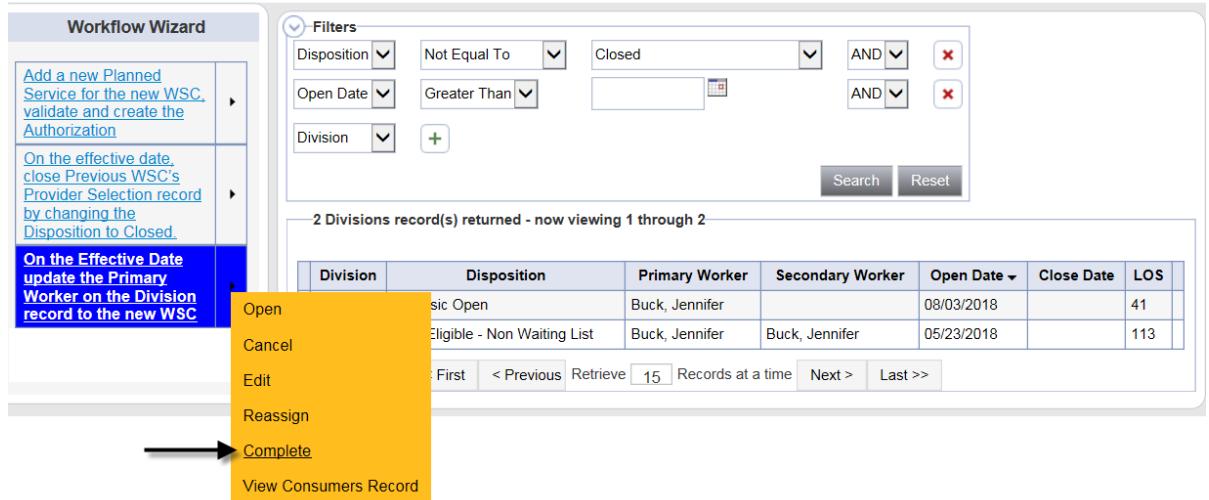
Referral Date	04/03/2018
Referral Source	
Referral Reason	

3. Click **File > Save and Close Division.**

**Tip**

When the Primary Worker is updated on the Division page, the Primary Worker on the Programs page is also updated.

4. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.



Workflow Wizard

Add a new Planned Service for the new WSC, validate and create the Authorization

On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.

On the Effective Date update the Primary Worker on the Division record to the new WSC

Reassign

Complete

View Consumers Record

Filters

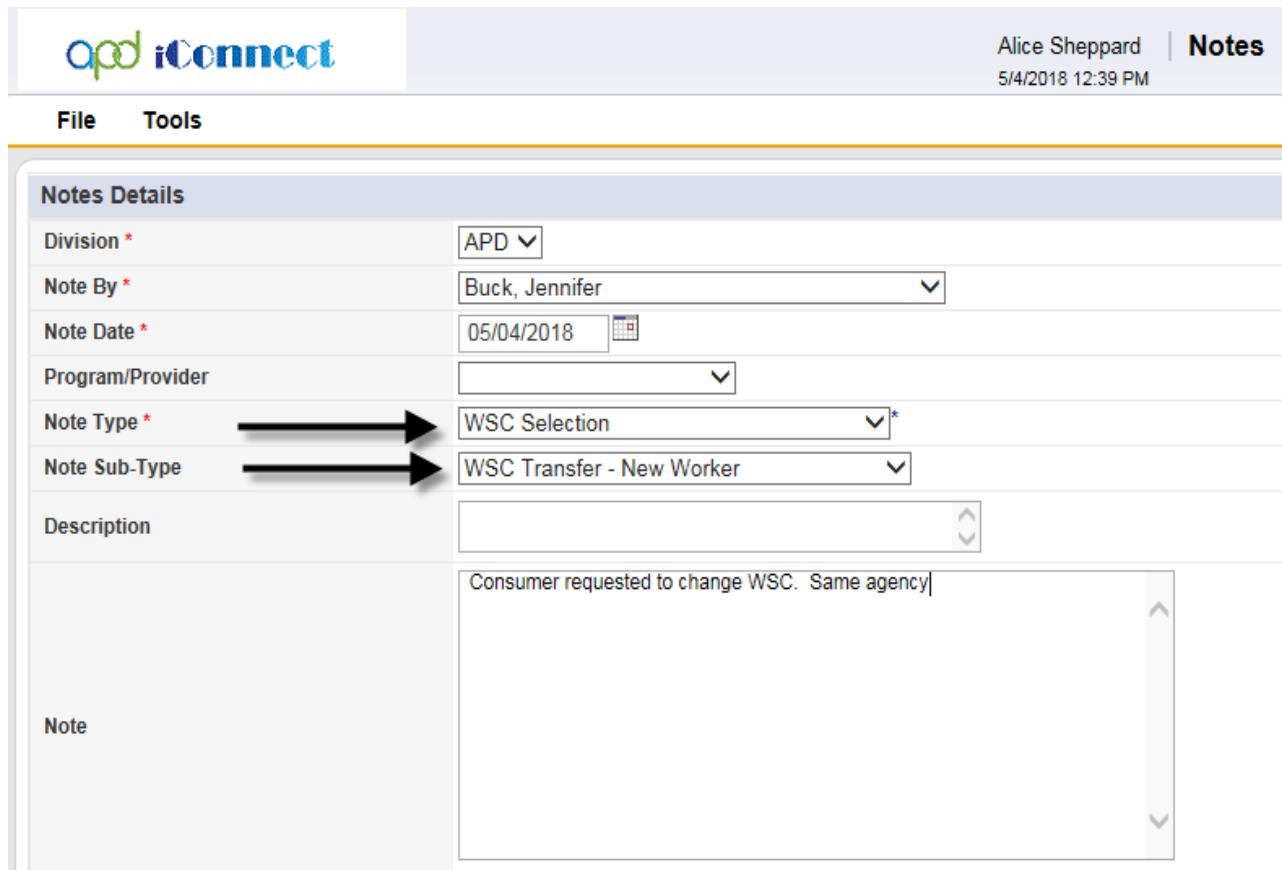
Division	Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
Open	asic Open	Buck, Jennifer		08/03/2018		41
Cancel	Eligible - Non Waiting List	Buck, Jennifer	Buck, Jennifer	05/23/2018		113

WSC Selection – Same Agency/Provider

Depending on the reason for the change the Region staff or the old WSC will work with the consumer to select a new WSC and effective date. A note is added in APD iConnect to begin the reassignment process. NOTE: this is an area of organizational change. Regions will be involved to ensure caseload capacity is not exceeded.

New WSC Request - Add a Note

1. To begin, log into APD iConnect and set Role = Region Waiver Workstream Worker or WSC. Click **Go**.
2. Navigate to the consumer's record and click the **Notes** tab > click **File > Add Notes**.
3. The Note details page displays. Update the following fields.
 - a. Division = APD
 - b. Note Type = WSC Selection
 - c. Note Subtype = WSC Transfer – New Worker
 - d. Status = Pending
 - e. Note = details of the requested change
 - f. Attach all supporting documentation



apd iConnect

Alice Sheppard | **Notes**
5/4/2018 12:39 PM

File Tools

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 05/04/2018

Program/Provider

Note Type * **WSC Selection**

Note Sub-Type **WSC Transfer - New Worker**

Description

Consumer requested to change WSC. Same agency

Note

4. Click **File > Save and Close Notes**
5. The Consumer has selected new WSC. Update the Note with a **document** demonstrating the consumer was given choice within the agency. Then send the Note for Region Review before accepting the case.
6. The Region staff or WSC will navigate to the consumer's Record and select the **Notes** tab. Select the **WSC Selection Note** to open. The Note Details page displays. Update the following fields:
 - a. Note Type = remains WSC Selection
 - b. Sub Type = remains WSC Transfer – Worker
 - c. Note = details of the selected WSC and request for region review before accepting the case.
 - d. Status = remains Pending
 - e. Recipients = Region Waiver Lead

f. Attachment = search for and select the saved **document** and attach it to the note.

7. The Region Waiver Lead will monitor My Dashboard for incoming Notes. The Region Waiver Lead will locate the WSC Selection Note in the Notes queue and select it to open.

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
10106	Sheppard, John	WSC Selection	WSC Transfer - New Worker	06/23/2019	Buck, Jennifer	Pending	<input type="checkbox"/>
10106	Sheppard, John	ICF	Reason Timeline Unmet	06/25/2019	Buck, Jennifer	Pending	<input type="checkbox"/>
10106	Sheppard, John	QSI	QSI Request	06/25/2019	Buck, Jennifer	Pending	<input type="checkbox"/>
10172	Sheppard, Videl	ICF	Transition Planning	06/25/2019	Itchik, Leslie	Pending	<input type="checkbox"/>
10106	Sheppard, John	ICF	Transition Planning	06/21/2019	Buck, Jennifer	Pending	<input type="checkbox"/>

8. The Region Waiver Lead will also check the Caseload report monthly to ensure there are no limit violations. This report will be accessed from an APD SharePoint site.

9. The Region Waiver Lead will approve or not approve based on the requested WSC's case load and will update the Note with his/her decision. Update the following fields:

- Note Type = remains WSC Selection
- Sub Type = change to WSC Transfer Approved or WSC Transfer Not Approved
- Note = decision details to approve or not approve the case load
- Status = Complete
- Recipients = Old WSC, Agency Owner/Manager, Waiver Workstream Worker

APD iConnect

File Tools Reports

Division * APD

Note By * Buck, Jennifer

Note Date * 08/23/2019

Program/Provider

Note Type * WSC Selection

Note Sub-Type WSC Transfer - New Worker

Description

On 8/23/2019 at 12:32 PM, Jennifer Buck wrote: Approving the case load

Note

New Text

Append Text to Note

Status * Complete

Date Completed 08/23/2019

Attachments

Add Attachment

Document Description Category Action

There are no attachments to display

Note Recipients

Add Note Recipient: ... Clear

Name	Date Sent	Date Read	Status	Date Signed	Action
Buck, Jennifer	08/23/2019		Unread		Remove

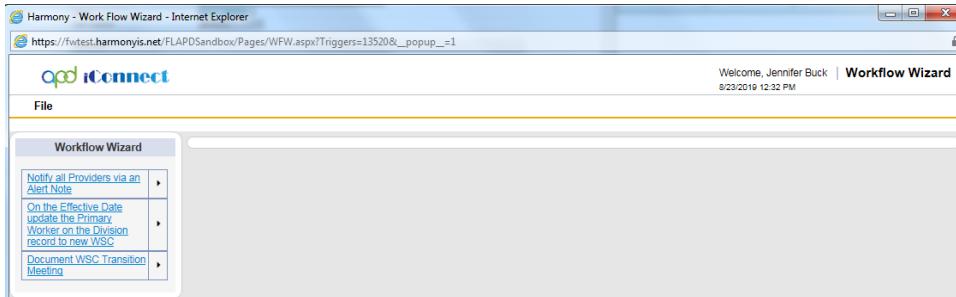
10. The old WSC will monitor My Dashboard for incoming notes for notification that the Waiver Lead has approved or not approved the case load for the new WSC.

- When approved, the old WSC will complete the transition meeting with the new WSC. Proceed to the [WSC Transition Meeting](#) section.
- When not approved, the old WSC will work with the consumer to select a new WSC and effective date.

11. Saving the WSC Selection Note with SubType = WSC Transfer Approved and Status = Complete, triggers a Workflow Wizard for the user/Region Waiver Lead, with the following ticklers:

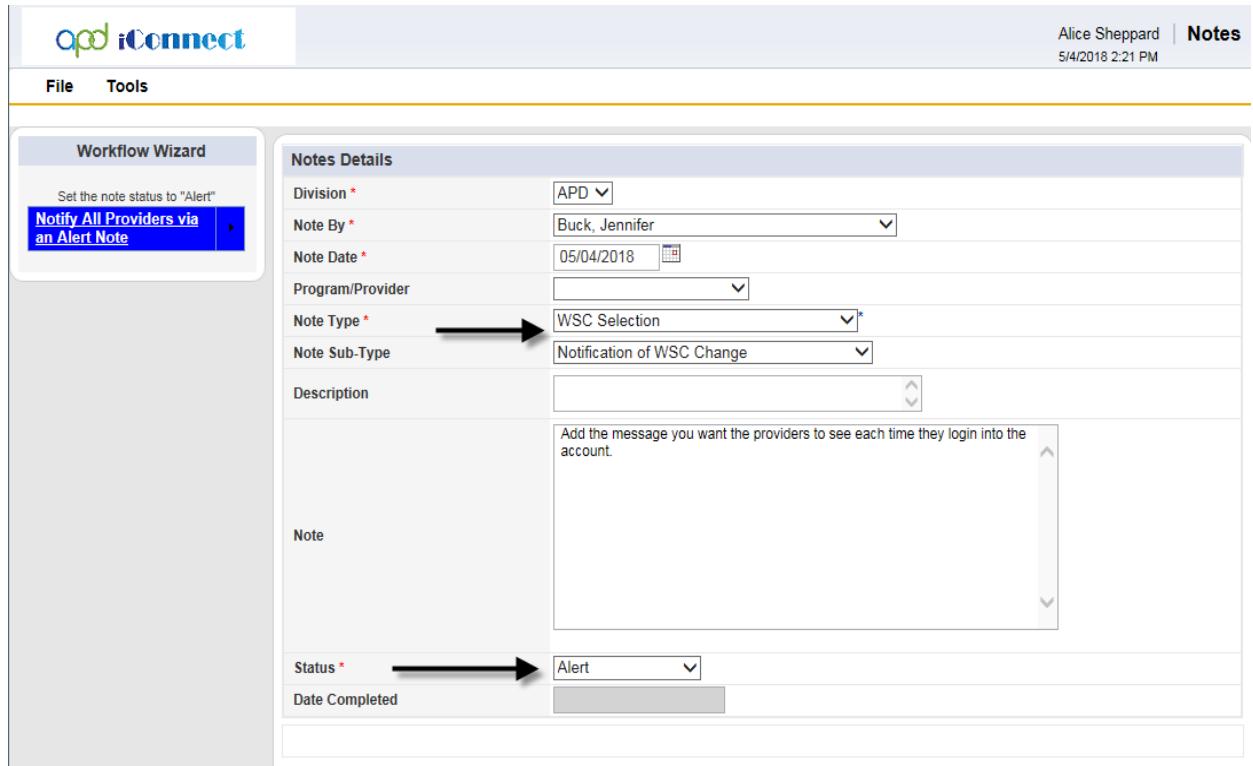
- Notify all Providers via an Alert Note. The Waiver Lead will complete this tickler immediately.
- On the Effective Date update the Primary Worker on the Division record to new WSC. The Waiver Lead will reassign this tickler to the new WSC.

- c. Document WSC Transition Meeting. The Waiver Lead will reassign this tickler to the new WSC.



Notify All Providers via an Alert Note

1. Saving the WSC Selection Note with SubType = WSC Transfer – New Worker and Status = Complete, triggers the **Notify all Providers via an Alert Note** tickler. Select it to open. The Notes Detail page displays.
2. Update the following fields:
 - a. Division = APD
 - b. Note Type = WSC Selection
 - c. Note Subtype = Notification of WSC Change
 - d. Note = Add the message you want the providers to see each time they login into the account.
 - e. Status = Alert



apd iConnect

File Tools

Workflow Wizard

Set the note status to "Alert!"

Notify All Providers via an Alert Note

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 05/04/2018

Program/Provider

Note Type * **WSC Selection**

Note Sub-Type Notification of WSC Change

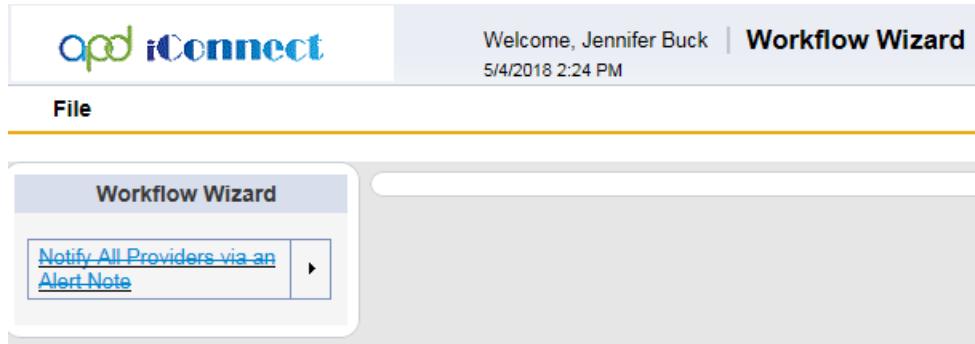
Description

Note

Status * **Alert**

Date Completed

3. Click **File > Save Notes**. The Tickler is marked as complete.



apd iConnect

Welcome, Jennifer Buck | **Workflow Wizard**

5/4/2018 2:24 PM

File

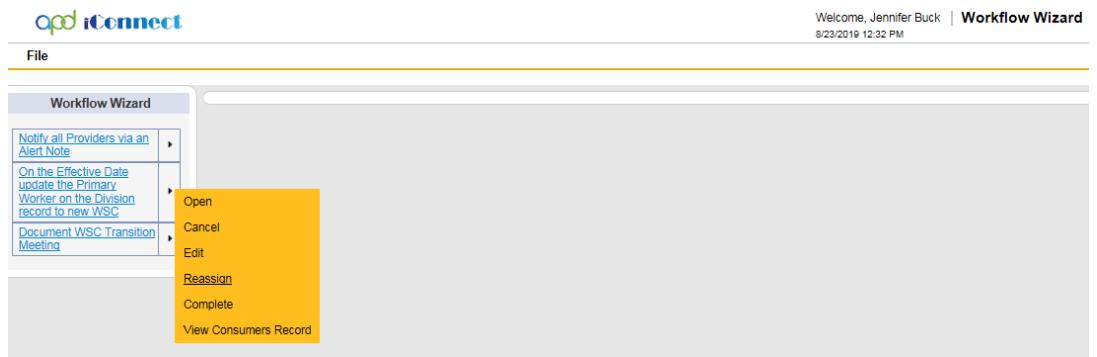
Workflow Wizard

[Notify All Providers via an Alert Note](#)

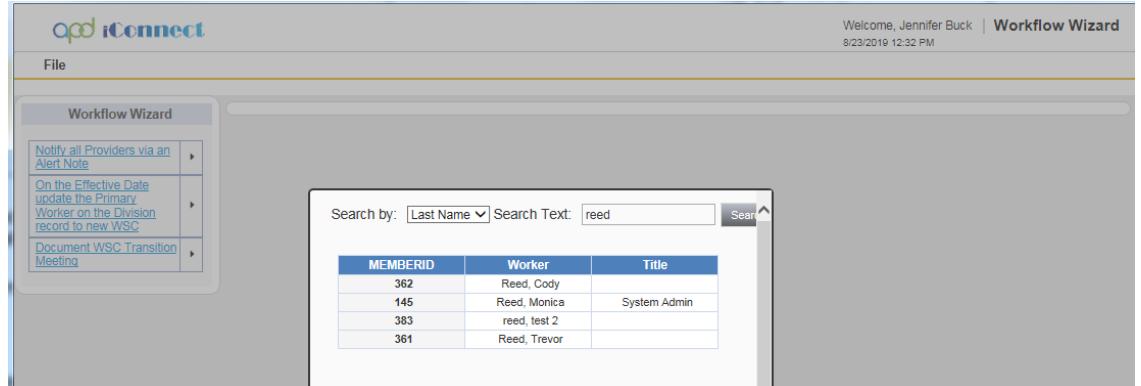
Update Primary Worker

1. Saving the WSC Selection Note with SubType = WSC Transfer – New Worker and Status = Complete, triggers the **On the Effective Date update the Primary Worker on the Division record to new WSC** tickler. The Waiver Lead will reassign it to the new WSC.

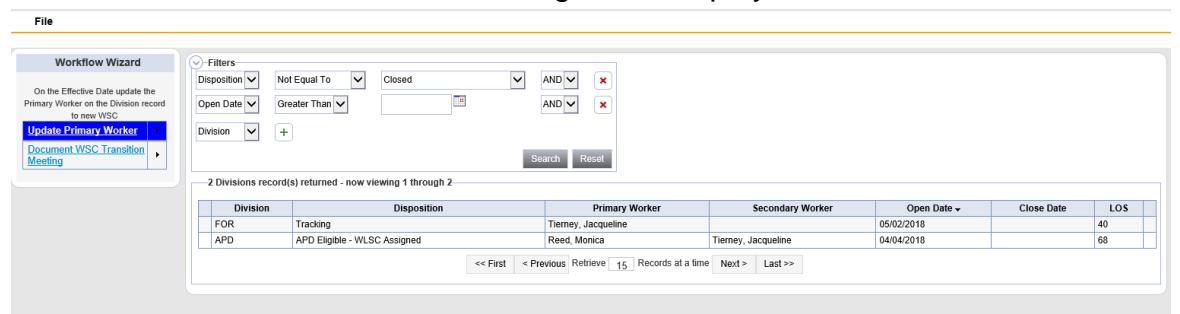
- From the tickler flyout menu, select **Reassign**.



- Search for and select the new WSC name. When select, the tickler is automatically reassigned.



- The new WSC will monitor **My Dashboard** for incoming ticklers.
- Click the **On the effective date, update the Primary Worker on the Division record to the new WSC** tickler. The consumer's Divisions list view grid will display.



6. On the effective date of the new WSC, the new WSC will update the primary worker on the Division which will automatically update the worker on the associated Program records and Provider Selection records.
7. Select the **APD Eligible – Waiver** record.
8. The Division details page displays. Update the following fields:
 - a. Primary Worker = select the ellipsis to search for and select the new WSC Worker.
 - b. A notification will display informing the user changing the Primary Worker on the Division record will reassign all pending assessments, authorizations, plans, and ticklers from the old WSC to the new WSC. Click **OK** to accept.

Changing the primary worker will update the worker designated on all pending assessments, authorizations, plans, plan reviews, ticklers, placements, payments, and any child-linked openclose records. Do you want to continue?

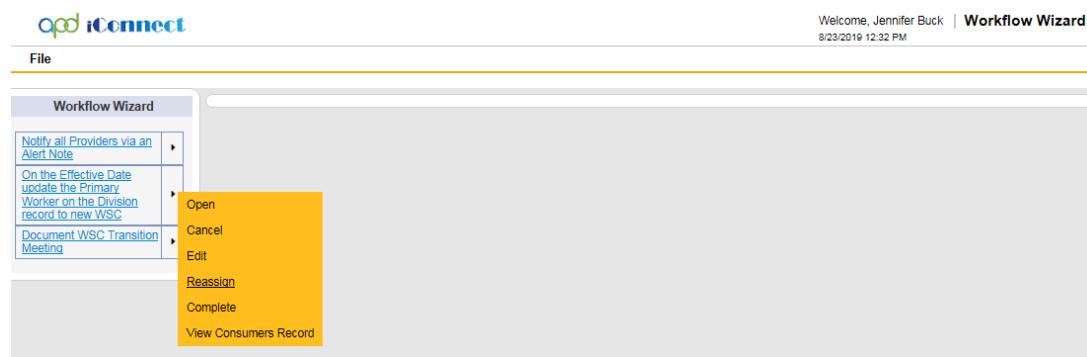
OK **Cancel**
 - b. Secondary Worker = Region Waiver Lead

9. Click **File > Save and Close Division**.
10. Upon completing the tasks outlined in the tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.
11. When the primary worker on the division record is changed on the effective date, the worker on the provider selection record will update automatically to the new WSC and the previous worker/old WSC on the provider selection record will close automatically.

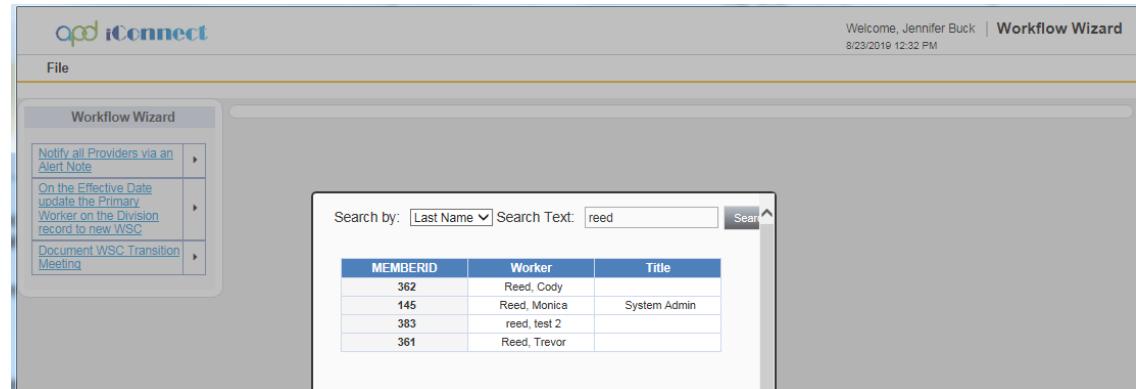
WSC Transition Meeting

1. Saving the WSC Selection Note with SubType = WSC Transfer – New Worker and Status = Complete, triggers the **Document WSC Transition Meeting** tickler. The Waiver Lead will reassign it to the new WSC.

2. From the tickler flyout menu, select **Reassign**.



3. Search for and select the new WSC name. When select, the tickler is automatically reassigned.



4. The new WSC will monitor **My Dashboard** for incoming ticklers. Locate the **Document WSC Transition Meeting** tickler. Select to open the Notes detail page. Once the transition process is complete, the new WSC will complete this tickler by adding a Note confirming the transition is complete. For now, it can be closed.
5. As part of the WSC Transition process, the previous WSC will meet and discuss the Consumer case with the new WSC.
6. The previous WSC will mark the Person-Centered Support Plan form as complete, making it ready only. The new WSC will create a new Person-Centered Support Plan duplicated from the one completed by the previous WSC.

7. The previous WSC will navigate to the consumer's record and click on the Forms tab. Click the **Person-Centered Support Plan** form with Status = Open.

Form	Review	Review Date	Worker	Division	Status
Person Centered Support Plan	Annual	07/05/2019	Buck, Jennifer	APD	Open
Person Centered Support Plan	Initial	07/05/2018	Buck, Jennifer	APD	Complete

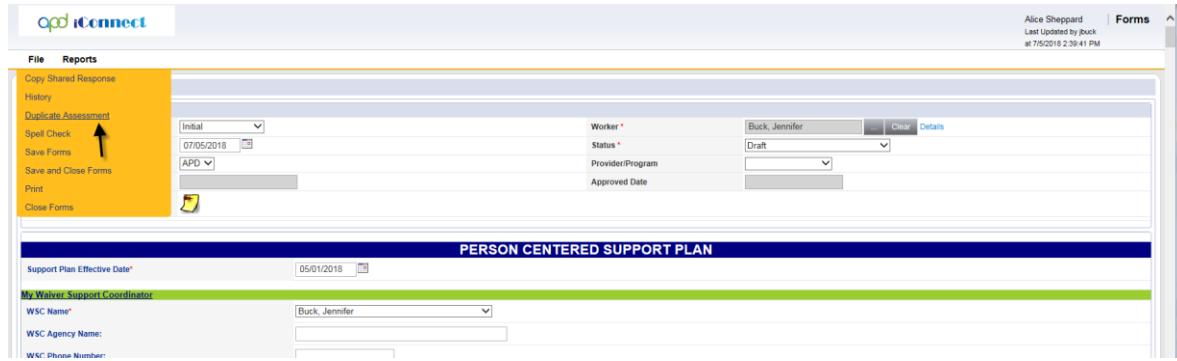
8. Update the following fields:

- Review the form and ensure it is complete.
- Change the Status = Complete

9. Click **File > Save and Close Forms.**

10. The new WSC will use the **Duplicate Assessment** feature to copy information such as the social history from the Person-Centered Support Plan completed by the previous WSC into a new Person-Centered Support Plan for the new WSC. The new WSC will update all section of the support plan with new information and change the effective date of the plan.

11. To do so, with the Person-Centered Support Plan created from the previous WSC opened, click **File > Duplicate Assessment**. A notification window displays. Click OK. The new Person-Centered Support Plan form that is an exact copy of the existing Person-Centered Support Plan form is displayed.



12. Update the following fields:

- In the Form header, change the **Review Type** = Annual.
- Update the support plan effective date.
- Make updates to goals, needs, and other important factors.

13. When finished, change the **Status** = Open. Click **File > Save and Close Forms**.

14. Following the WSC Transition meeting with the Consumer, the WSC will locate the **Document WSC Transition Meeting** tickler from **My Dashboard**. Select it to open.

15. A new Consumer Note record opens. Update the following fields:

- Division = APD
- Note Type = WSC Selection
- Note Subtype = WSC Transition Note
- Note = Add details recording the meeting with the Consumer

e. Status = Complete

16. Click **File > Save Note**.

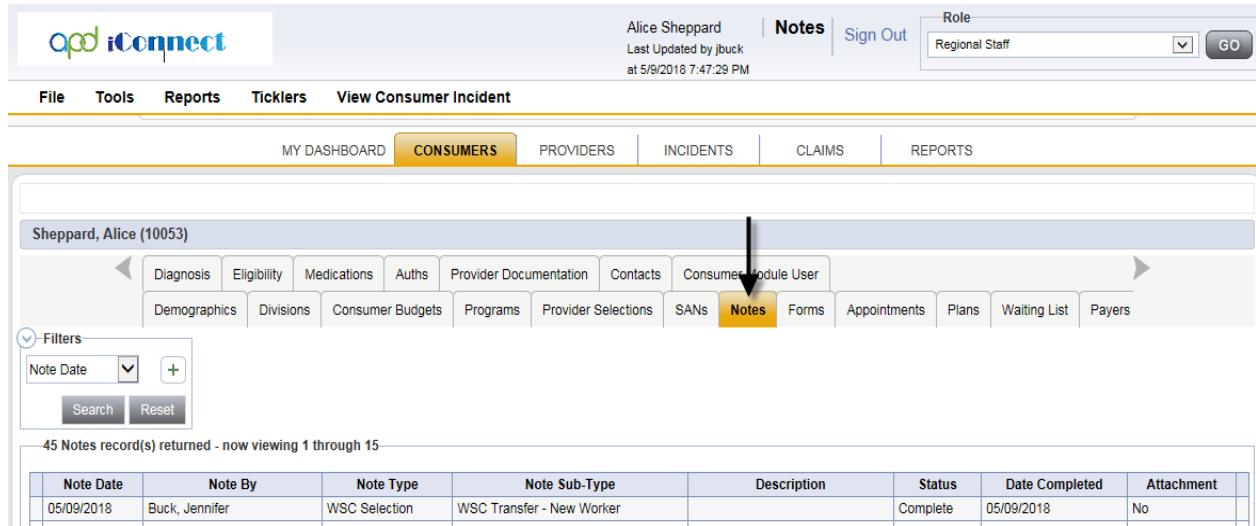
17. The tickler is marked as complete.

Inter-region Transfer on Waiting List

The Region Office may receive a request to transfer a Consumer on the Waiting List to a different Waiting List Support Coordinator due to a pending move or a new address.

1. To begin, log into APD iConnect and set Role = Waiting List Workstream Worker. Click **Go**.
2. Navigate to the consumer's record, click on the **Notes** tab.

3. Click **File > Add Notes.**



The screenshot shows the apd iConnect software interface. At the top, there is a header with the apd iConnect logo, user information (Alice Sheppard, Last Updated by jbuck at 5/9/2018 7:47:29 PM), and a sign out link. Below the header is a navigation bar with links for File, Tools, Reports, Ticklers, and View Consumer Incident. The main menu bar includes MY DASHBOARD, CONSUMERS (which is highlighted in yellow), PROVIDERS, INCIDENTS, CLAIMS, and REPORTS. Below the main menu, a sub-menu for 'Sheppard, Alice (10053)' is displayed, with tabs for Diagnosis, Eligibility, Medications, Auths, Provider Documentation, Contacts, Consumer Module User, Demographics, Divisions, Consumer Budgets, Programs, Provider Selections, SANS, Notes (which is highlighted in yellow), Forms, Appointments, Plans, Waiting List, and Payers. A 'Filters' section is present with a dropdown for 'Note Date' and buttons for 'Search' and 'Reset'. Below the sub-menu, a message indicates '45 Notes record(s) returned - now viewing 1 through 15'. A table is shown with columns: Note Date, Note By, Note Type, Note Sub-Type, Description, Status, Date Completed, and Attachment. One row is visible: 05/09/2018, Buck, Jennifer, WSC Selection, WSC Transfer - New Worker, Complete, 05/09/2018, No.

4. The Note details page displays. Update the following fields:

- a. Division = APD
- b. Note Type = Central Record Transfer
- c. Note Subtype = Pending Central Record Transfer
- d. Note recipient = select the ellipsis to search for and select the Waiting List Workstream Lead at the Receiving Region
- e. Status = Pending
- f. Attach all supporting documentation

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 05/09/2018

Program/Provider

Note Type * Central Record Transfer

Note Sub-Type Pending Central Record Transfer

Description

Note

Region Office has received a request to transfer a Consumer on the Waiting List

Status * Pending

Date Completed

5. Click **File > Save and Close Notes**.

6. The Region Waiting List Workstream Lead will monitor his/her **My Dashboard > Notes** queue.

Welcome, Jennifer Buck | My Dashboard | Sign Out

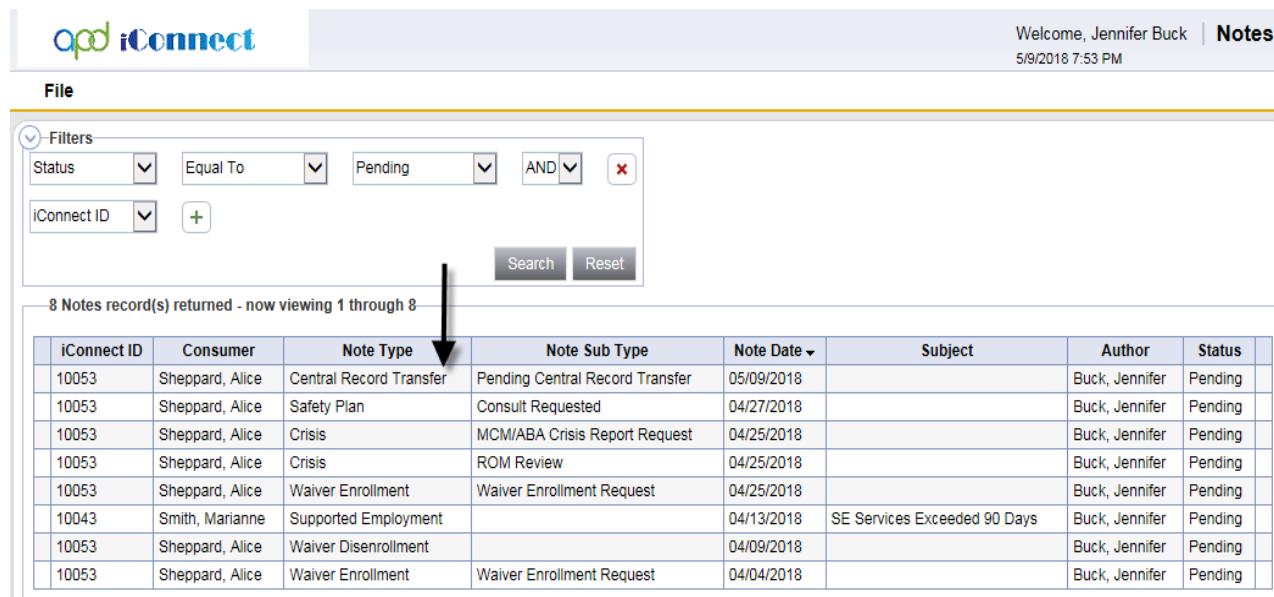
Role
Region Waiting List Workstream Lead

File

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER REPORTS

CONSUMERS	INCIDENTS	PROVIDERS	TASKS
Division	Disposition	Notes	My Management
My Enrollments	Screening Priority	Referrals	
Provider Selections	Status		
Notes	My Incident Queue		
Complete			
Pending	9	My Incident Ticklers	

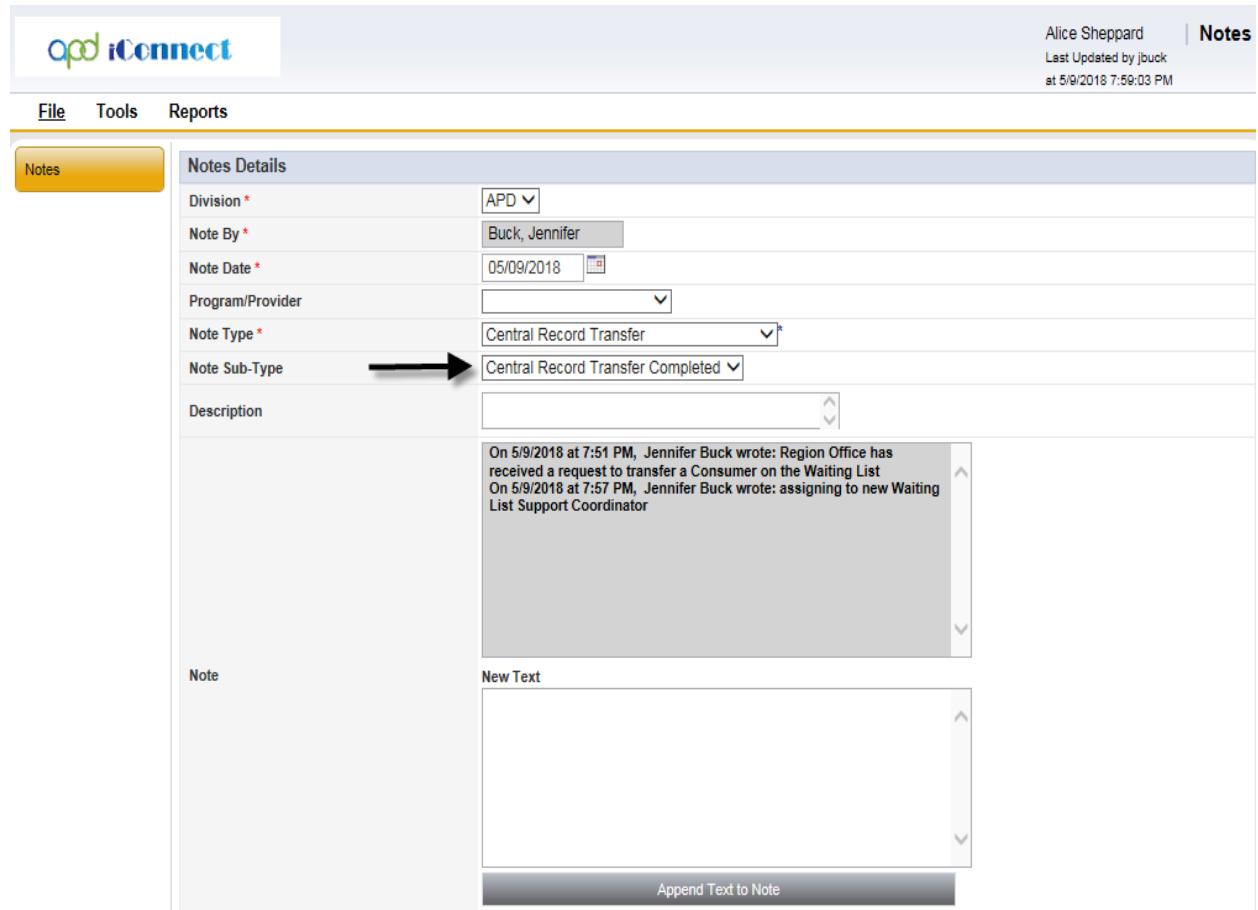
7. Click the **Central Record Transfer** Note to open it.



The screenshot shows the apd iConnect Case Management Module. At the top, there is a navigation bar with the apd iConnect logo, a user welcome message 'Welcome, Jennifer Buck', and a 'Notes' link. Below the navigation bar is a 'Filters' section with dropdown menus for 'Status' (set to 'Equal To' 'Pending') and 'iConnect ID'. There are also 'AND' and 'OR' dropdowns, a '+' button to add more filters, and 'Search' and 'Reset' buttons. Below the filters, a message states '8 Notes record(s) returned - now viewing 1 through 8'. A black arrow points to the 'Note Type' column header in a table below. The table has columns: iConnect ID, Consumer, Note Type, Note Sub Type, Note Date, Subject, Author, and Status. The data in the table is as follows:

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
10053	Sheppard, Alice	Central Record Transfer	Pending Central Record Transfer	05/09/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Safety Plan	Consult Requested	04/27/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Crisis	MCM/ABA Crisis Report Request	04/25/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Crisis	ROM Review	04/25/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Waiver Enrollment	Waiver Enrollment Request	04/25/2018		Buck, Jennifer	Pending
10043	Smith, Marianne	Supported Employment		04/13/2018	SE Services Exceeded 90 Days	Buck, Jennifer	Pending
10053	Sheppard, Alice	Waiver Disenrollment		04/09/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Waiver Enrollment	Waiver Enrollment Request	04/04/2018		Buck, Jennifer	Pending

8. The Note Details page displays. Update the following fields:
 - a. Sub Type = Central Record Transfer Completed
 - b. Note = add a summary of the transfer assignment and Append Text to Note.
 - c. Note Recipient = select the ellipsis to search for and select the Waiting List Support Coordinator in the Receiving Region.
 - d. Status = Complete



The screenshot shows the 'Notes Details' screen in the apd iConnect software. The 'Notes' tab is selected in the navigation bar. The 'Notes Details' section contains the following fields:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 05/09/2018
- Program/Provider: (dropdown menu)
- Note Type: Central Record Transfer
- Note Sub-Type: Central Record Transfer Completed (highlighted with a black arrow)

The 'Description' section contains a scrollable text area with the following content:

On 5/9/2018 at 7:51 PM, Jennifer Buck wrote: Region Office has received a request to transfer a Consumer on the Waiting List
On 5/9/2018 at 7:57 PM, Jennifer Buck wrote: assigning to new Waiting List Support Coordinator

The 'Note' and 'New Text' sections are empty. A 'Append Text to Note' button is located at the bottom of the 'New Text' section.

9. Click **File > Save and Close Notes**.

10. Navigate to the Consumer record and click the **Division** tab.

Division	Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
APD	APD Eligible - Waiver	Buck, Jennifer	Buck, Jennifer	04/03/2018		36

11. Select the APD Division record to open it.

12. The Division Details page displays. Update the following fields:

- Primary Worker = new Waiting List Support Coordinator
- A notification will display informing the user changing the Primary Worker on the Division record will reassign all pending assessments, authorizations, plans, and ticklers from the old WSC to the new WSC. Click **OK** to accept.

Changing the primary worker will update the worker designated on all pending assessments, authorizations, plans, plan reviews, ticklers, placements, payments, and any child-linked openclose records. Do you want to continue?

OK **Cancel**

- Secondary Worker = Clinical Workstream Lead

Events

Division *	APD
Disposition *	APD Eligible - Waiver
Disposition Date	05/09/2018
Open Date	04/03/2018
Data Entry Date	04/03/2018
Primary Worker *	Worker, Applicable
Secondary Worker	Buck, Jennifer
Application Received Date *	04/01/2018
Interested in ICF/IID	
Age Category at Time of Application *	6 and Above
Application Pended Due Date	
Eligibility Documentation Complete Date	

Referral Source

Referral Date	04/03/2018
---------------	------------

Alice Sheppard | Division
Last Updated by jbuck
at 5/9/2018 5:22:54 PM

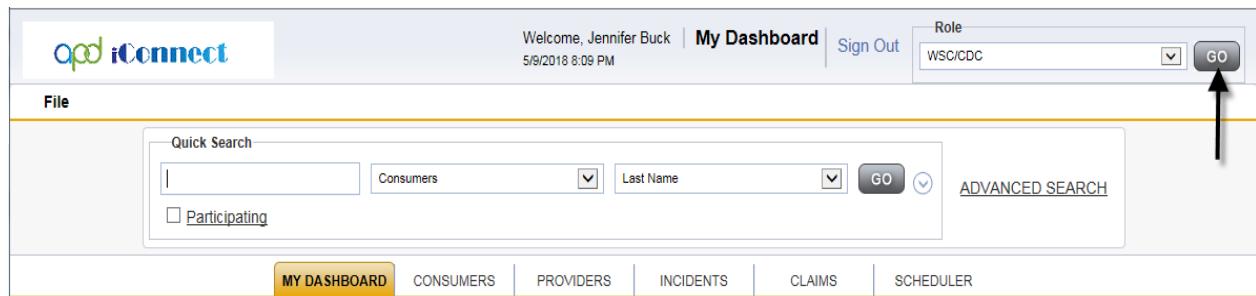
13. Click **File > Save and Close Division**.

Inter-region Transfer on Waiver

Prompted by an Address Change Request from the Consumer, the WSC will update the consumer's demographics record with the new address. If there is a need to transfer the consumer to a different region, the WSC should determine if Residential Placement is necessary. If the Consumer requires Residential Placement, proceed to the Residential Planning section. If not, the Receiving Region Office will be notified of the incoming Consumer via a Note.

Notify the Receiving Region Office via a Note

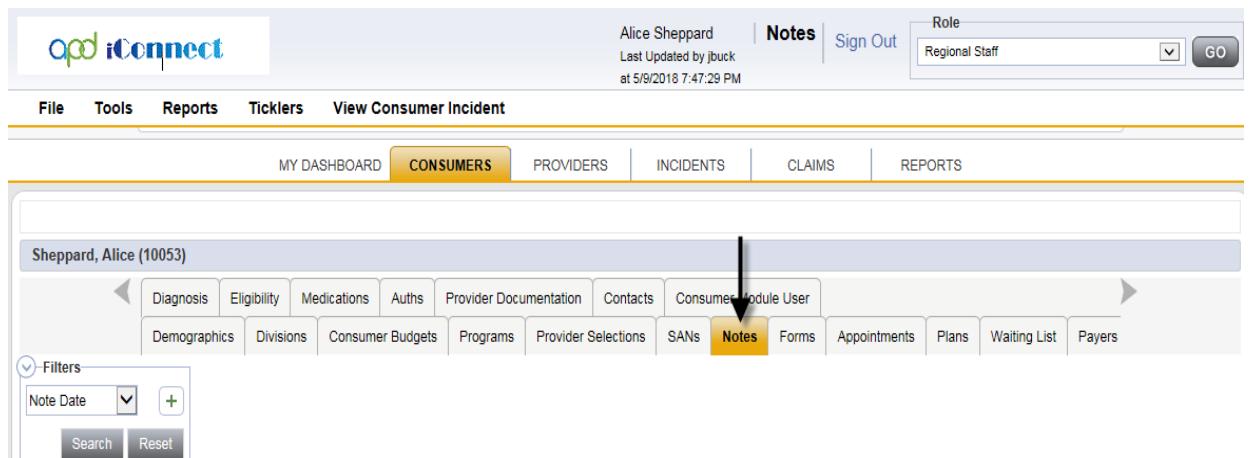
1. To begin, log into APD iConnect and set Role = WSC/CDC. Click **Go**.



The screenshot shows the APD iConnect dashboard. At the top, there is a 'Welcome, Jennifer Buck' message, a 'My Dashboard' link, and a 'Sign Out' link. A dropdown menu for 'Role' is open, showing 'WSC/CDC' as the selected option. A large black arrow points to the 'GO' button on the right side of the role dropdown. Below the header, there is a 'File' menu, a 'Quick Search' bar with fields for 'Text', 'Consumers', 'Last Name', and a 'GO' button, and a link to 'ADVANCED SEARCH'. The main menu bar includes 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. The 'CONSUMERS' tab is highlighted with a yellow box.

2. Navigate to the consumer's record, click on the **Notes** tab.

3. Click **File > Add Notes**.

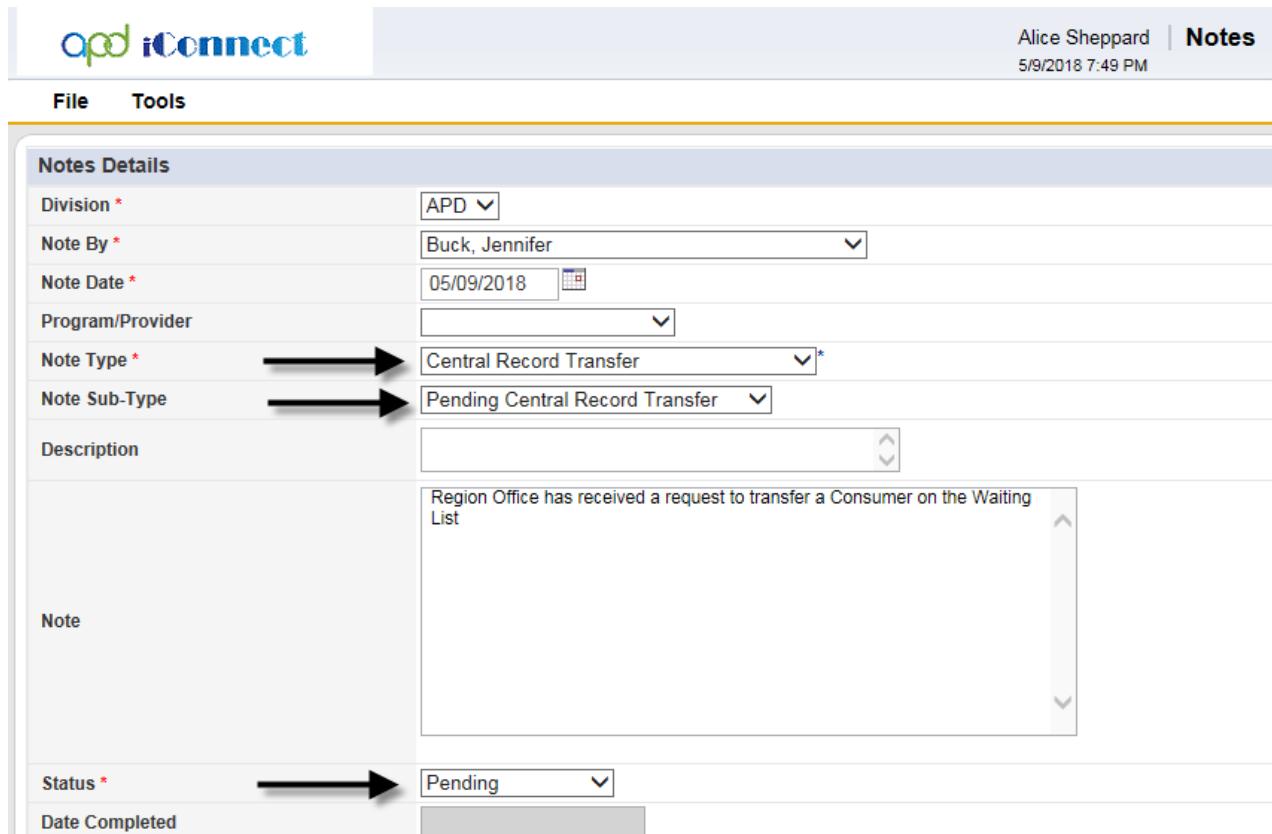


The screenshot shows the APD iConnect consumer record for 'Sheppard, Alice (10053)'. The 'File' menu is open, showing 'File', 'Tools', 'Reports', 'Ticklers', and 'View Consumer Incident'. The 'CONSUMERS' tab is highlighted with a yellow box. The consumer's name and ID are displayed above the record. The main menu bar includes 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'REPORTS'. Below the main menu, there is a navigation bar with tabs: 'Diagnosis', 'Eligibility', 'Medications', 'Auths', 'Provider Documentation', 'Contacts', 'Consumer Module User', 'Demographics', 'Divisions', 'Consumer Budgets', 'Programs', 'Provider Selections', 'SANs', 'Notes', 'Forms', 'Appointments', 'Plans', 'Waiting List', and 'Payers'. The 'Notes' tab is highlighted with a yellow box. A 'Filters' section is visible on the left, with a dropdown for 'Note Date' and buttons for 'Search' and 'Reset'. A large black arrow points to the 'Notes' tab in the consumer-specific navigation bar.

4. The Note details page displays. Update the following fields:

- a. Division = APD

- b. Note Type = Central Record Transfer
- c. Note Subtype = Pending Central Record Transfer
- d. Note recipient = select the ellipsis to search for and select the Waiver Workstream Lead at the Receiving Region
- e. Status = Pending
- f. Attach all supporting documentation

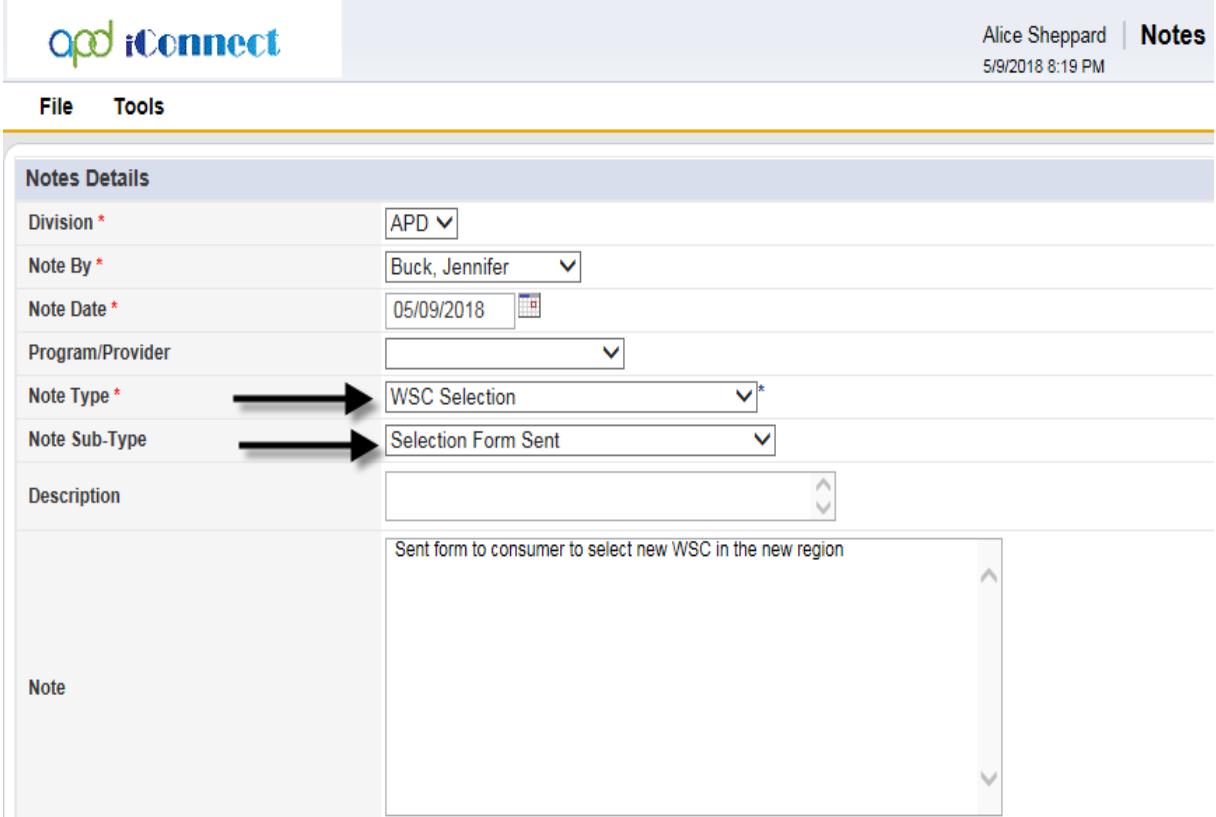


The screenshot shows the 'Notes Details' page in APD iConnect. The 'Notes Details' section contains the following fields:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 05/09/2018
- Program/Provider: (dropdown menu)
- Note Type: Central Record Transfer (highlighted with a red arrow)
- Note Sub-Type: Pending Central Record Transfer (highlighted with a red arrow)
- Description: Region Office has received a request to transfer a Consumer on the Waiting List
- Note: (text area)
- Status: Pending (highlighted with a red arrow)
- Date Completed: (dropdown menu)

5. Click **File > Save and Close Notes.**
6. The Receiving region will send the WSC Selection form to the Consumer and document it was sent in APD iConnect.
7. From the Notes tab, click **File > Add Note.**
8. The Note details page displays. Update the following fields:
 - a. Division = APD
 - b. Note Type = WSC Selection
 - c. Note Subtype = Selection Form Sent

d. Status = Pending



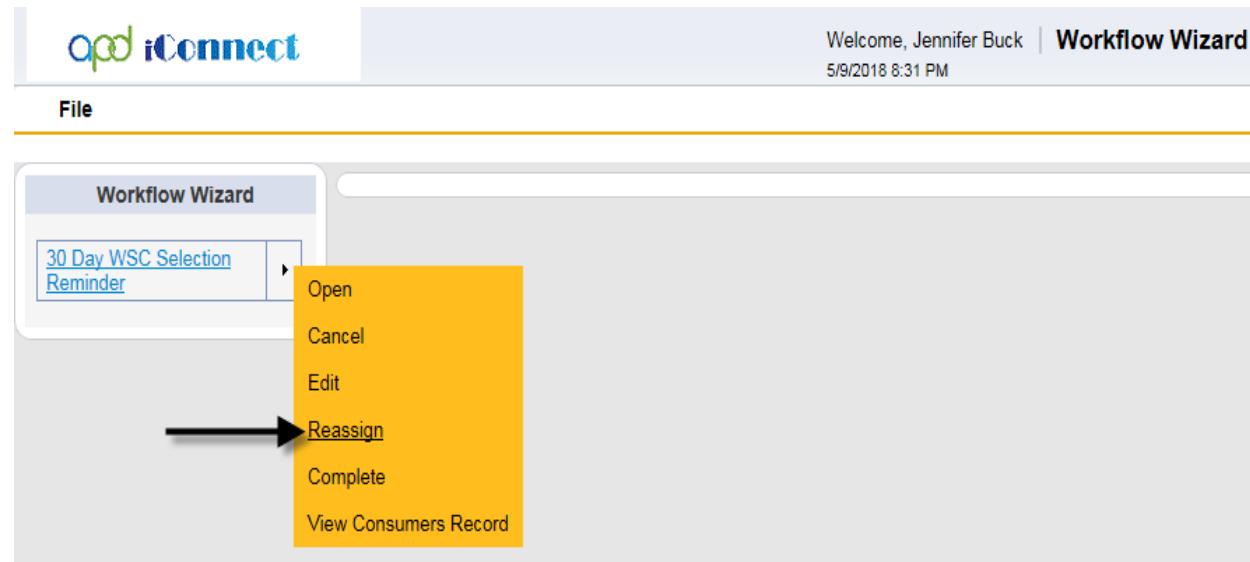
The screenshot shows the 'Notes Details' form in the apd iConnect software. The 'Note Type' field is set to 'WSC Selection' and the 'Note Sub-Type' field is set to 'Selection Form Sent'. Both fields have black arrows pointing to them from the left. The 'Description' field contains the text 'Sent form to consumer to select new WSC in the new region'.

9. Click **File > Save and Close Notes.**

10. Upon saving a Note with Note Sub Type = Selection Form Sent, a Workflow Wizard will trigger with the following tickler:

a. 30-day WSC Selection Reminder. The WSC should reassign this tickler to the Waiver Workstream Lead if the Consumer has already relocated to the receiving region.

11. From the tickler flyout menu, click **Reassign**.

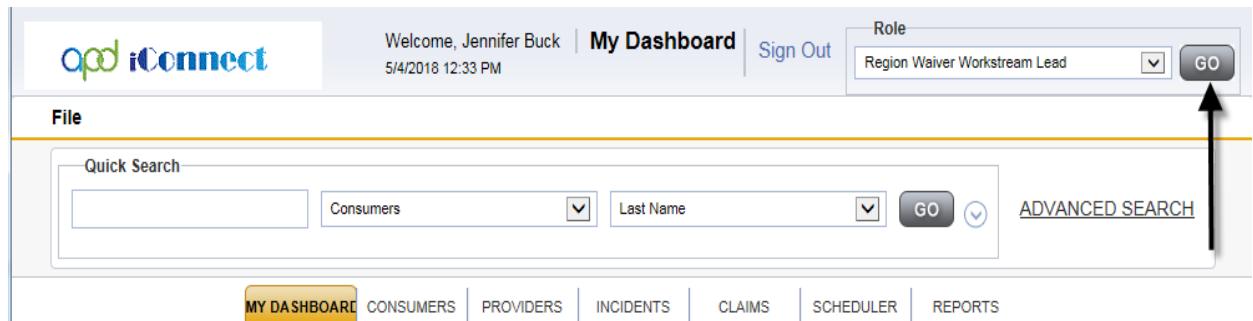


12. Search for and select the receiving Waiver Workstream Lead worker record and the tickler is reassigned.
13. This tickler is visible to the Waiver Workstream Lead on the My Dashboard > Ticklers queue.
14. In 30 days when the tickler is due, the Waiver Workstream Lead will check if the Consumer has selected the WSC indicated by the existence of a WSC Selection/WSC Inter-Region Transfer Note. If the selection has been made, the Waiver Workstream Lead will cancel the tickler by selecting Cancel from the tickler flyout menu.
15. If Consumer has not notified regional office of his/her newly selected Waiver Support Coordinator, the Waiver Workstream Lead will make the selection on the behalf of the Consumer.

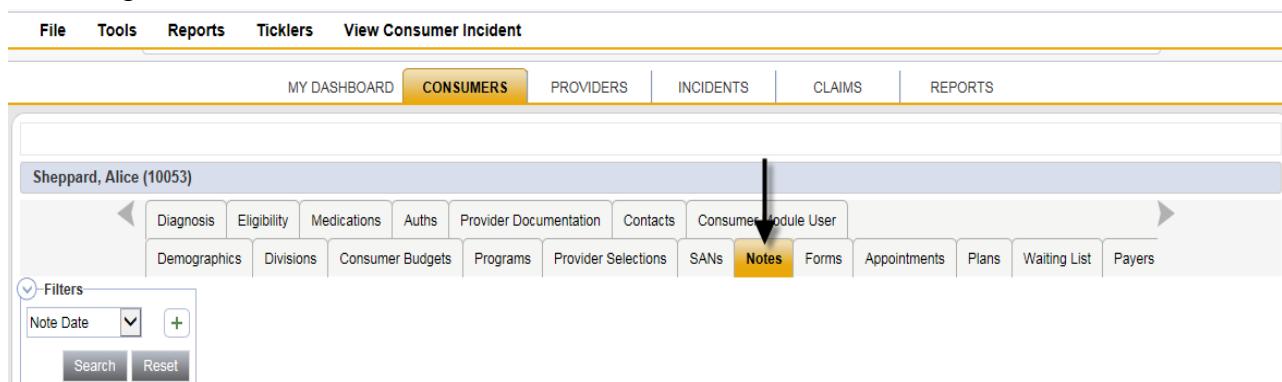
Consumer selects new WSC

The Consumer notifies the receiving regional office of his/her newly selected Waiver Support Coordinator.

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



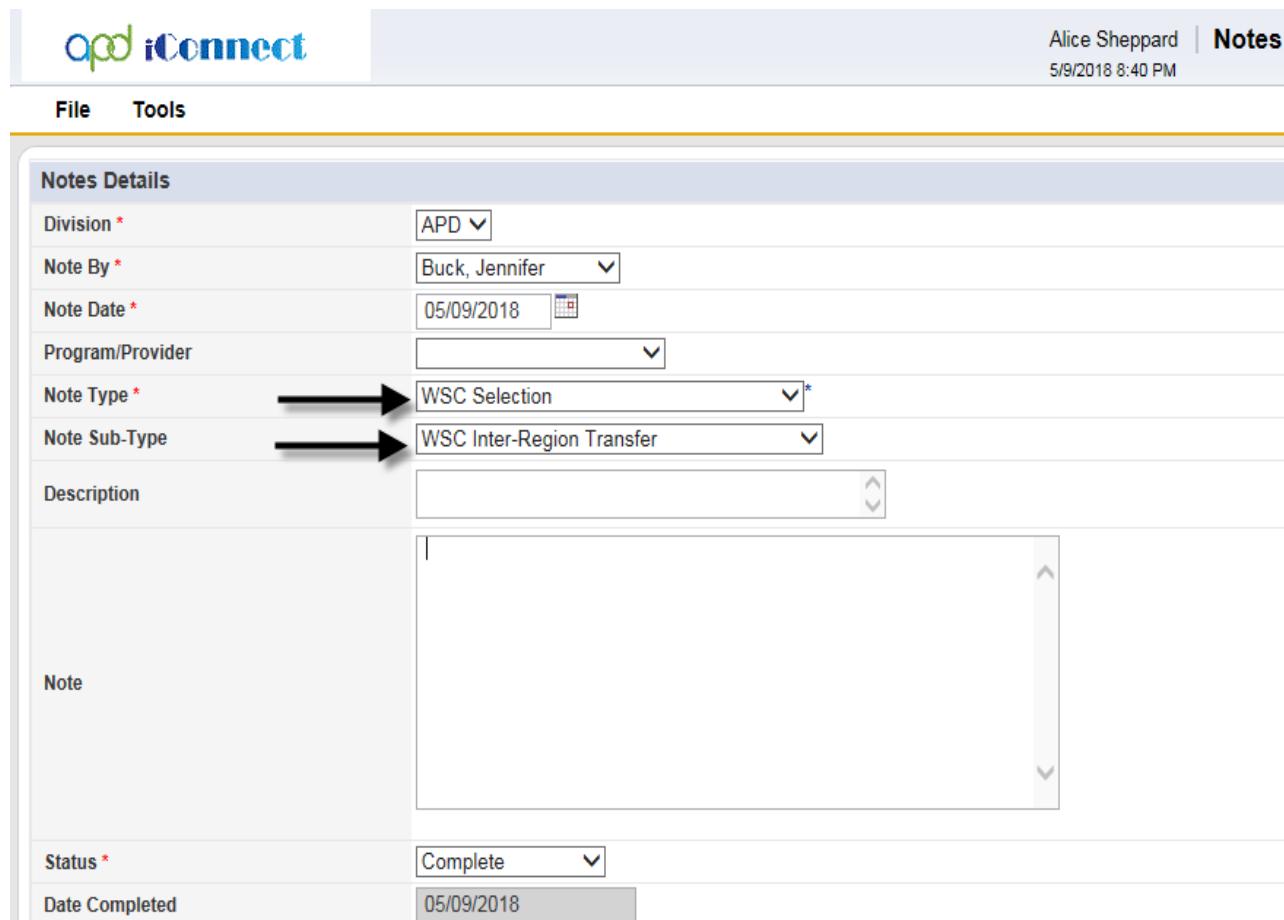
2. Navigate to the Consumer Record and click the **Notes** tab.



3. Click **File > Add Note**.

4. The Note detail page displays. Update the following fields:

- a. Division = APD
- b. Note Type = WSC Selection
- c. Note Subtype = WSC Inter-Region Transfer
- d. Status = Complete



apd iConnect

Alice Sheppard | Notes
5/9/2018 8:40 PM

File Tools

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 05/09/2018

Program/Provider

Note Type * **WSC Selection**

Note Sub-Type **WSC Inter-Region Transfer**

Description

Note

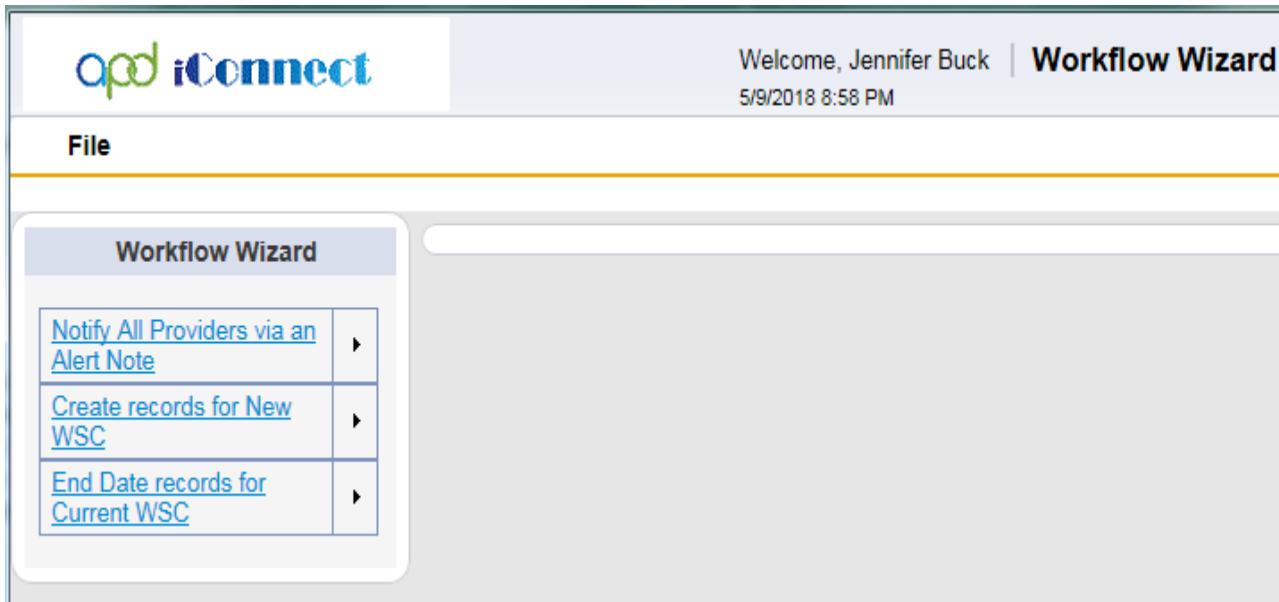
Status * Complete

Date Completed 05/09/2018

5. Click **File > Save and Close Notes.**

6. Upon saving the Note with Note Type = WSC Selection and Sub Type = WSC Inter-Region Transfer a Workflow Wizard triggers with the following ticklers:

- Notify all Providers via an Alert Note
- End Date records for Current WSC
- Create records for New WSC



Notify all Providers via an Alert Note

1. Click the Notify All Providers via an Alert note tickler to display the Notes detail page.
2. Complete [section WSC Selection – New Agency: Notify All Providers via an Alert Note](#) to add the Alert note.

Create Records for New WSC

1. Click the Create records for New WSC tickler to display a message tickler.
2. Complete [section WSC Selection – New Agency: Create records for New WSC](#) to create the new WSC records.

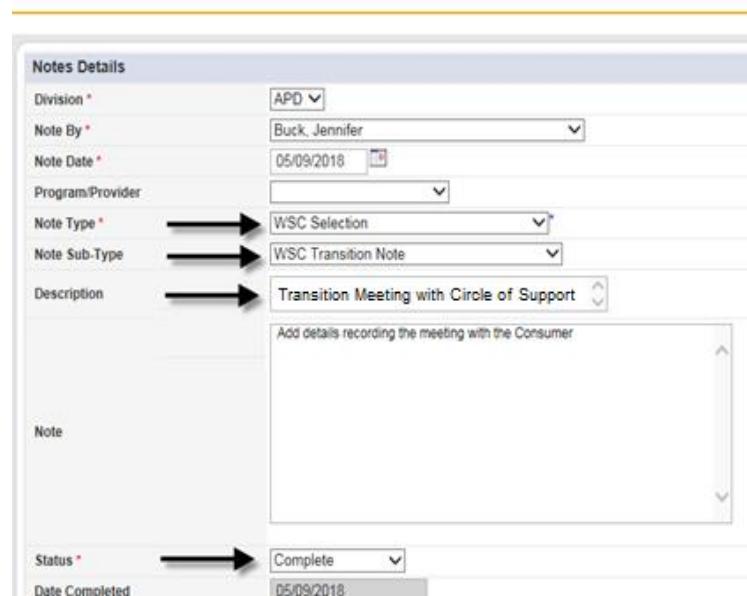
End Date Records for Current WSC

1. Click the End Date Records for Current WSC tickler to display a message tickler.
2. Complete [section WSC Selection – New Agency: End Date records for Current WSC](#) to end date the Current WSC records.

As Needed: WSC Transition Planning Note

There are times in which the current WSC will need to complete a series of tasks in order to facilitate a consumer's transition to another region. Examples may include assisting the individual/family interviewing providers, coordinating services and transportation to another region, or hosting a transition call with the current circle of supports and the newly selected circle of supports to ensure that there is a smooth transition. The WSC will document such tasks using a Note.

1. The WSC will navigate to the consumer's record and click **Notes > File > Add Note**.
 - a. Update the following fields:
 - i. Division = APD
 - ii. Note Type = WSC Selection
 - iii. Note Subtype = WSC Transition Note
 - iv. Description = WSC will document the types of activities conducted.
 - v. Note = Add details recording the meeting with the Consumer
 - vi. Status = Complete



Notes Details	
Division *	APD
Note By *	Buck, Jennifer
Note Date *	05/09/2018
Program/Provider	
Note Type *	WSC Selection
Note Sub-Type	WSC Transition Note
Description	Transition Meeting with Circle of Support
Add details recording the meeting with the Consumer	
Note	
Status *	Complete
Date Completed	05/09/2018

2. Click **File > Save and Close Note**.