Chapter 14 | WSC Reassignment

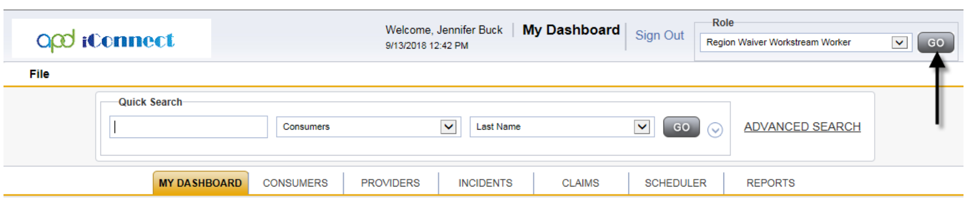
Introduction

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.

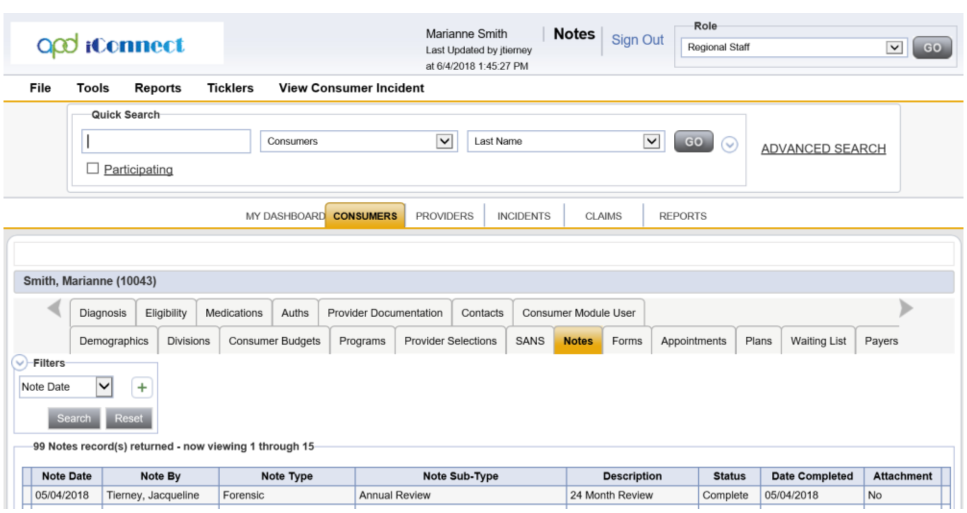
Reassignment Notification

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.

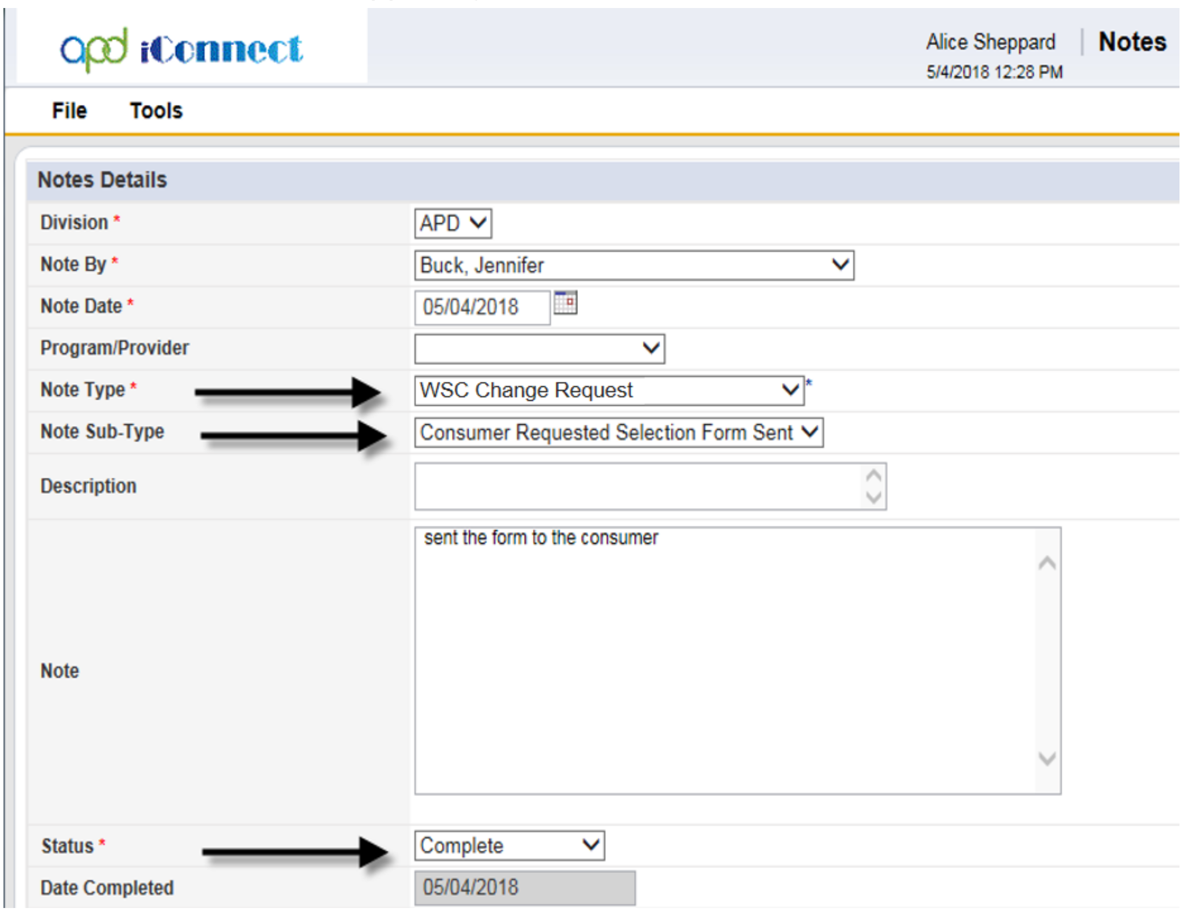
1. To begin, log into APD iConnect and set Role = Region Waiver Workstream Worker. Click **Go.**



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



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



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

5. The WSC Selection Form and other supporting documents will be printed and mailed to the Consumer.

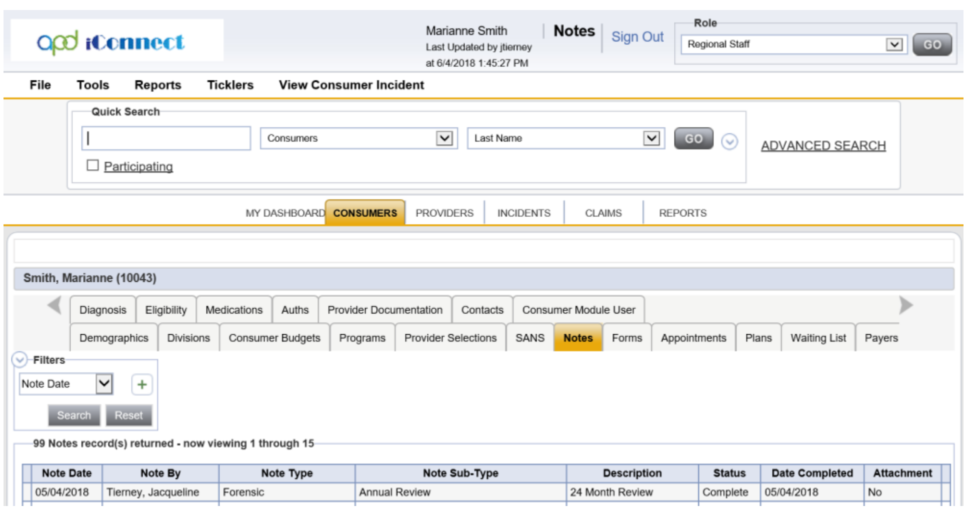
WSC Selection – New Agency/Provider

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.

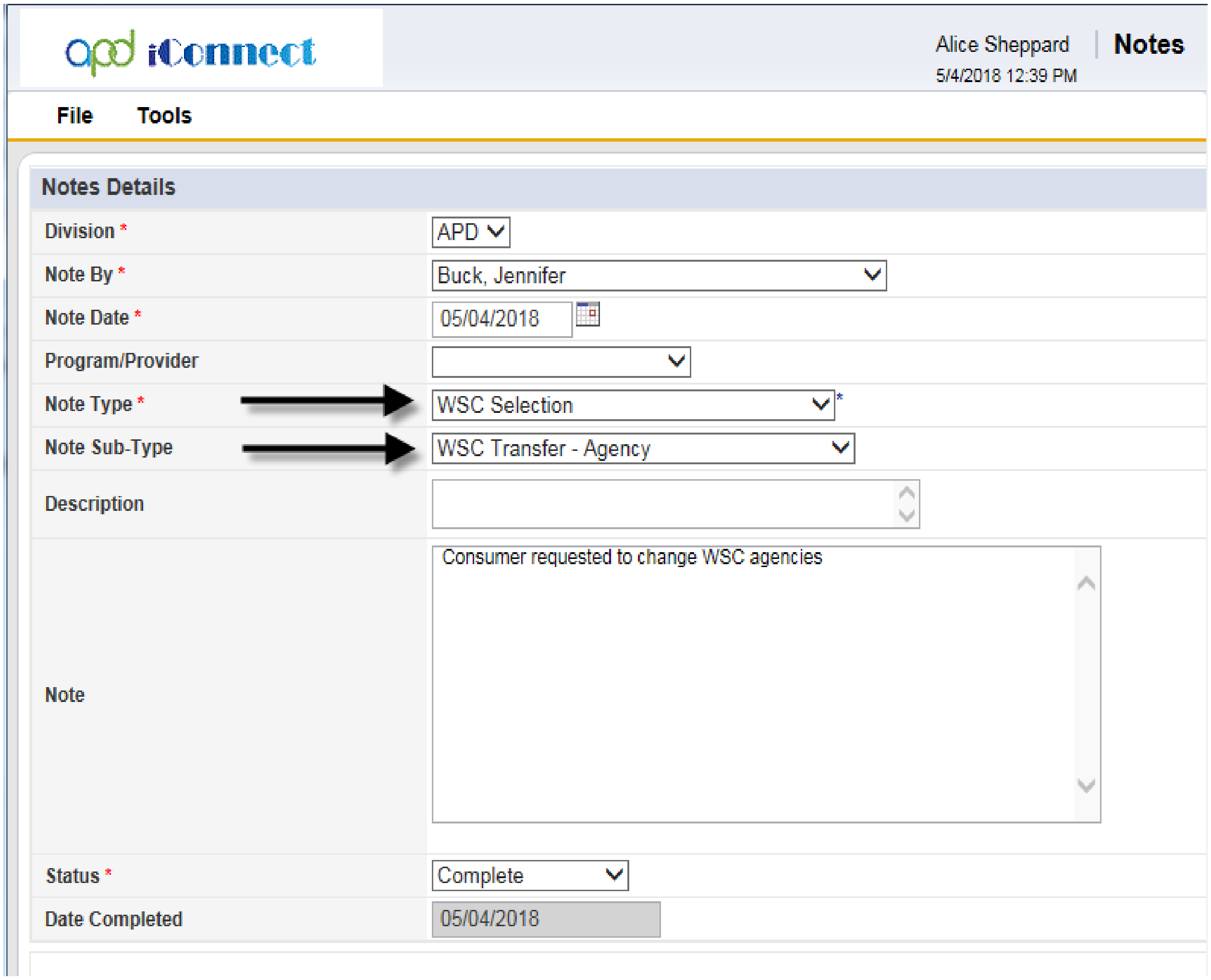
New WSC Selected - Add a Note

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.**



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



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

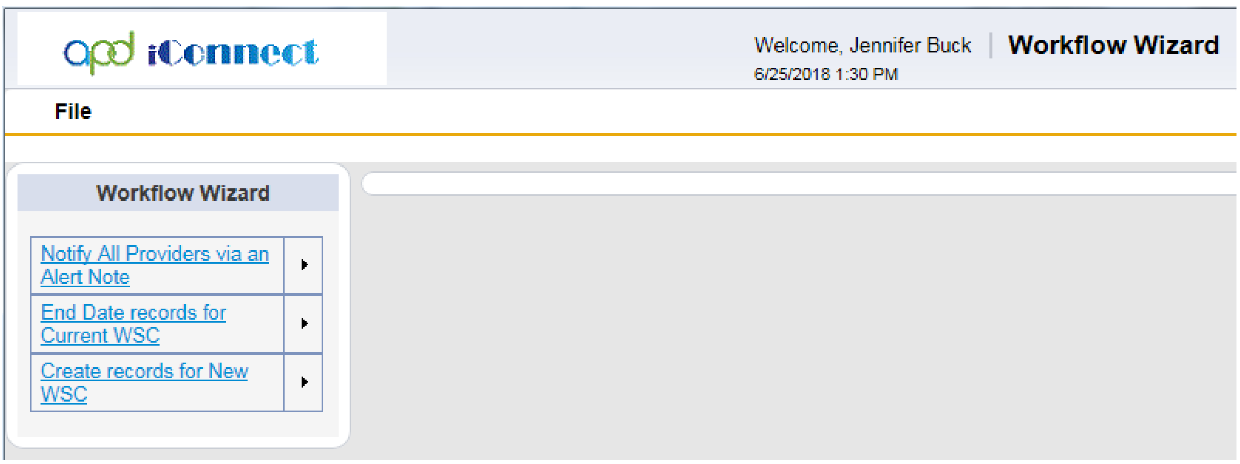
5. Upon saving the Note, a Workflow Wizard will trigger with the following Ticklers for the User.
   a. Notify all Providers via an Alert Note
   b. End date records for current WSC
   c. Create records for New WSC

6. The actions to take for each are listed in the following sections.

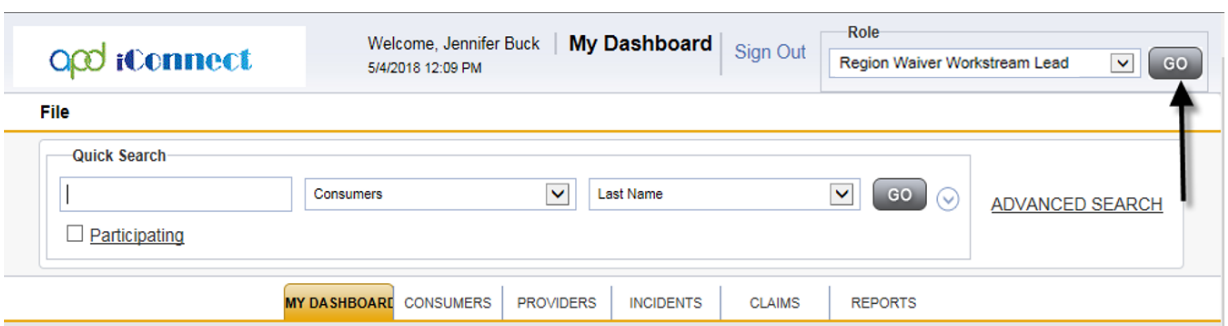
Notify All Providers via an Alert Note

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.

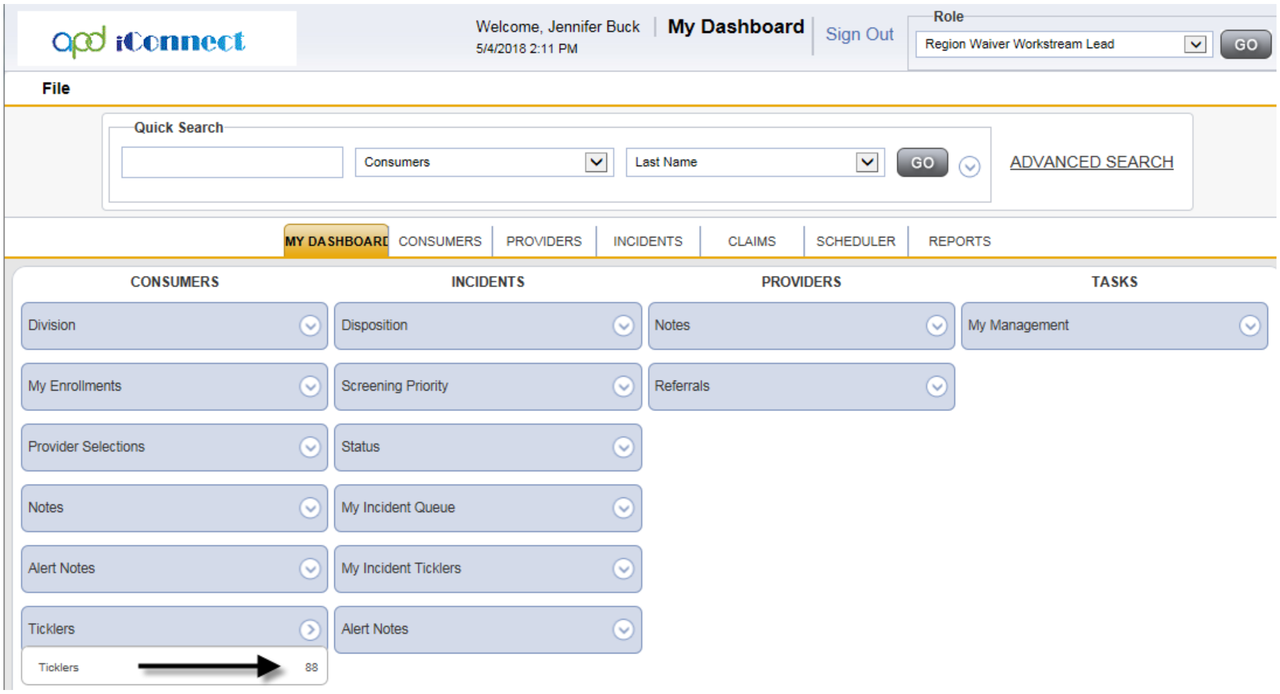
1. To begin, the user would have just saved the WSC Selection Note and triggered the Workflow Wizard. The ticklers are displayed in a new window. Click the tickler to Open it.



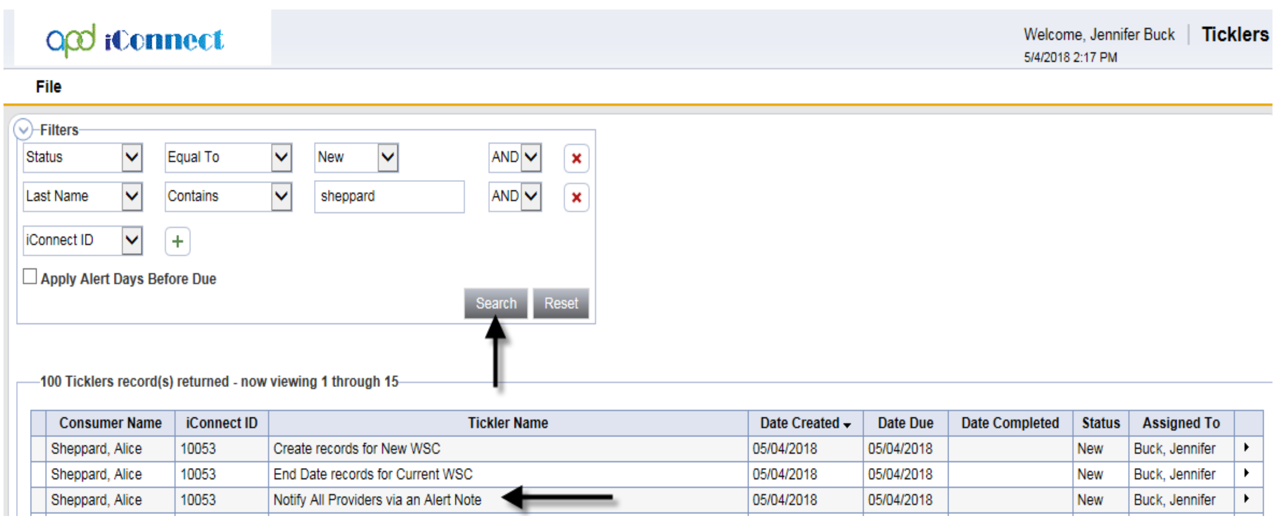
2. The ticklers are also visible via My Dashboard at any time. To begin log into APD iConnect and set Role = Region Waiver Workstream Lead. Click **Go.**



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**

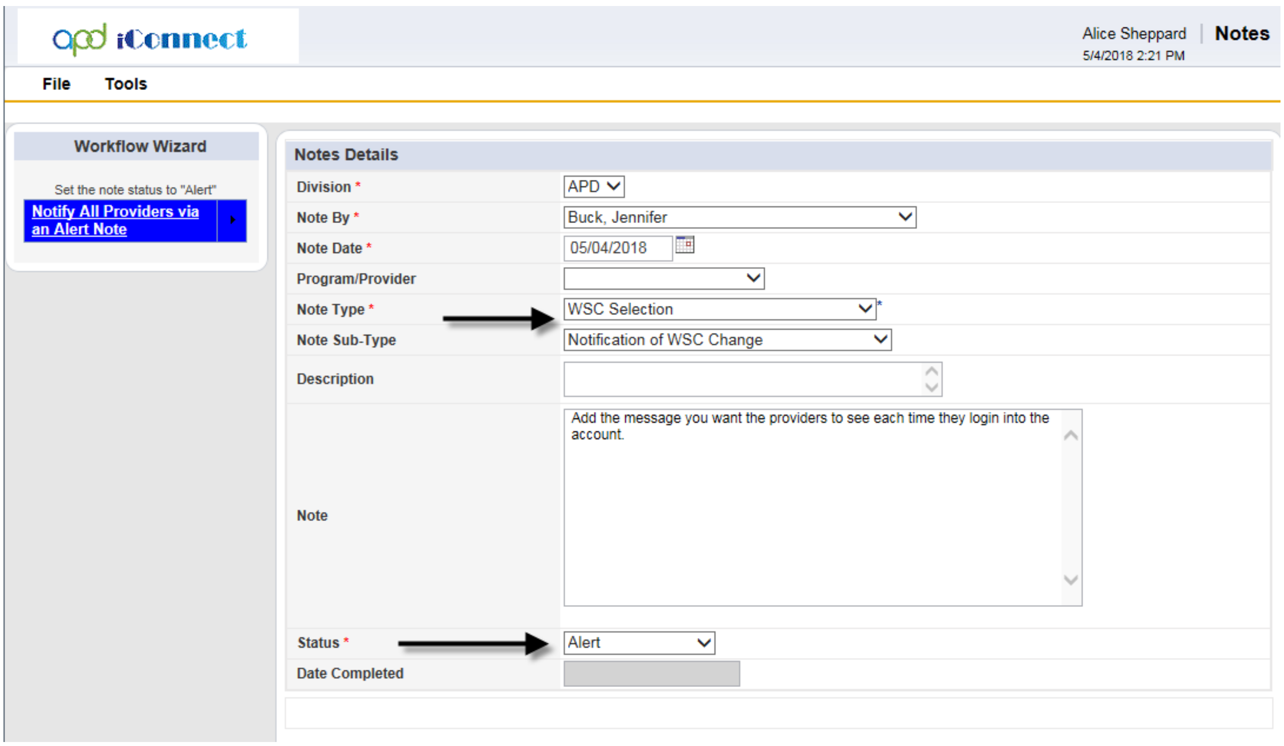


Tip

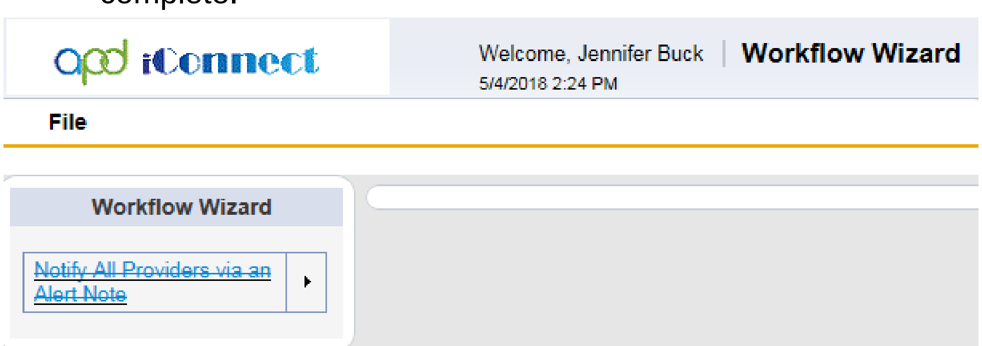
When searching for a future Tickler, remember to clear the check box next to Apply Alert Days Before Due prior to clicking ***Search****.*

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



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

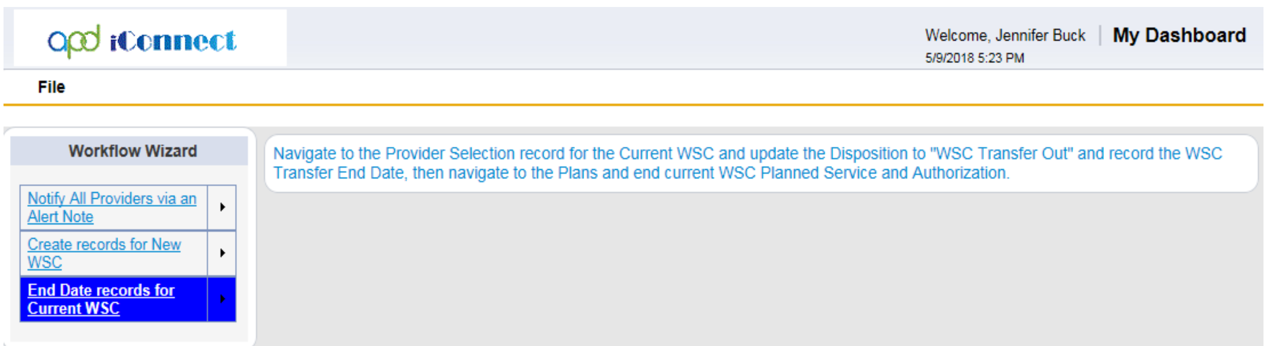


End Date Records for Current WSC

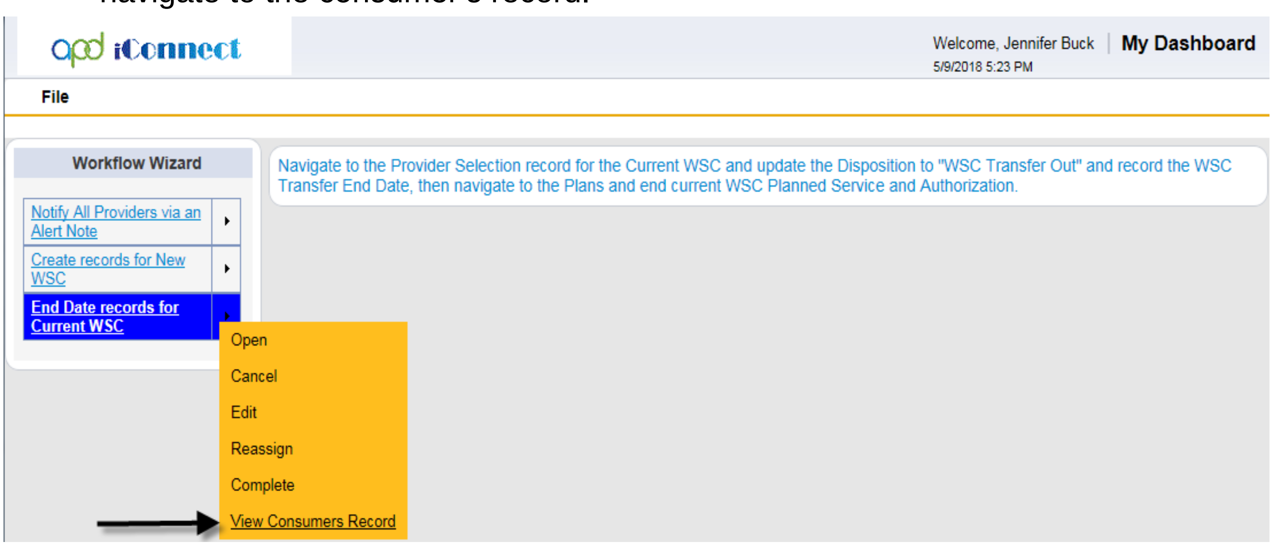
1. Return to the Workflow Wizard and find the Tickler called **End Date Records for Current WSC** tickler.

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:

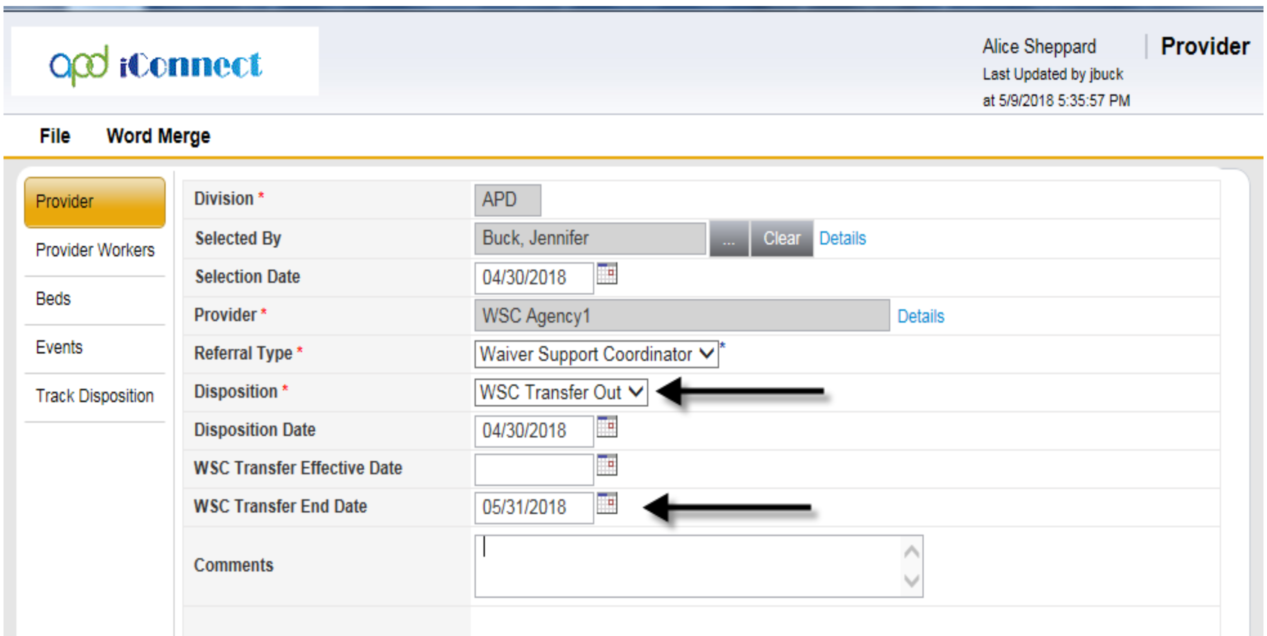


4. Users can click the **View Consumer Record** option from the tickler flyout menu to navigate quickly to the Consumer record from the tickler or can complete a quick Search to navigate to the consumer's record.



5. Click the **Provider Selection** tab. From the list view grid, select the applicable WSC Provider Agency record. The provider detail page displays.

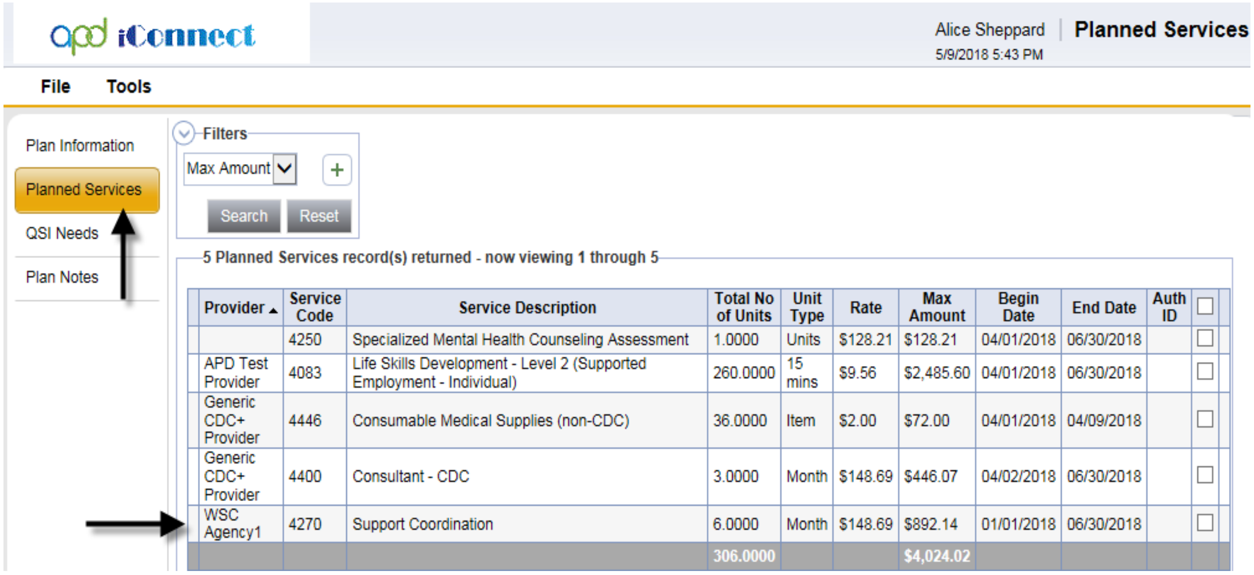
6. Update the following fields:
   a. Disposition = WSC Transfer Out
   b. Disposition Date = enter date the Disposition was changed
   c. WSC Transfer End Date = enter the end date (last day of the month)



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

Alice Sheppard | Planned Services

5/9/2018 5:43 PM

File Tools

Plan Information

Planned Services

QSI Needs

Plan Notes

Filters

Max Amount

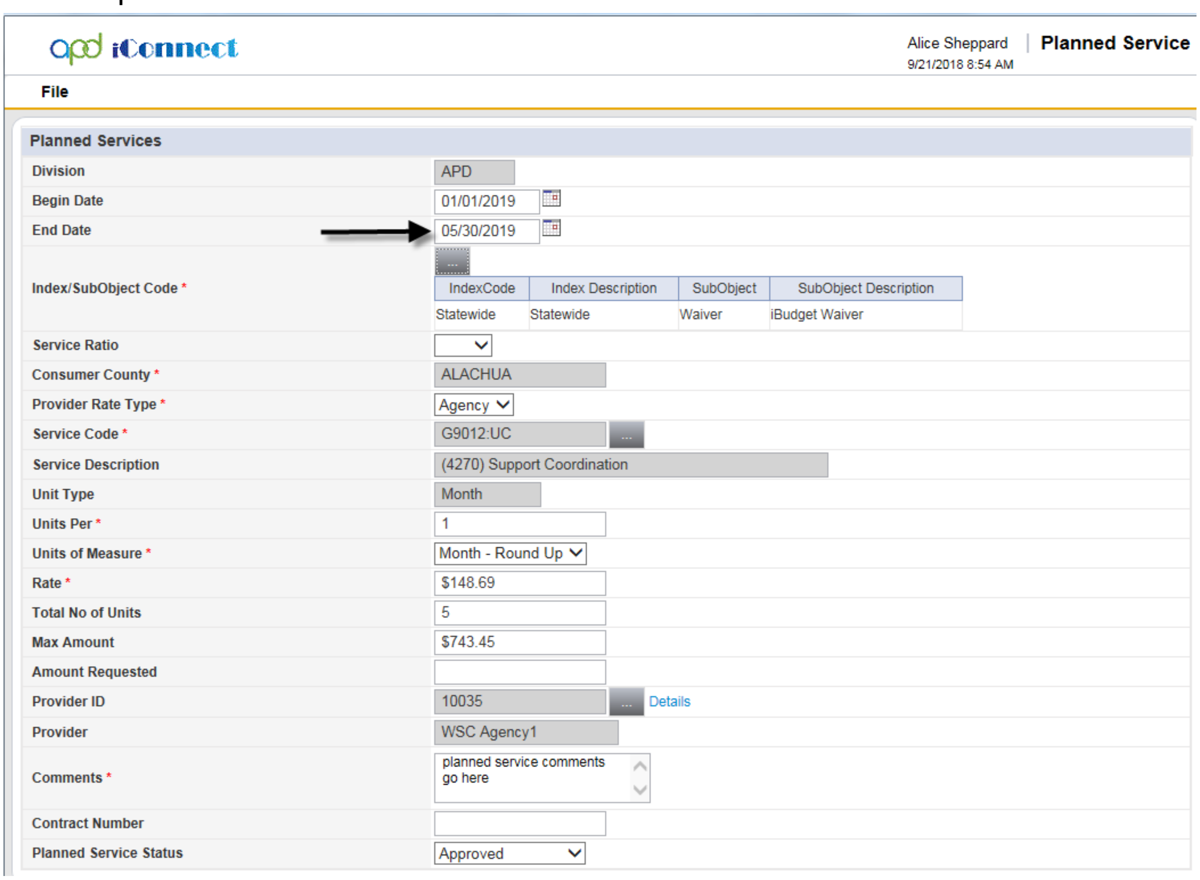
Search Reset

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	
	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		
Generic CDC+ Provider	4400	Consultant - CDC	3.0000	Month	$148.69	$446.07	04/02/2018	06/30/2018		
WSC Agency1	4270	Support Coordination	6.0000	Month	$148.69	$892.14	01/01/2018	06/30/2018		
			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

Alice Sheppard | Planned Service

9/21/2018 8:54 AM

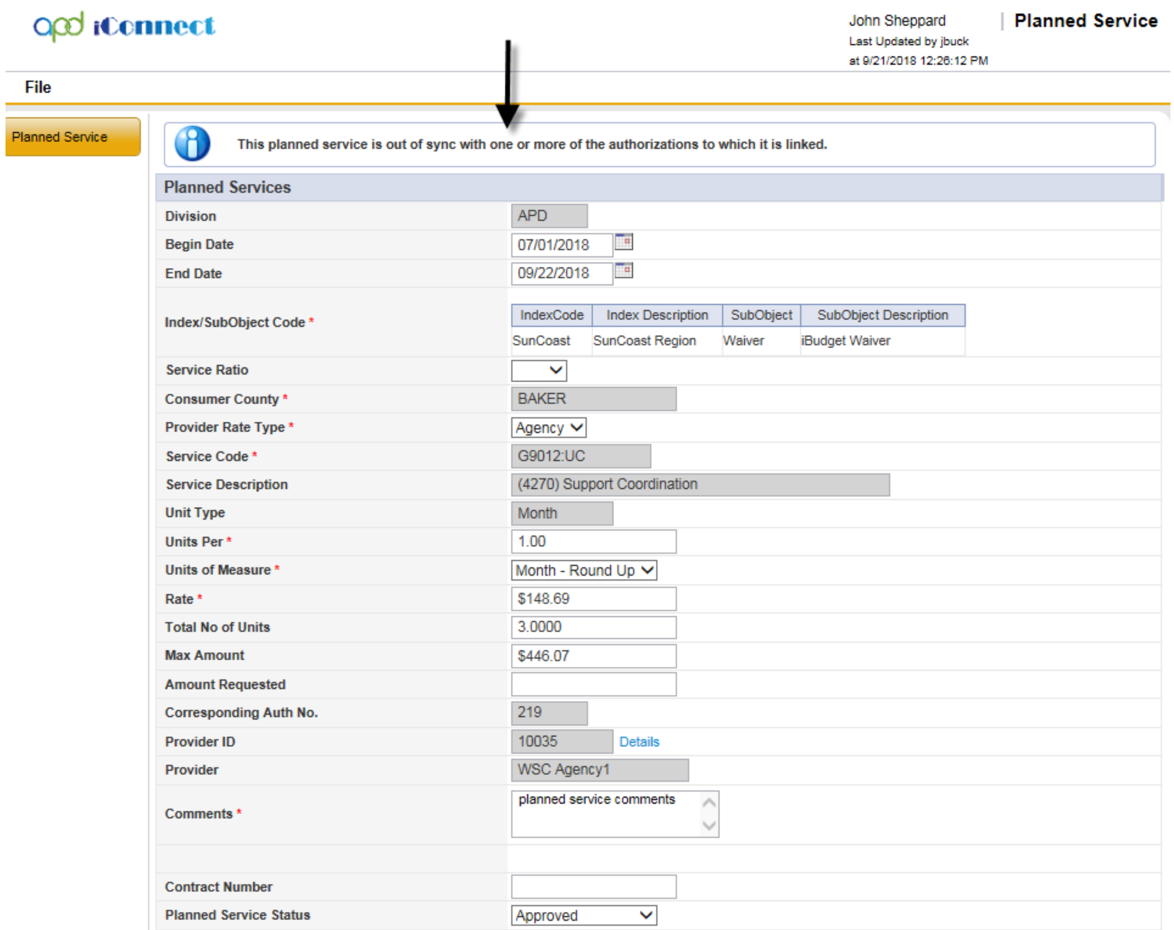
File

Planned Services

Division	APD
Begin Date	01/01/2019
End Date	05/30/2019
Index/SubObject Code *	IndexCode: Statewide; Index Description: Statewide; SubObject: Waiver; SubObject Description: iBudget Waiver
Service Ratio	
Consumer County *	ALACHUA
Provider Rate Type *	Agency
Service Code *	G9012:UC
Service Description	(4270) Support Coordination
Unit Type	Month
Units Per *	1
Units of Measure *	Month - Round Up
Rate *	$148.69
Total No of Units	5
Max Amount	$743.45
Amount Requested	
Provider ID	10035 Details
Provider	WSC Agency1
Comments *	planned service comments go here
Contract Number	
Planned Service Status	Approved

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

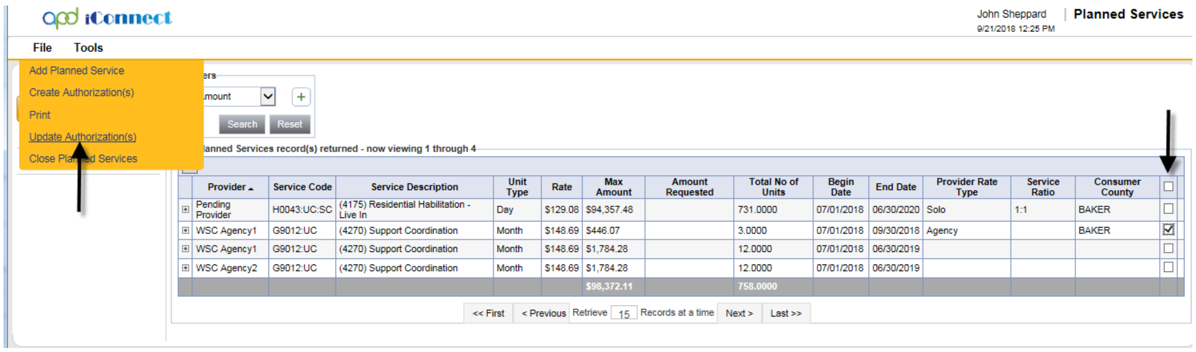
13. A notification displays for the user that the planned service is out of sync with the authorization. The changes to the planned service must also be made to the authorization.



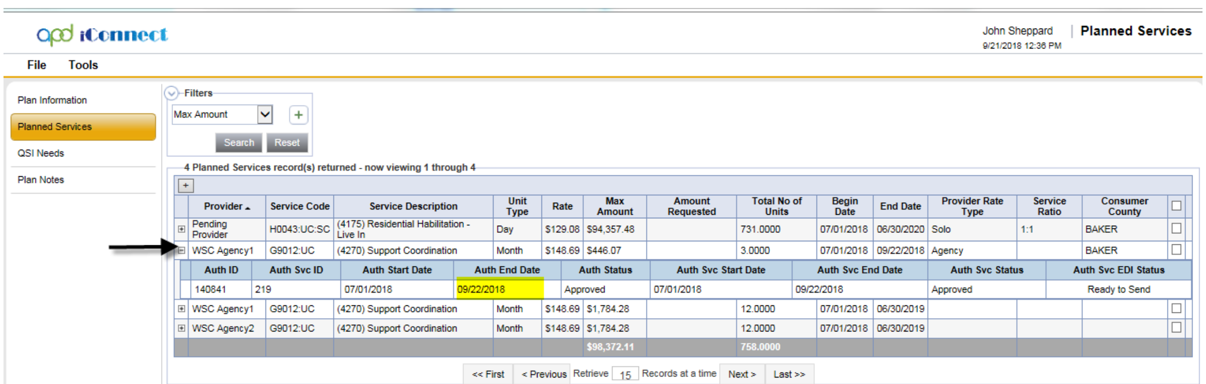
14. To do so, select the Planned Services subpage.

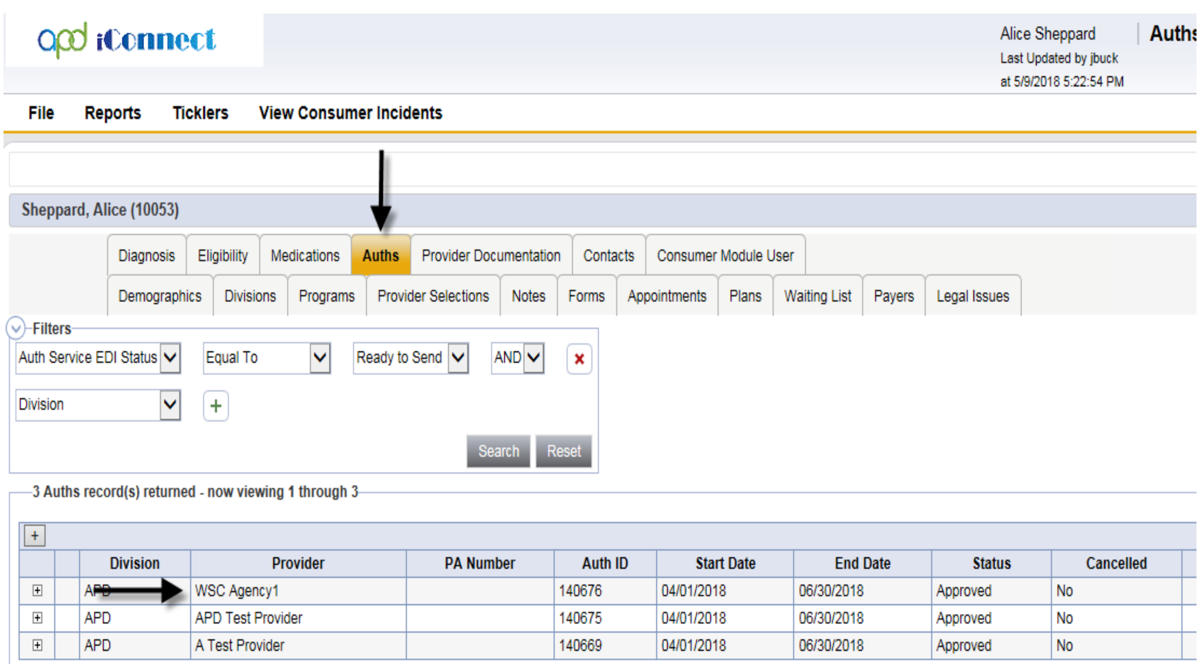
15. Click the checkbox next to the planned service that was updated.

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

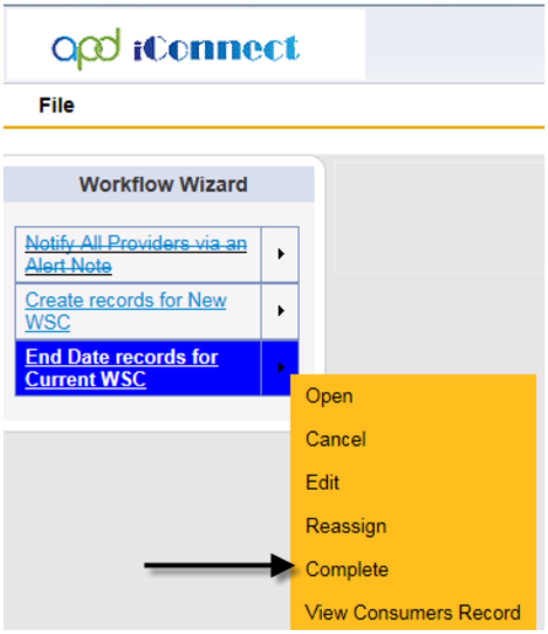


17. The authorization details can be viewed by selecting the + next to the edited planned service or from the Authorization tab.





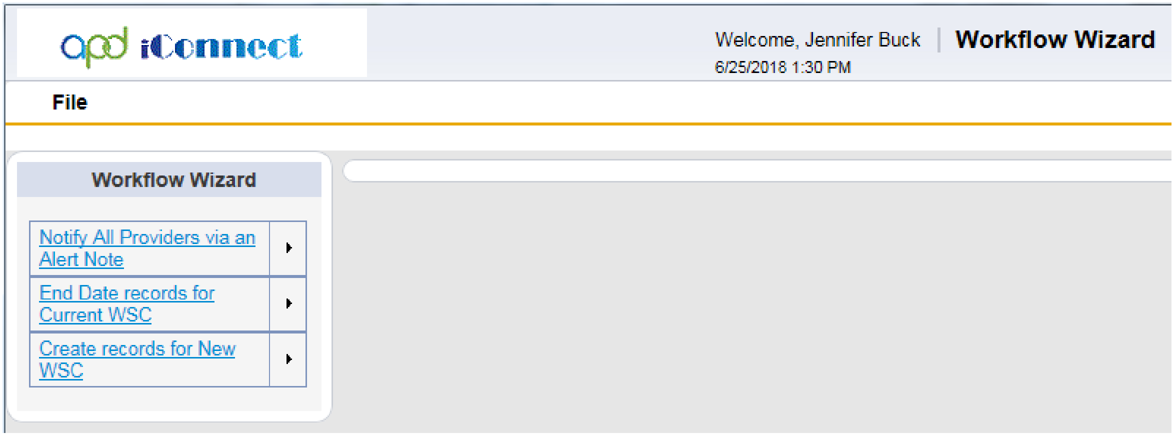
18. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.



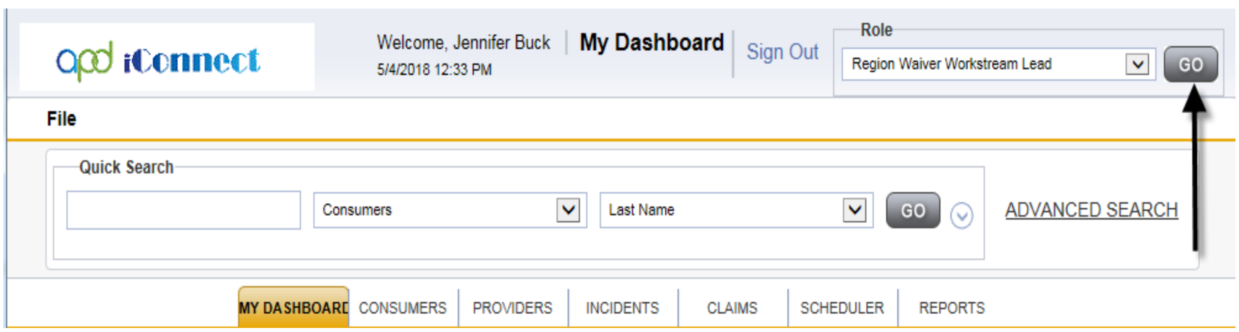
Create Records for New WSC

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.)

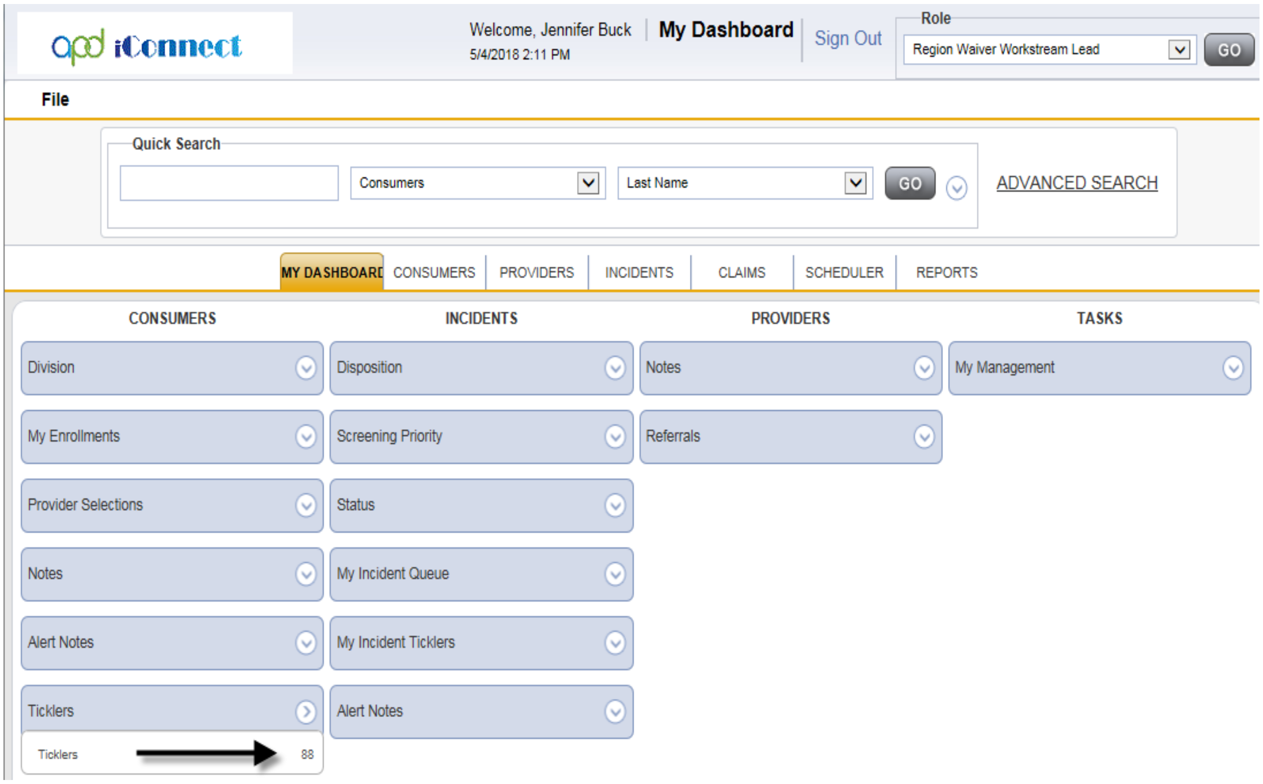
2. The ticklers are displayed in a new window. Click the tickler to Open it.



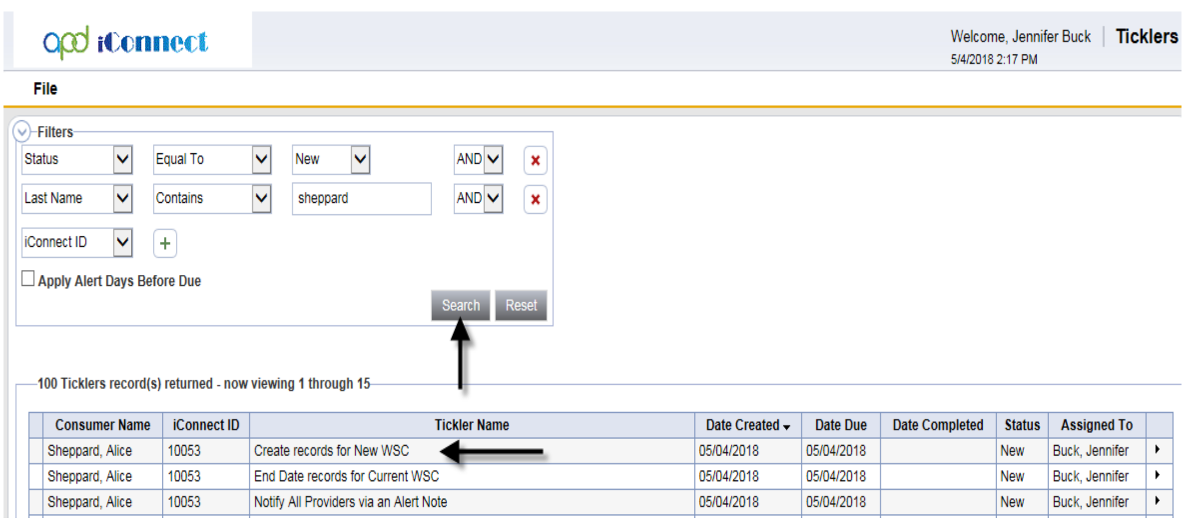
3. The ticklers are also visible via My Dashboard at any time. To begin log into APD iConnect and set Role = Region Waiver Workstream Lead. Click **Go.**



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.



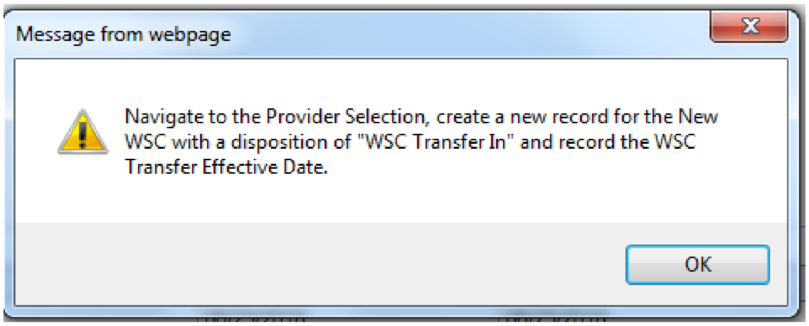
5. From here, user the multi variable search to find the Tickler. Click **Search**



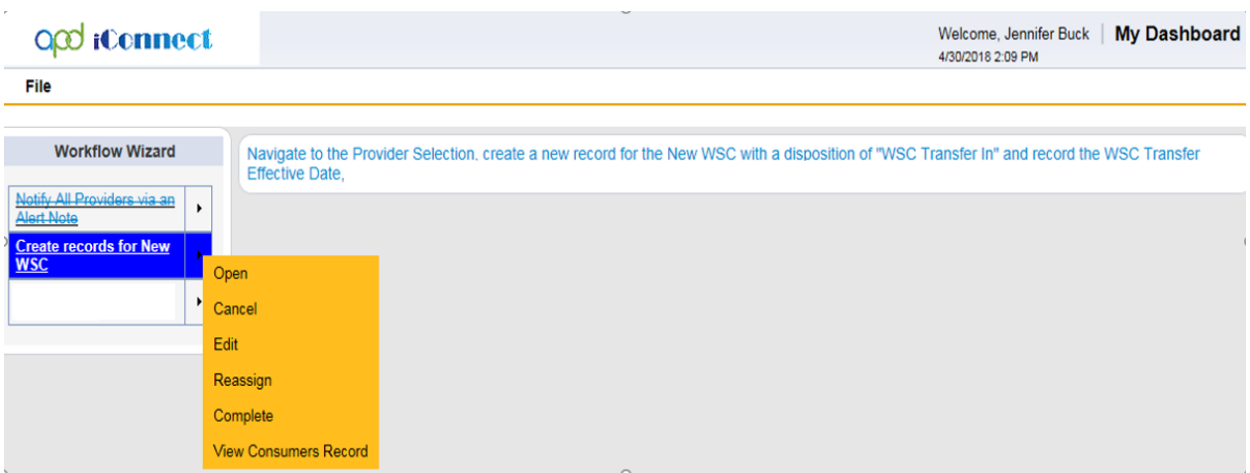
Tip

*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:

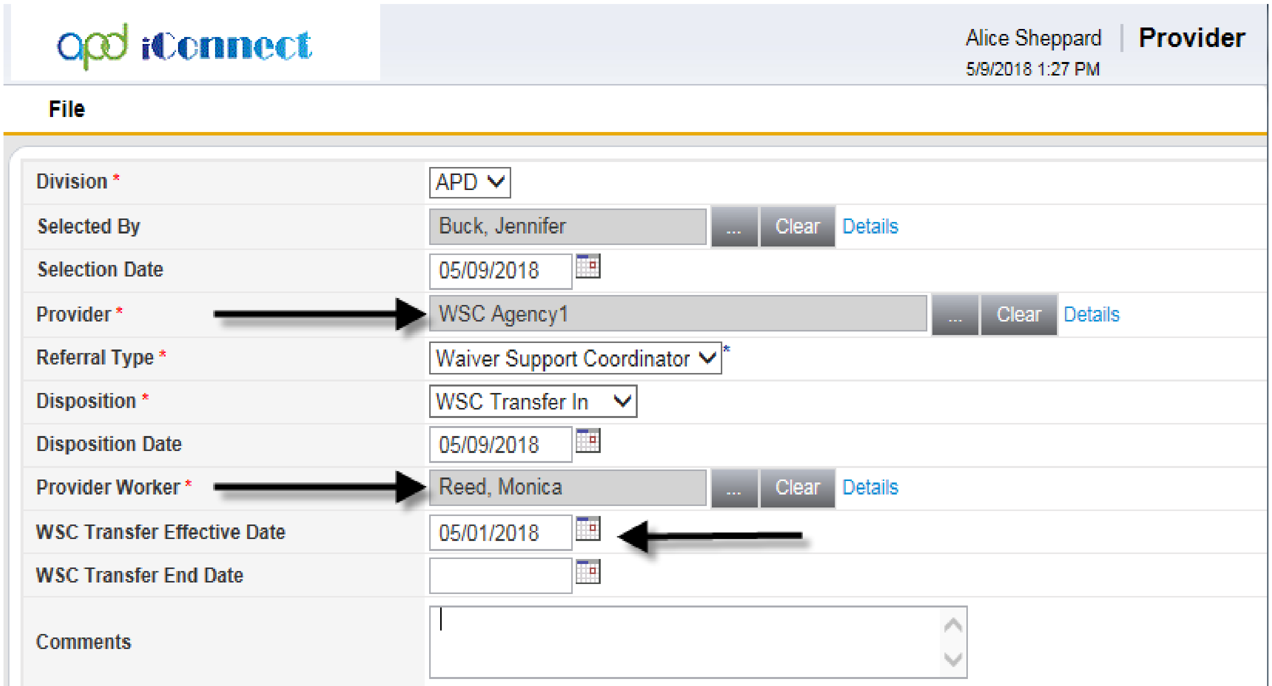


7. To complete the Tickler, click the **View Consumer Record** option from the tickler flyout menu to navigate quickly to the Consumer record from the tickler or can complete a quick Search to navigate to the consumer's record.



8. Click the **Provider Selections** tab.

9. Click **File** > **Add Provider**. The Provider Selection Detail page opens.



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

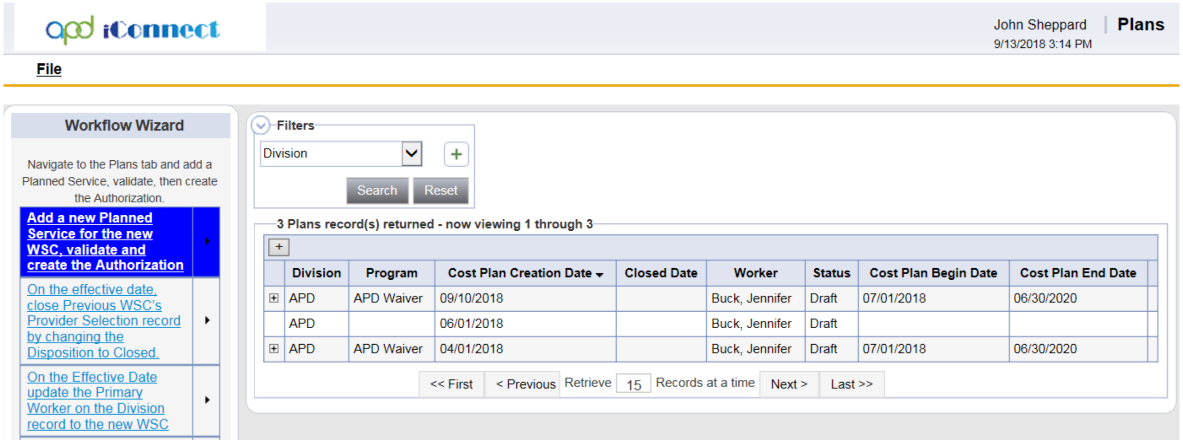
11. Click **File** > **Save and Close Provider**.

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

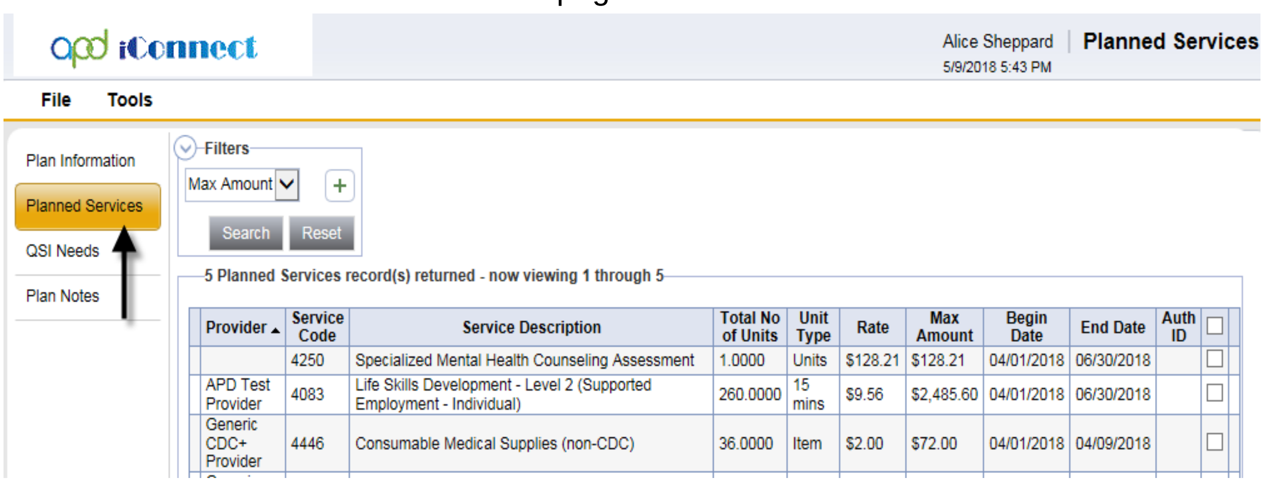
1. Upon saving the Provider Selection Record with a Disposition = WSC Transfer In, a Workflow Wizard will trigger for the user with three Ticklers.
    a. Add a new Planned Service for the new WSC, validate and create the Authorization.
    b. On the effective date, update Primary Worker on the Division 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.



3. Click the APD waiver Plan. The Plan Information page displays.

4. Click the **Planned Services** subpage.

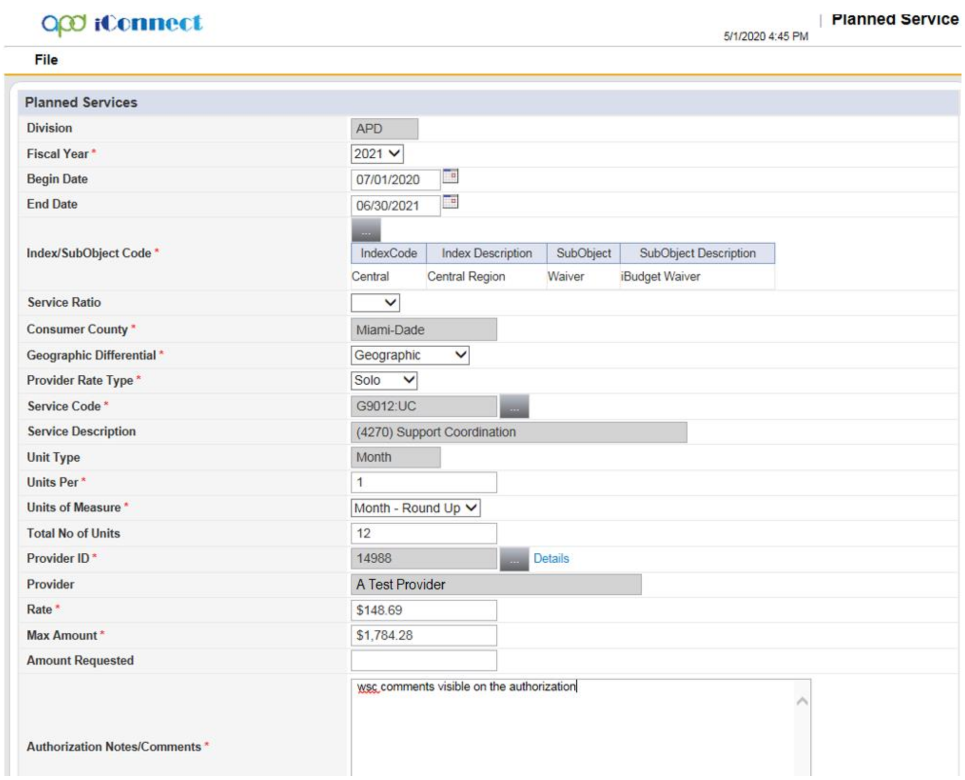


5. Click **File** > **Add Planned Service**.

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.

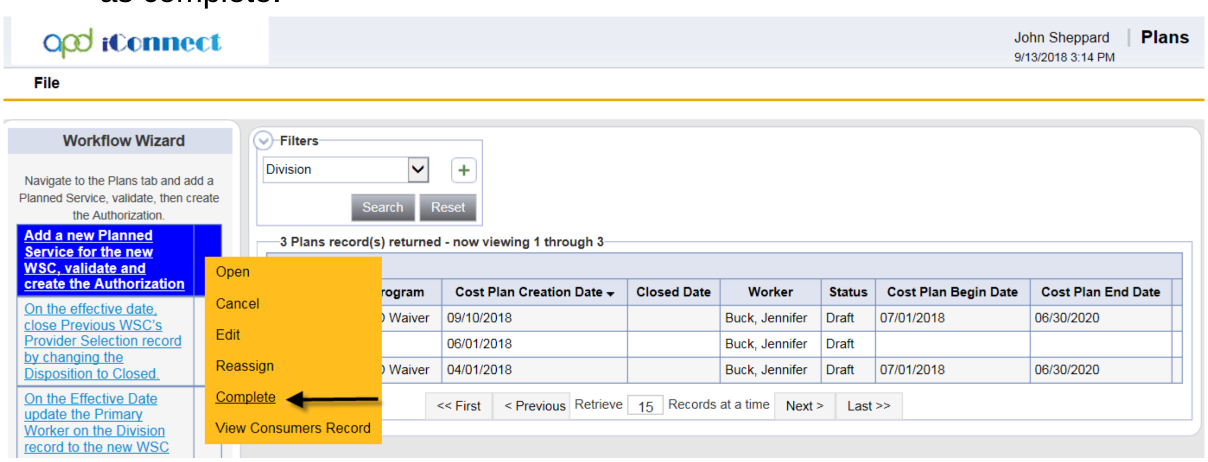
NOTE: The Start and End Dates of a Planned Service must be within the Cost Plan Begin and End Dates located on the Plan Information page.

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.



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

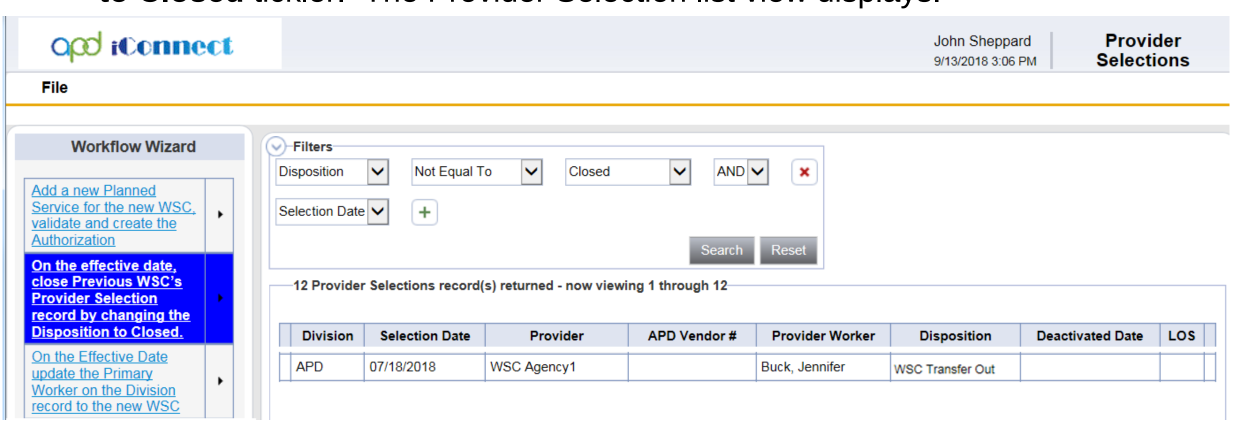
8. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.



Close Previous WSC’s Provider Selection Record

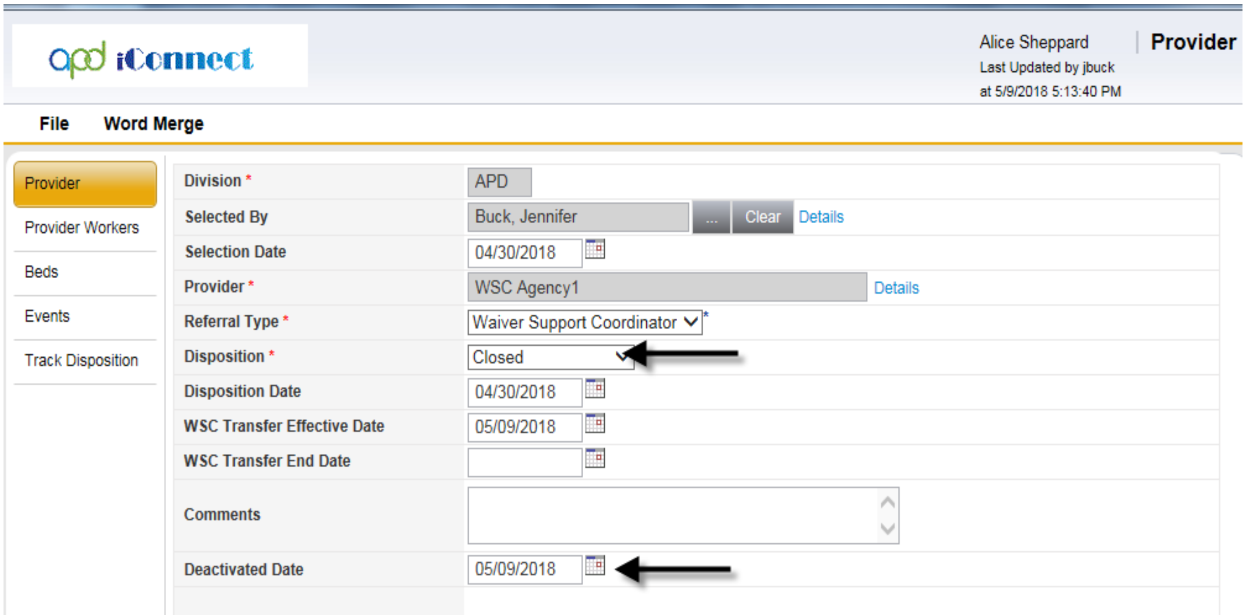
1. Upon saving the Provider Selection Record with a Disposition = WSC Transfer In, a Workflow Wizard will trigger for the user with the following Ticklers to complete on the effective date of the new WSC. Similar ticklers were completed earlier when an end date was added to the Previous WSC’s Provider 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.



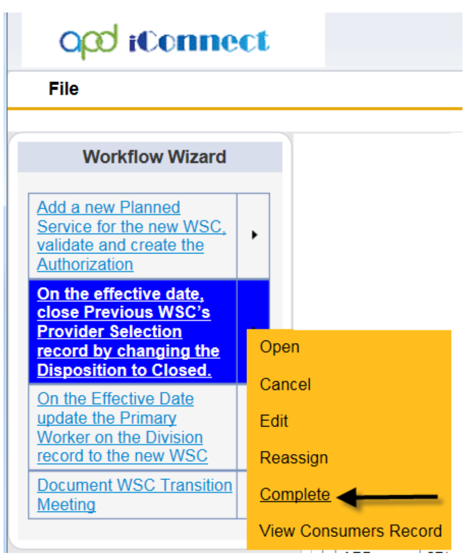
3. Click the previous WSC Provider Selection Record. The Details page displays. Update the following fields:
    a. Disposition = Closed

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



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

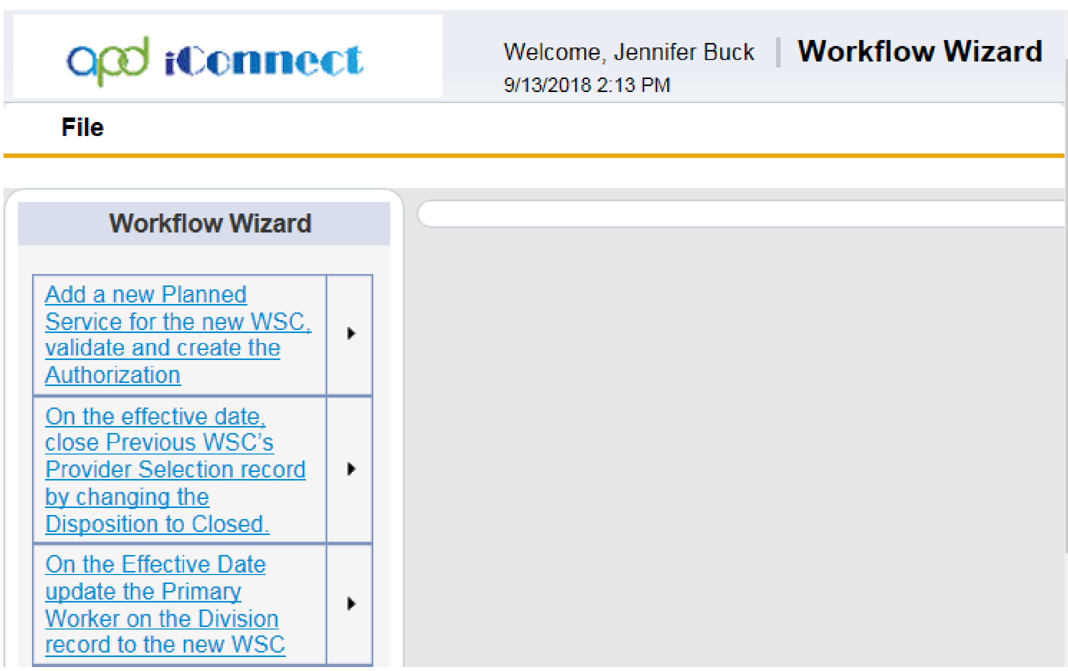
5. Navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.



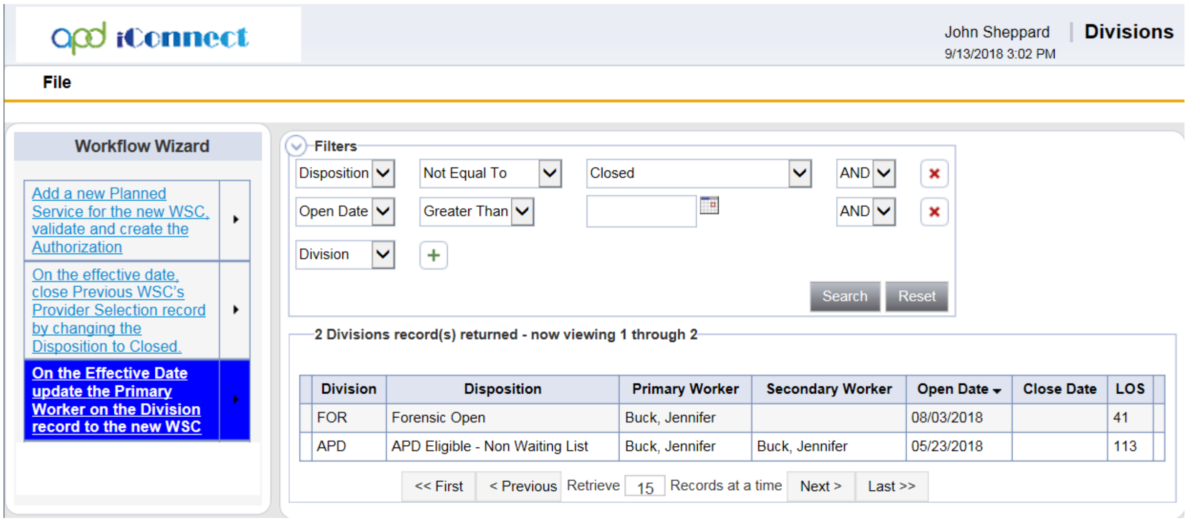
Update the Primary Worker

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.

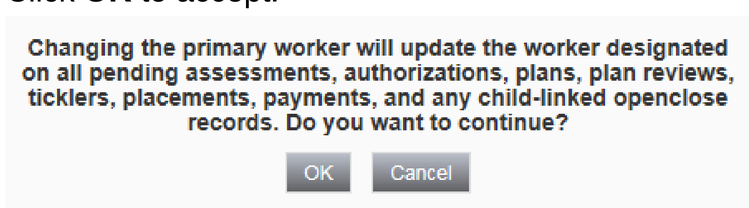
a. On the effective date, update Primary Worker on the Division record to the new WSC. This tickler will trigger immediately but the user should not complete it until the effective date because the change is effective immediately.
b. On the effective date, close Previous WSC's Provider Selection Record 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.

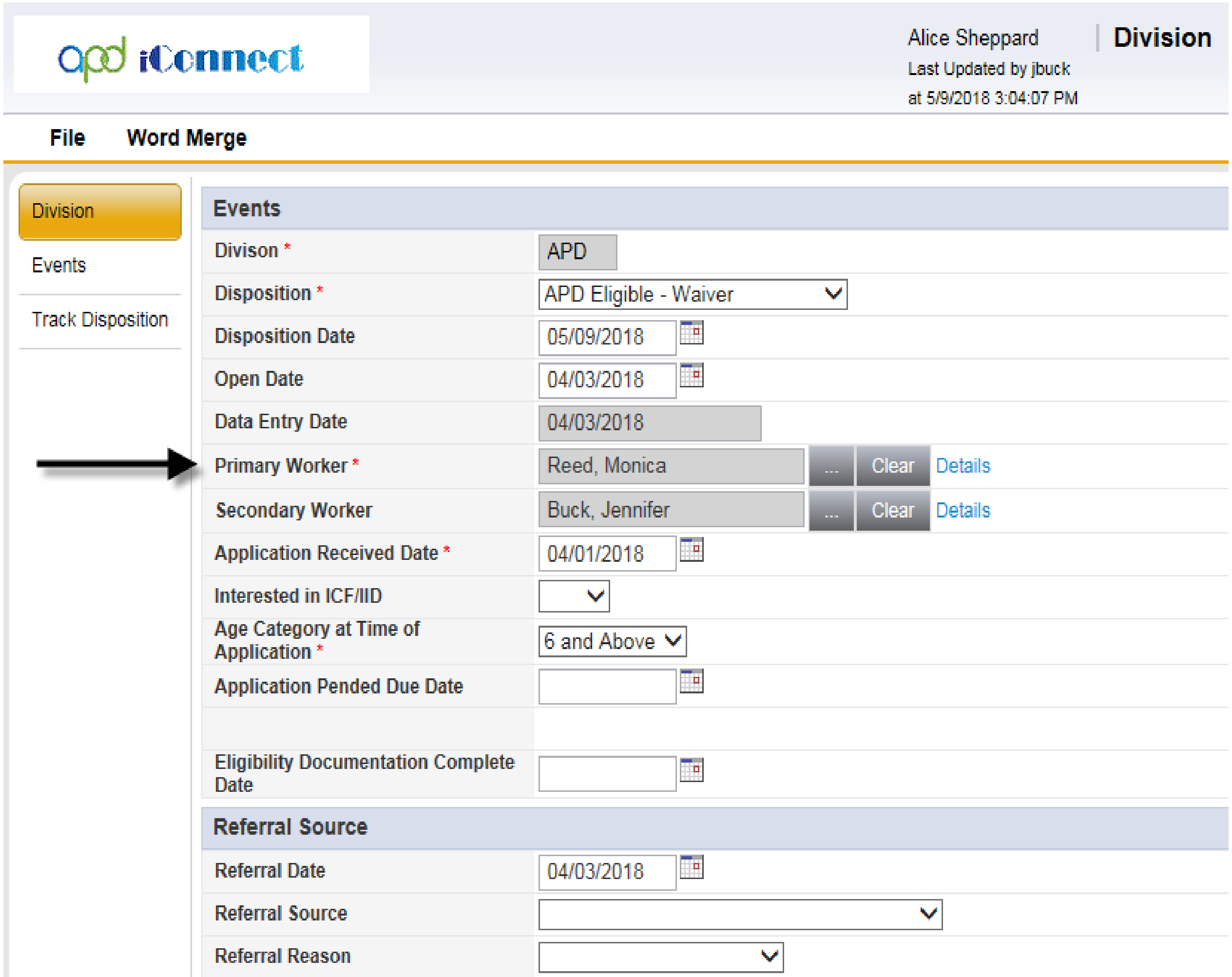


1. Click the **On the Effective date, update Primary Worker** tickler. The Division list view displays.



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.



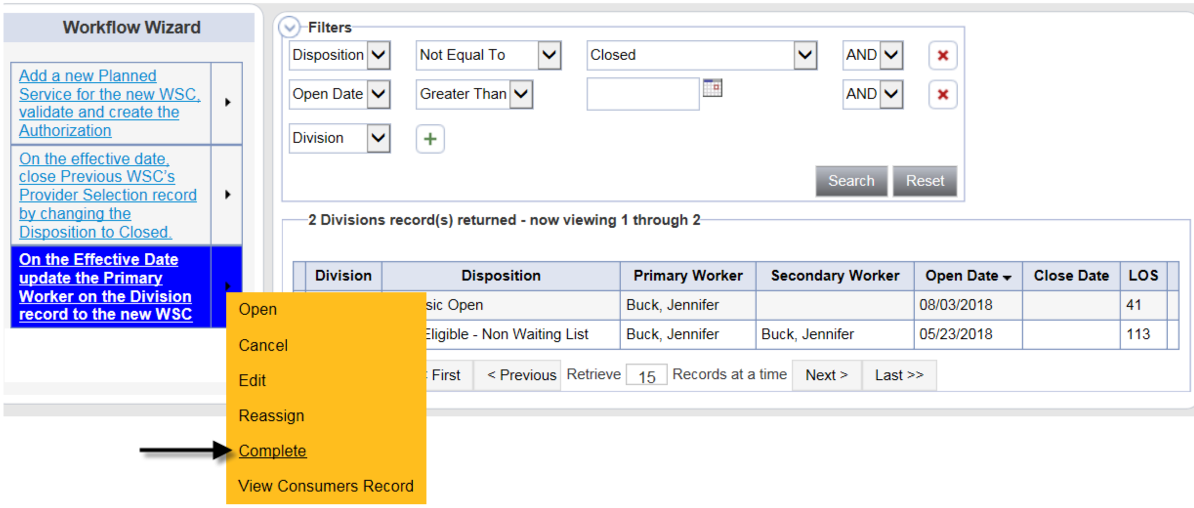


3. Click **File** > **Save and Close Division**.

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.



WSC Selection – Same Agency/Provider

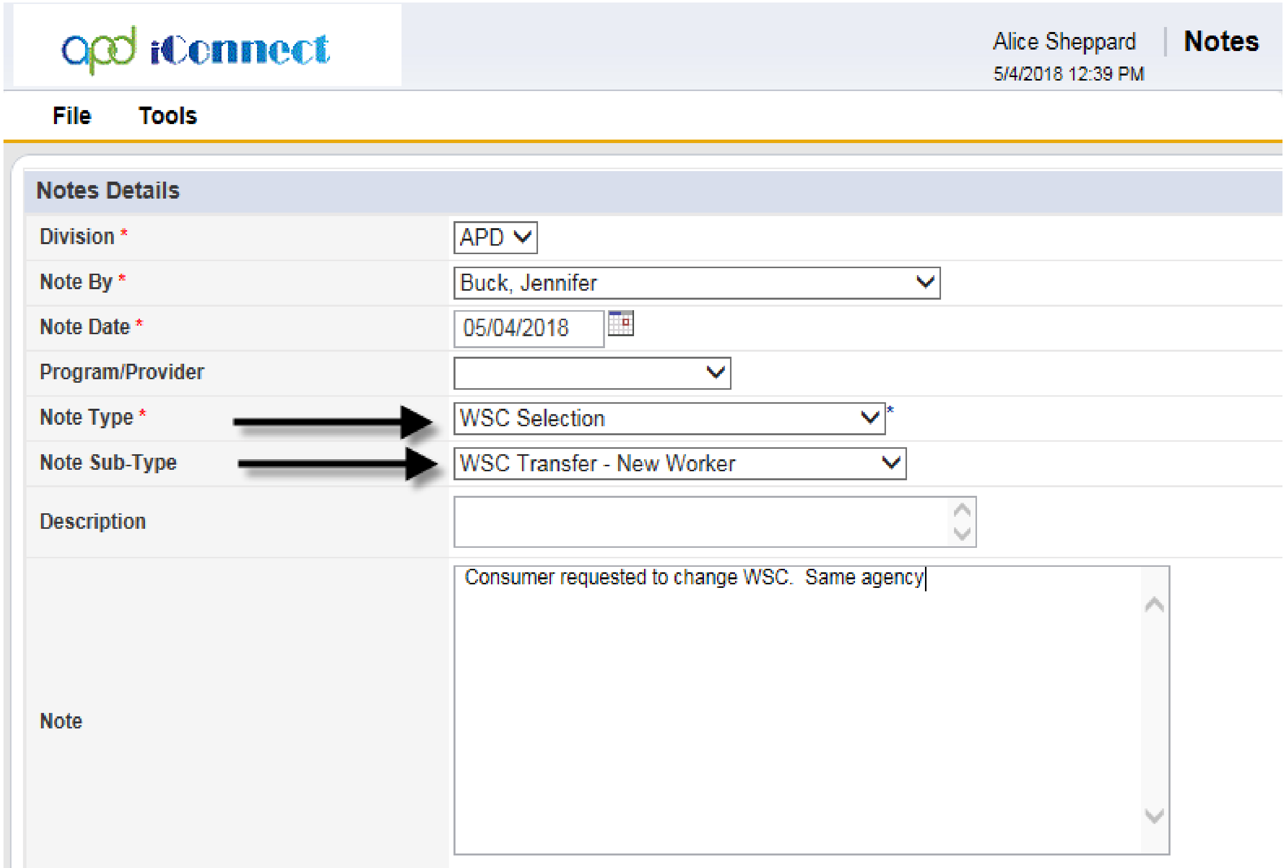
Depending on the reason for the change the Region staff or the old WSC will work with the consumer to select a new WSC and effective date. A note is added in APD iConnect to begin the reassignment process. NOTE: this is an area of organizational change. Regions will be involved to ensure caseload capacity 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



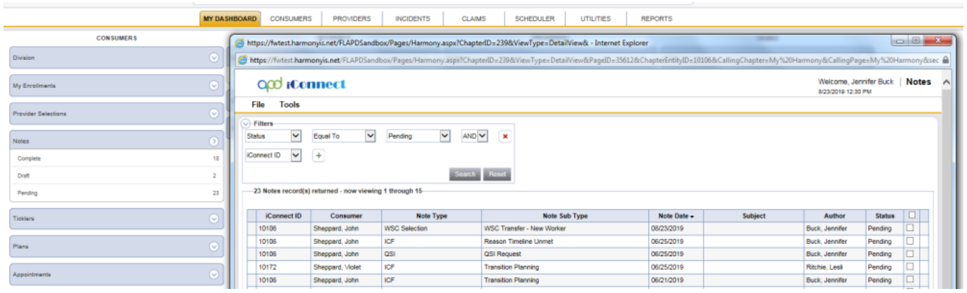
4. Click **File** > **Save and Close Notes**

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

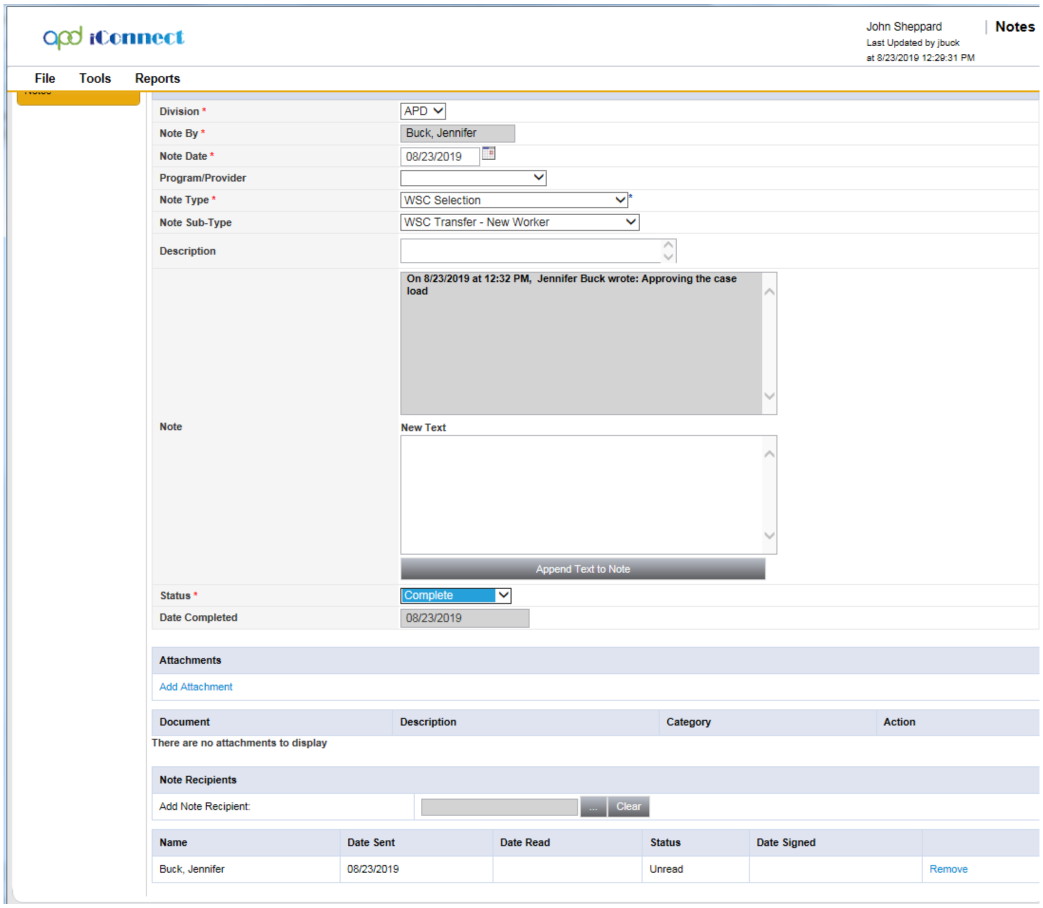
f. Attachment = search for and select the saved **document** and attach it to the note.

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.



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.

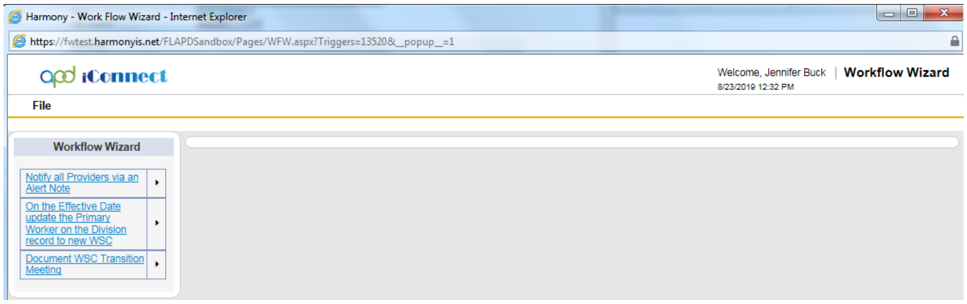
9. The Region Waiver Lead will approve or not approve based on the requested WSC's case load and will update the Note with his/her decision. Update the following fields:
   a. Note Type = remains WSC Selection
   b. Sub Type = change to WSC Transfer Approved or WSC Transfer Not Approved
   c. Note = decision details to approve or not approve the case load
   d. Status = Complete
   e. Recipients = Old WSC, Agency Owner/Manager, Waiver Workstream Worker



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.
    a. When approved, the old WSC will complete the transition meeting with the new WSC. Proceed to the WSC Transition Meeting section.
    b. 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:
    a. Notify all Providers via an Alert Note. The Waiver Lead will complete this tickler immediately.
    b. 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.

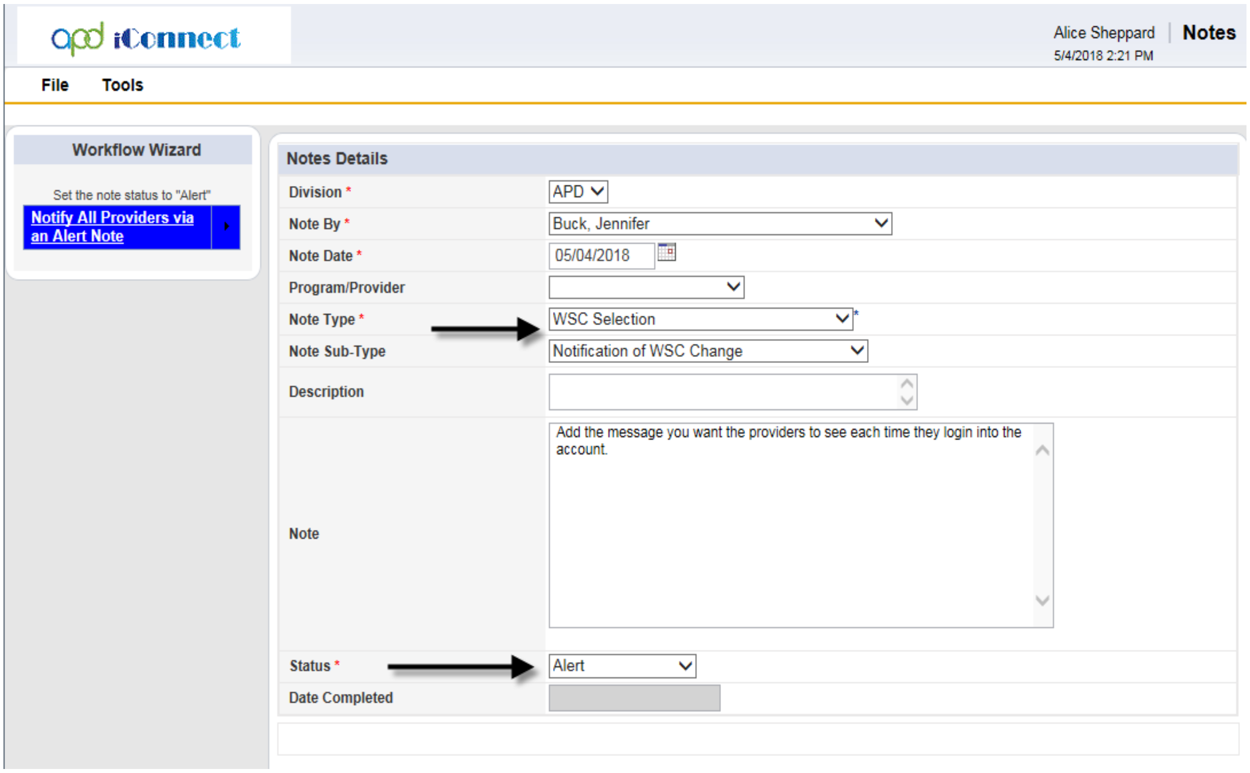
c. Document WSC Transition Meeting. The Waiver Lead will reassign this tickler to the new WSC.



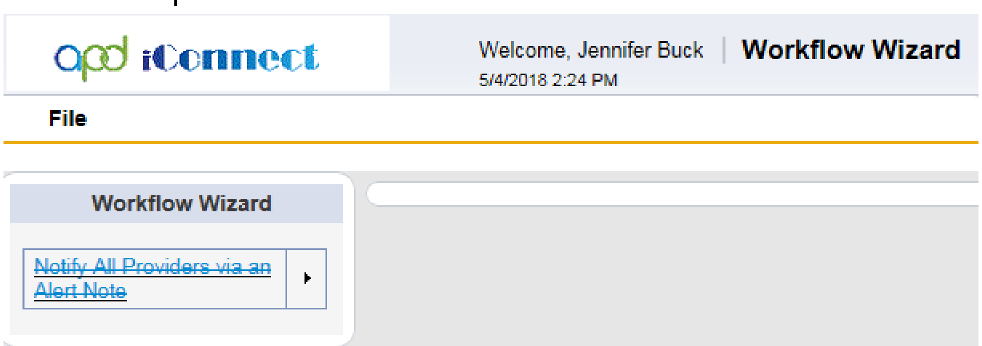
Notify All Providers via an Alert Note

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



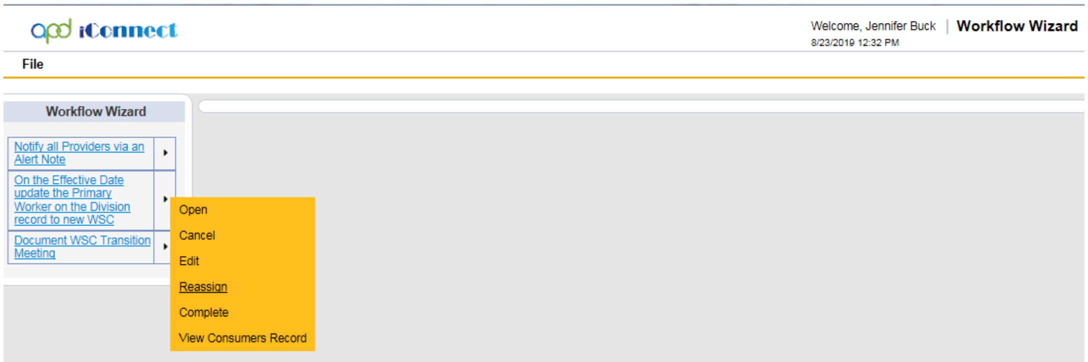
3. Click **File > Save Notes**. The Tickler is marked as complete.



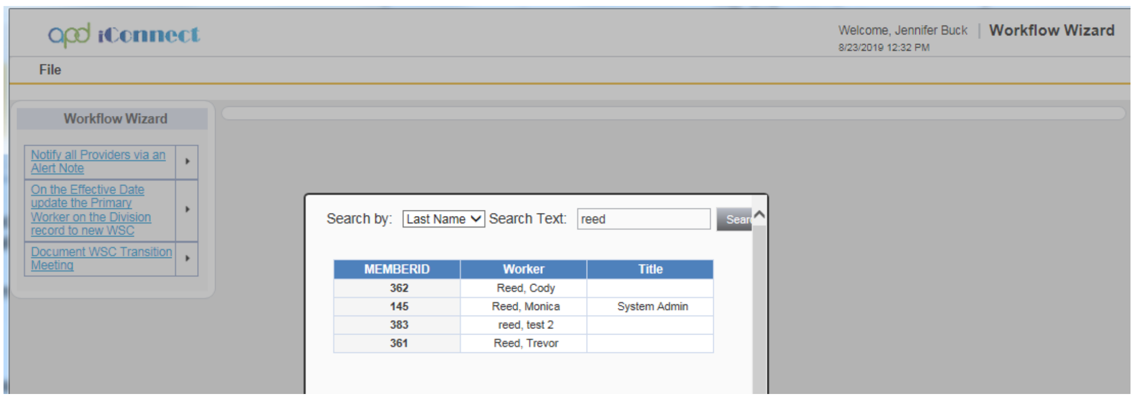
Update Primary Worker

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.

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

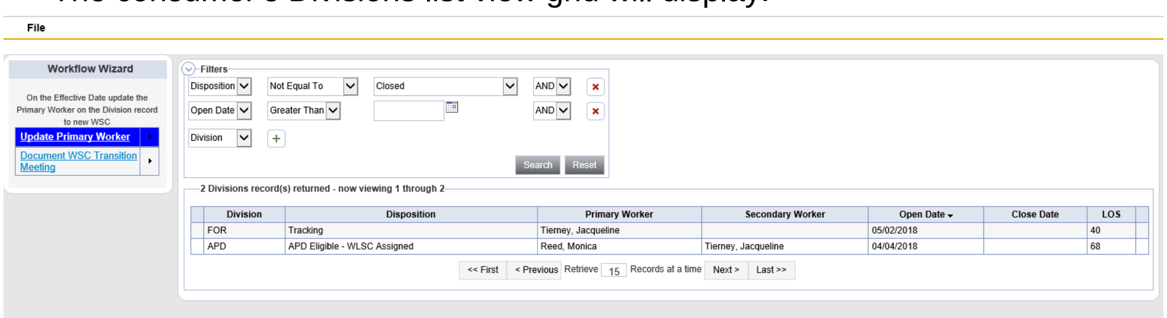


3. Search for and select the new WSC name. When select, the tickler is automatically reassigned.



4. The new WSC will monitor **My Dashboard** for incoming ticklers.

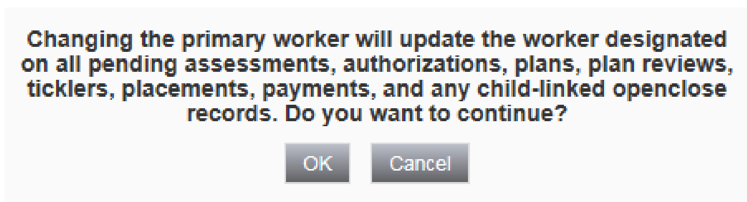
5. Click the **On the effective date, update the Primary Worker on the Division record to the new WSC** tickler. The consumer's Divisions list view grid will display.



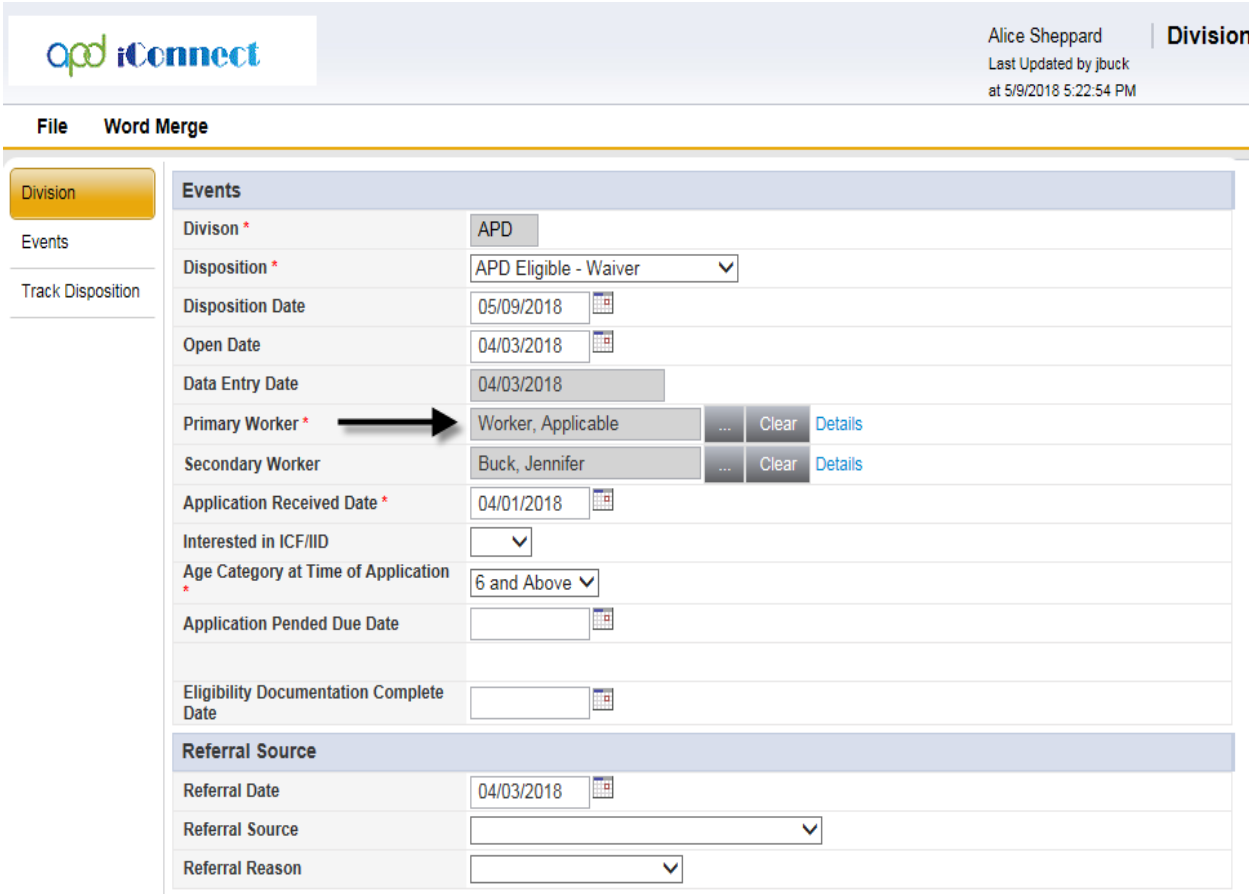
6. On the effective date of the new WSC, the new WSC will update the primary worker on the Division which will automatically update the worker on the associated Program records and Provider Selection records.

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.



    b. Secondary Worker = Region Waiver Lead



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

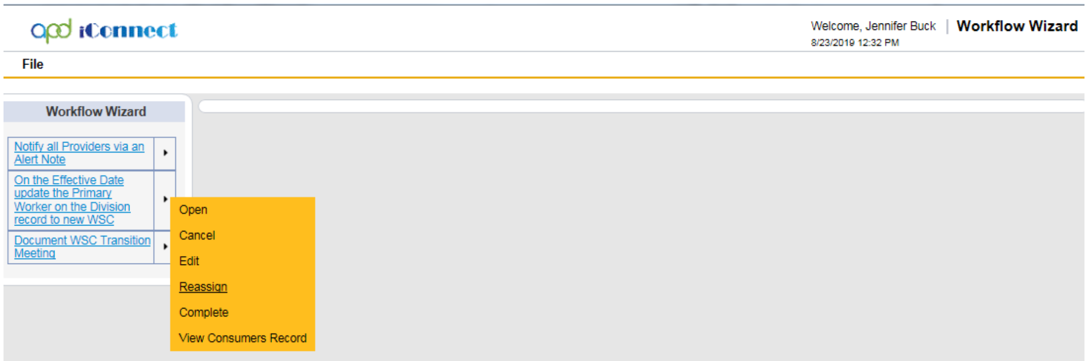
10. Upon completing the tasks outlined in the tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

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.

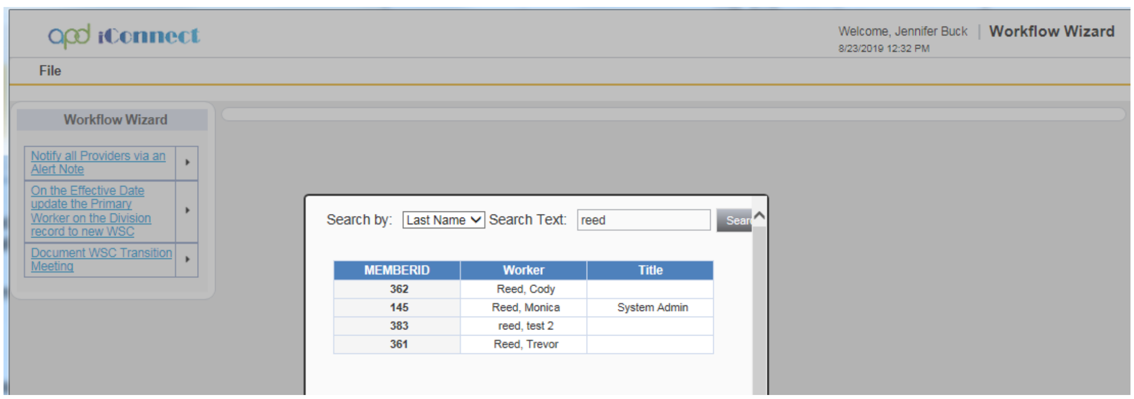
WSC Transition Meeting

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.

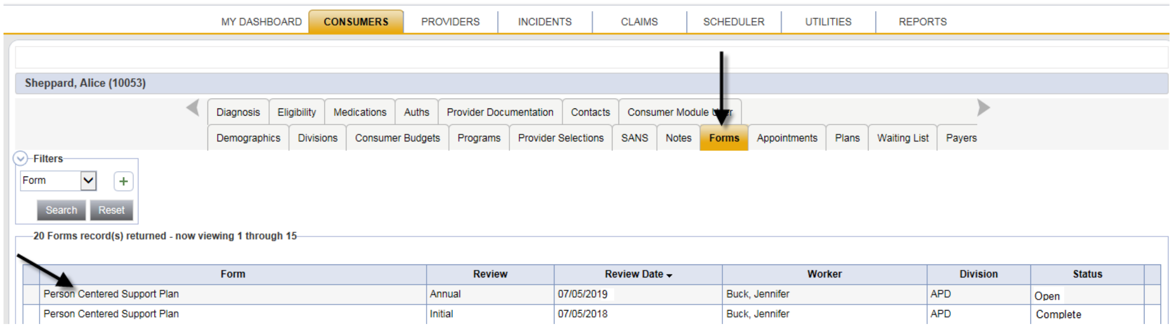


4. The new WSC will monitor **My Dashboard** for incoming ticklers. Locate the **Document WSC Transition Meeting** tickler. Select to open the Notes detail page. Once the transition process is complete, the new WSC will complete this tickler by adding a Note confirming the transition is complete. For 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.

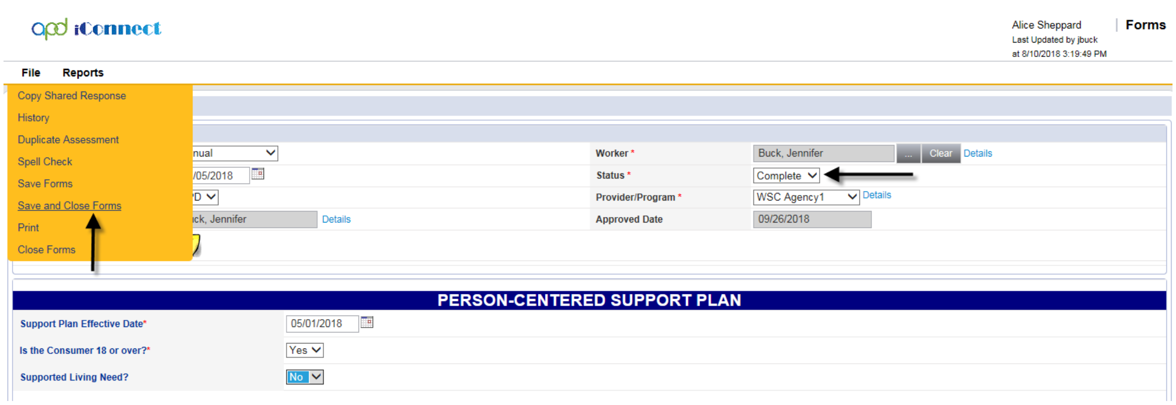
6. The previous WSC will mark the Person-Centered Support Plan form as complete, making it ready only. The new WSC will create a new Person-Centered Support Plan duplicated from the one completed by the previous WSC.

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.



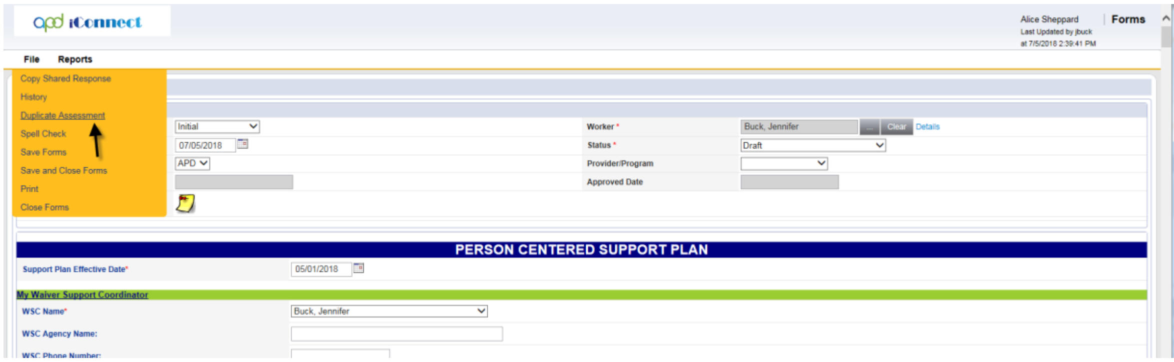
8. Update the following fields:
    a. Review the form and ensure it is complete.
    b. Change the Status = Complete

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.



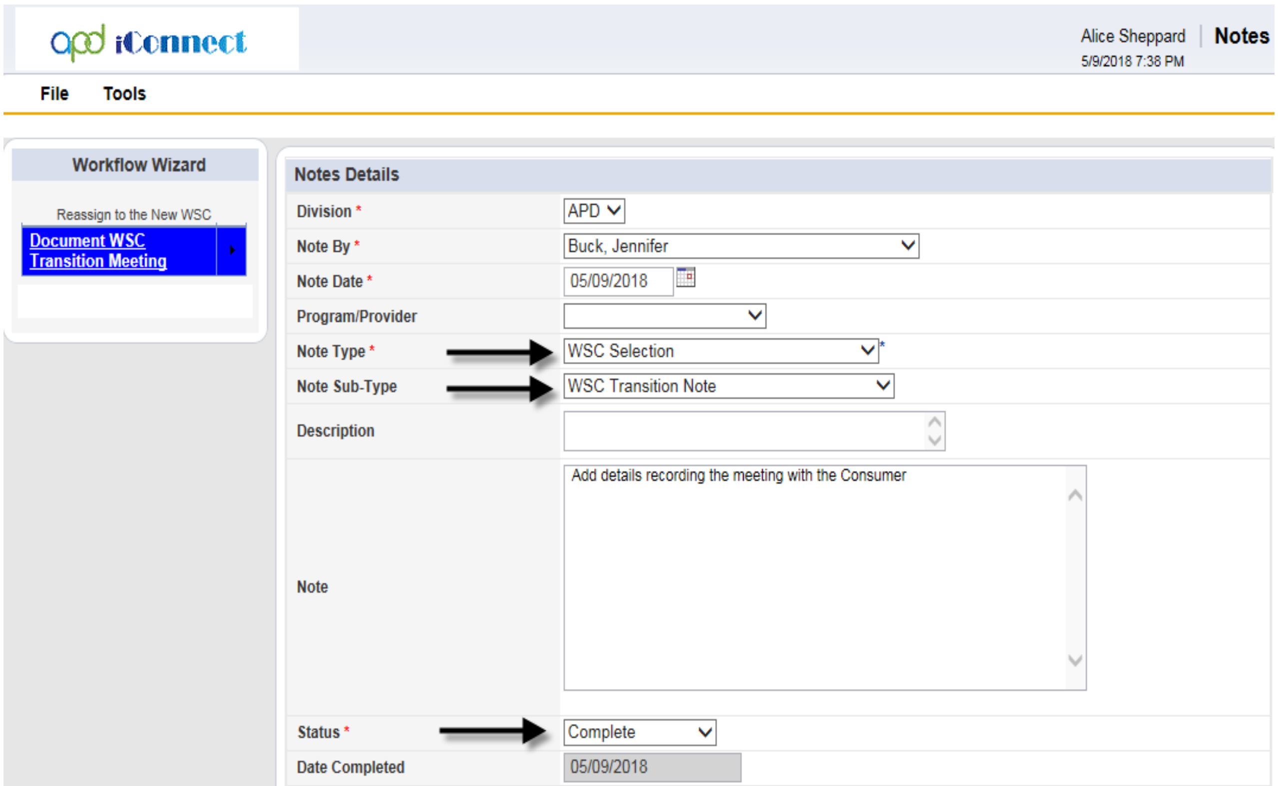
12. Update the following fields:
    a. In the Form header, change the **Review Type** = Annual.
    b. Update the support plan effective date.
    c. Make updates to goals, needs, and other important factors.

13. When finished, change the S**tatus** = 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:
    a. Division = APD
    b. Note Type = WSC Selection
    c. Note Subtype = WSC Transition Note
    d. Note = Add details recording the meeting with the Consumer

e. Status = Complete



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

17. The tickler is marked as complete.

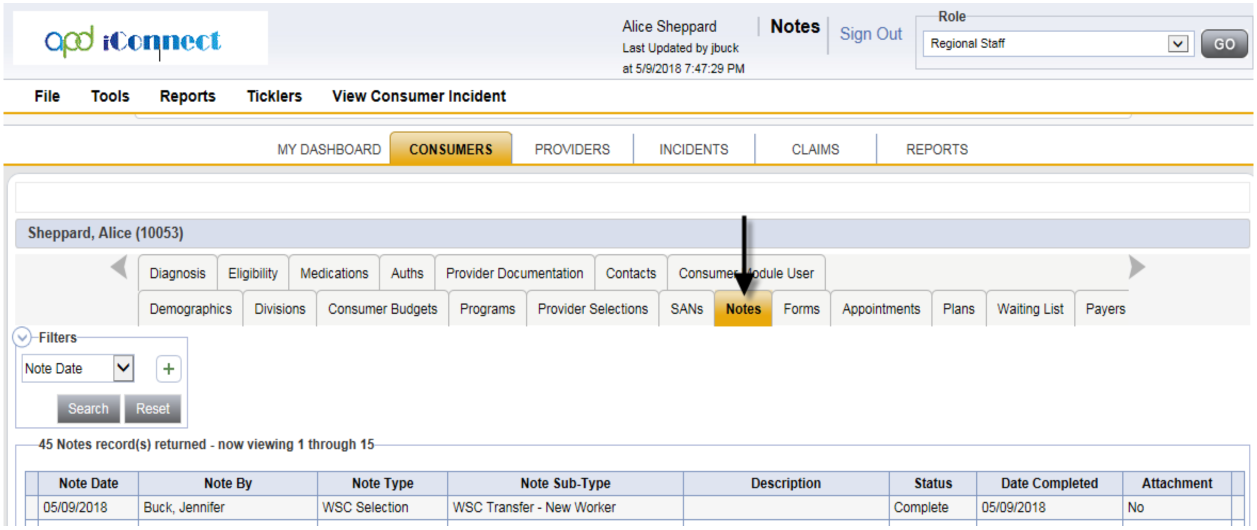
Inter-region Transfer on Waiting List

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.

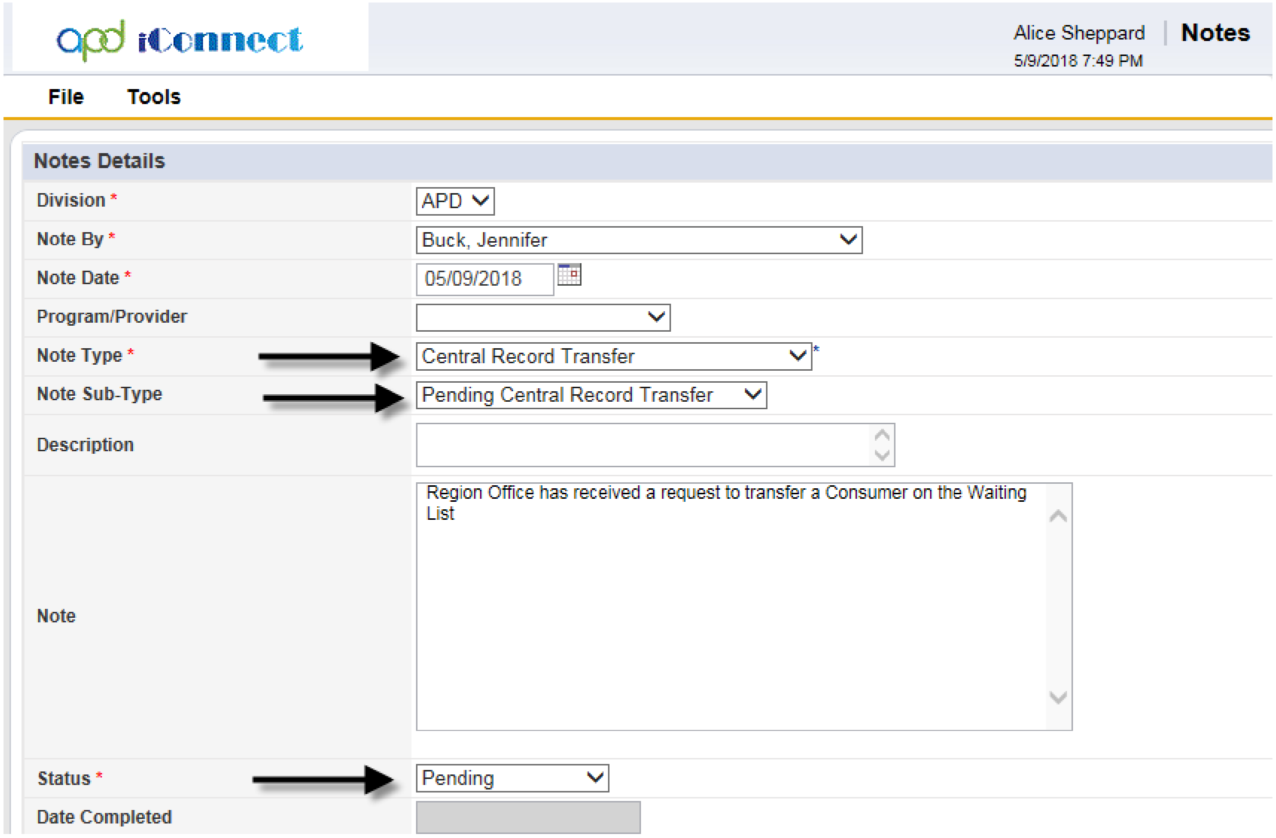
1. To begin, log into APD iConnect and set Role = Waiting List Workstream Worker. Click **Go.**

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

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

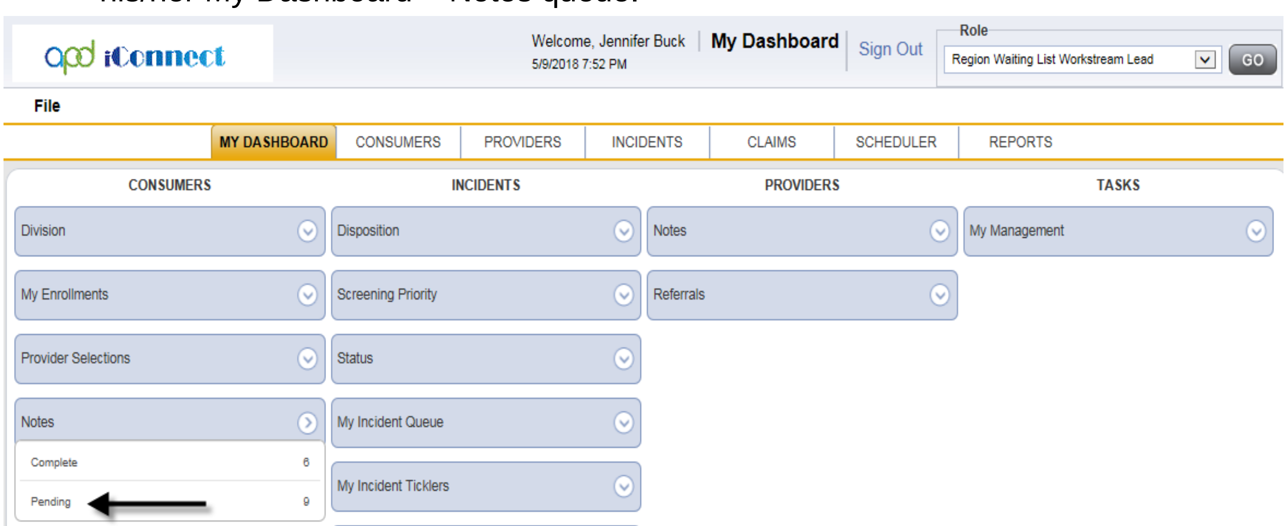


4. The Note details page displays. Update the following fields:
    a. Division = APD
    b. Note Type = Central Record Transfer
    c. Note Subtype = Pending Central Record Transfer
    d. Note recipient = select the ellipsis to search for and select the Waiting List Workstream Lead at the Receiving Region
    e. Status = Pending
    f. Attach all supporting documentation

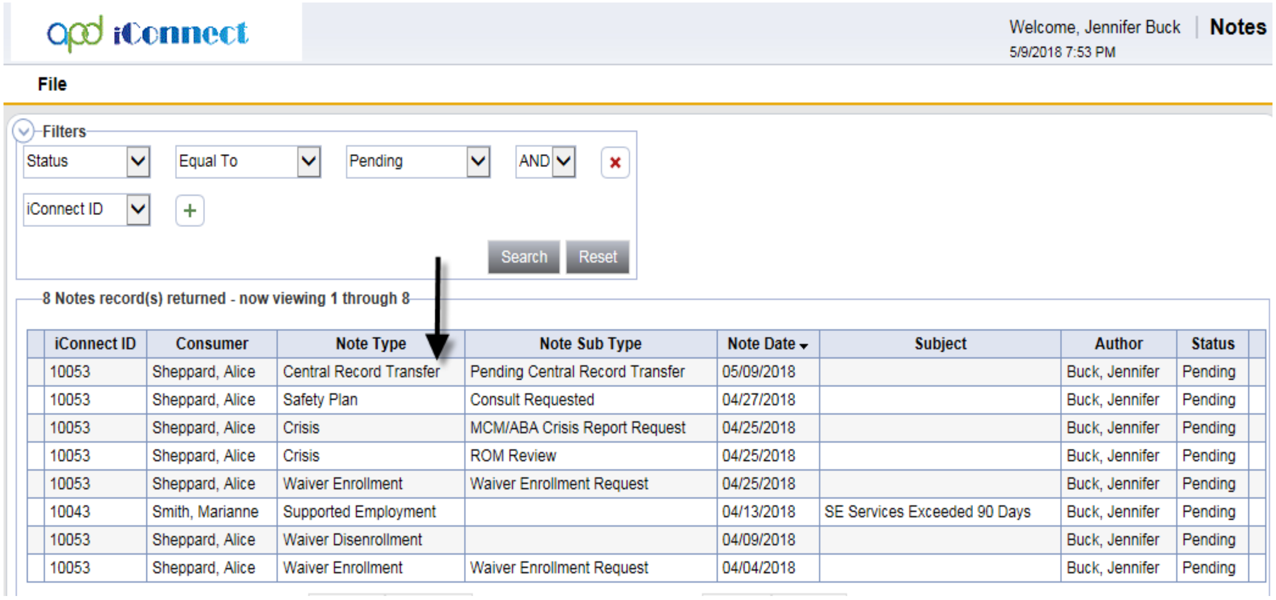


5. Click **File** > **Save and Close Notes**.

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

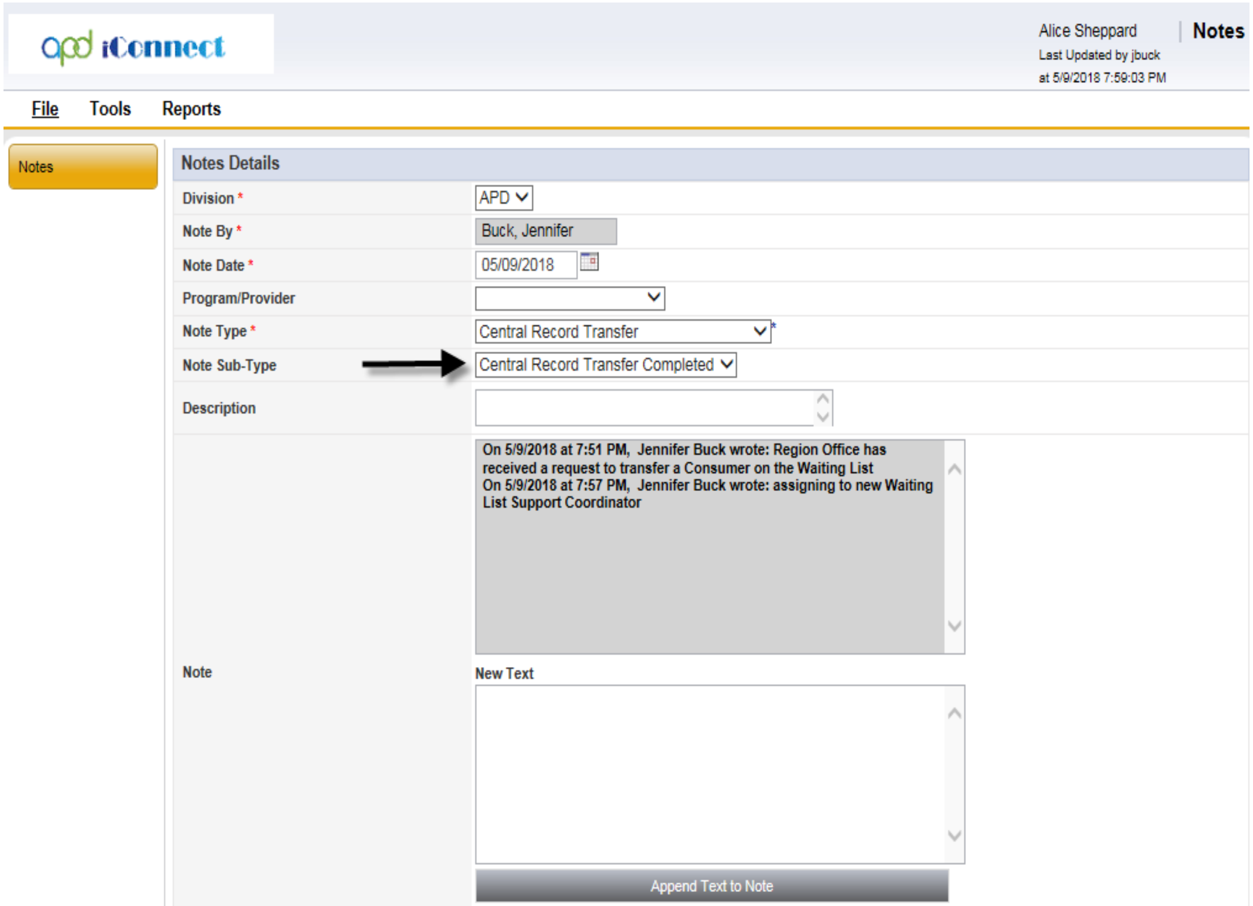


7. Click the **Central Record Transfer** Note to open it.



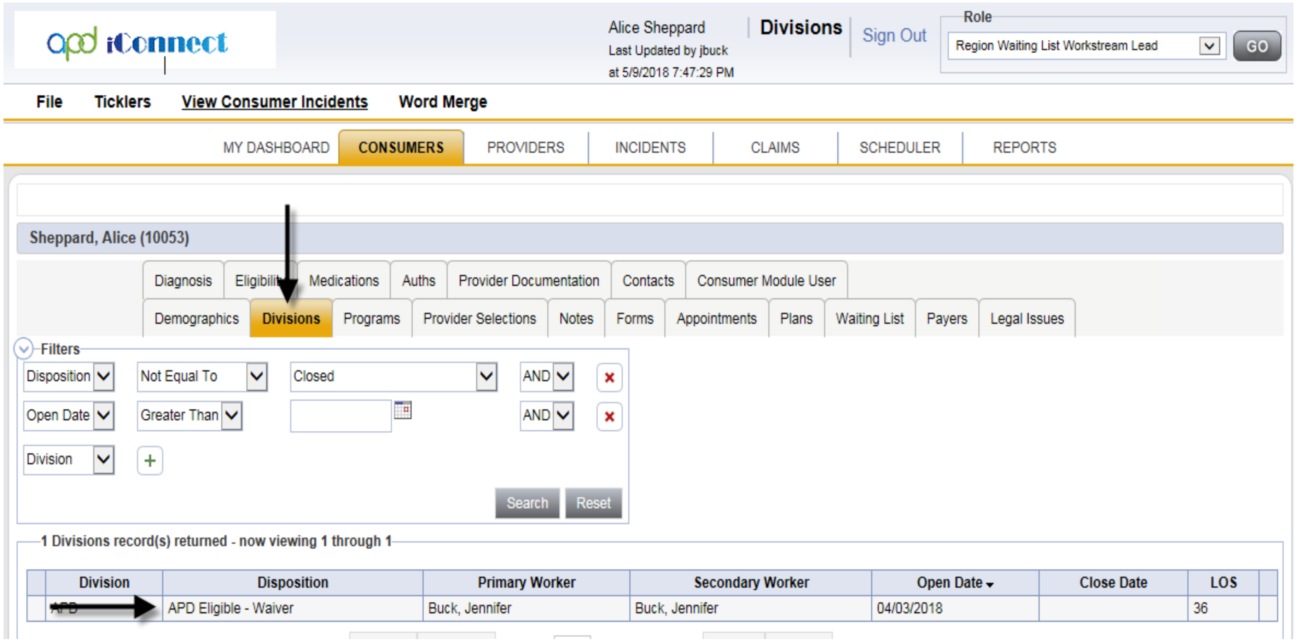
iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
10053	Sheppard, Alice	Central Record Transfer	Pending Central Record Transfer	05/09/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Safety Plan	Consult Requested	04/27/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Crisis	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



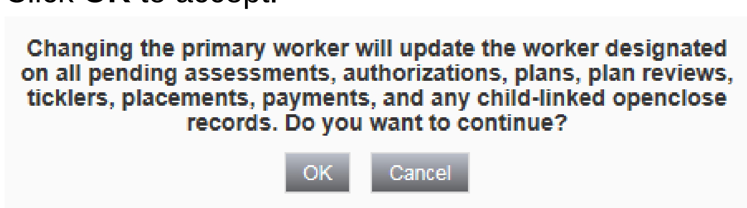
9. Click **File** > **Save and Close Notes**.

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

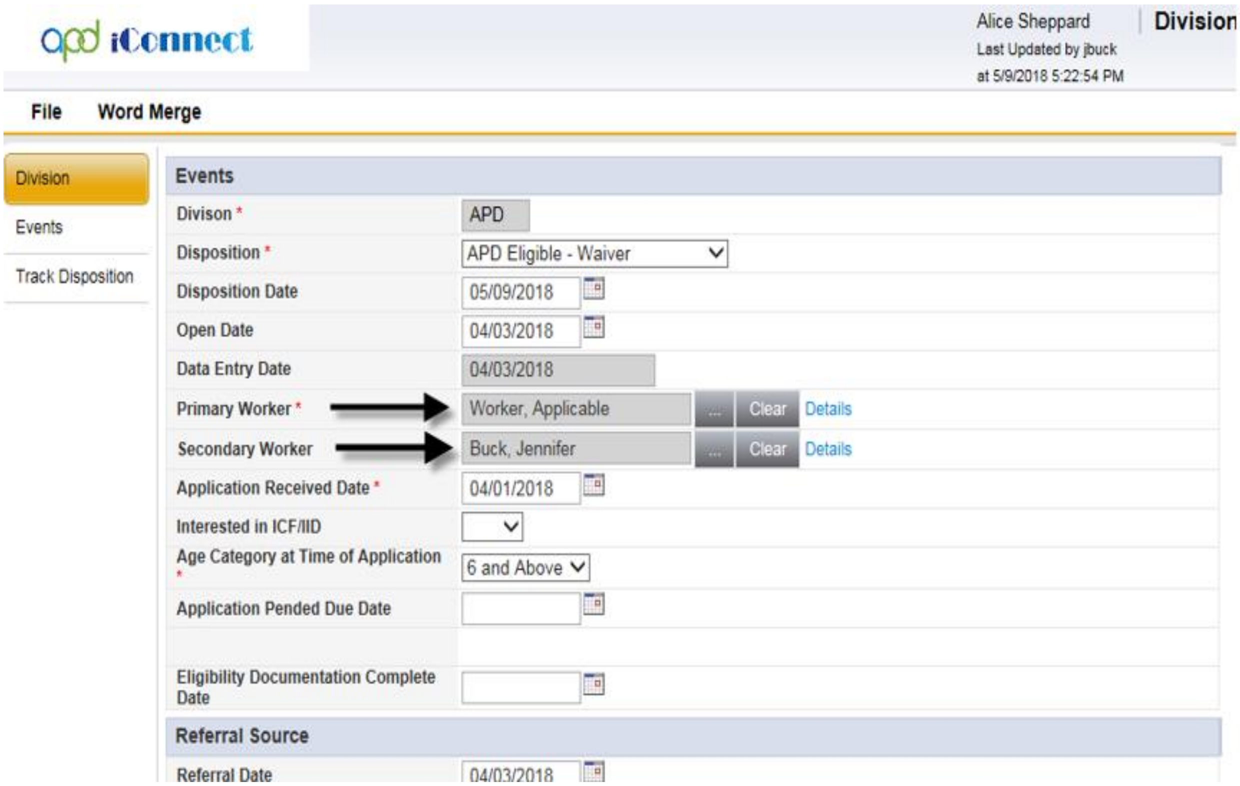


11. Select the APD Division record to open it.

12. The Division Details page displays. Update the following fields:
    a. Primary Worker = new Waiting List Support Coordinator
    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.



    c. Secondary Worker = Clinical Workstream Lead



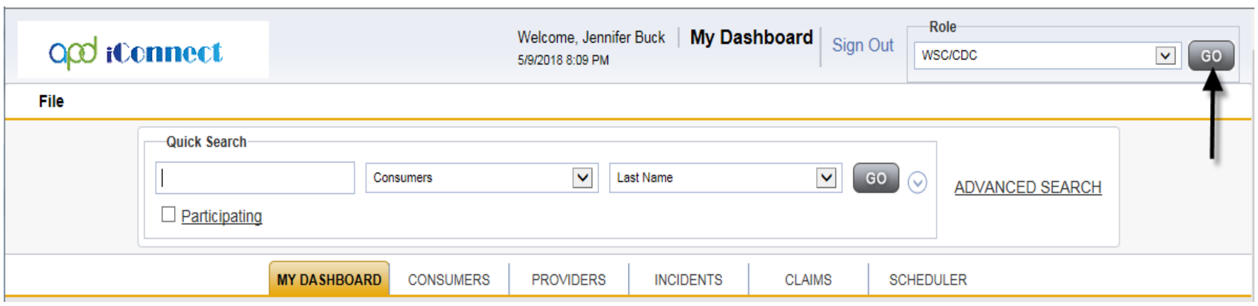
13. Click **File** > **Save and Close Division.**

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.

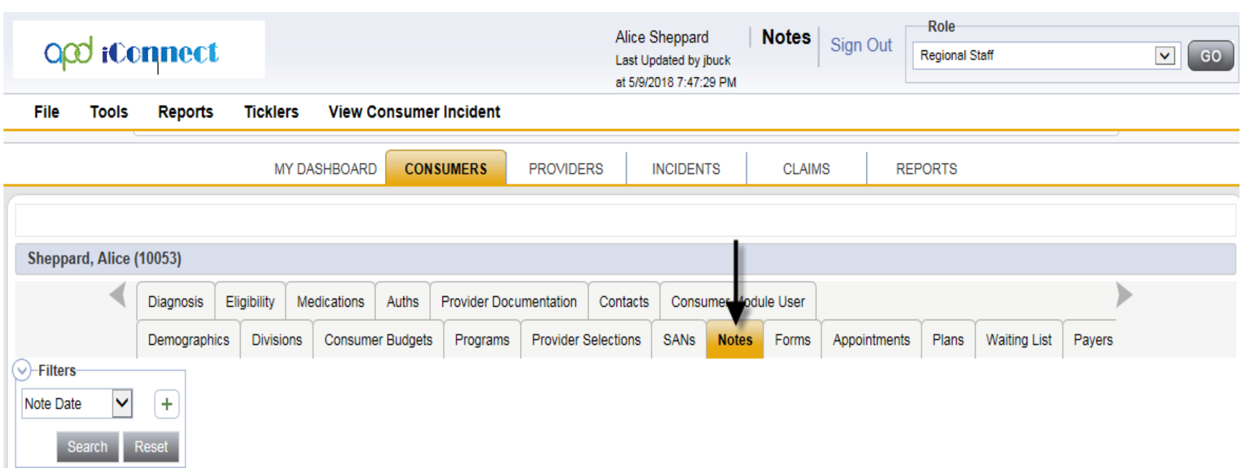
Notify the Receiving Region Office via a Note

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



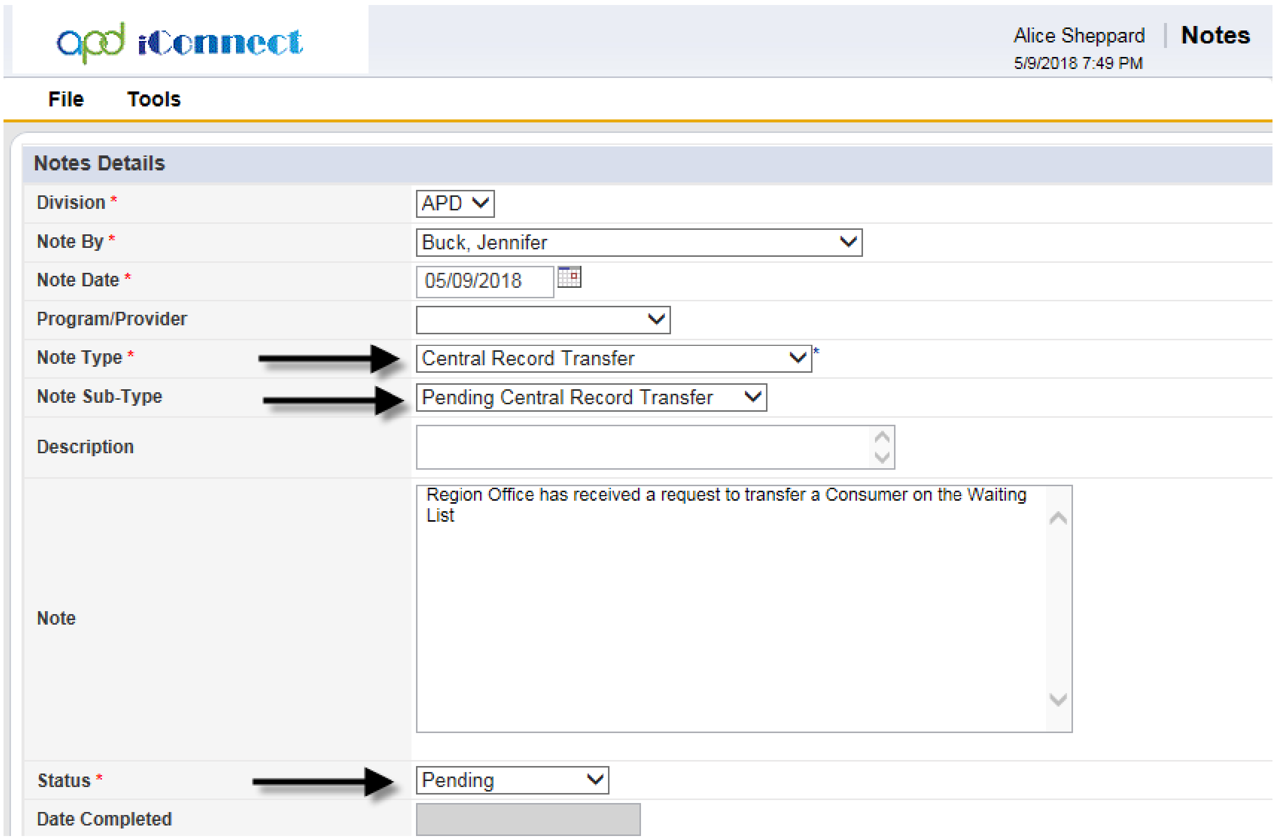
2. Navigate to the consumer's record, click on the **Notes** tab.

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



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



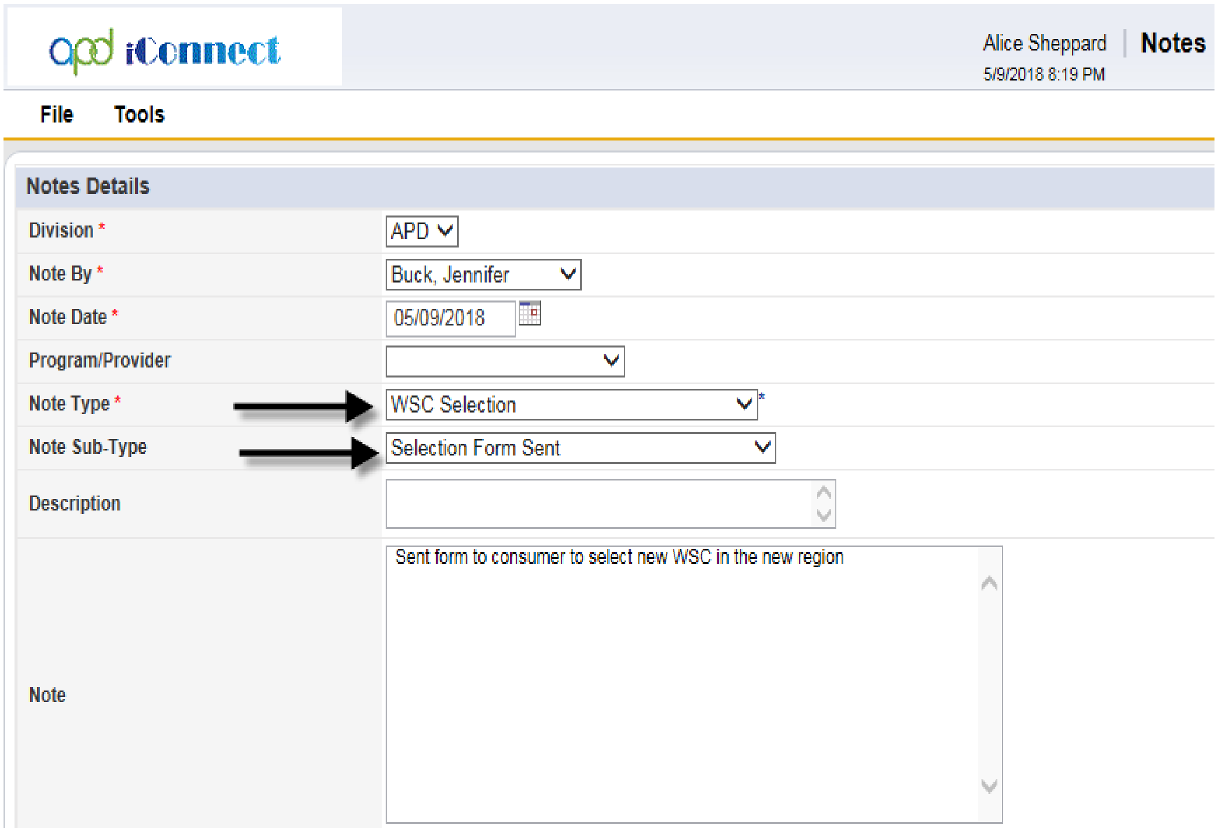
5. Click **File** > **Save and Close Notes**.

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

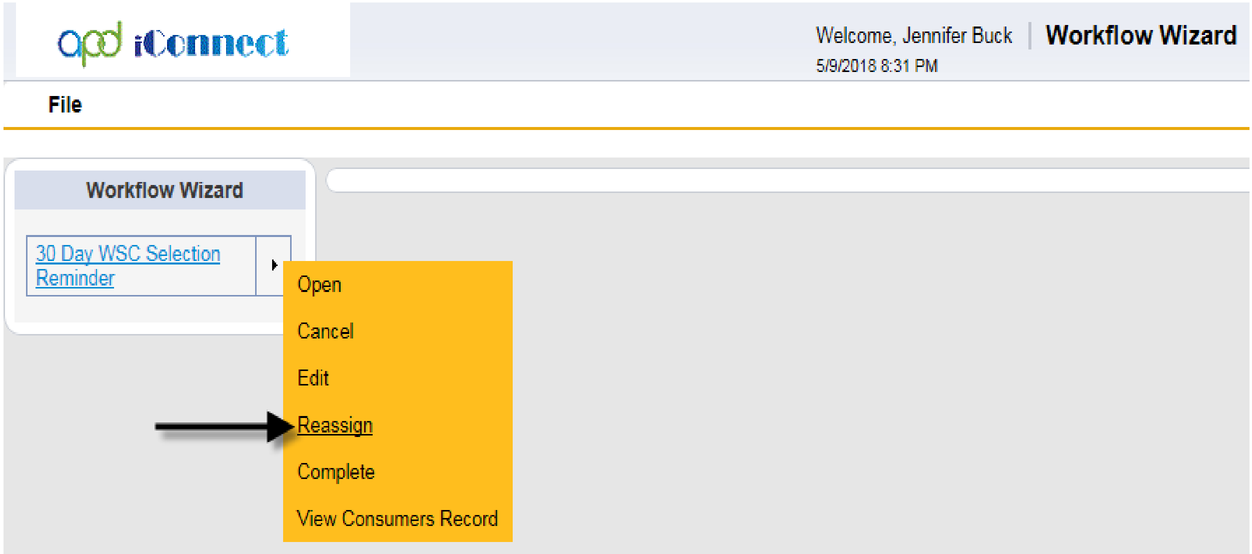
d. Status = Pending



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.

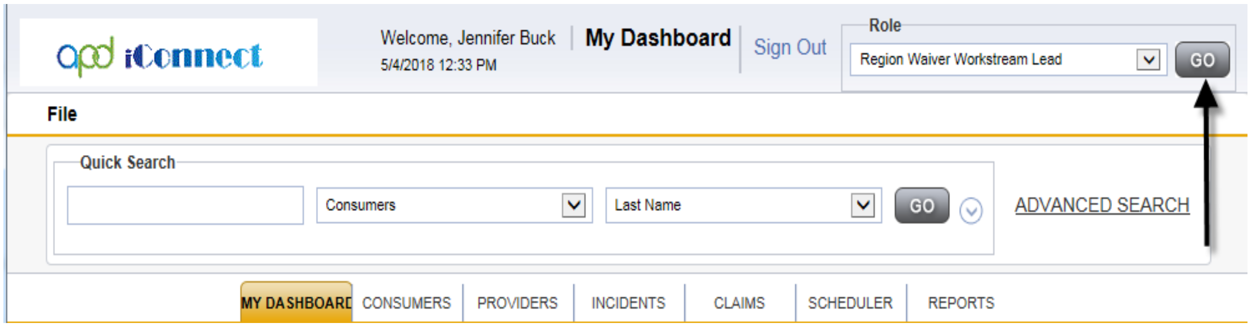
14. In 30 days when the tickler is due, the Waiver Workstream Lead will check if the Consumer has selected the WSC indicated by the existence of a WSC Selection/WSC Inter-Region Transfer Note. If the selection has been made, the Waiver Workstream Lead will cancel the tickler by selecting Cancel from 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.

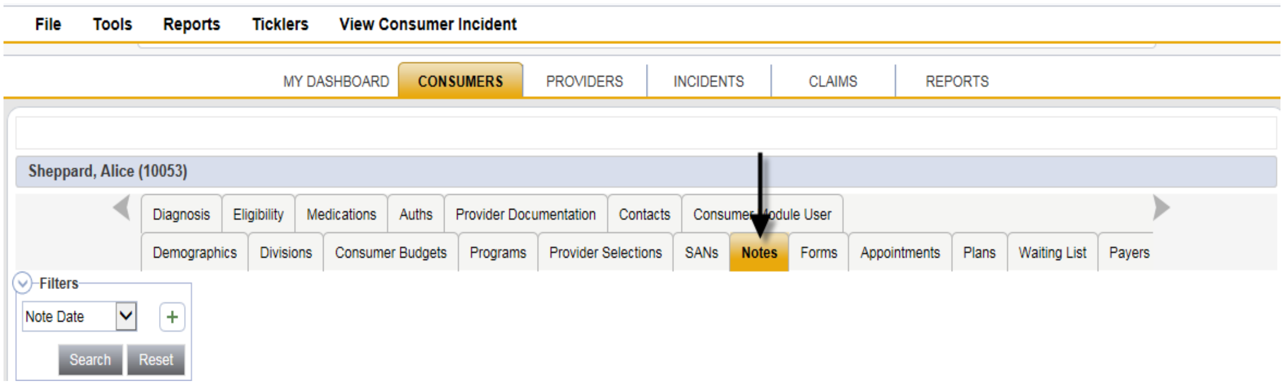
Consumer selects new WSC

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.**

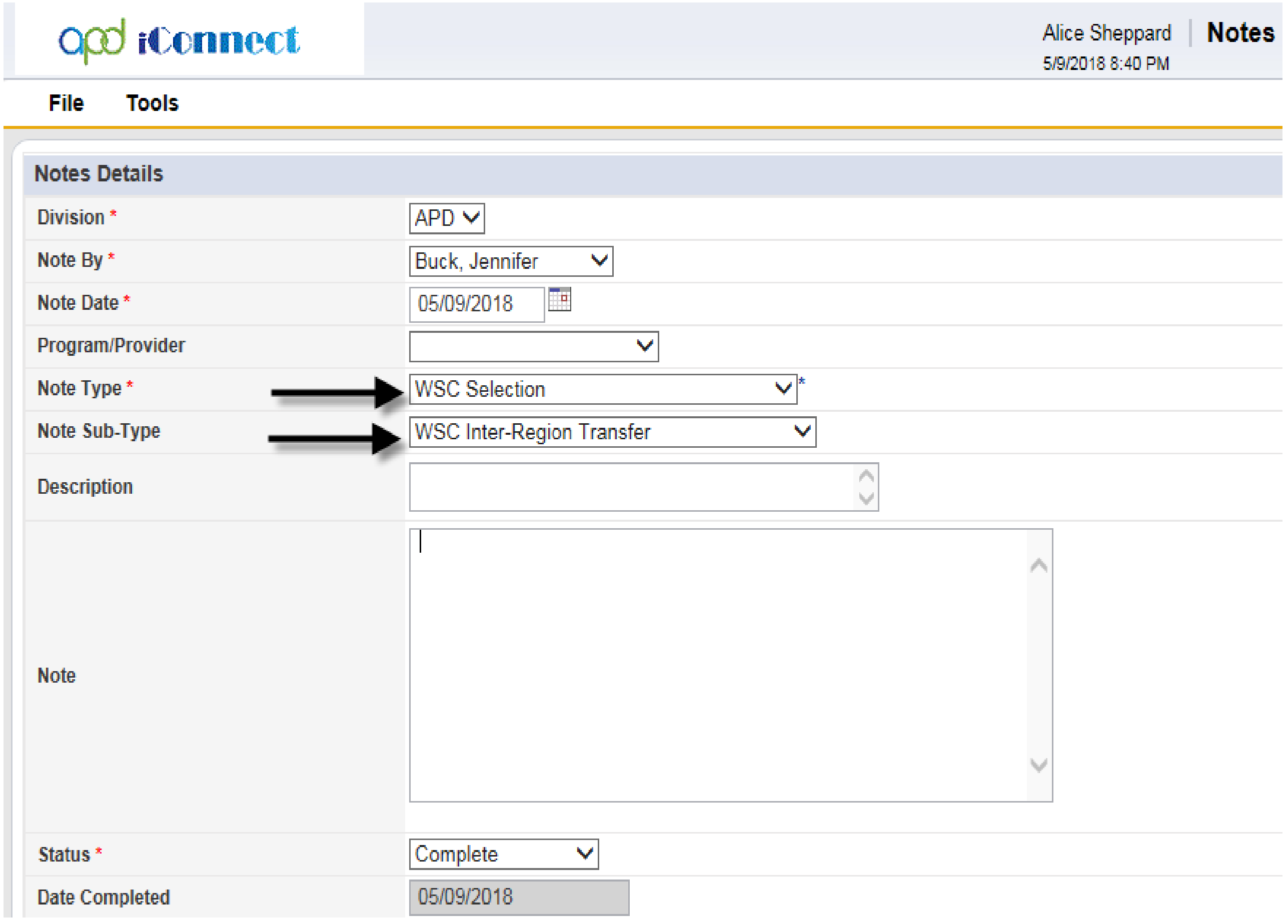


2. Navigate to the Consumer Record and click the **Notes** tab.



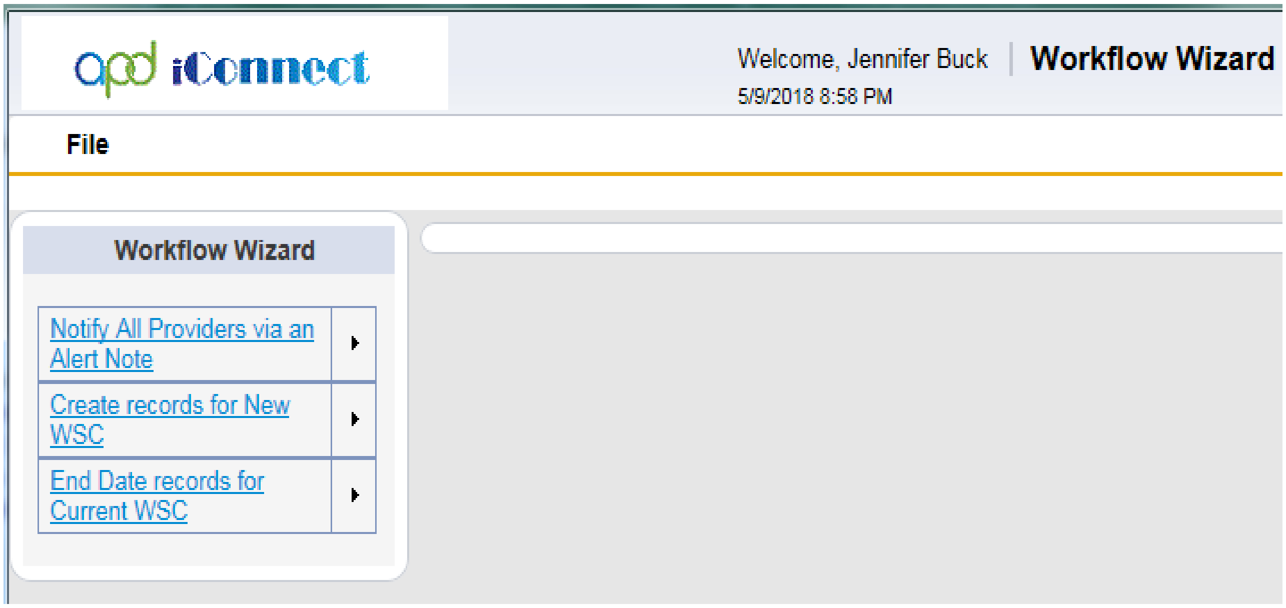
3. Click **File** > **Add Note**.

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



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:
   a. Notify all Providers via an Alert Note
   b. End Date records for Current WSC
   c. 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

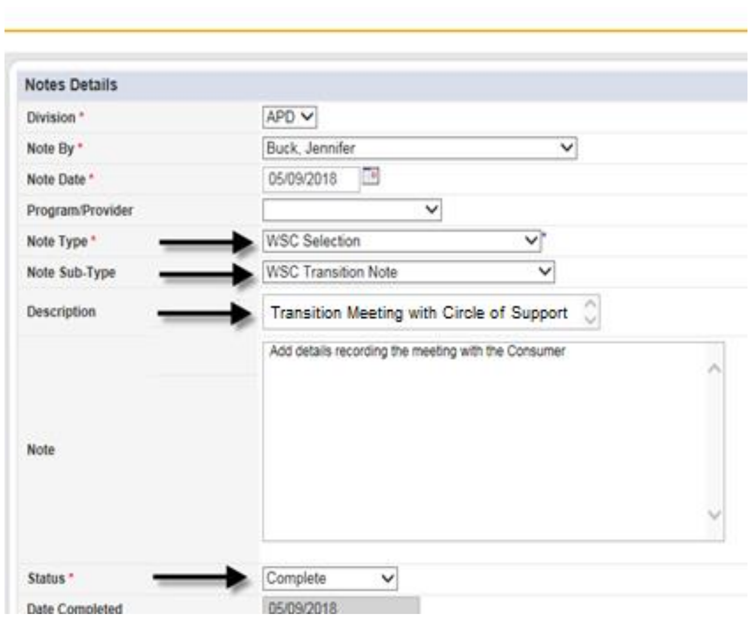
1. Click the End Date Records for Current WSC tickler to display a message tickler.

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



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