Chapter 14 | WSC Reassignment

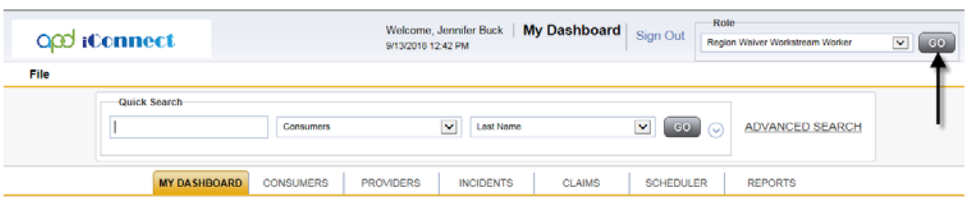
Introduction

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.

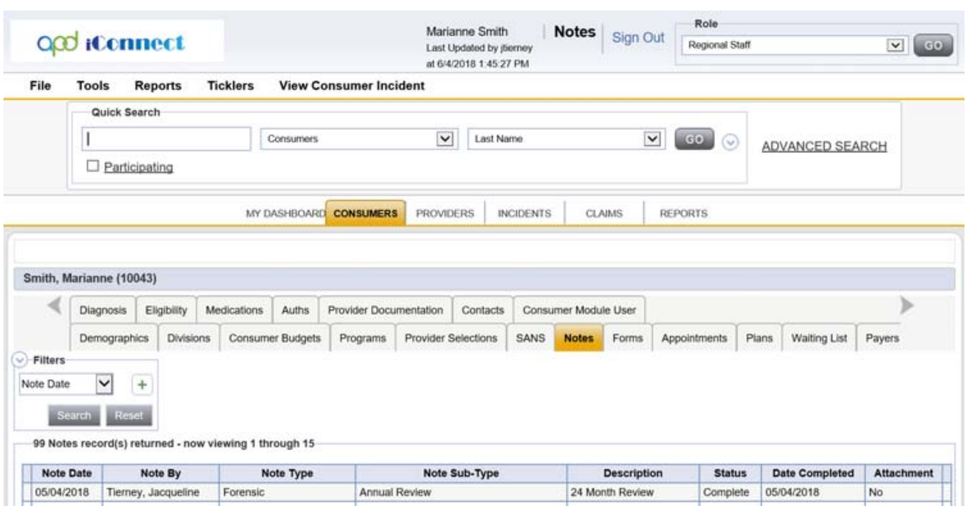
Reassignment Notification

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, Regional Staff initiate the process by adding a Note in 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

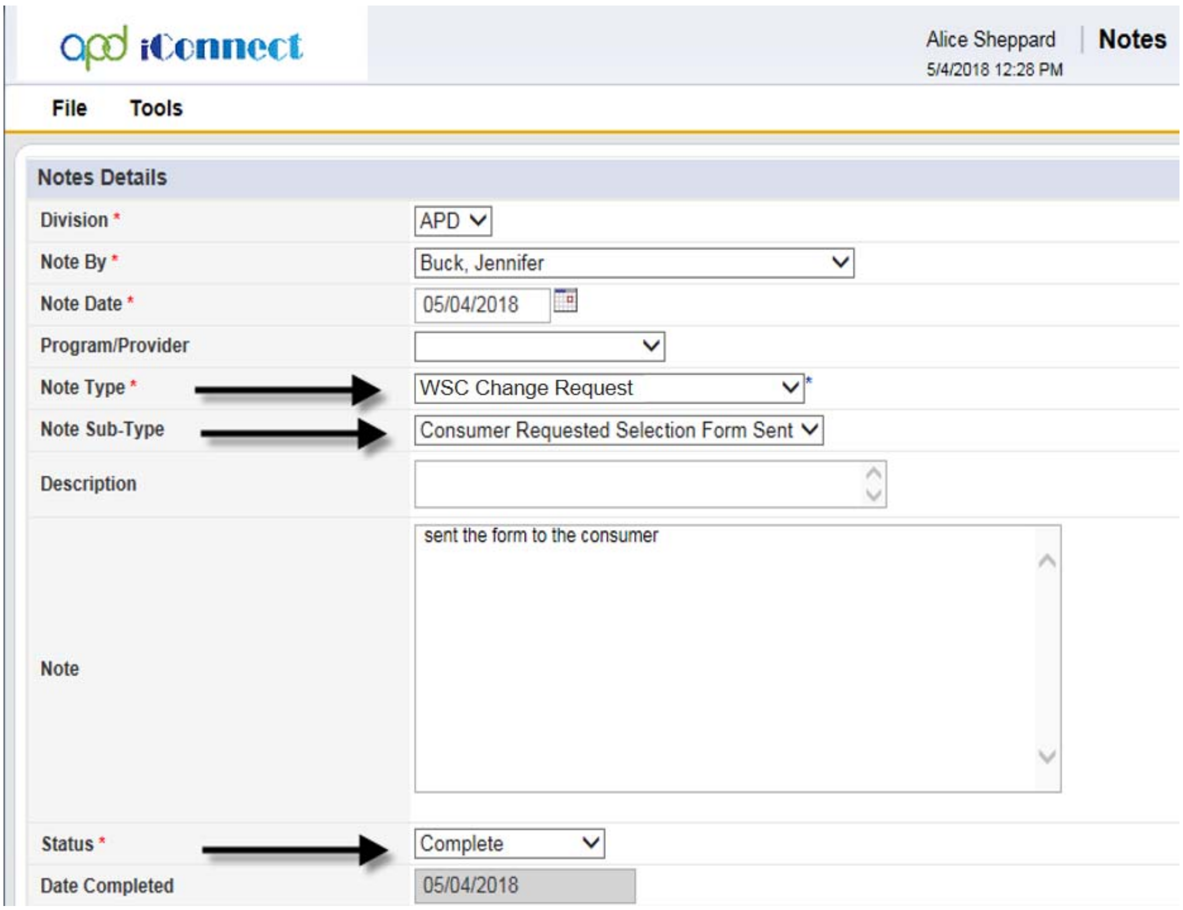
NOTE: WSC and Service Providers cannot see this Note Type

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**

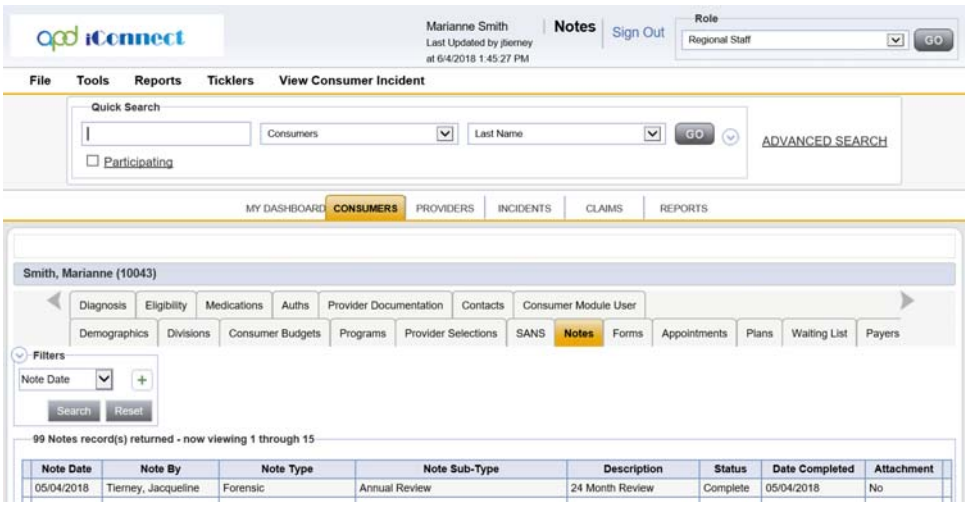
5. The WSC Selection Form and other supporting documents will be printed and mailed to the Consumer.

WSC Selection – New Agency/Provider

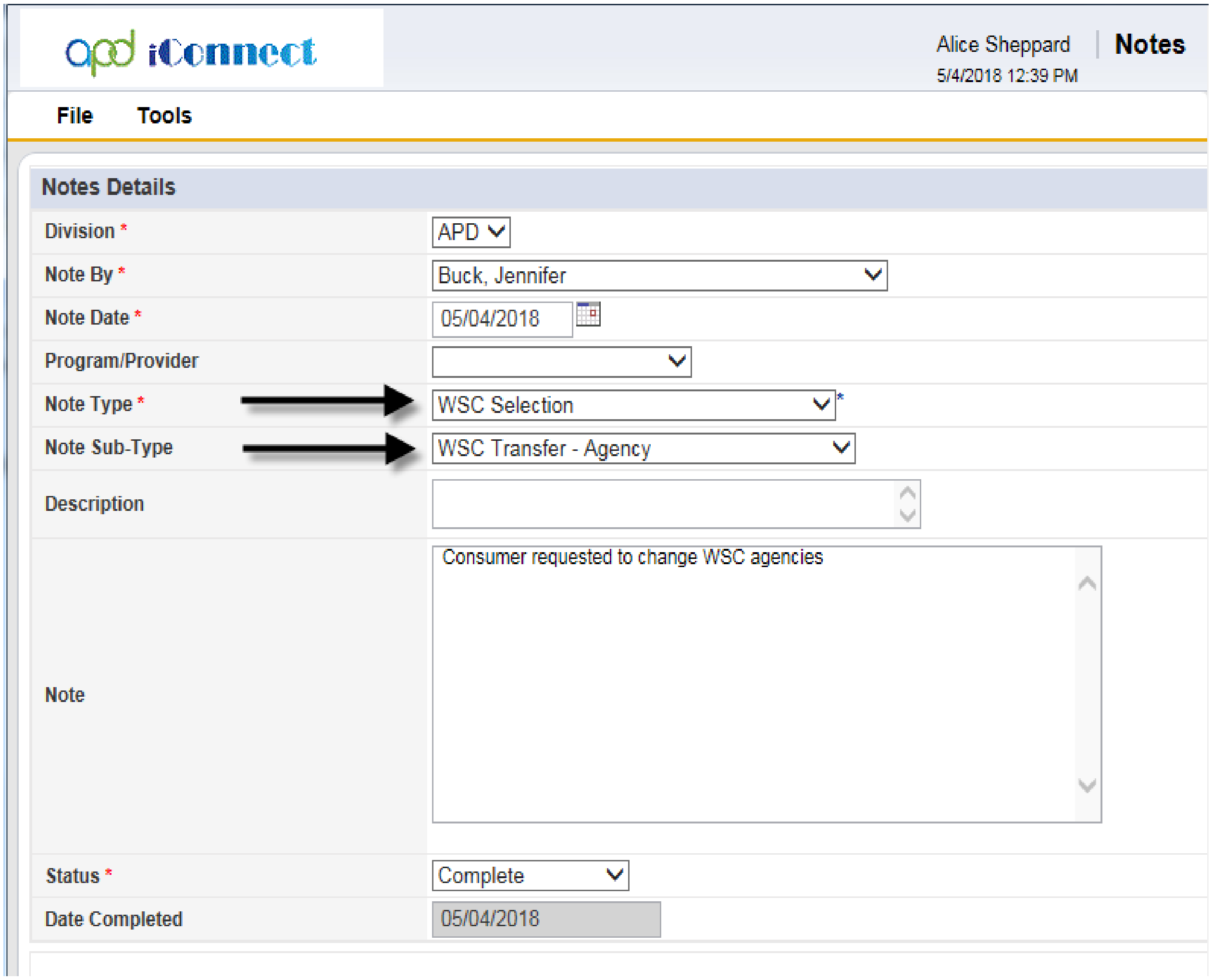
The Consumer notifies the local regional office of his/her newly selected Waiver Support Coordinator agency or solo provider. Upon receiving the notification, the Regional Staff will add a Note in iConnect to begin the reassignment process.

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**.

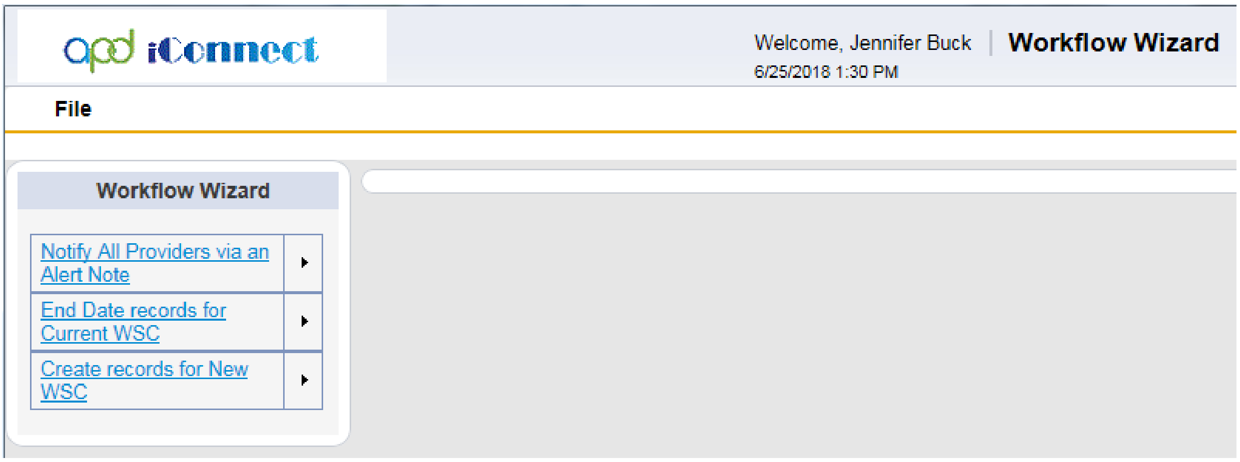
5. Upon saving the Note, a Workflow Wizard will trigger with the following Ticklers for the User.
    a. Notify all Providers via an Alert Note
    b. End date records for current WSC
    c. Create records for New WSC

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

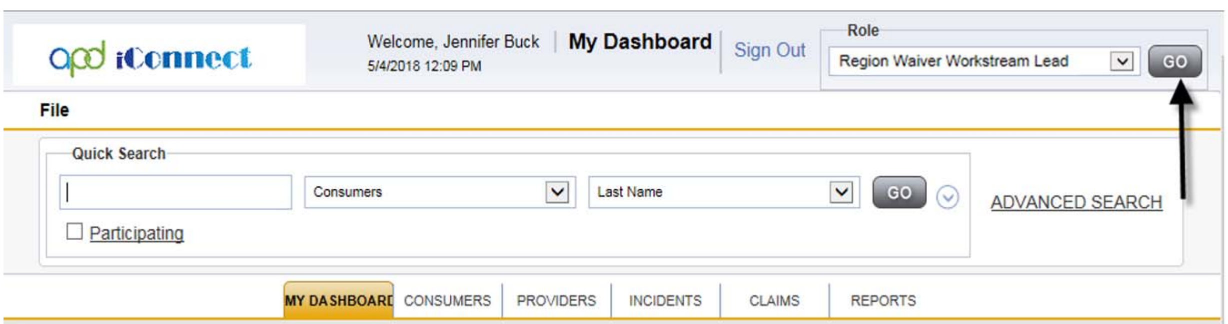
Notify All Providers via an Alert Note

The Consumer has notified the local regional office of his/her newly selected Waiver Support Coordinator and the Regional 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.

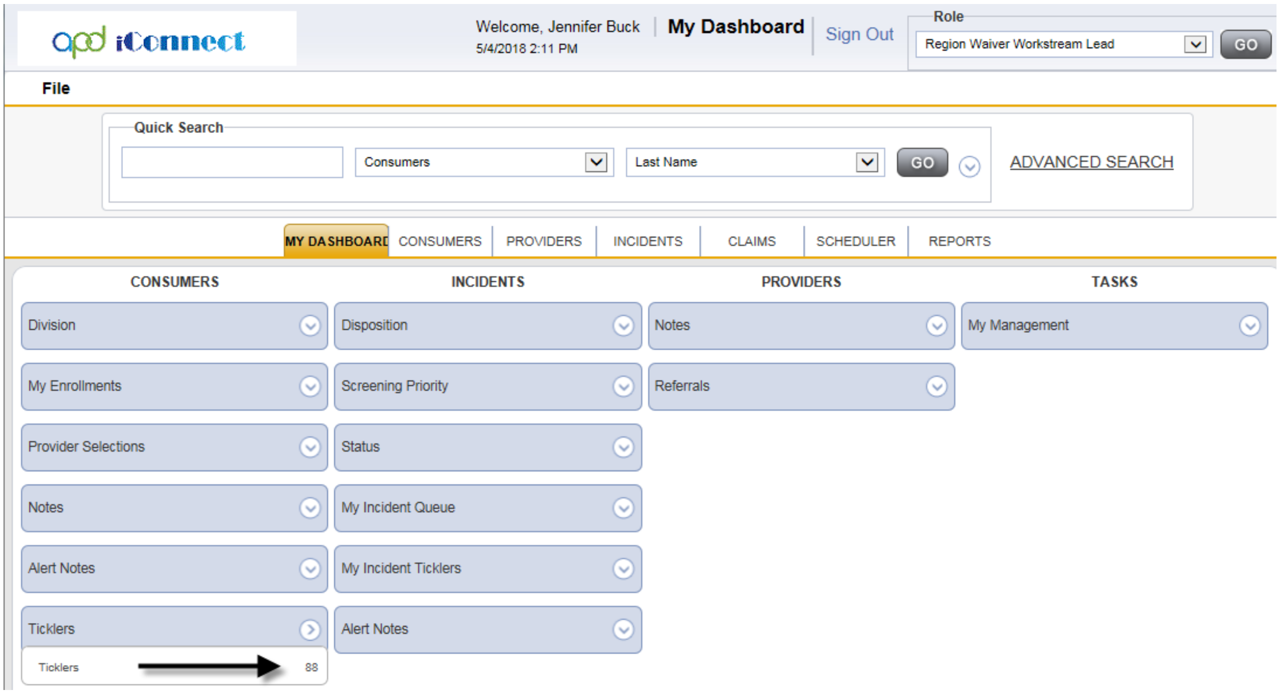
1. To begin, the user would have just saved the WSC Selection Note and triggered the Workflow Wizard. The ticklers are displayed in a new window. Click the tickler to Open it.



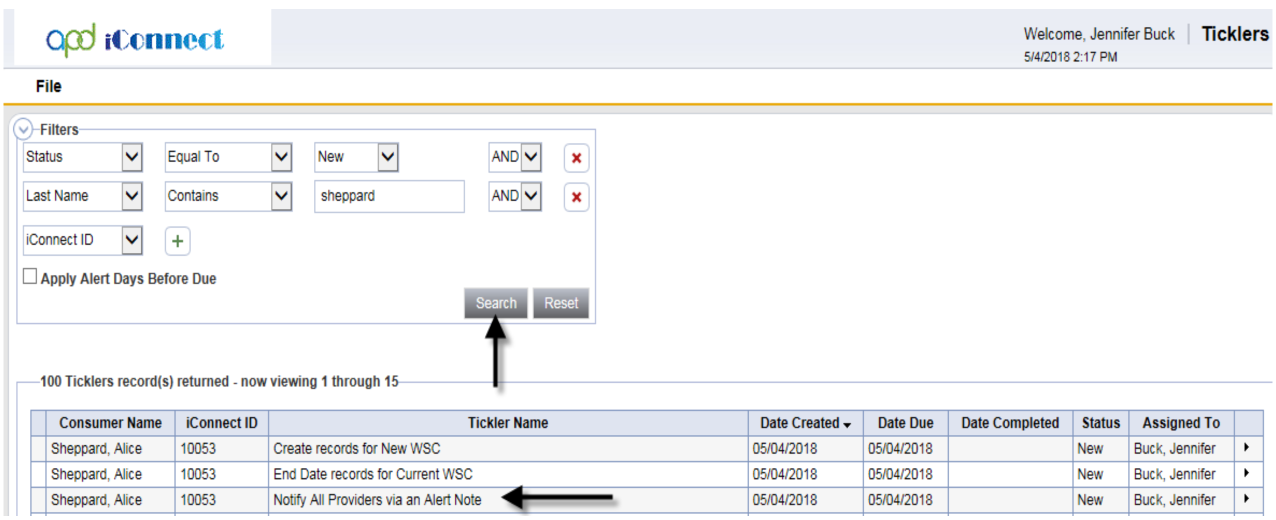
2. The ticklers are also visible via My Dashboard at any time. To begin log into APD iConnect and set Role = Regional Waiver Workstream Lead. Click **Go.**



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**

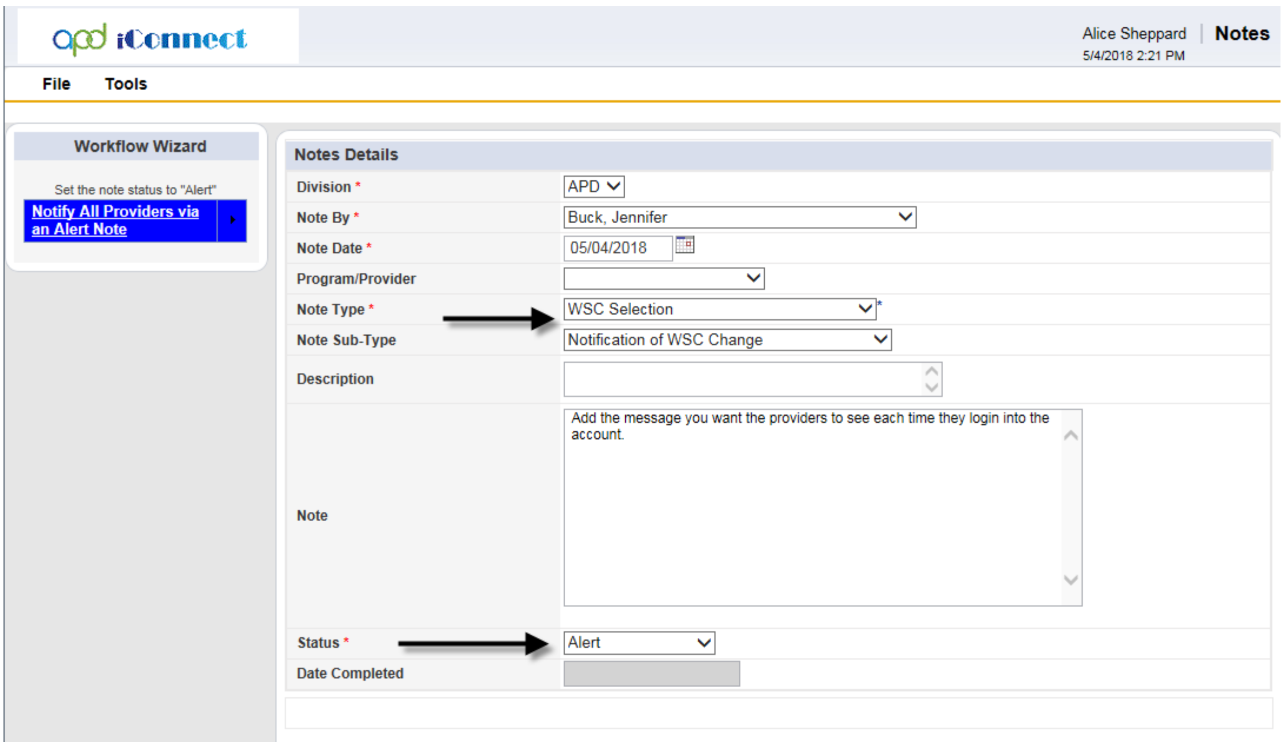


Tip

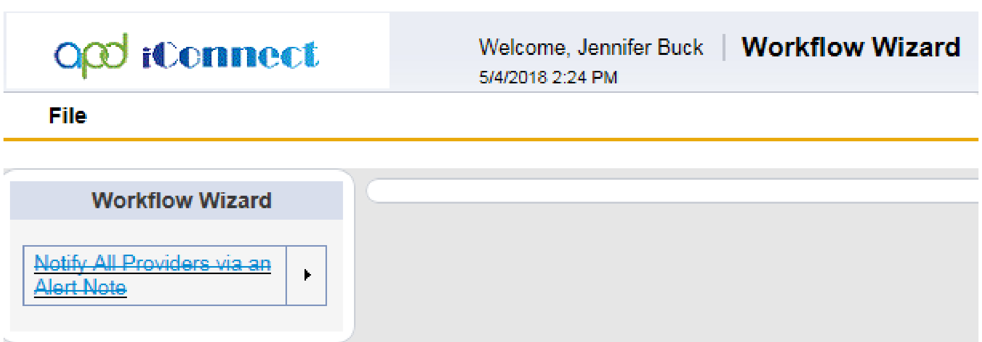
When searching for a future Tickler, remember to clear the check box next to Apply Alert Days Before Due prior to clicking ***Search****.*

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

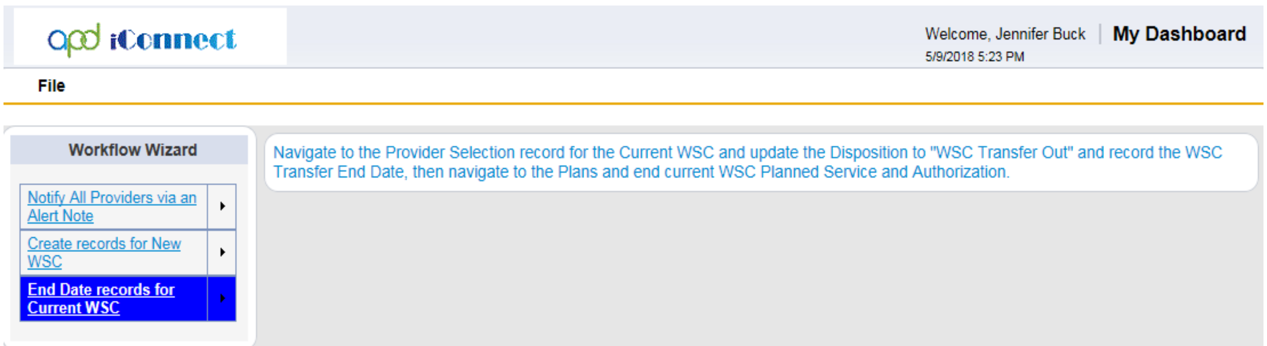


7. Click **File > Save Notes**. The Tickler is marked as complete.

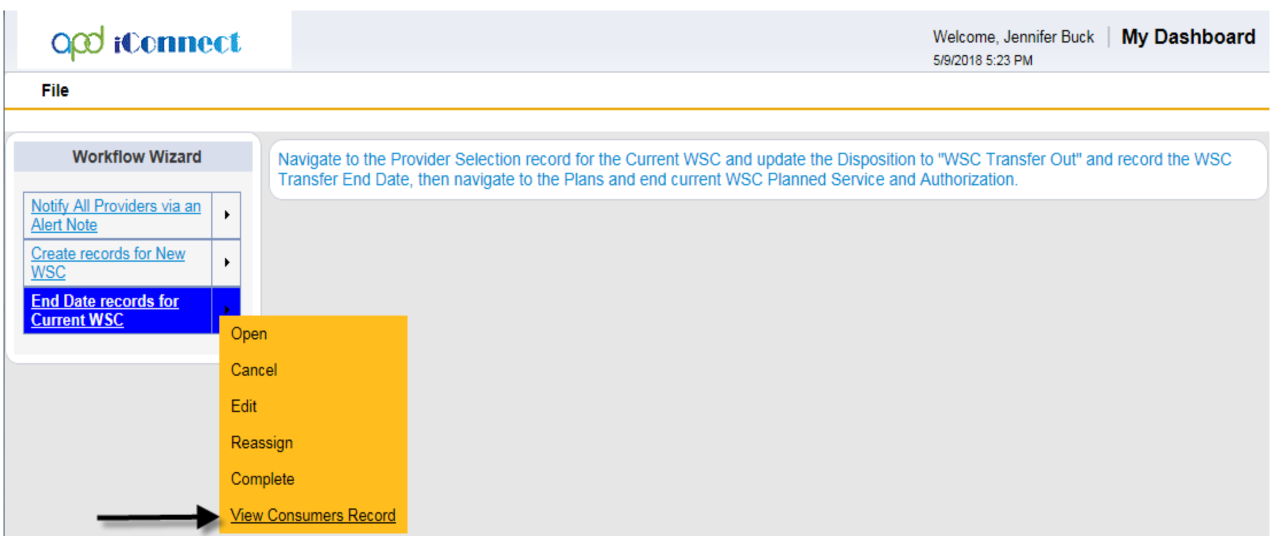


End Date Records for Current WSC

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:

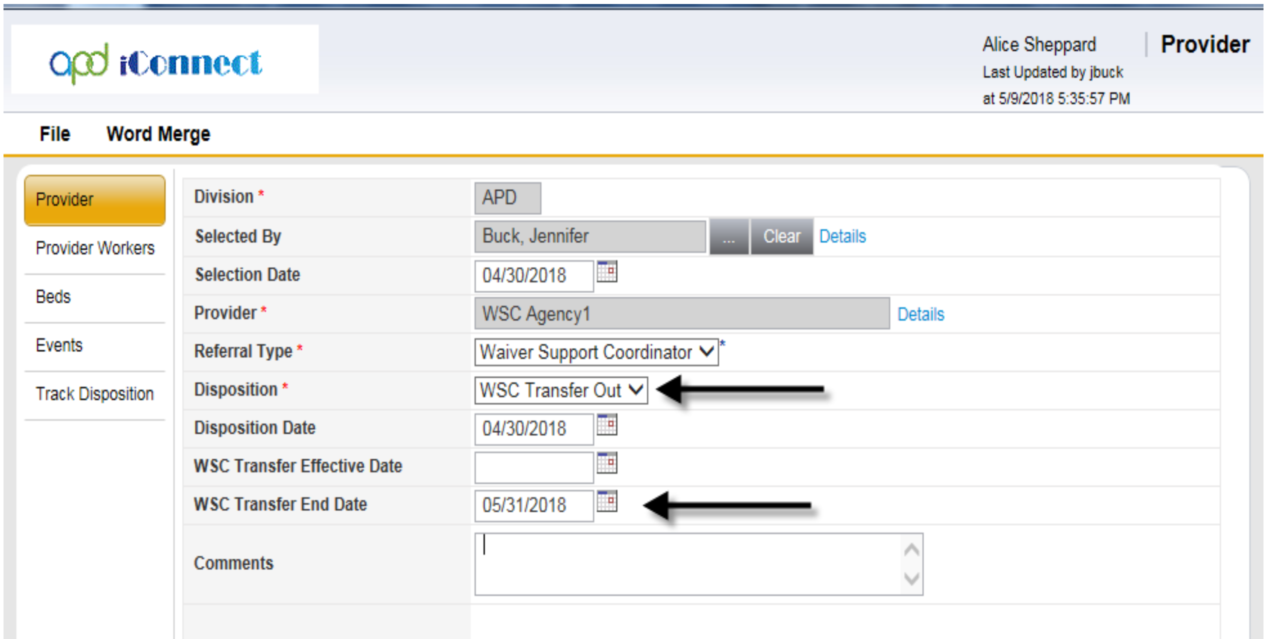


4. Users can click the **View Consumer Record** option from the tickler flyout menu to navigate quickly to the Consumer record from the tickler or can complete a quick Search to navigate to the Consumer's record.



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

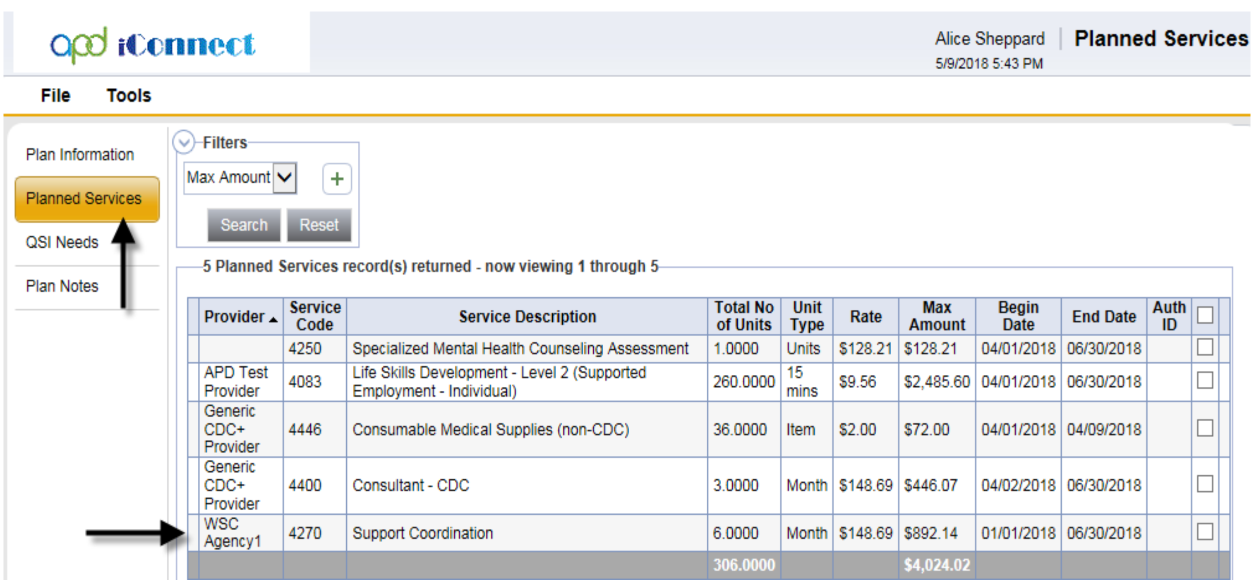
6. Update the following fields:
   a. "Disposition" = WSC Transfer Out
   b. "Disposition Date" = enter date the "Disposition" was changed
   c. "WSC Transfer End Date" = enter the end date (last day of the month)



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

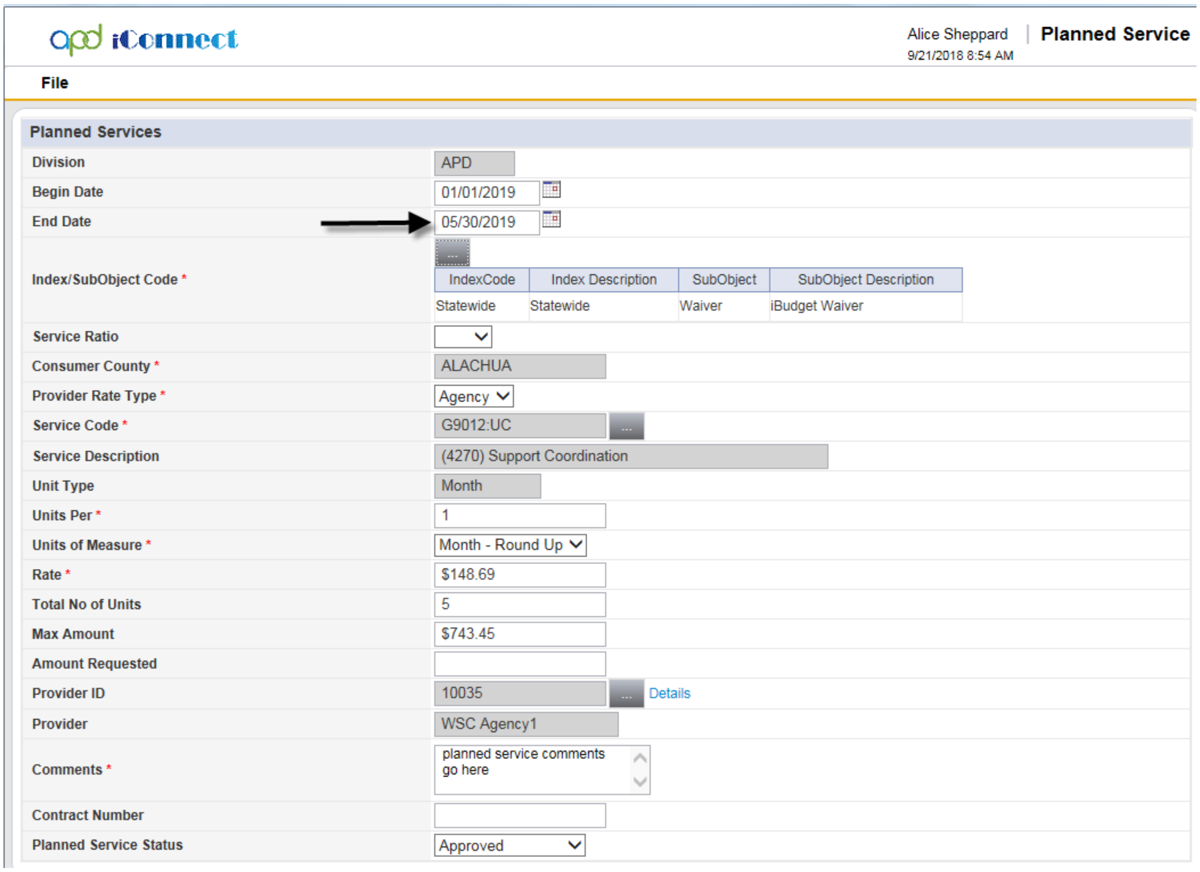
2. Continue with the second part of the message tickler, to end date the Current WSC Planned Service and Authorization.

3. Click the **Plan** tab. Select the APD Waiver Plan to open the Plan Details page. Click the **Planned Services** subpage.



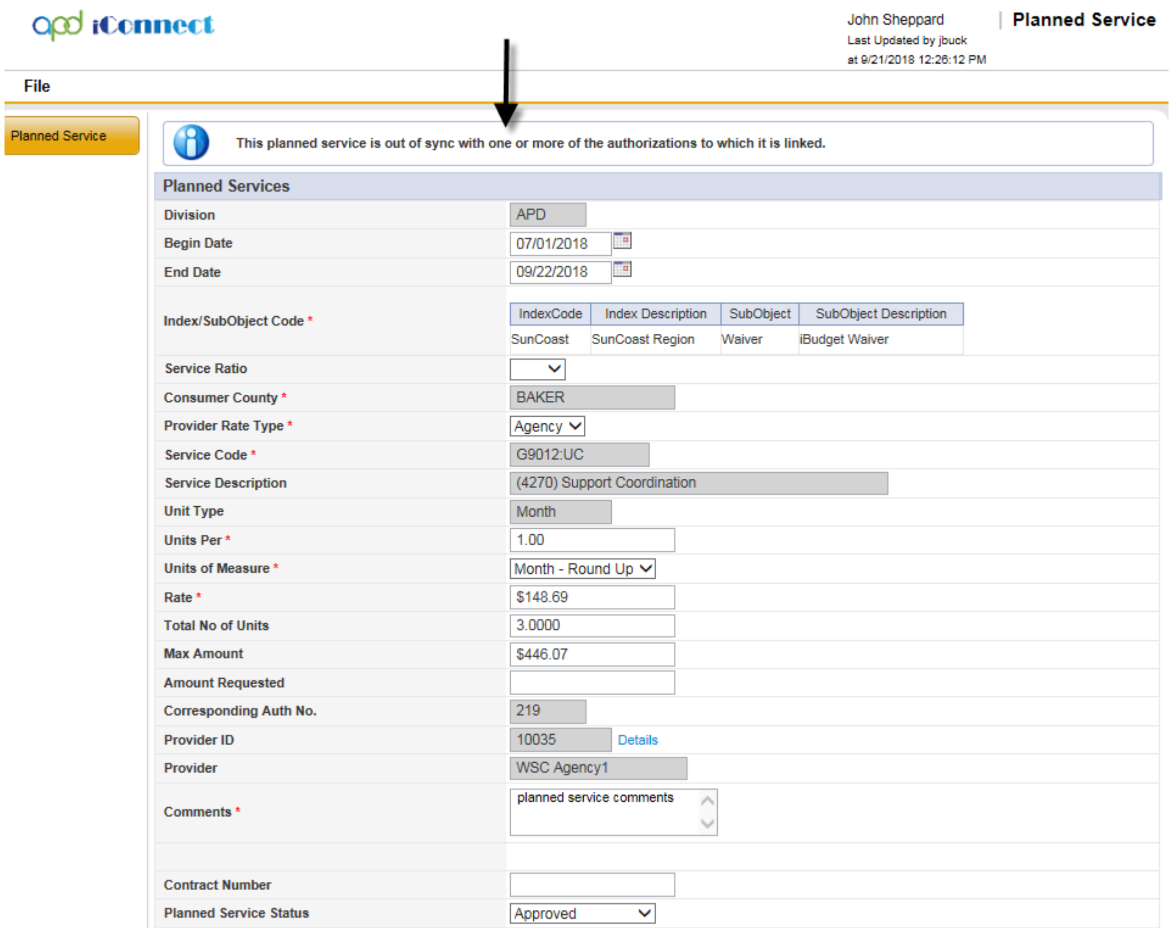
4. Select the Support Coordination planned service to open the details page.

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



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

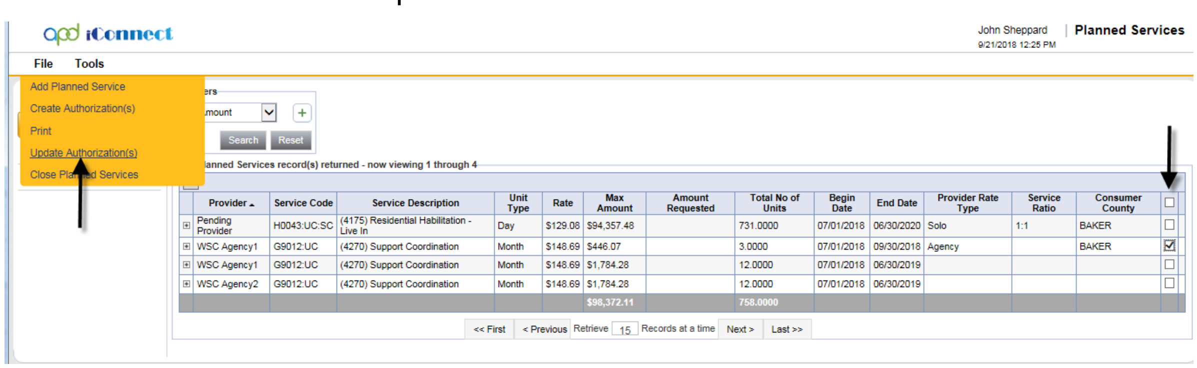
7. A notification displays for the user that the planned service is out of sync with the authorization. The changes to the planned service must also be made to the authorization.



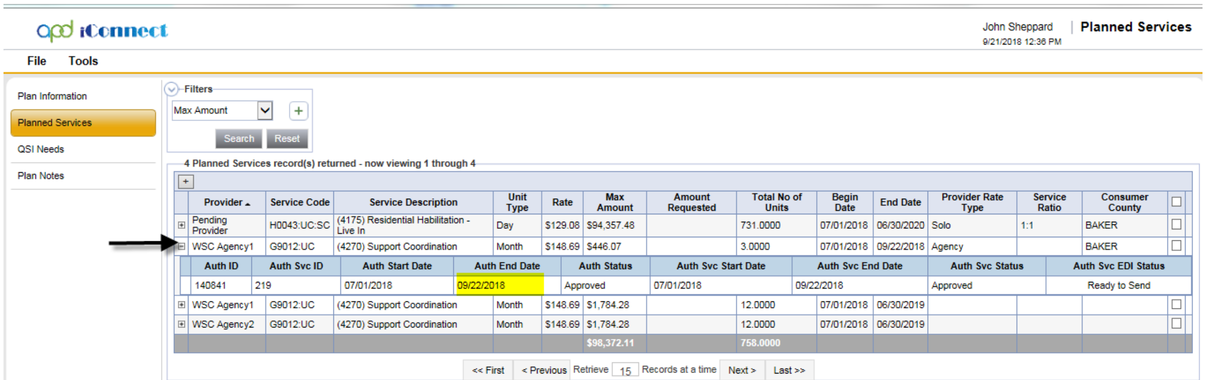
8. To do so, select the Planned Services subpage.

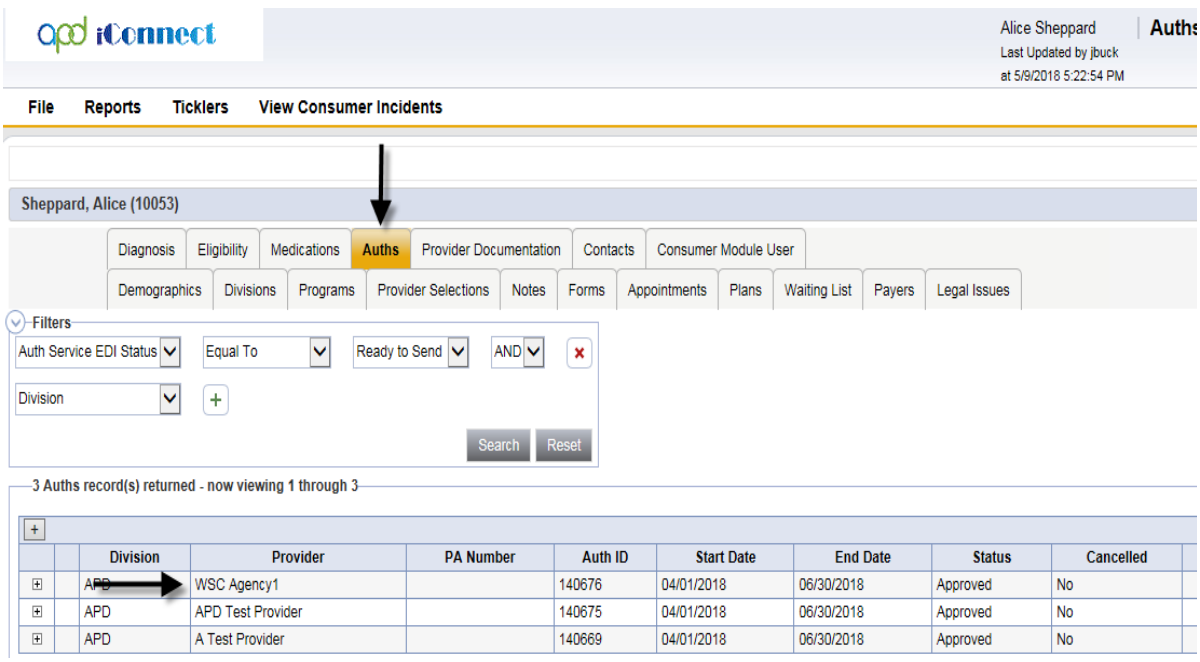
9. Click the checkbox next to the planned service that was updated.

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

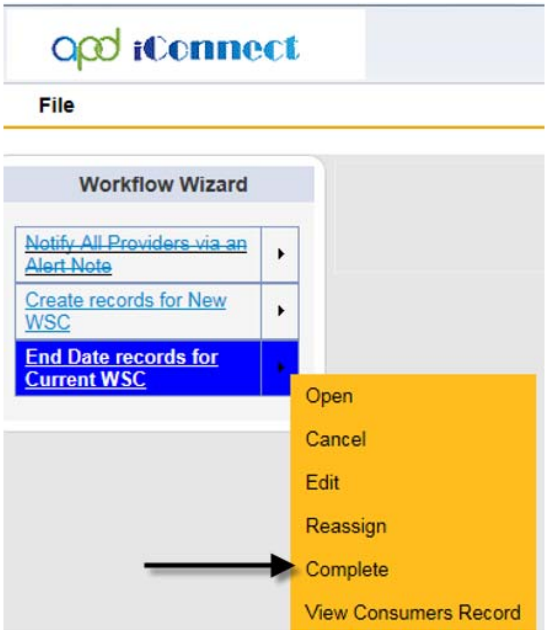


11. The authorization details can be viewed by selecting the + next to the edited planned service or from the Authorization tab.



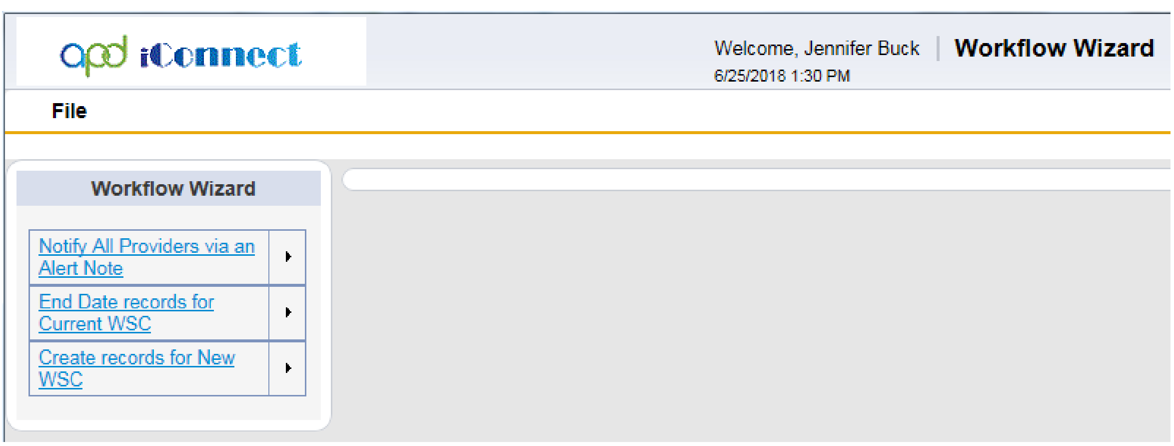


12. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

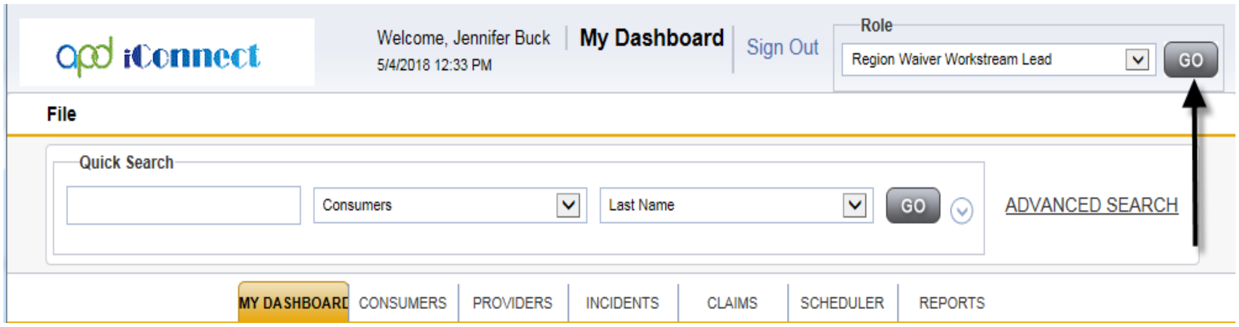


Create Records for New WSC

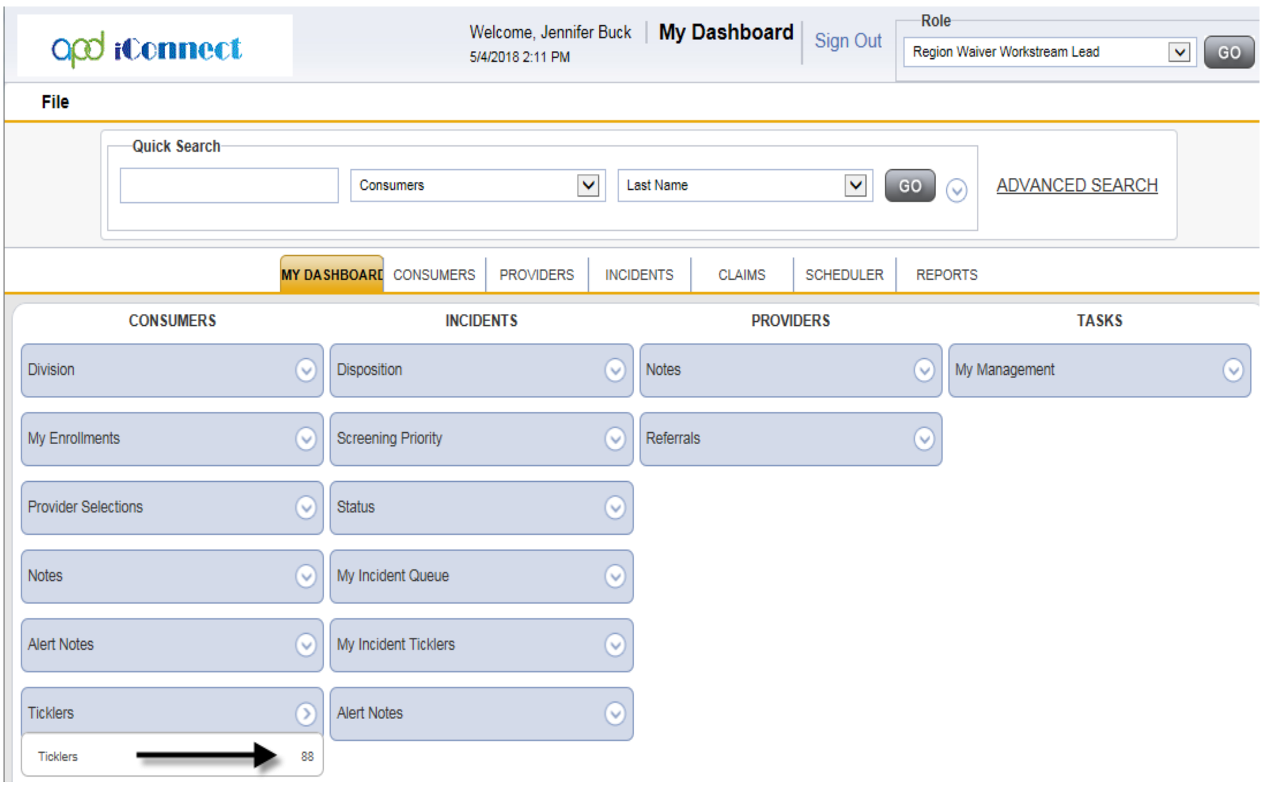
1. To begin, the user would have just saved the WSC Selection Note and triggered the Workflow Wizard. The user will be prompted to create new Provider Selection records for the new WSC and later change the Primary Worker to the new WSC (real time.) The user will also be prompted to end date the Provider 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.



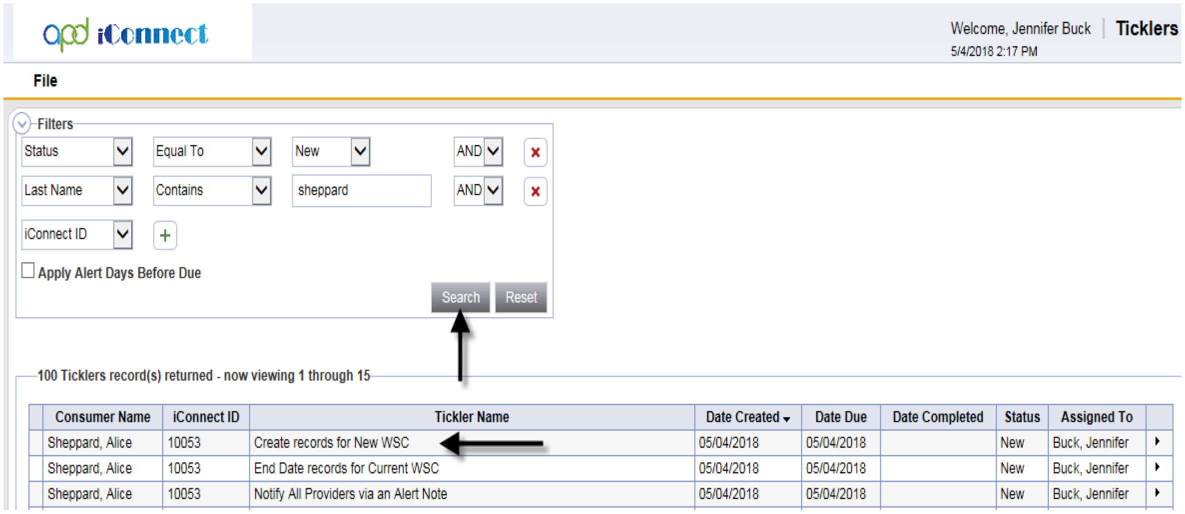
3. The ticklers are also visible via My Dashboard at any time. To begin log into APD iConnect and set Role = Region Waiver Workstream Lead. Click **Go.**



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.



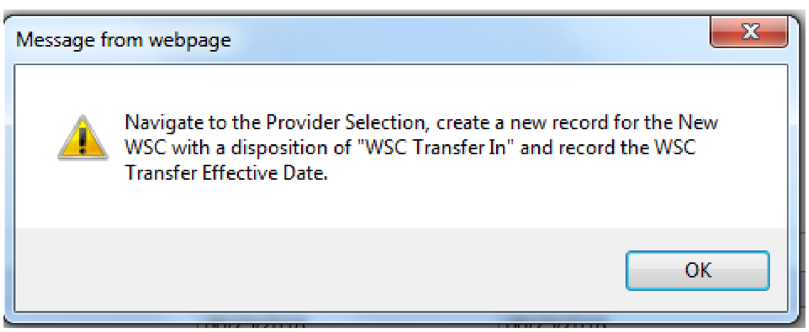
5. From here, user the multi variable search to find the Tickler. Click **Search**



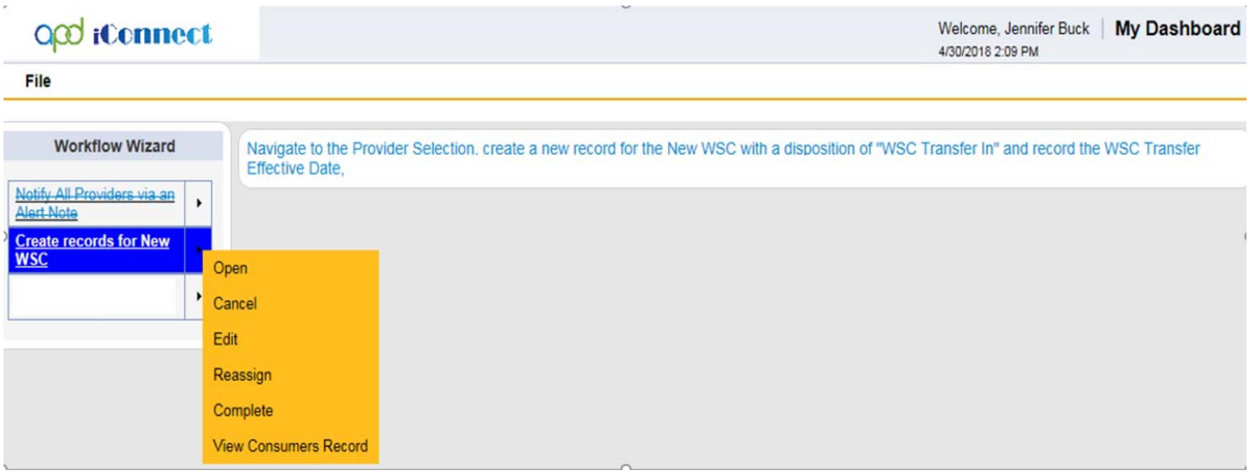
Tip

*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:

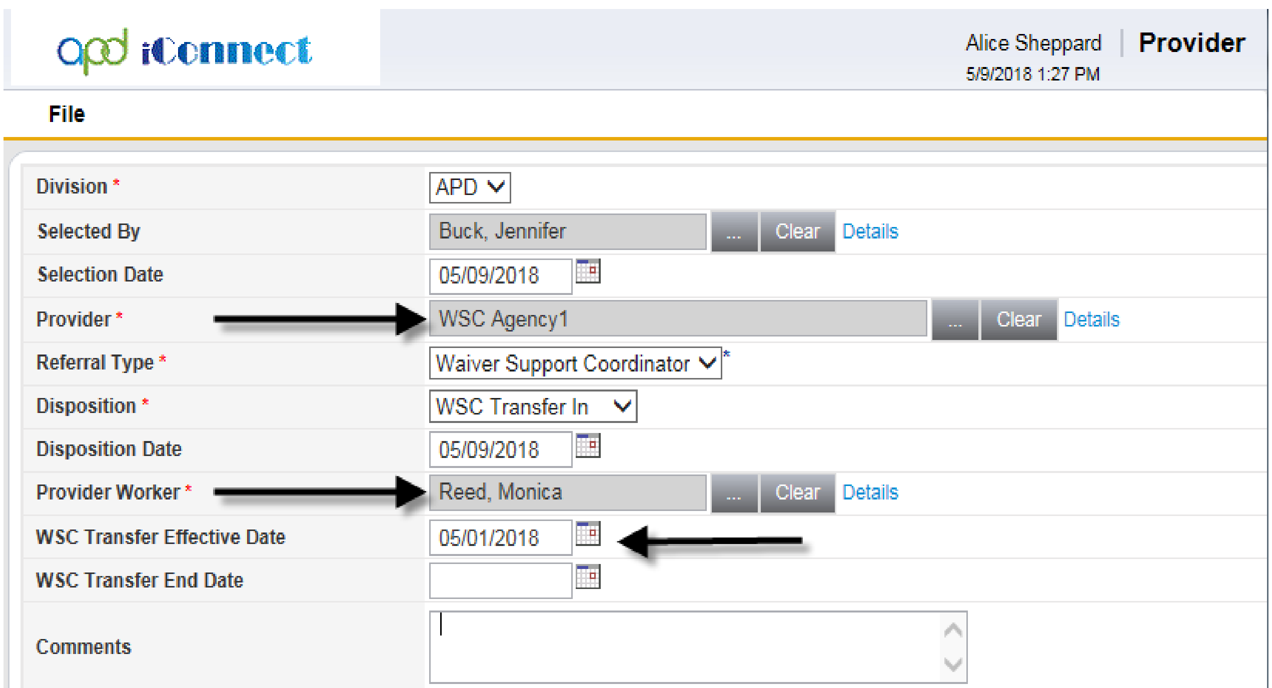


7. To complete the Tickler, click the **View Consumer Record** option from the tickler flyout menu to navigate quickly to the Consumer record from the tickler or can complete a quick Search to navigate to the Consumer's record.



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

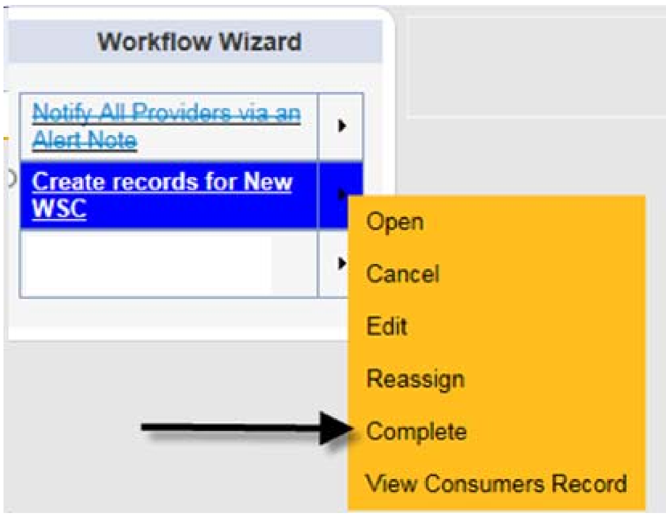
g. Disposition Date = defaults to today

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

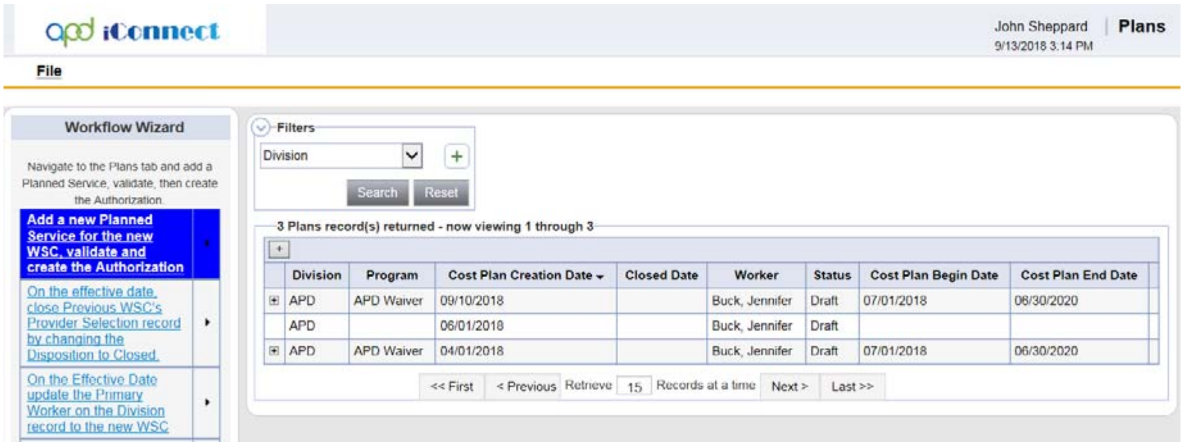
1. Upon saving the Provider Selection Record with a Disposition = WSC Transfer In, a Workflow Wizard will trigger for the user with three Ticklers.

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

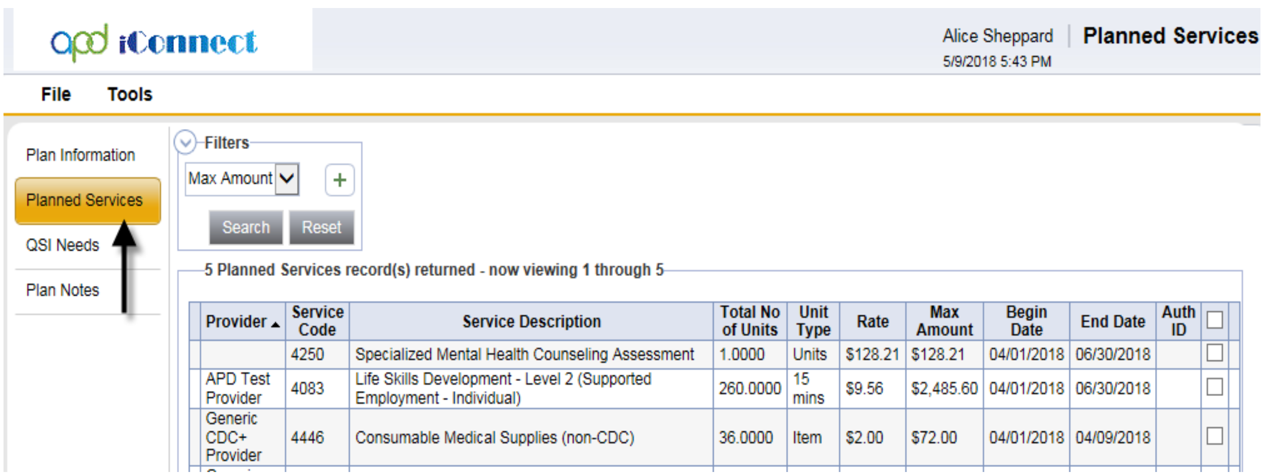
    b. On the effective date, update Primary Worker on the Division record to the new WSC

    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.



2. Click **File** > **Add Planned Service**.
3. 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: 17 – 18 FY = 2018 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. Provider Rate Type: Select Solo or Agency

h. Service Code

i. Unit Type auto populates when service code selected

j. 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.

k. Unit of Measure

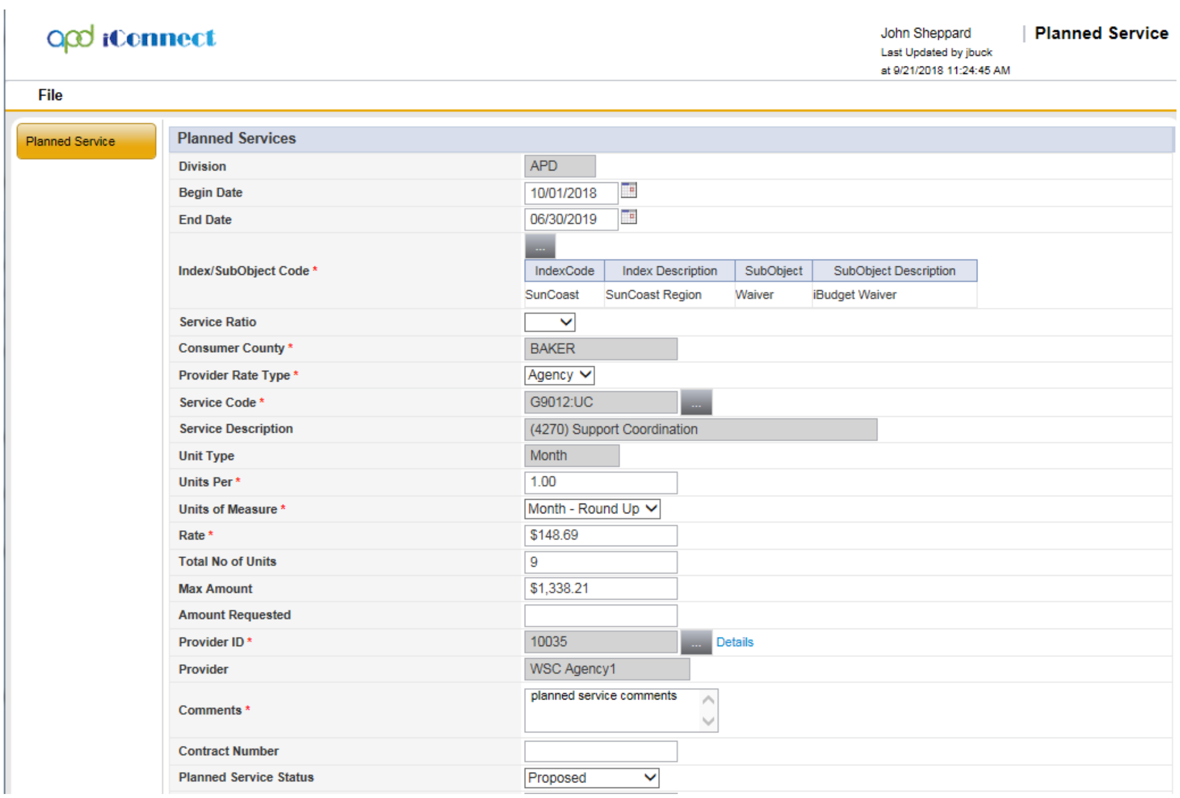
l. Total No of Units will auto-populate

m. 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.

n. Rate will auto populate and depending on the service code may or may not be editable.

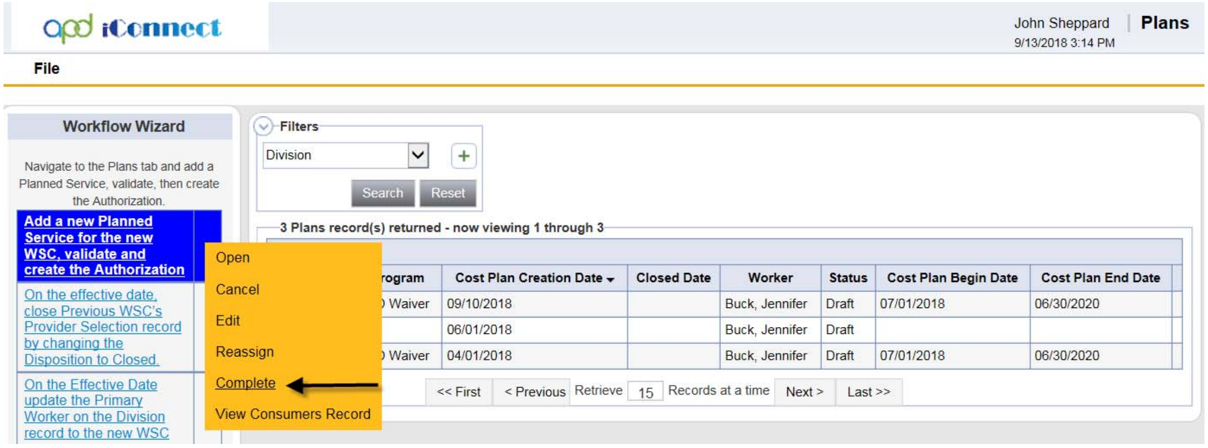
o. Comments enter as applicable

p. Amount Requested and Planned Service Status = are used by the Lead to document the approved, partially approved or denied details. The WSC can leave the status = Proposed.



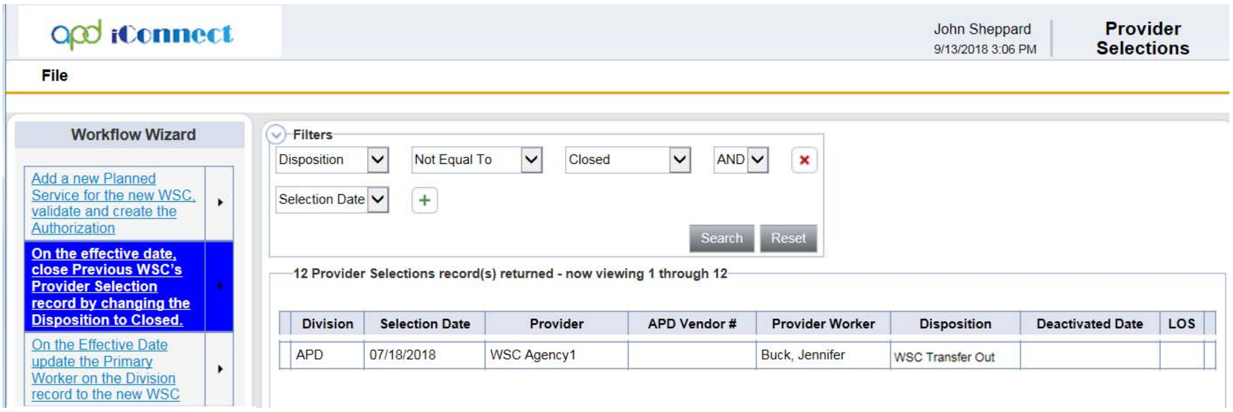
4. Click **File** > **Save and Close Planned Service**.

5. 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.

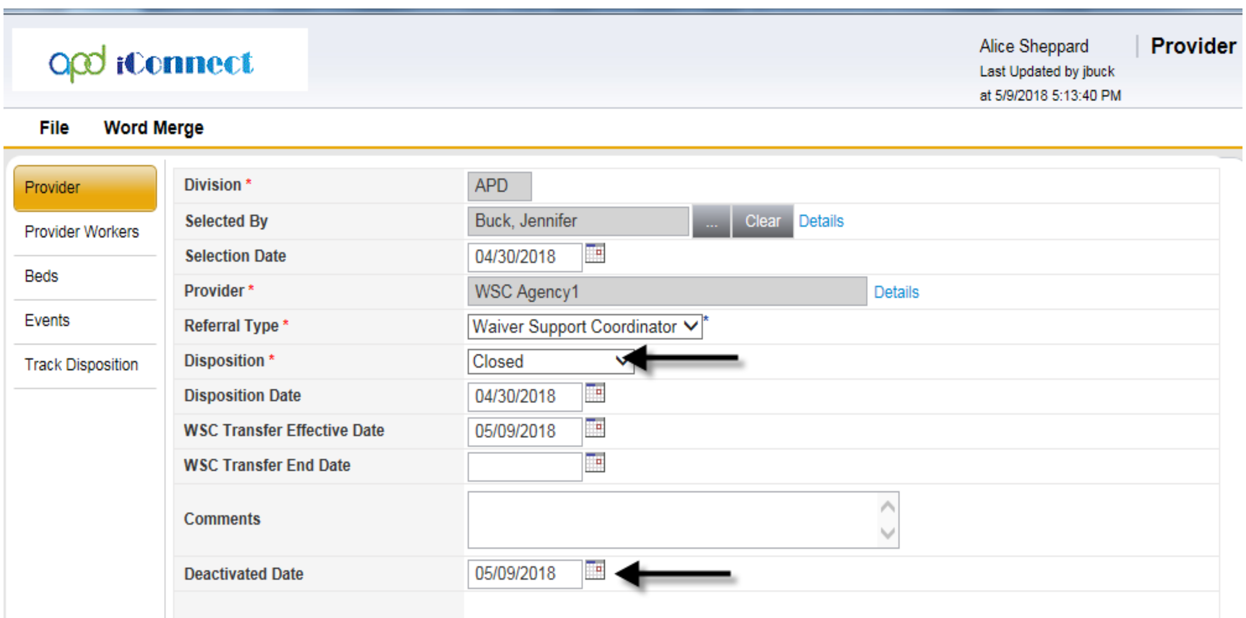


Close Previous WSC's Provider Selection Record

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.

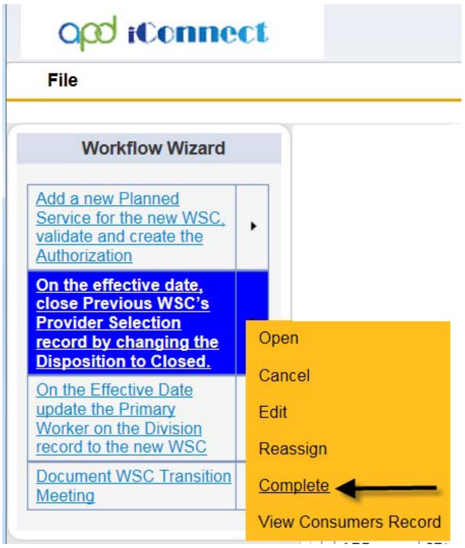


6. Click the previous WSC Provider Selection Record. The Details page displays. Update the following fields:
    a. Disposition = Closed
    b. Disposition Date = defaults to current date but can be edited



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

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



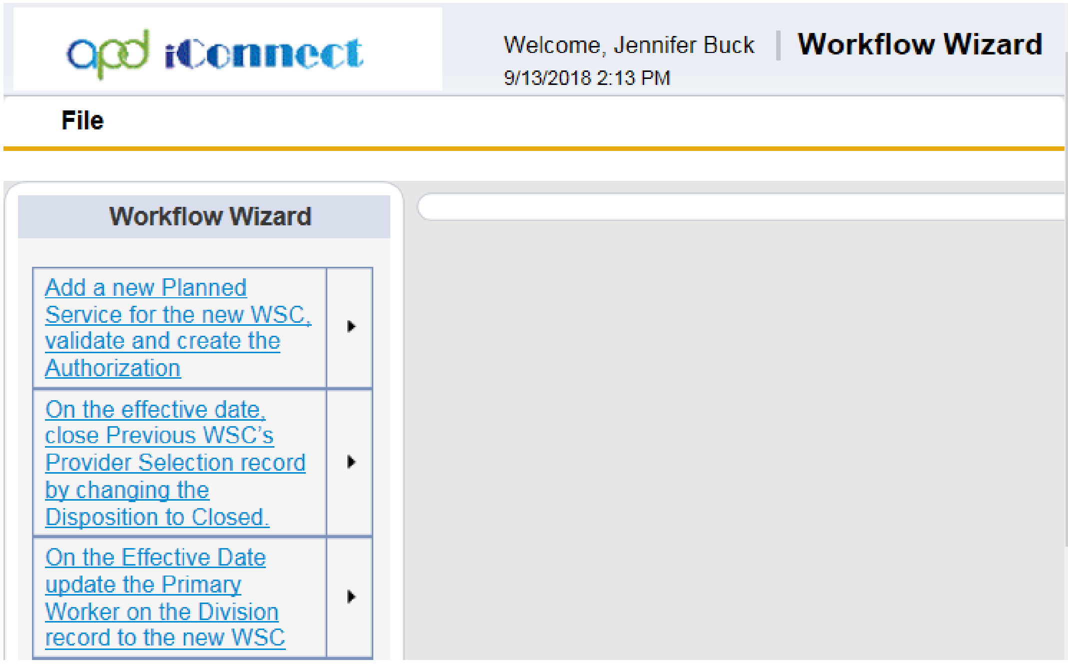
Update the Primary Worker

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 actually closing the records, removing access for the previous WSC.

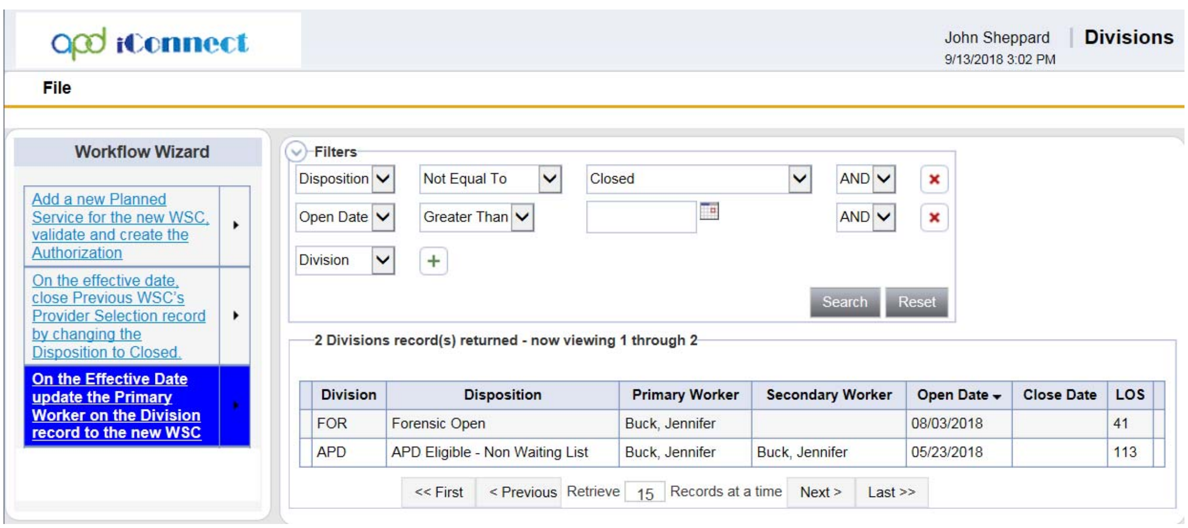
a. On the effective date, update Primary Worker on the Division record to the new WSC. This tickler will trigger immediately but the user should not complete it until the effective date because the change is effective immediately.

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.



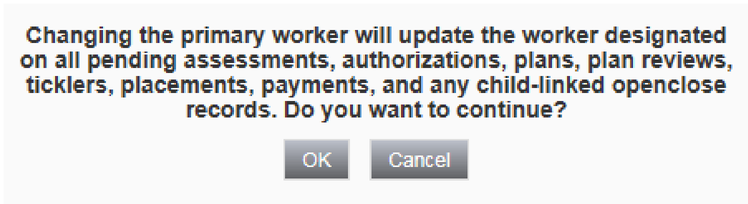
Click the **On the Effective date, update Primary Worker** tickler. The Division list view displays.

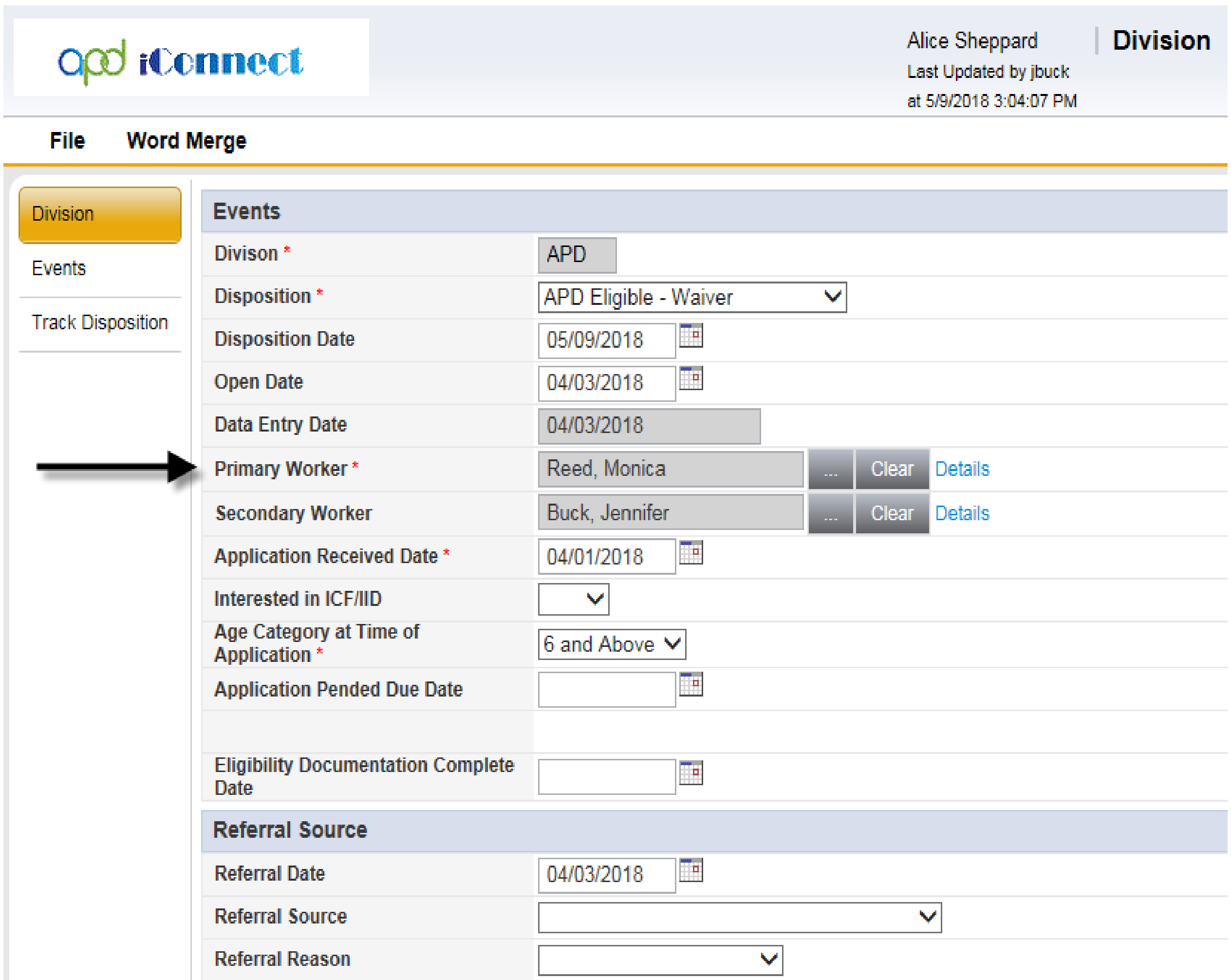


i. Click the **APD Eligible – Waiver** Division record. The Division details page opens. Update the following fields:

   i. Primary Worker = select the ellipsis to search for and select the new WSC Worker.

   ii. 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.



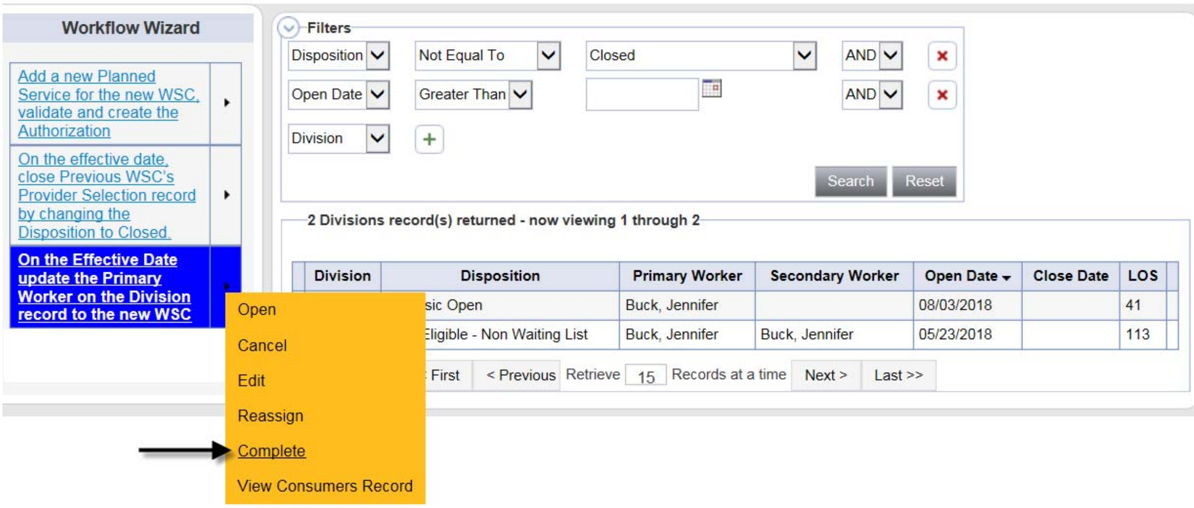


ii. Click **File** > **Save and Close Division**.

Tip

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

iii. 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

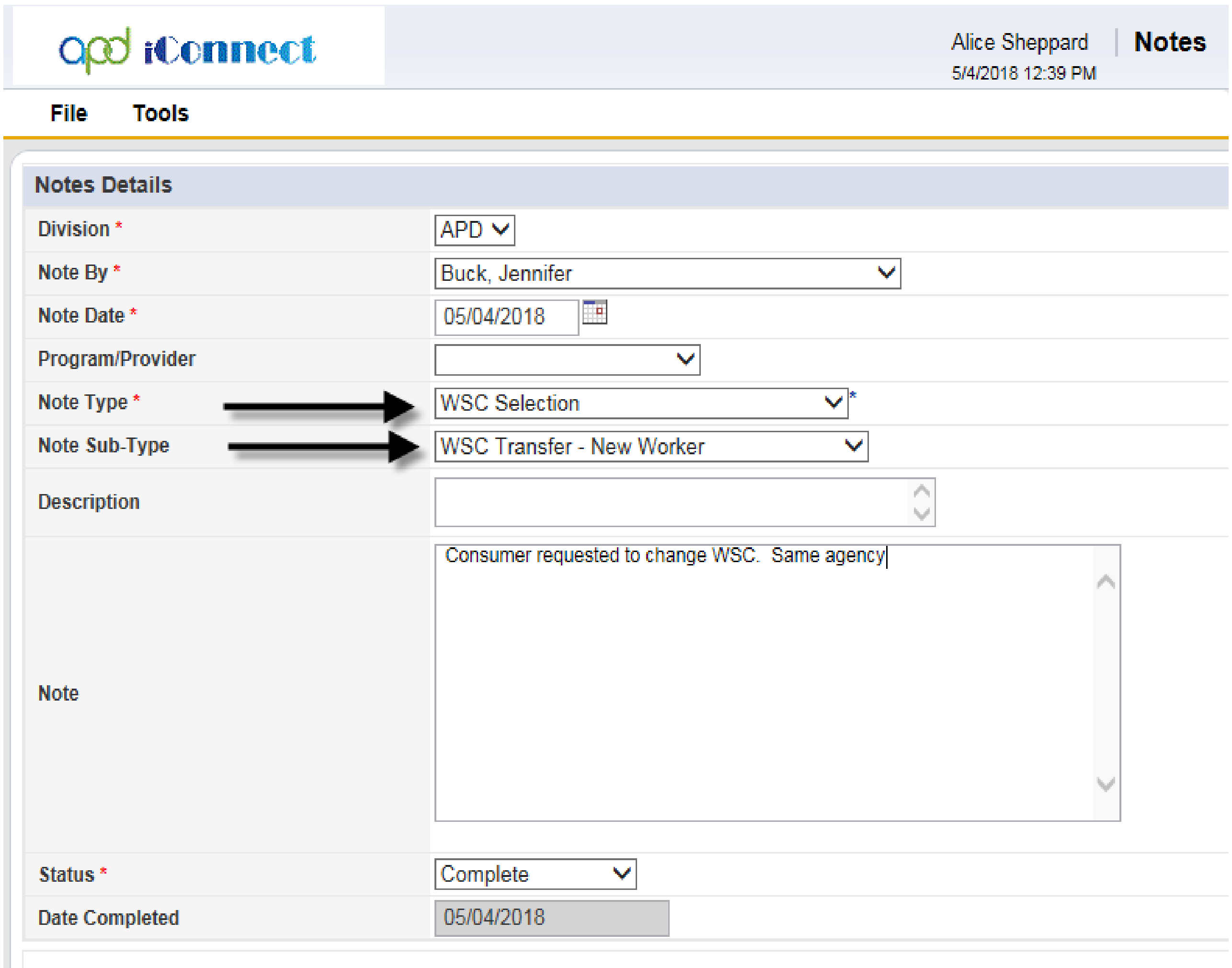
The Consumer notifies the local regional office of his/her newly selected Waiver Support Coordinator. Upon receiving the notification, the Regional Staff will add a Note in iConnect to begin the reassignment process. NOTE: this is an area of organizational change. Regions will be involved to ensure caseload capacity is not exceeded.

New WSC Selected - Add a Note

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

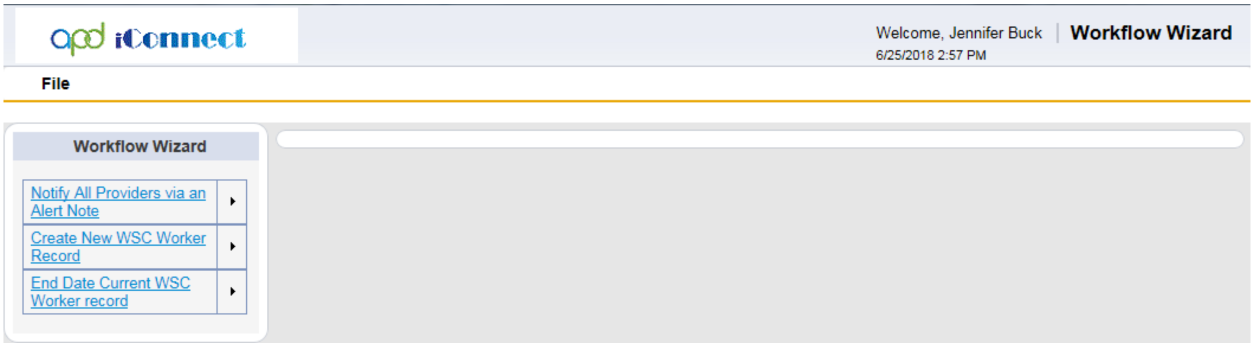
2. Navigate to the Consumer's record and click the **Notes** tab > click **File** > **Add Notes**.

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 = Complete
    e. Attach all supporting documentation



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

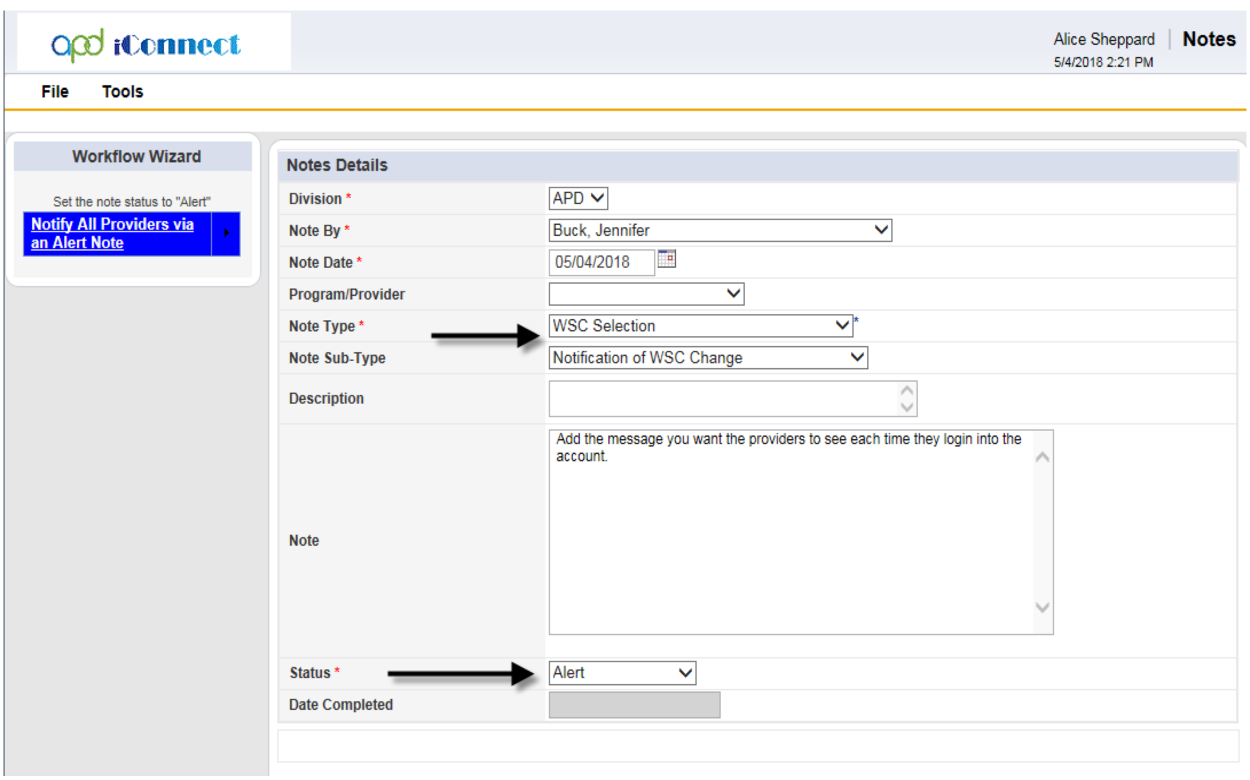
5. Saving this note as complete triggers a Workflow Wizard for the user with the following ticklers:
    a. Notify all Providers via an Alert Note
    b. End Date Current WSC Worker Record
    c. Create New WSC Worker Record



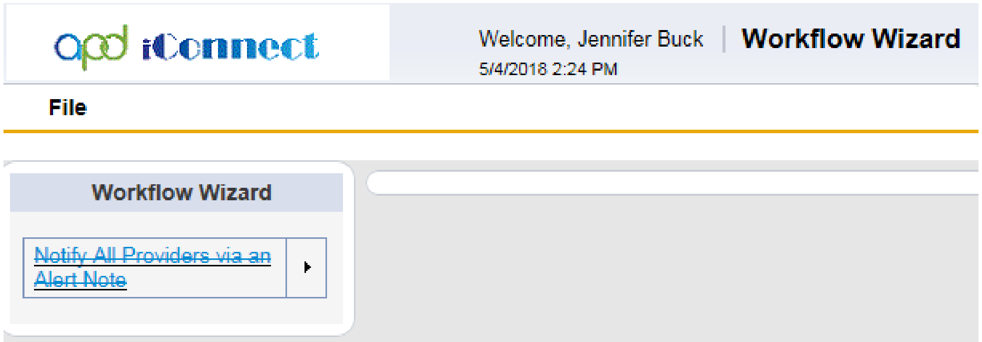
Notify All Providers via an Alert Note

1. Click the **Notify All Providers via an Alert Note** tickler to Open it. 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

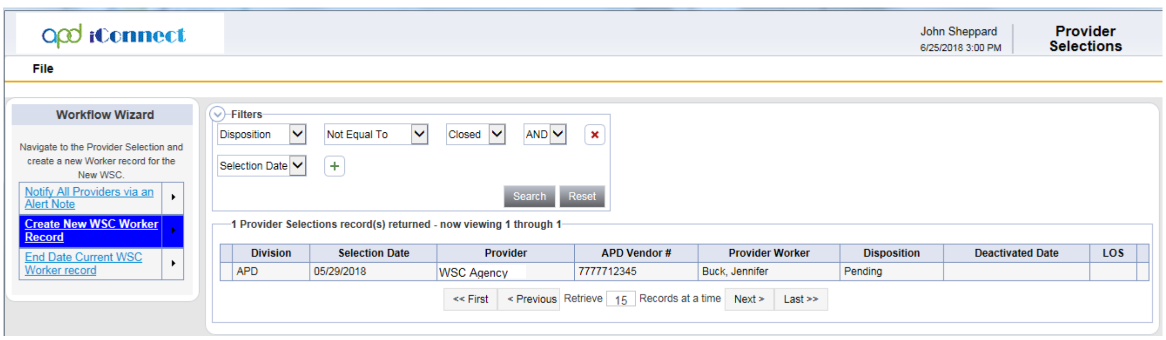


3. Click **File > Save Notes**. The Tickler is marked as complete.



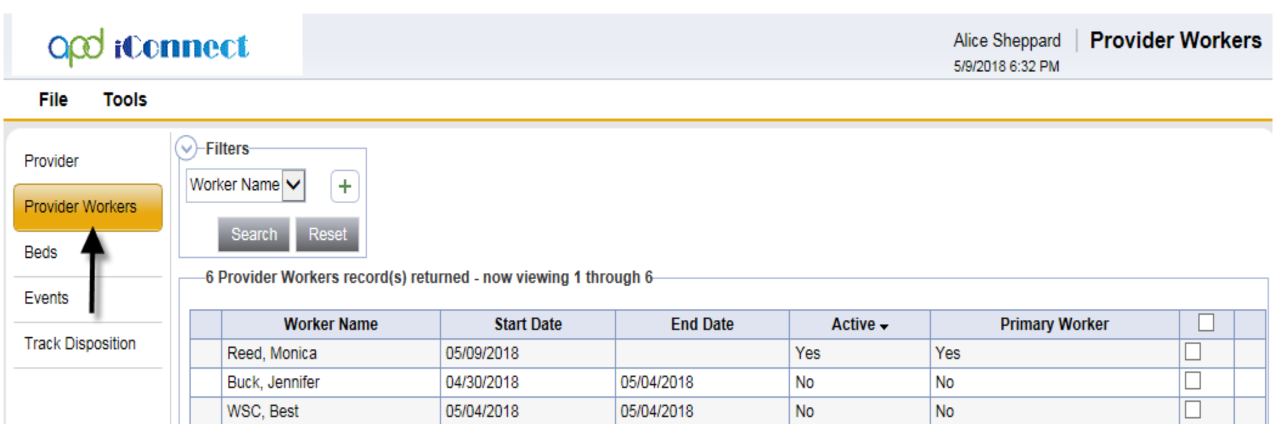
Create New WSC Worker Record

1. Return to the Workflow Wizard window. Click the **Create New WSC Worker Record** tickler to open it. The Provider Selections list view displays.

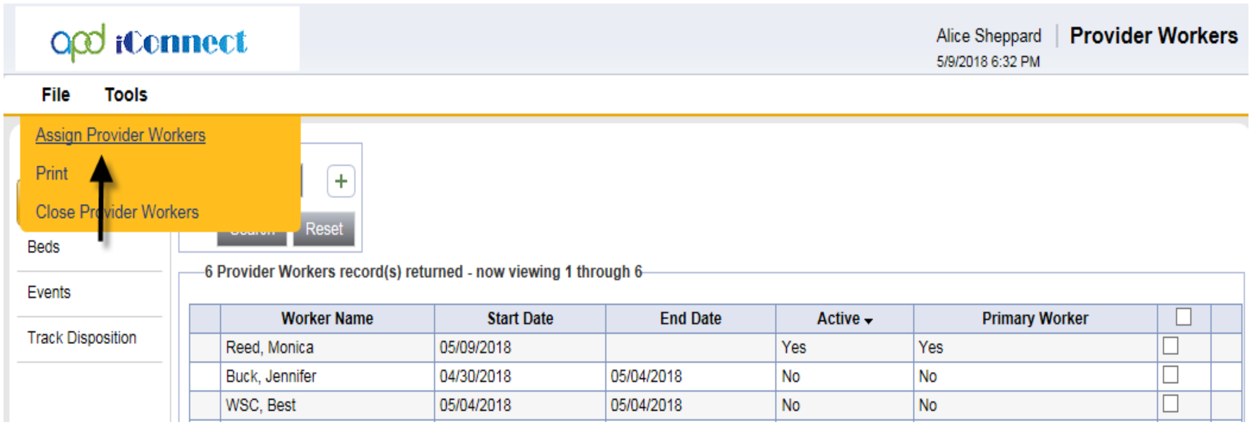


2. Click the applicable WSC Provider Agency record. The provider detail page displays.

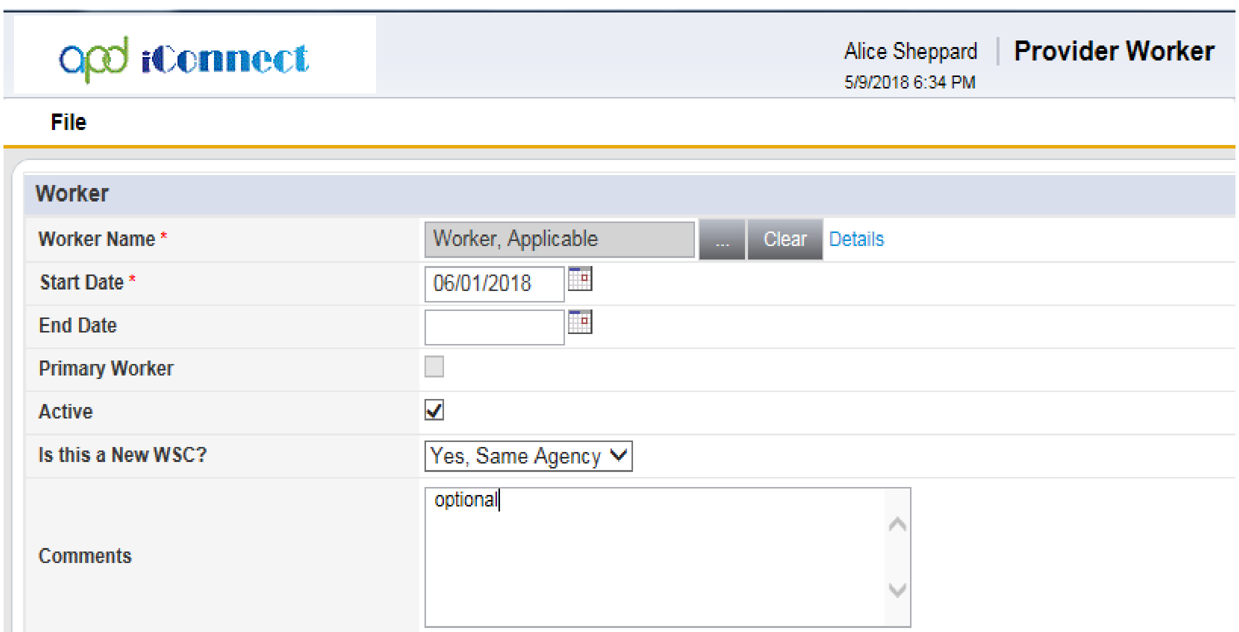
3. Select the **Provider Worker** subpage. A list of the Providers workers is displayed.



4. Click **File** > **Assign Provider Workers**.



5. The Provider Worker detail page displays. Update the following fields to add the new WSC.
   a. Worker Name = select the ellipsis to search for and select the new WSC Worker.
   b. Start Date = defaults to today. Change to the first day of the following month.
   c. End Date = leave blank
   d. Primary Worker checkbox = cannot be selected until the previous WSC is unselected as the primary worker which will be completed later in the workflow.
   e. Active = keep checked
   f. Is this a New WSC? = Yes, Same Agency
   g. Comments = optional



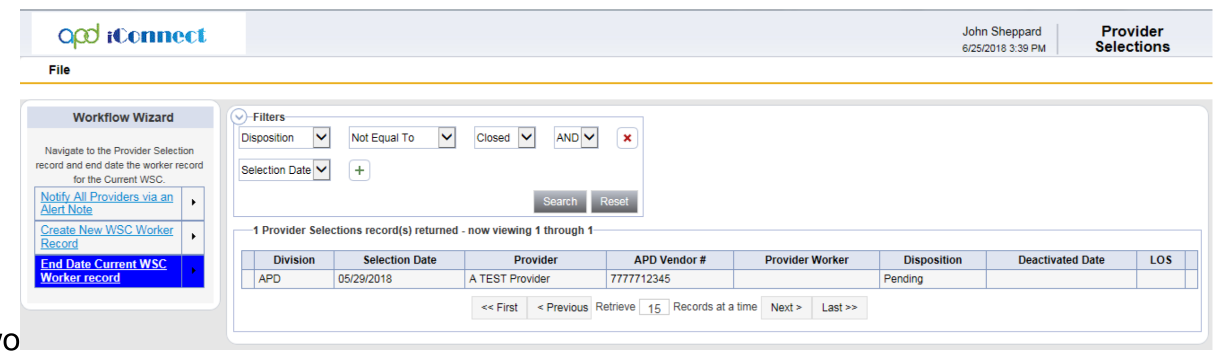
6. Click **File** > **Save and Close Provider Worker**.

7. When Is this a New WSC = Yes, Same Agency is selected another Workflow Wizard is triggered to update the primary worker on the effective date. This will open in a new Workflow Wizard window in addition to the Workflow Wizard window that is already opened. Proceed to the next step and End Date the Current WSC Worker Record before completing the Update the Primary Worker tickler.

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.

End Date Current WSC Worker Record

1. Return to the Workflow Wizard window. Click the **End Date records for Current WSC** tickler to open it. The Consumer's Provider Selection List View grid displays.



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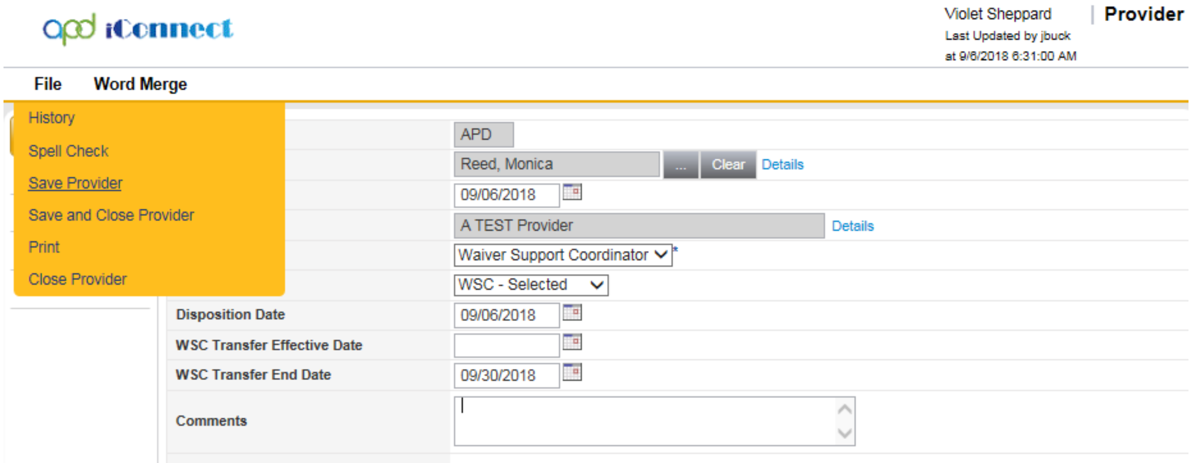
2. From the list view grid, select the applicable WSC Provider Agency record.

3. The Provider details page displays. Update the following fields:
    a. WSC Transfer End Date = enter the last day of current month.

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



5. 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.

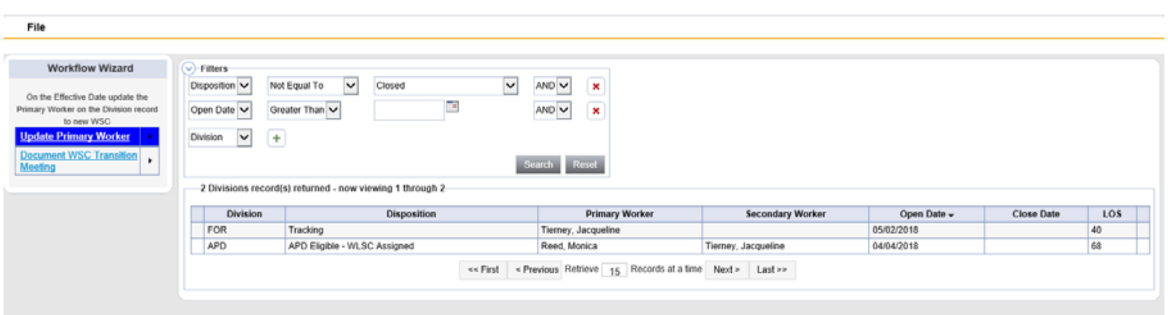
Update Primary Worker

1. Saving the Worker Record with Is this a new WSC? = Yes, Same Agency triggers a Workflow Wizard with the following ticklers:

   a. On the Effective Date update the Primary Worker on the Division record to 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. WSC Transition Meeting (which should be reassigned to the new WSC.)

2. 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.



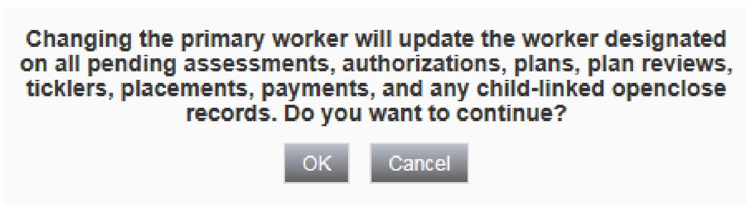
3. On the effective date of the new WSC, update the primary worker on the Division which will automatically update the worker on the associated Program records.

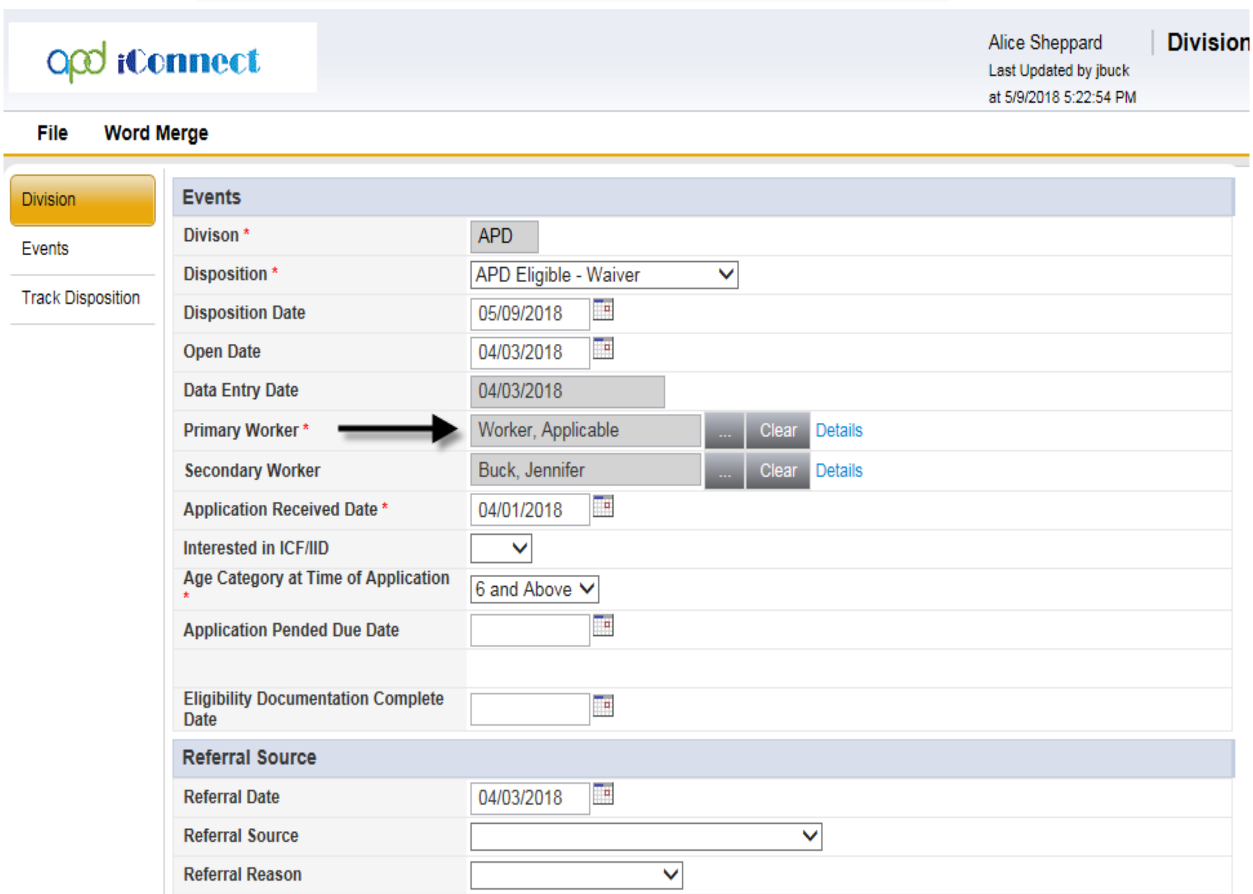
4. Select the **APD Eligible – Waiver** record.

5. The Division details page displays. Update the following fields:

b. Primary Worker = select the ellipsis to search for and select the new WSC Worker.

c. 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.

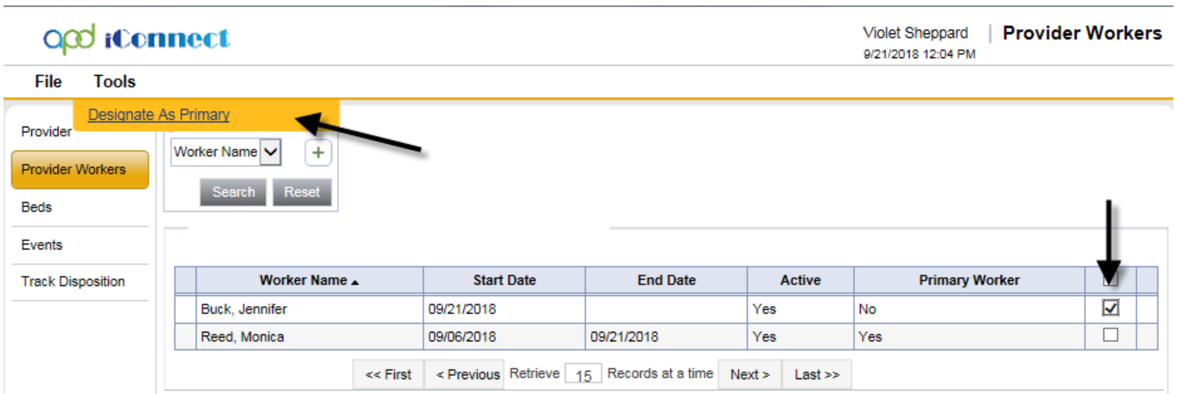




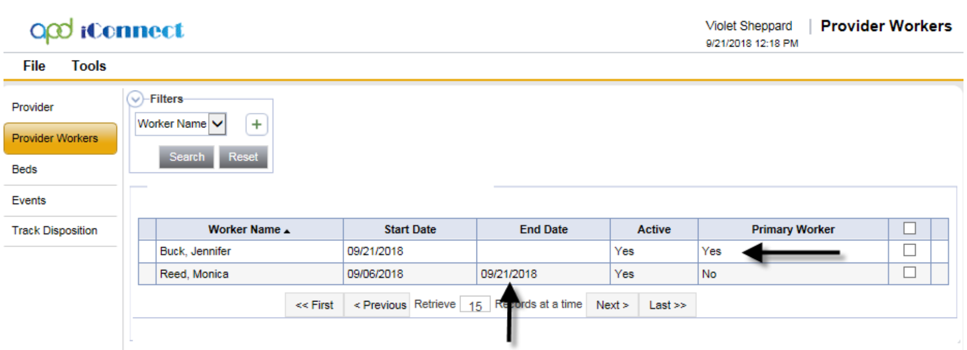
7. Click **File** > **Save and Close Division**.

8. Navigate to the Provider Selection record. The new Primary Worker is listed as a Worker but needs to be designated as primary.

9. Check the box next to the new WSC name and click tools > designate as Primary.



10. The new WSC record is Marked as the Primary Worker and the former WSC is no longer Primary Worker with an end date of today.

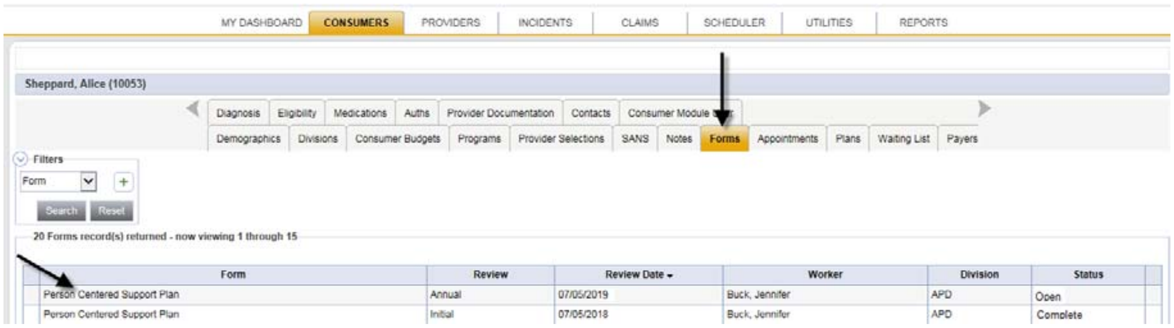


11. Upon completing the tasks outlined in the tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

WSC Transition Process

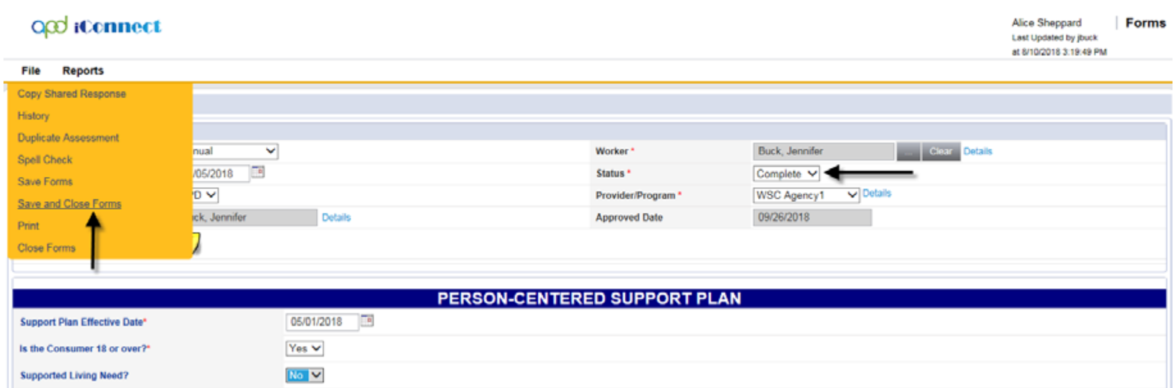
1. As part of the WSC Transition process, the previous WSC will mark the Person Centered Support Plan form as complete, making it ready only. The new WSC will create a new Person Centered Support Plan duplicated from the one completed by the previous WSC.

2. 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.



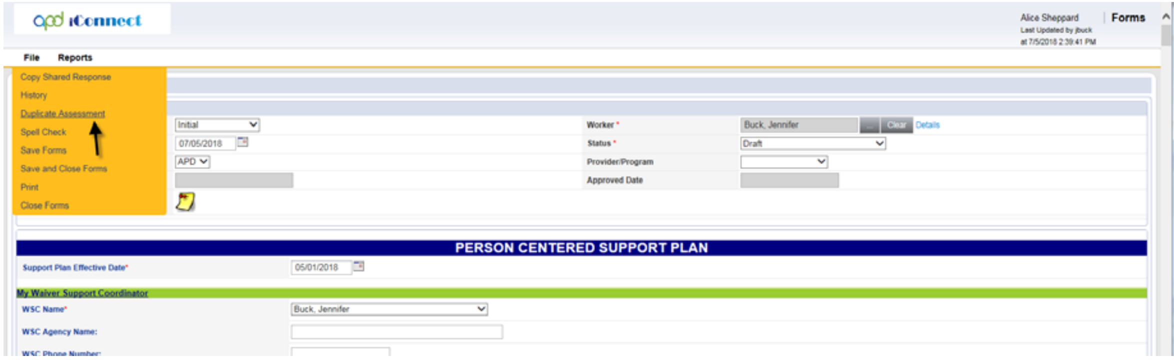
1. Update the following fields:
   a. Review the form and ensure it is complete.
   b. Change the Status = Complete

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



3. 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.

4. 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.



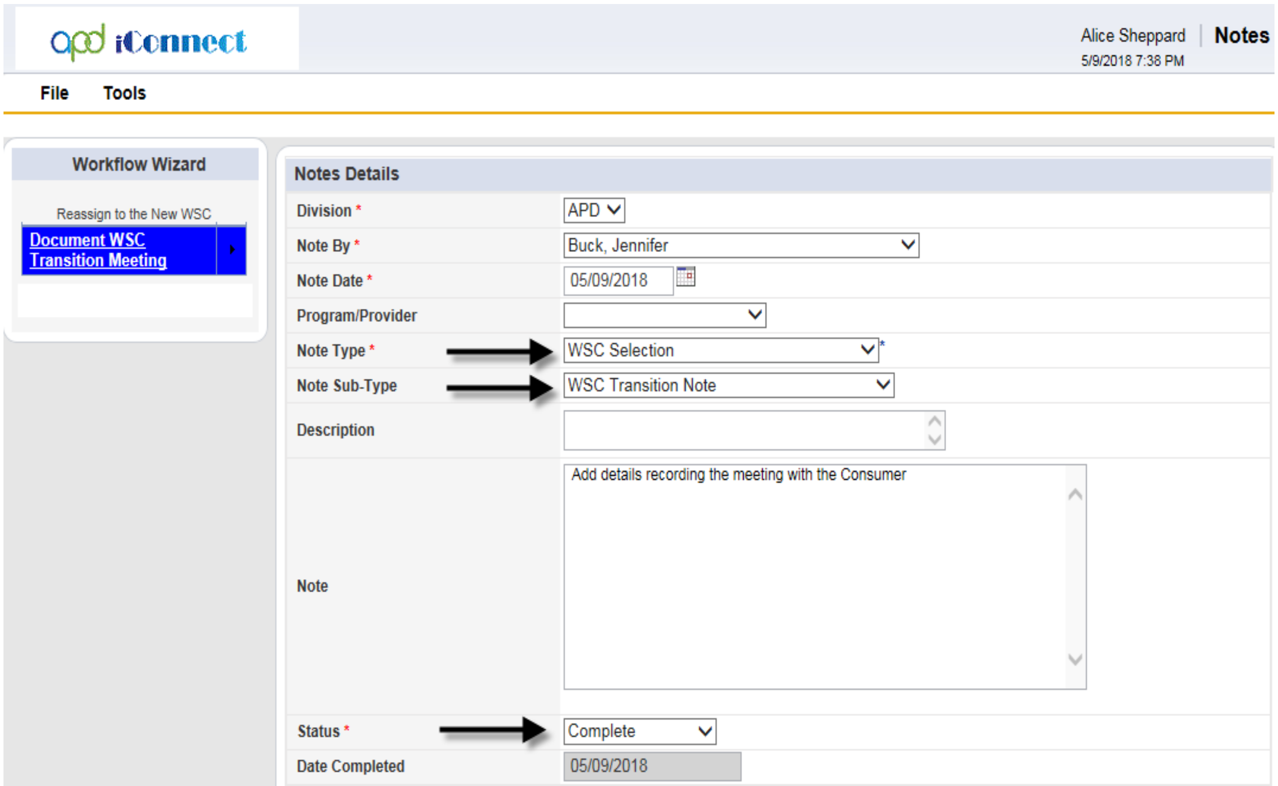
5. In the Form header, change the **Review Type** = Annual.

6. Update the support plan effective date.

7. Make updates to goals, needs, and other important factors.

8. When finished, change the S**tatus** = Open. Click **File** > **Save and Close Forms.**

9. When the Provider Selection Record for the new WSC was saved with a Disposition of WSC Transfer In, or for transfers within an agency, Provider Worker Record saved with = Is this a New WSC? = Yes, Same Agency, a Workflow Wizard triggers a reminder to:
   a. Document WSC Transition Meeting – *Assigned to WSC*
10. 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.
11. 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



12. Click **File** > **Save Note.**
13. The tickler is marked as complete.

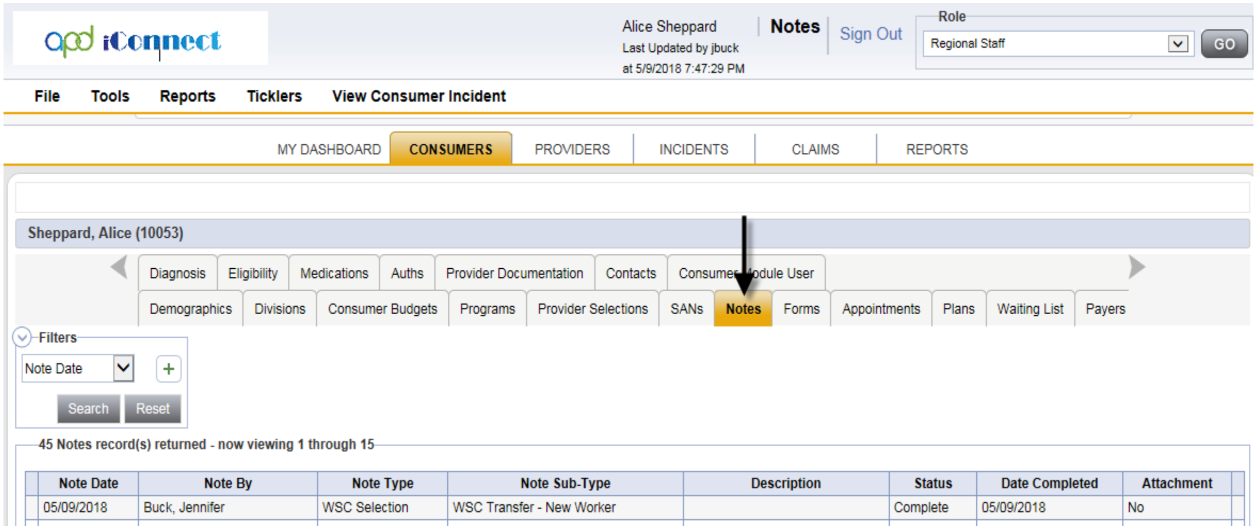
Inter-region Transfer on Waiting List

The Regional 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.

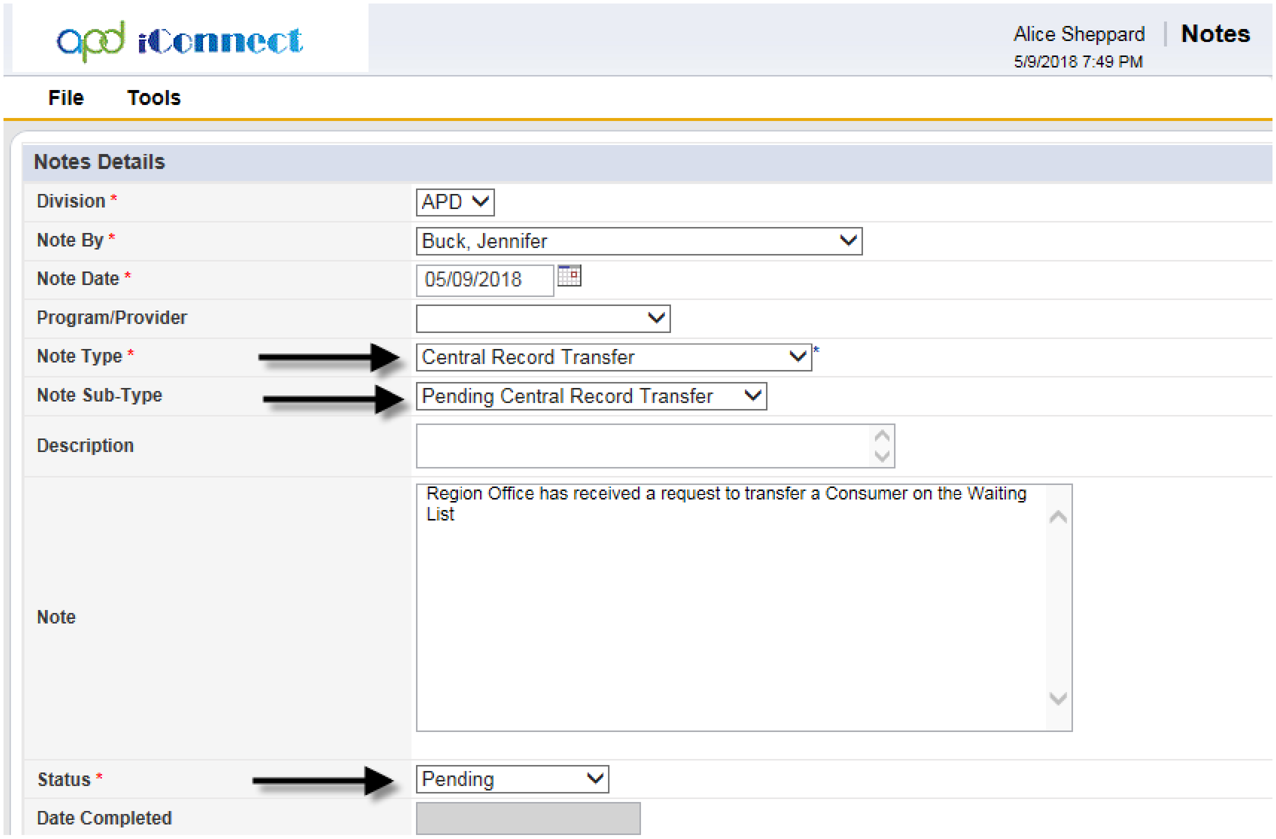
1. To begin, log into APD iConnect and set Role = Waiting List Workstream Worker. Click **Go.**

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

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

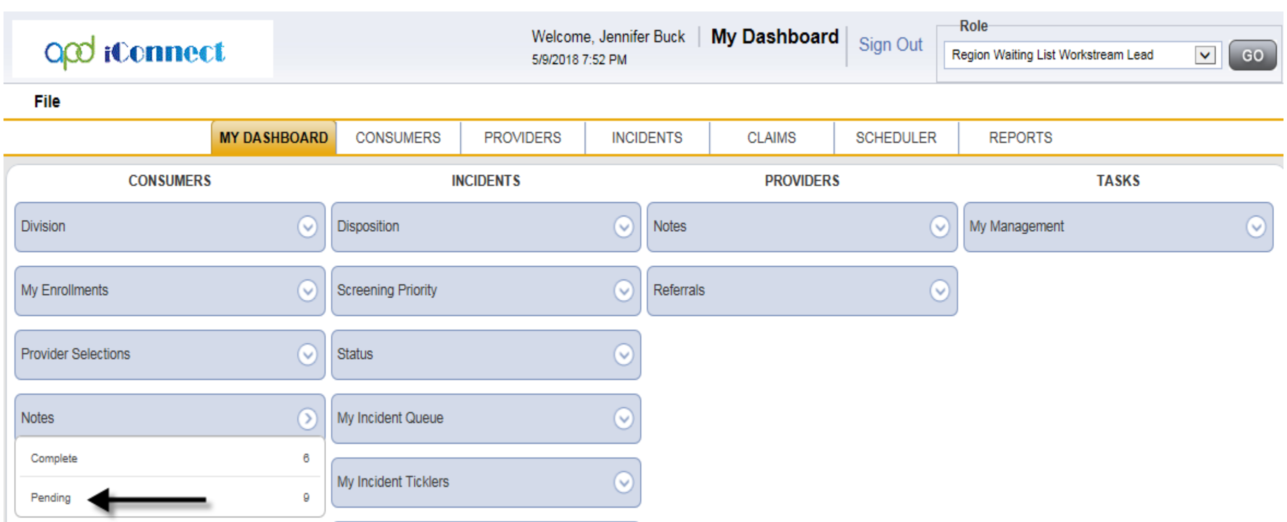


4. The Note details page displays. Update the following fields:
    a. Division = APD
    b. Note Type = Central Record Transfer
    c. Note Subtype = Pending Central Record Transfer
    d. Note recipient = select the ellipsis to search for and select the Waiting List Workstream Lead at the Receiving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

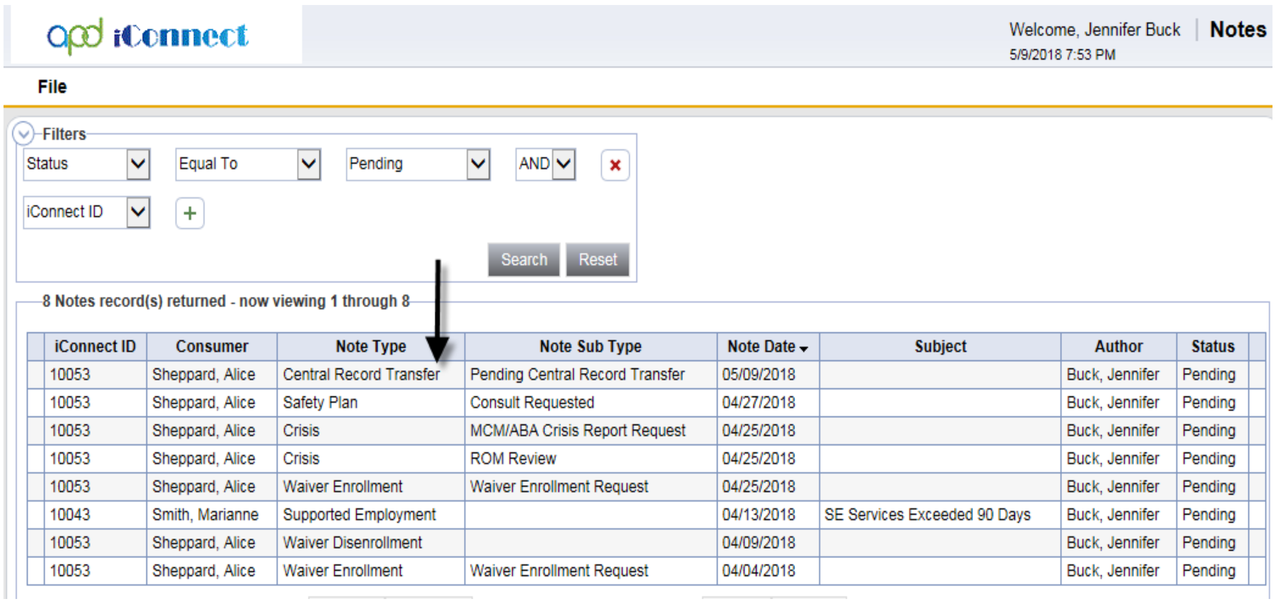


5. Click **File** > **Save and Close Notes**.

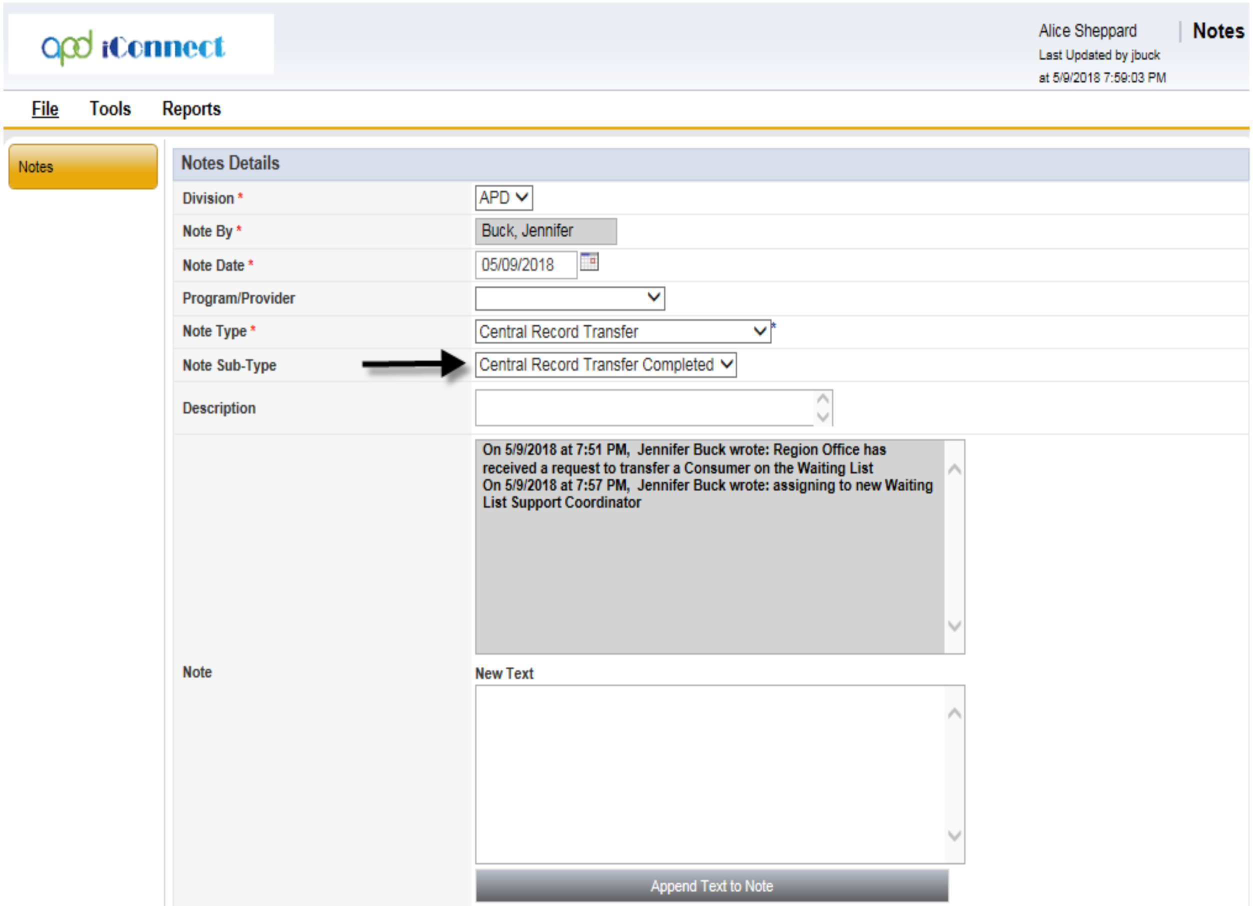
6. The Regional Waiting List Workstream Lead will monitor his/her My Dashboard > Notes queue.



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

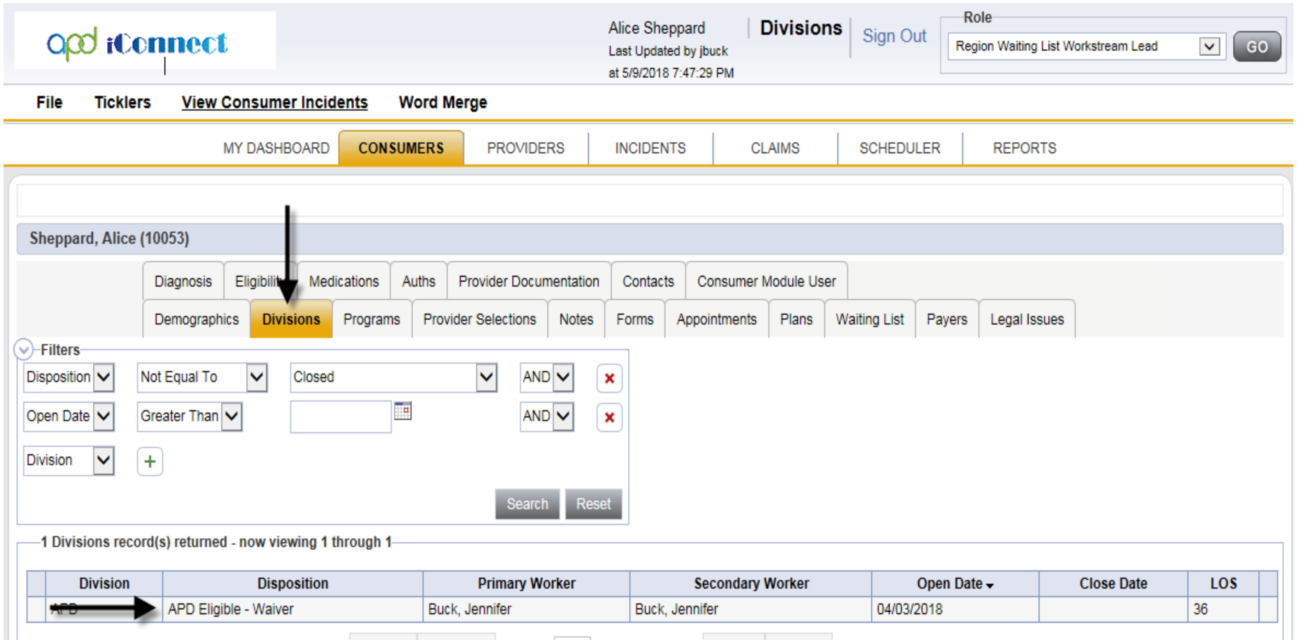


8. The Note Details page displays. Update the following fields:
    a. Sub Type = Central Record Transfer Completed
    b. Note = add a summary of the transfer assignment and Append Text to Note.
    c. Note Recipient = select the ellipsis to search for and select the Waiting List Support Coordinator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



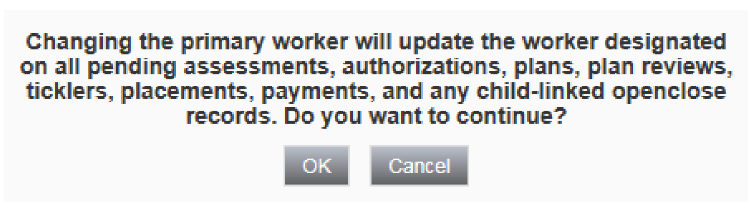
9. Click **File** > **Save and Close Notes**.

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

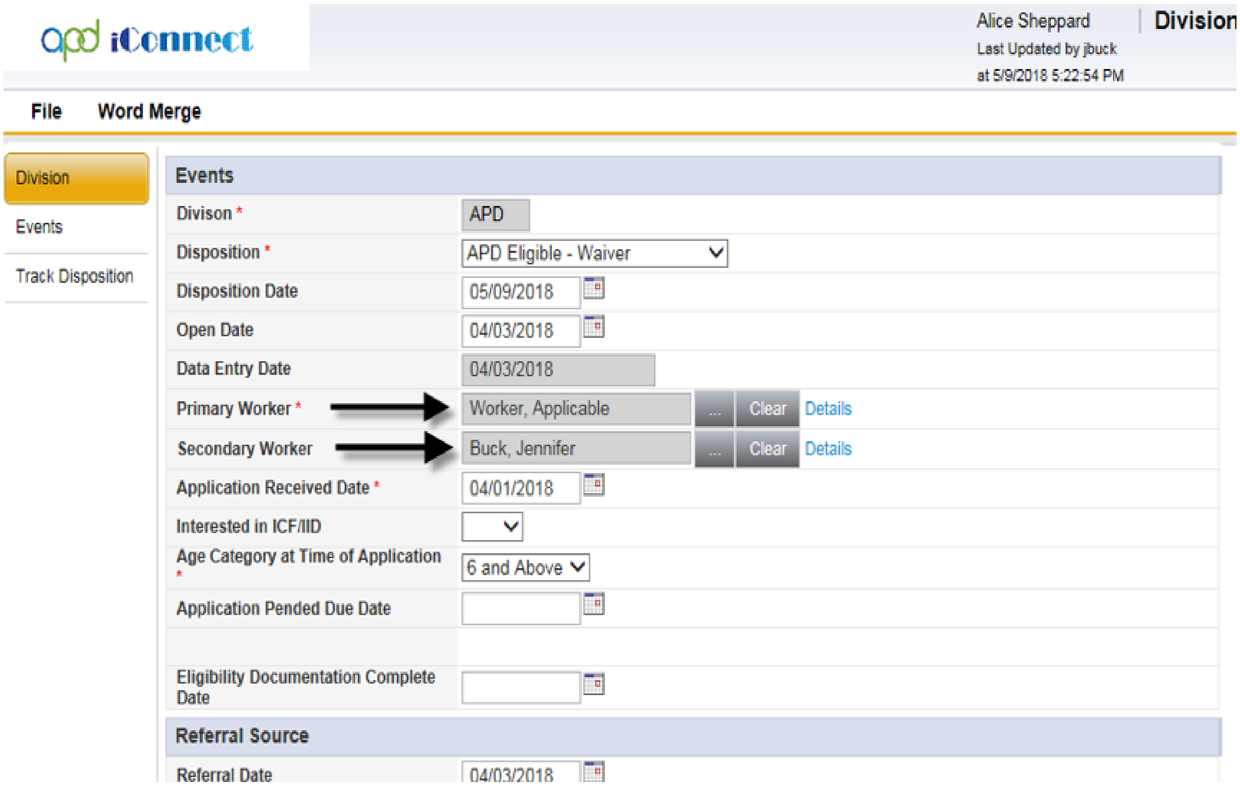


11. Select the APD Division record to open it.

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

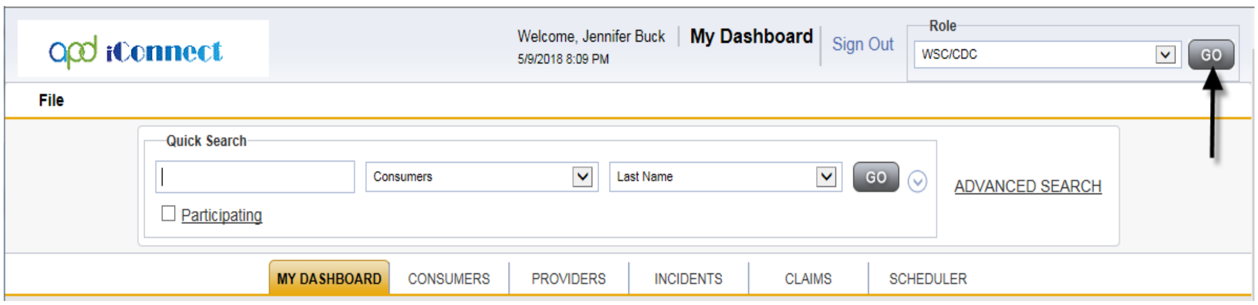


13. Click **File** > **Save and Close Division.**

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.

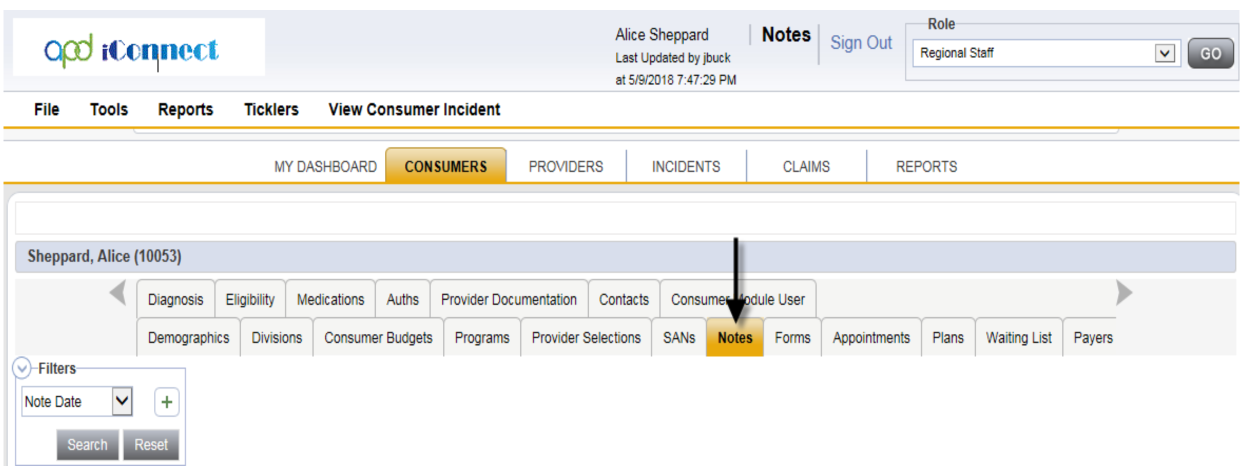
1. To begin, log into APD iConnect and set Role = WSC/CDC. Click **Go.**



Notify the Receiving Region Office via a Note

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

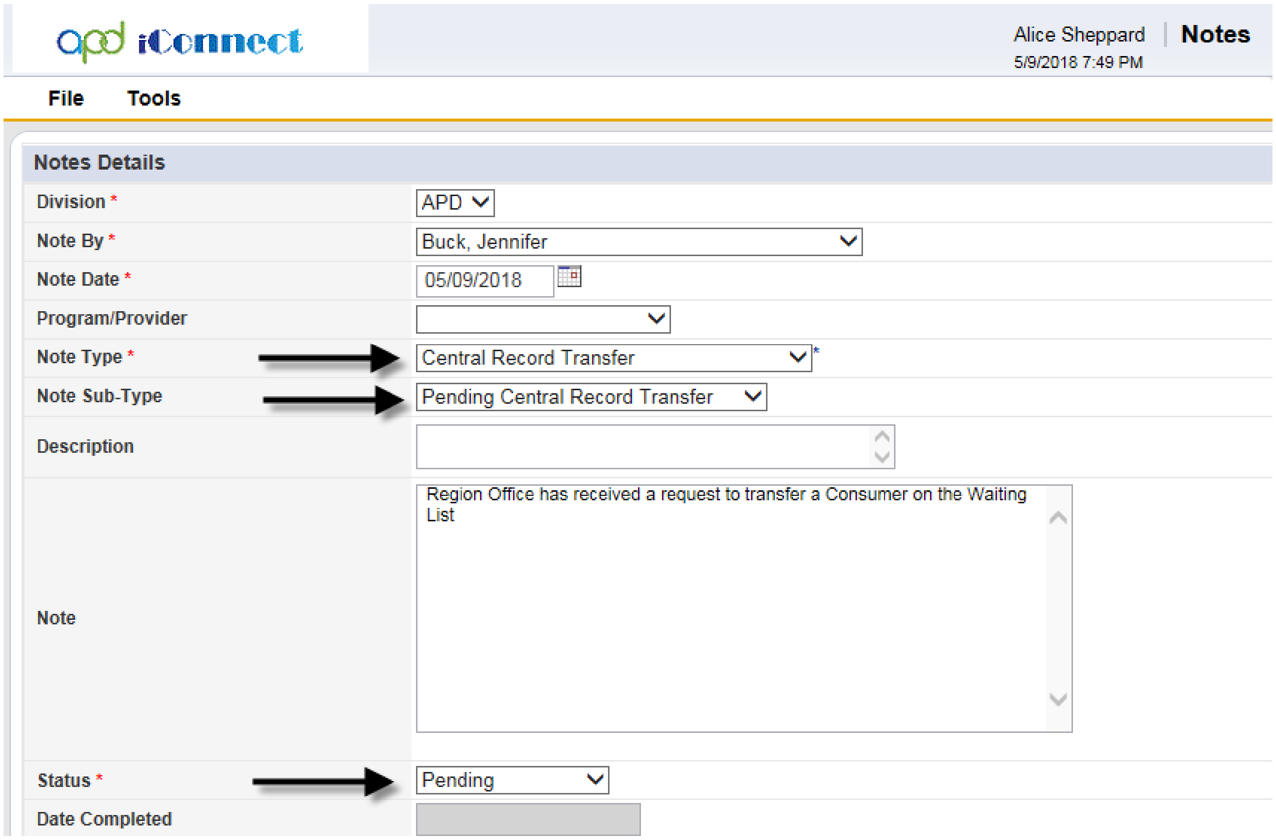
b. Note Type = Central Record Transfer

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 iConnect.

7. From the Notes tab, click **File** > **Add Note**.

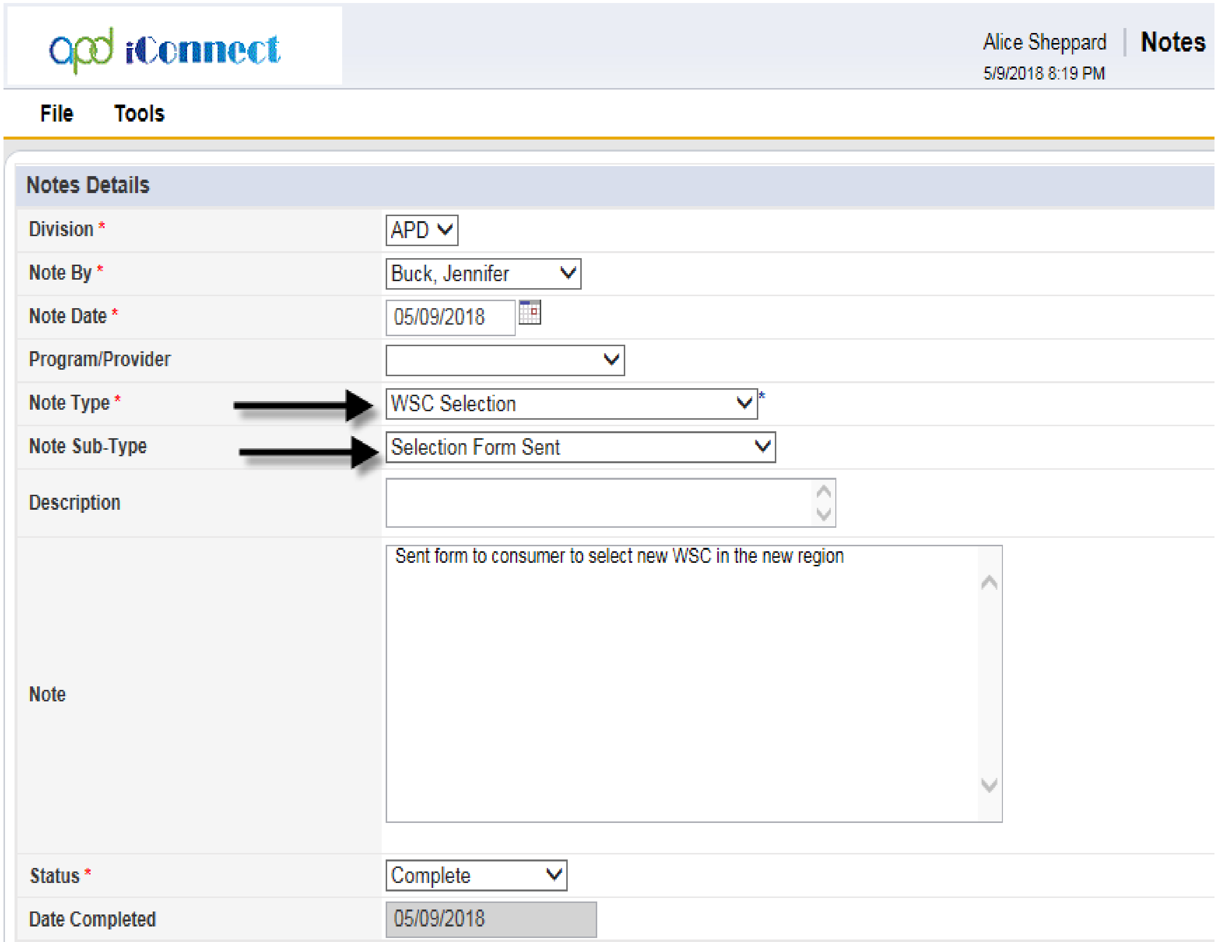
8. The Note details page displays. Update the following fields:

    a. Division = APD

    b. Note Type = WSC Selection

    c. Note Subtype = Selection Form Sent

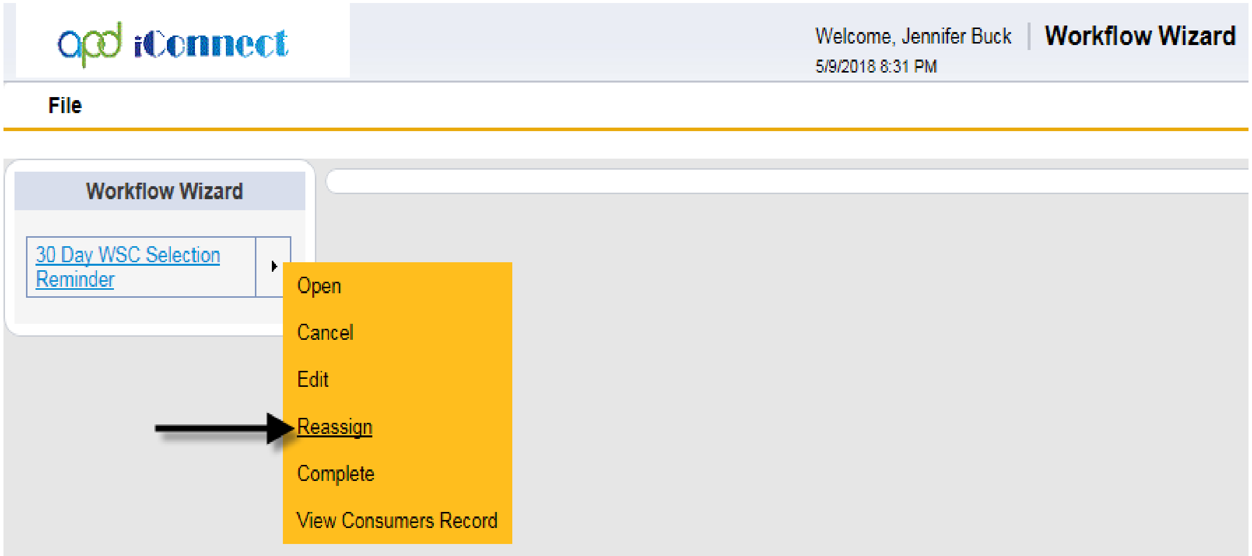
    d. Status = Complete



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.

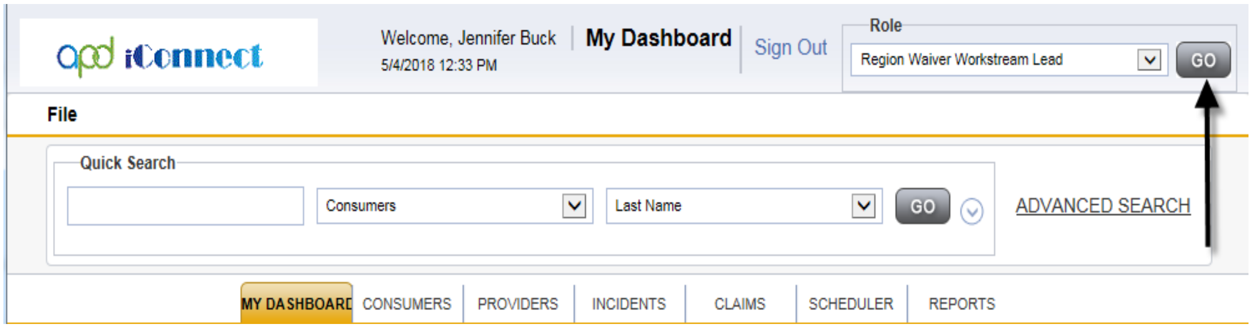
14. In 30 days when the tickler is due, the Waiver Workstream Lead will check if the Consumer has selected the WSC indicated by the existence of a WSC Selection/WSC Inter-Region Transfer Note. If the selection has been made, the Waiver Workstream Lead will cancel the tickler by selecting Cancel from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

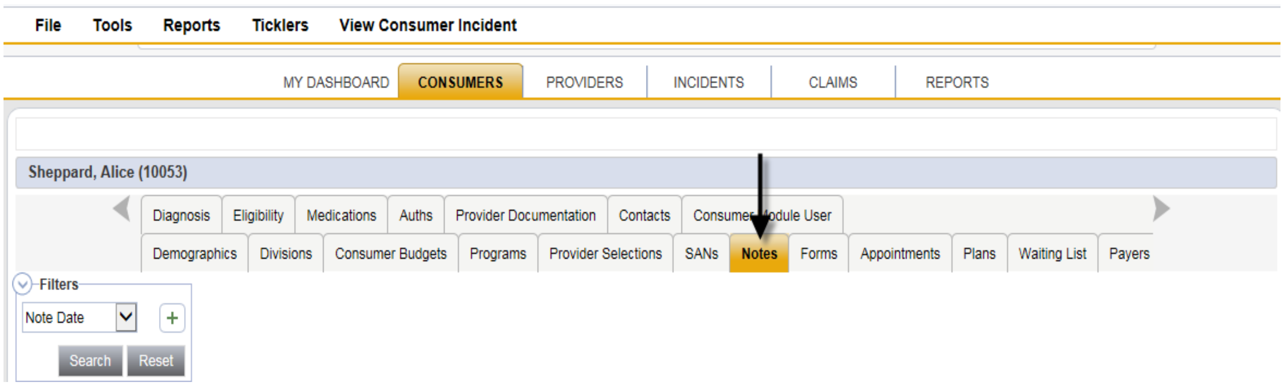
Consumer selects new WSC

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.**

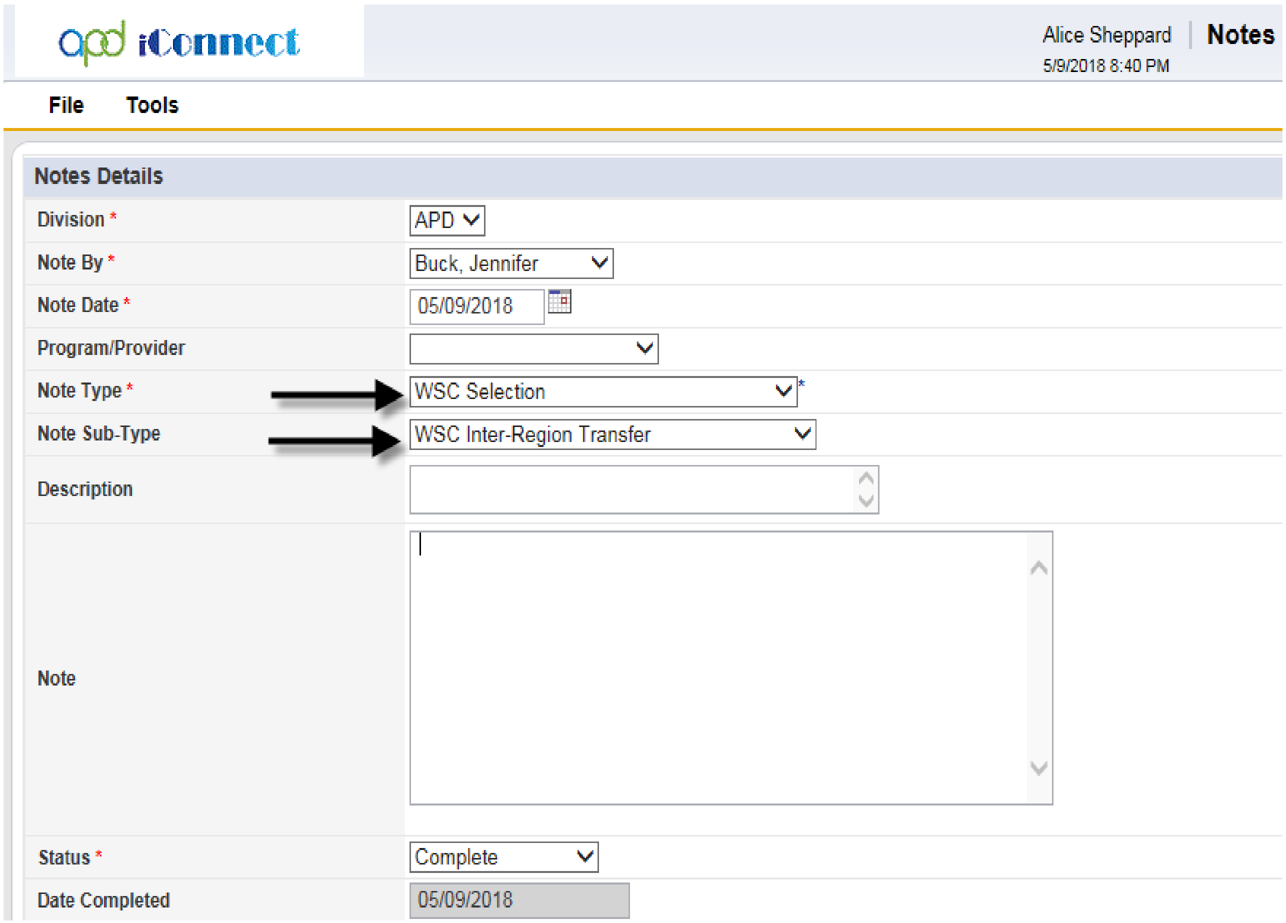


2. Navigate to the Consumer Record and click the **Notes** tab.



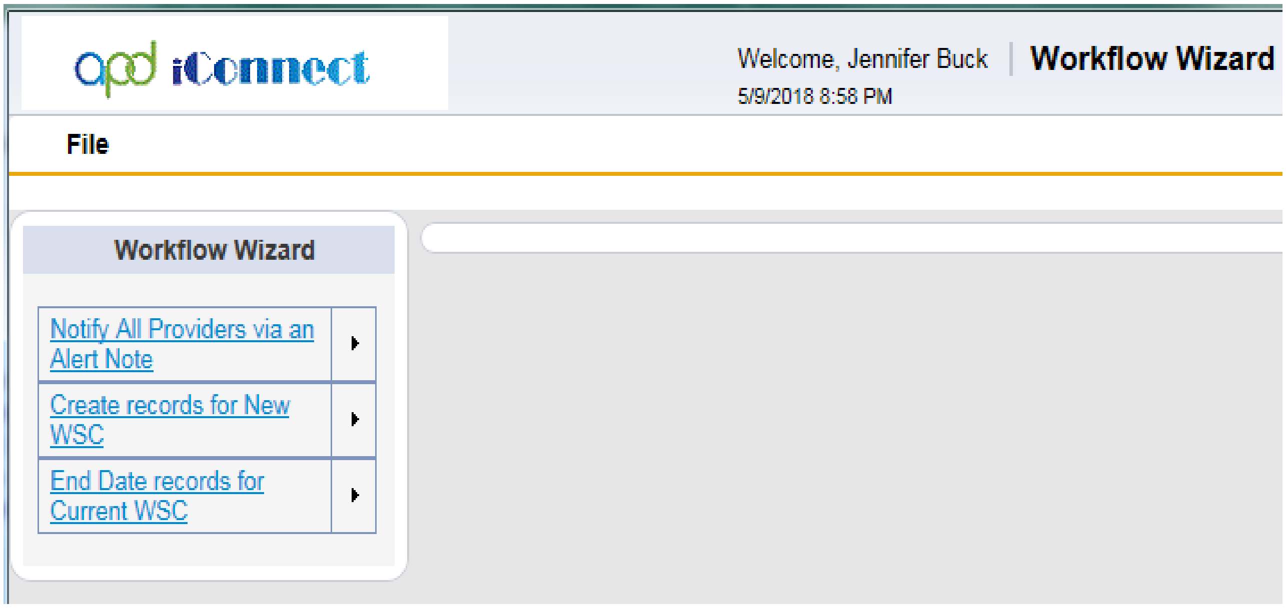
1. Click **File** > **Add Note**.

2. 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

7. Click the Create records for New WSC tickler to display a message tickler.

8. 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.