

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 **ellipses** to search for and select Waiver Workstream Lead worker record.
- e. Status = Complete
- f. Attach all supporting documentation

The screenshot shows the 'Notes Details' form in the iConnect system. The form includes fields for Division (APD), Note By (Buck, Jennifer), Note Date (05/04/2018), Program/Provider, Note Type (WSC Change Request), Note Sub-Type (Consumer Requested Selection Form Sent), Description, Note, Status (Complete), and Date Completed (05/04/2018). Annotations include arrows pointing to the Note Type, Note Sub-Type, and Status fields, and a double arrow pointing to the Note field.

Notes Details

Division * APD ▼

Note By * Buck, Jennifer ▼

Note Date * 05/04/2018

Program/Provider ▼

Note Type * WSC Change Request ▼*

Note Sub-Type Consumer Requested Selection Form Sent ▼

Description

Note

sent the form to the consumer

Status * Complete ▼

Date Completed 05/04/2018

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**.

The screenshot displays the APD iConnect web interface. At the top, the user is logged in as Marianne Smith, with the role set to 'Regional Staff'. The 'Notes' tab is selected in the top navigation bar. Below the navigation bar, there is a 'Quick Search' section with a text input field, a dropdown menu set to 'Consumers', and a 'Last Name' dropdown. A 'GO' button is next to the search fields. Below the search section, there is a 'MY DASHBOARD' section with tabs for 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'REPORTS'. The 'CONSUMERS' tab is active. Below the dashboard, there is a section for 'Smith, Marianne (10043)' with various tabs including 'Diagnosis', 'Eligibility', 'Medications', 'Auths', 'Provider Documentation', 'Contacts', 'Consumer Module User', 'Demographics', 'Divisions', 'Consumer Budgets', 'Programs', 'Provider Selections', 'SANS', 'Notes', 'Forms', 'Appointments', 'Plans', 'Waiting List', and 'Payers'. The 'Notes' tab is selected. Below the tabs, there is a 'Filters' section with a 'Note Date' dropdown and a 'Search' button. Below the filters, there is a table with 99 notes returned, showing the first 15 records. The table has columns for Note Date, Note By, Note Type, Note Sub-Type, Description, Status, Date Completed, and Attachment.

Note Date	Note By	Note Type	Note Sub-Type	Description	Status	Date Completed	Attachment
05/04/2018	Tierney, Jacqueline	Forensic	Annual Review	24 Month Review	Complete	05/04/2018	No


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



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

File Tools

Notes Details

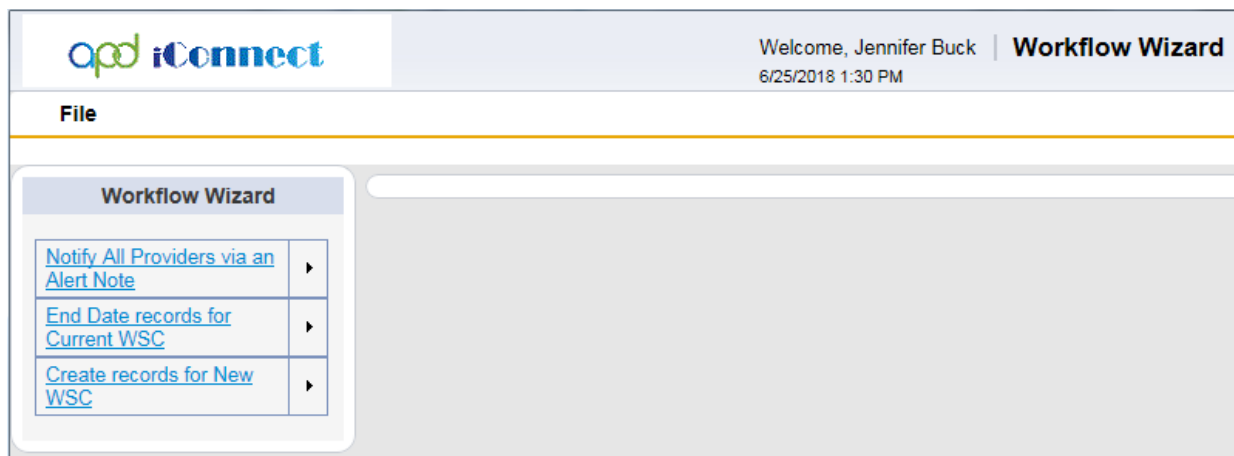
Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	05/04/2018 
Program/Provider	▼
Note Type *	WSC Selection ▼*
Note Sub-Type	WSC Transfer - Agency ▼
Description	<div> <div></div> <div></div> </div>
Note	<div>Consumer requested to change WSC agencies</div> <div></div>
Status *	Complete ▼
Date Completed	05/04/2018

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

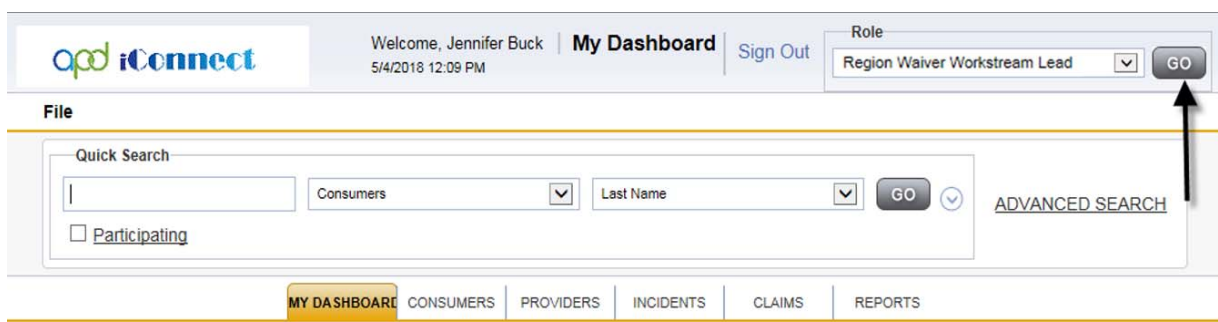
Notify All Providers via an Alert Note

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

oconnect iConnect

Welcome, Jennifer Buck | My Dashboard | Sign Out

Role: Region Waiver Workstream Lead

File

Quick Search: Consumers Last Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER REPORTS

CONSUMERS INCIDENTS PROVIDERS TASKS

Division My Enrollments Provider Selections Notes Alert Notes Ticklers

Disposition Screening Priority Status My Incident Queue My Incident Ticklers Alert Notes

Notes Referrals

Ticklers 88

4. From here, use the multi variable search to find the Tickler. Click **Search**

oconnect iConnect

Welcome, Jennifer Buck | Ticklers

File

Filters

Status Equal To New AND

Last Name Contains sheppard AND

iConnect ID +

☐ Apply Alert Days Before Due

Search Reset

100 Ticklers record(s) returned - now viewing 1 through 15

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



Tip

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

5. Click the **Notify All Providers via an Alert Note** tickler to Open it. The Notes Detail page displays.

6. Update the following fields:

- a. Division = APD
- b. Note Type = WSC Selection
- c. Note Subtype = Notification of WSC Change
- d. Note = Add the message you want the providers to see each time they login into the account.
- e. Status = Alert

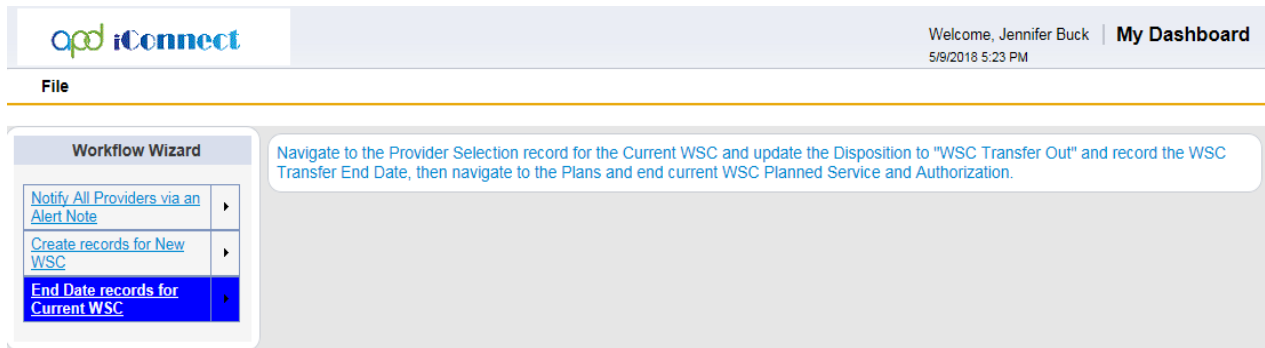
The screenshot shows the 'Notes Details' form in the iConnect system. On the left, a 'Workflow Wizard' sidebar contains a button 'Notify All Providers via an Alert Note'. The main form has the following fields: 'Division' (APD), 'Note By' (Buck, Jennifer), 'Note Date' (05/04/2018), 'Program/Provider' (empty), 'Note Type' (WSC Selection), 'Note Sub-Type' (Notification of WSC Change), 'Description' (empty), 'Note' (a text area containing the instruction: 'Add the message you want the providers to see each time they login into the account.'), 'Status' (Alert), and 'Date Completed' (empty). Arrows point from the 'Note Type' and 'Status' dropdowns to their respective values, and a blue button in the sidebar points to the 'Note' text area.

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

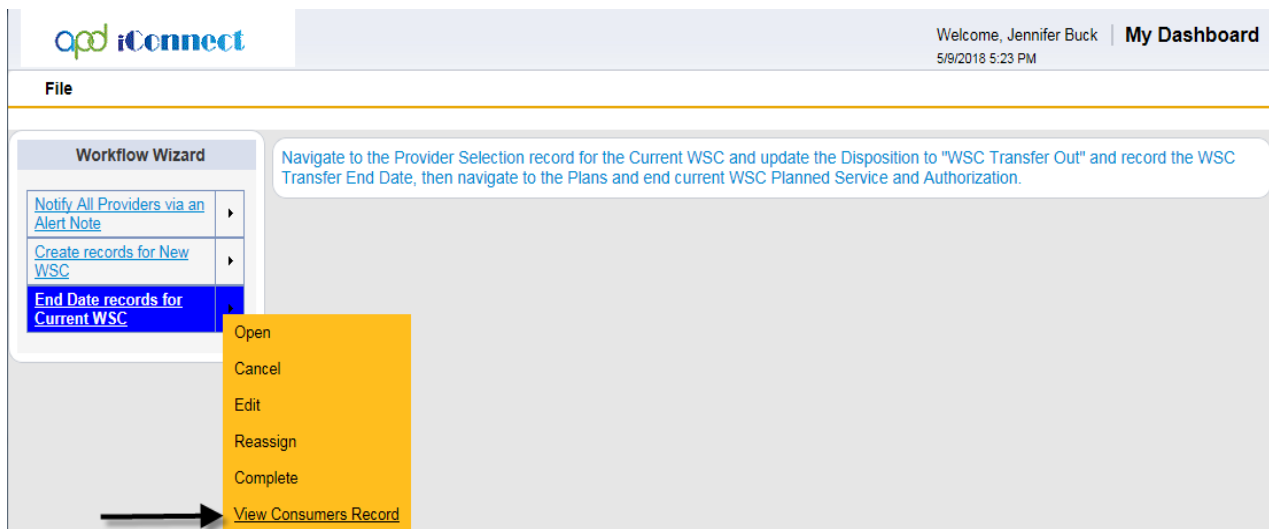
The screenshot shows the 'Workflow Wizard' in the iConnect system. The top bar displays the iConnect logo, 'Welcome, Jennifer Buck', and 'Workflow Wizard'. Below the bar, a 'File' menu is visible. The main area shows a button 'Notify All Providers via an Alert Note' with a right-pointing arrow.

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)



Alice Sheppard | **Provider**
 Last Updated by j buck
 at 5/9/2018 5:35:57 PM

File Word Merge

Provider

Provider Workers


Beds

Events

Track Disposition

Division *	APD		
Selected By	Buck, Jennifer	...	Clear Details
Selection Date	04/30/2018		
Provider *	WSC Agency1 Details		
Referral Type *	Waiver Support Coordinator ▼*		
Disposition *	WSC Transfer Out ▼ ←		
Disposition Date	04/30/2018		
WSC Transfer Effective Date			
WSC Transfer End Date	05/31/2018	←	
Comments			

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.



Alice Sheppard | **Planned Services**
 5/9/2018 5:43 PM

File Tools

Plan Information

Planned Services

QSI Needs

Plan Notes

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		<input type="checkbox"/>
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		<input type="checkbox"/>
Generic CDC+ Provider	4446	Consumable Medical Supplies (non-CDC)	36.0000	Item	\$2.00	\$72.00	04/01/2018	04/09/2018		<input type="checkbox"/>
Generic CDC+ Provider	4400	Consultant - CDC	3.0000	Month	\$148.69	\$446.07	04/02/2018	06/30/2018		<input type="checkbox"/>
WSC Agency1	4270	Support Coordination	6.0000	Month	\$148.69	\$892.14	01/01/2018	06/30/2018		<input type="checkbox"/>
			306.0000			\$4,024.02				

4. Select the Support Coordination planned service to open the details page.
5. Change the End Date. The page refreshes and the totals update.



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 *	<table> <thead> <tr> <th>IndexCode</th> <th>Index Description</th> <th>SubObject</th> <th>SubObject Description</th> </tr> </thead> <tbody> <tr> <td>Statewide</td> <td>Statewide</td> <td>Waiver</td> <td>iBudget Waiver</td> </tr> </tbody> </table>	IndexCode	Index Description	SubObject	SubObject Description	Statewide	Statewide	Waiver	iBudget Waiver
IndexCode	Index Description	SubObject	SubObject Description						
Statewide	Statewide	Waiver	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								
Provider	WSC Agency1								
Comments *	planned service comments go here								
Contract Number									
Planned Service Status	Approved								

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.



John Sheppard | **Planned Service**
 Last Updated by j buck
 at 9/21/2018 12:28:12 PM

File

Planned Service


This planned service is out of sync with one or more of the authorizations to which it is linked.

Planned Services

Division: APD
 Begin Date: 07/01/2018
 End Date: 09/22/2018

IndexCode	Index Description	SubObject	SubObject Description
SunCoast	SunCoast Region	Waiver	iBudget Waiver

Service Ratio: ▼
 Consumer County: BAKER
 Provider Rate Type: Agency ▼
 Service Code: G9012:UC
 Service Description: (4270) Support Coordination
 Unit Type: Month
 Units Per: 1.00
 Units of Measure: Month - Round Up ▼
 Rate: \$148.69
 Total No of Units: 3.0000
 Max Amount: \$446.07
 Amount Requested:
 Corresponding Auth No.: 219
 Provider ID: 10035 [Details](#)
 Provider: WSC Agency1
 Comments:


planned service comments

 Contract Number:
 Planned Service Status: Approved ▼

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.



John Sheppard | **Planned Services**
 9/21/2018 12:25 PM


File **Tools**

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

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

Provider	Service Code	Service Description	Unit Type	Rate	Max Amount	Amount Requested	Total No of Units	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County	
Pending Provider	H0043:UC:SC	(4175) Residential Habilitation - Live In	Day	\$129.08	\$94,357.48		731.0000	07/01/2018	06/30/2020	Solo	1:1	BAKER	<input type="checkbox"/>
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$446.07		3.0000	07/01/2018	09/30/2018	Agency		BAKER	<input checked="" type="checkbox"/>
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019				<input type="checkbox"/>
WSC Agency2	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019				<input type="checkbox"/>
					\$96,372.11		758.0000						

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



John Sheppard

9/21/2018 12:35 PM

Planned Services

File Tools

Plan Information

Planned Services

QSI Needs

Plan Notes

Filters

Max Amount

+

Search

Reset

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

Provider	Service Code	Service Description	Unit Type	Rate	Max Amount	Amount Requested	Total No of Units	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County	
Pending Provider	H0043 UC-SC	(4175) Residential Habilitation - Live In	Day	\$129.08	\$84,357.48		731.0000	07/01/2018	06/30/2020	Solo	1:1	BAKER	<input type="checkbox"/>
WSC Agency1	G9012 UC	(4270) Support Coordination	Month	\$148.69	\$446.07		3.0000	07/01/2018	09/22/2018	Agency		BAKER	<input type="checkbox"/>
	Auth ID	Auth Svc ID	Auth Start Date	Auth End Date	Auth Status	Auth Svc Start Date	Auth Svc End Date	Auth Svc Status	Auth Svc EDI Status				
	140841	219	07/01/2018	09/22/2018	Approved	07/01/2018	09/22/2018	Approved	Ready to Send				
WSC Agency1	G9012 UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019				<input type="checkbox"/>
WSC Agency2	G9012 UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019				<input type="checkbox"/>
					\$98,372.11		758.0000						

<< First

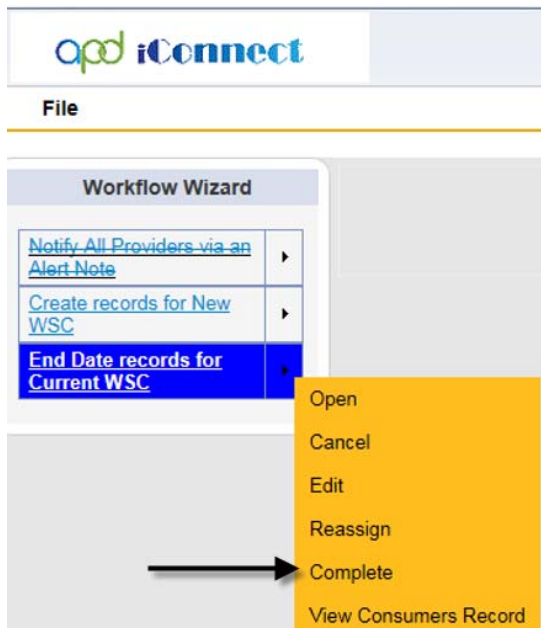
< Previous

Retrieve 15 Records at a time

Next >

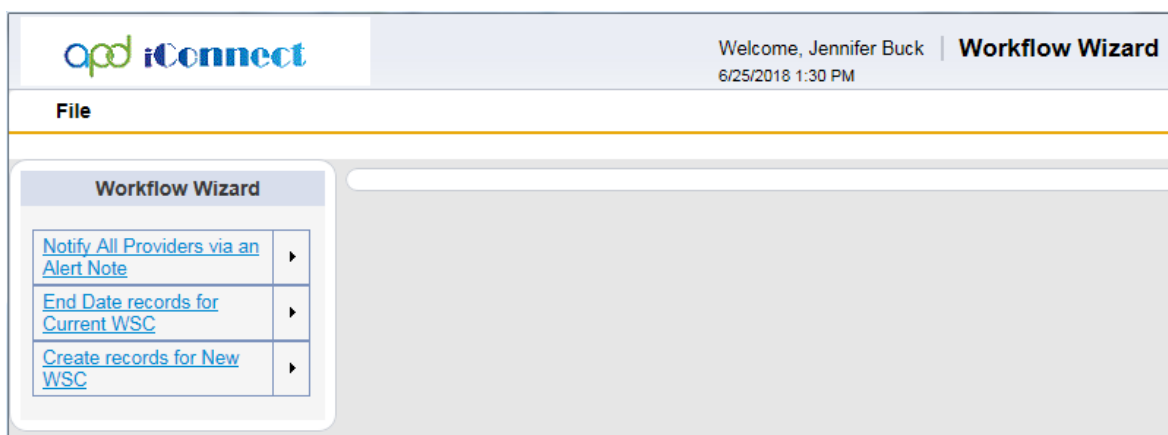
Last >>

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, use the multi variable search to find the Tickler. Click **Search**

ood iConnect Welcome, Jennifer Buck | **Ticklers**
 5/4/2018 2:17 PM

File

Filters
 Status Equal To New AND
 Last Name Contains sheppard AND
 iConnect ID +
☐ Apply Alert Days Before Due

100 Ticklers record(s) returned - now viewing 1 through 15

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



Tip

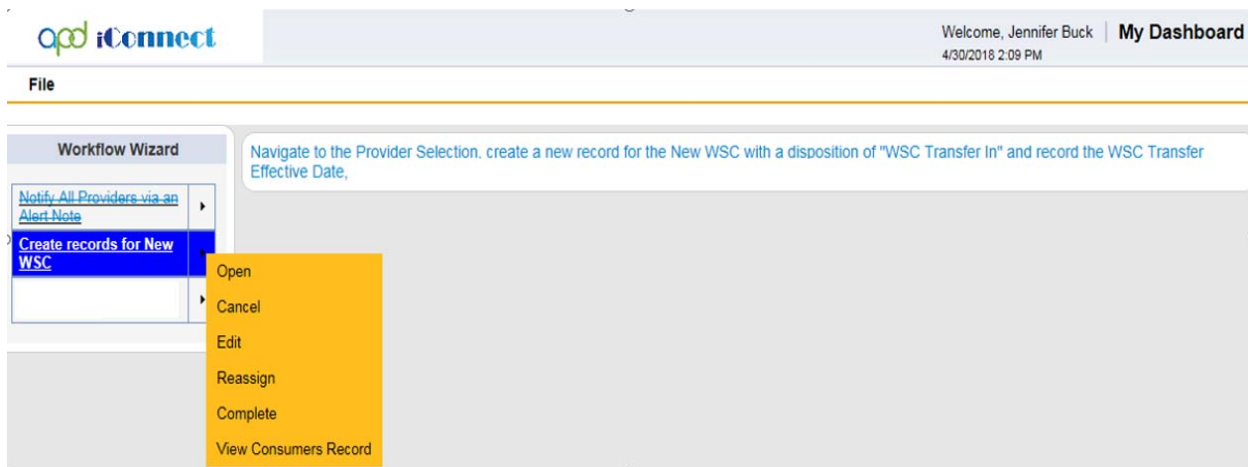
*When searching for a future Tickler, remember to clear the check box next to **Apply Alert Days Before Due** prior to clicking **Search**.*

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

Message from webpage

Navigate to the Provider Selection, create a new record for the New WSC with a disposition of "WSC Transfer In" and record the WSC Transfer Effective Date.

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.

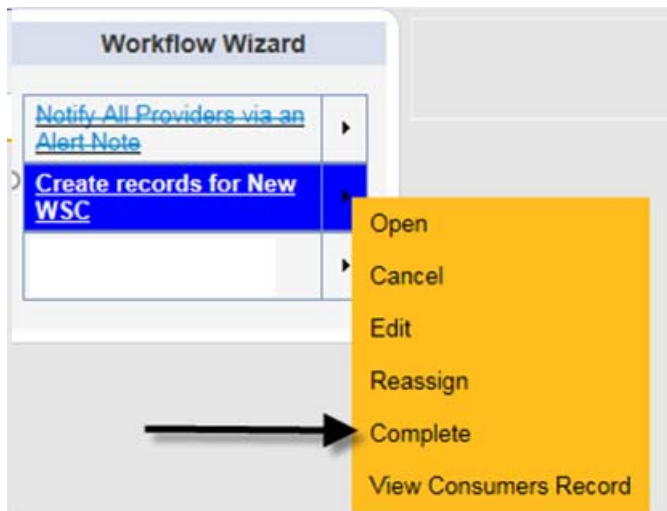
10. Update the following fields:

- Division = default to APD
- Selected by = defaults to Self
- Selection date = defaults to today
- Provider = select the ellipsis to search for and select the new WSC Agency
- Referral Type = Waiver Support Coordinator
- 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.

APD iConnect John Sheppard Plans 9/13/2018 3:14 PM

File

Workflow Wizard

Navigate to the Plans tab and add a Planned Service, validate, then create the Authorization

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

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

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

Filters

Division +

Search Reset

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

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

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

- Click the APD Waiver Plan. The Plan Information page displays.
- 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		<input type="checkbox"/>
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		<input type="checkbox"/>
Generic CDC+ Provider	4446	Consumable Medical Supplies (non-CDC)	36.0000	Item	\$2.00	\$72.00	04/01/2018	04/09/2018		<input type="checkbox"/>

- Click **File > Add Planned Service**.
- A new Planned Service record opens. Update the following fields:
 - 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.
 - Begin Date Enter the begin and End dates as the dates of service.
 - 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.
 - 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.'
 - Service Ratio: Select the correct ratio only if the service contains a ratio
 - 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.



John Sheppard | **Planned Service**
Last Updated by jbuick
at 9/21/2018 11:24:45 AM

Planned Service

Planned Services												
Division	APD											
Begin Date	10/01/2018											
End Date	06/30/2019											
Index/SubObject Code *	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e0e0e0;"> <th>IndexCode</th> <th>Index Description</th> <th>SubObject</th> <th>SubObject Description</th> </tr> </thead> <tbody> <tr> <td>SunCoast</td> <td>SunCoast Region</td> <td>Waiver</td> <td>iBudget Waiver</td> </tr> </tbody> </table>				IndexCode	Index Description	SubObject	SubObject Description	SunCoast	SunCoast Region	Waiver	iBudget Waiver
IndexCode	Index Description	SubObject	SubObject Description									
SunCoast	SunCoast Region	Waiver	iBudget Waiver									
Service Ratio	<div style="border: 1px solid #ccc; padding: 2px;">▼</div>											
Consumer County *	BAKER											
Provider Rate Type *	Agency ▼											
Service Code *	G9012:UC											
Service Description	(4270) Support Coordination											
Unit Type	Month											
Units Per *	1.00											
Units of Measure *	Month - Round Up ▼											
Rate *	\$148.69											
Total No of Units	9											
Max Amount	\$1,338.21											
Amount Requested												
Provider ID *	10035 Details											
Provider	WSC Agency1											
Comments *	<div style="border: 1px solid #ccc; padding: 2px;">planned service comments</div>											
Contract Number												
Planned Service Status	Proposed ▼											

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

- 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

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

APD iConnect John Sheppard
9/13/2018 3:06 PM **Provider Selections**

File

Workflow Wizard

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

Filters

Disposition Not Equal To Closed AND

Selection Date

12 Provider Selections record(s) returned - now viewing 1 through 12

Division	Selection Date	Provider	APD Vendor #	Provider Worker	Disposition	Deactivated Date	LOS
APD	07/18/2018	WSC Agency1		Buck, Jennifer	WSC Transfer Out		

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

APD iConnect Alice Sheppard
Last Updated by j buck
at 5/9/2018 5:13:40 PM **Provider**

File Word Merge

Provider

Provider Workers

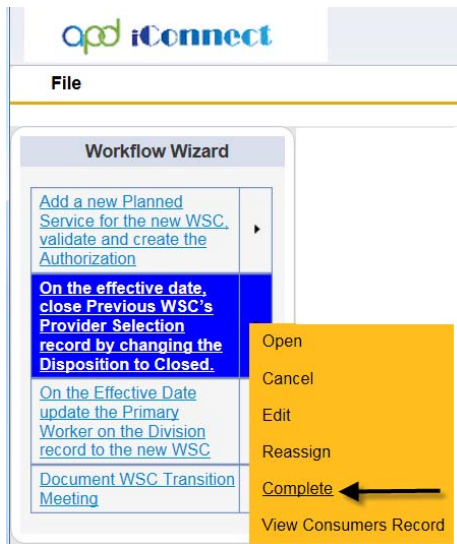
Beds

Events

Track Disposition

Division *	APD
Selected By	Buck, Jennifer <input type="button" value="Clear"/> Details
Selection Date	04/30/2018 <input type="button" value="Calendar"/>
Provider *	WSC Agency1 Details
Referral Type *	Waiver Support Coordinator <input type="button" value="v"/>
Disposition *	Closed <input type="button" value="v"/>
Disposition Date	04/30/2018 <input type="button" value="Calendar"/>
WSC Transfer Effective Date	05/09/2018 <input type="button" value="Calendar"/>
WSC Transfer End Date	<input type="button" value="Calendar"/>
Comments	<input type="text"/>
Deactivated Date	05/09/2018 <input type="button" value="Calendar"/>


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.

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



Welcome, Jennifer Buck | **Workflow Wizard**
9/13/2018 2:13 PM

File


Workflow Wizard

[Add a new Planned Service for the new WSC, validate and create the Authorization](#)

[On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.](#)

[On the Effective Date update the Primary Worker on the Division record to the new WSC](#)

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



John Sheppard | **Divisions**
9/13/2018 3:02 PM

File

Workflow Wizard

[Add a new Planned Service for the new WSC, validate and create the Authorization](#)

[On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.](#)

[On the Effective Date update the Primary Worker on the Division record to the new WSC](#)

Filters

Disposition Not Equal To AND

Open Date AND

Division +

Search

Reset

2 Divisions record(s) returned - now viewing 1 through 2

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

<< First

< Previous

Retrieve 15

Records at a time

Next >

Last >>

- 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.

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

OK

Cancel



Alice Sheppard

Division

Last Updated by jibuck

at 5/9/2018 3:04:07 PM

File Word Merge

Division

Events

Track Disposition

Events

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

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.

Workflow Wizard

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

Filters
 Disposition: [v] Not Equal To: [v] Closed: [v] AND: [v] [x]
 Open Date: [v] Greater Than: [v] [x]
 Division: [v] +
 Search Reset

2 Divisions record(s) returned - now viewing 1 through 2

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

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

Open
 Cancel
 Edit
 Reassign
Complete
 View Consumers Record


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

Notes Details

Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	05/04/2018 
Program/Provider	▼
Note Type *	WSC Selection ▼*
Note Sub-Type	WSC Transfer - New Worker ▼
Description	<div> <div></div> <div></div> </div>
Note	<div>Consumer requested to change WSC. Same agency </div> <div></div>
Status *	Complete ▼
Date Completed	05/04/2018

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



Welcome, Jennifer Buck | **Workflow Wizard**
6/25/2018 2:57 PM


File

Workflow Wizard

- [Notify All Providers via an Alert Note](#)
- [Create New WSC Worker Record](#)
- [End Date Current WSC Worker record](#)

Notify All Providers via an Alert Note

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



Alice Sheppard | **Notes**
5/4/2018 2:21 PM

File Tools

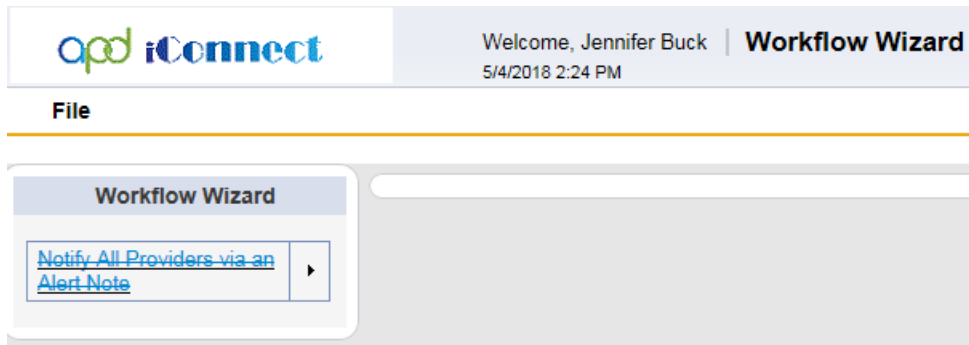
Workflow Wizard

Set the note status to "Alert"
[Notify All Providers via an Alert Note](#)

Notes Details

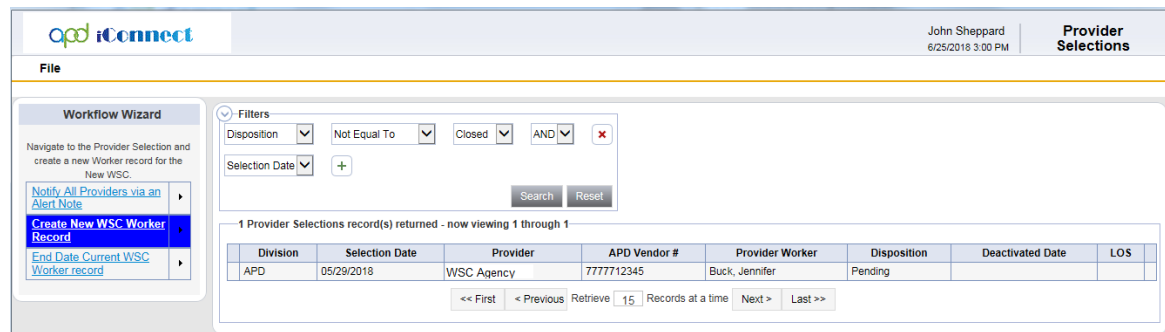
Division *	APD
Note By *	Buck, Jennifer
Note Date *	05/04/2018
Program/Provider	
Note Type *	WSC Selection
Note Sub-Type	Notification of WSC Change
Description	
Note	Add the message you want the providers to see each time they login into the account.
Status *	Alert
Date Completed	

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

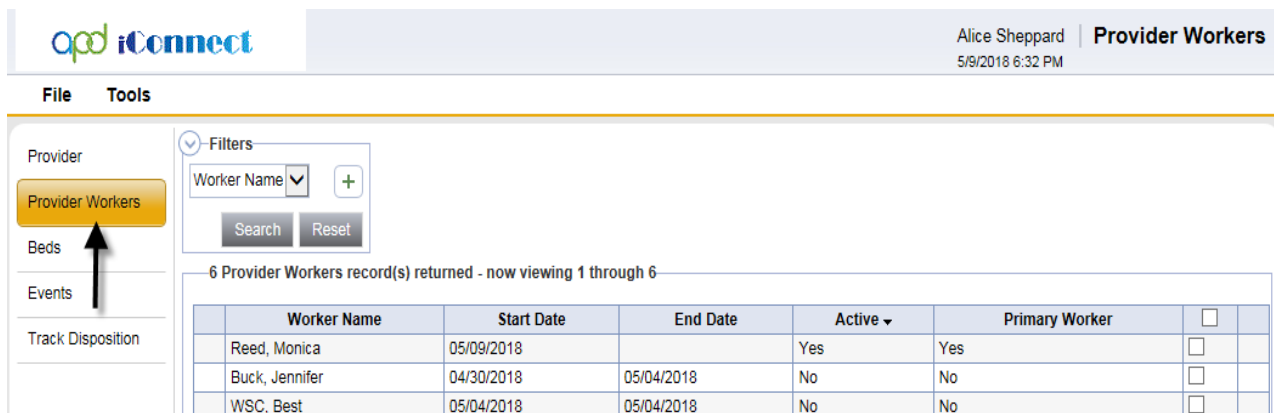


Create New WSC Worker Record

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**.

Alice Sheppard | Provider Workers
5/9/2018 6:32 PM

File Tools

Assign Provider Workers
Print
Close Provider Workers

Beds
Events
Track Disposition

6 Provider Workers record(s) returned - now viewing 1 through 6

Worker Name	Start Date	End Date	Active ▾	Primary Worker	<input type="checkbox"/>
Reed, Monica	05/09/2018		Yes	Yes	<input type="checkbox"/>
Buck, Jennifer	04/30/2018	05/04/2018	No	No	<input type="checkbox"/>
WSC, Best	05/04/2018	05/04/2018	No	No	<input type="checkbox"/>

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

Alice Sheppard | Provider Worker
5/9/2018 6:34 PM

File

Worker

Worker Name * Worker, Applicable ... Clear Details

Start Date * 06/01/2018

End Date

Primary Worker ☐

Active ☒

Is this a New WSC? Yes, Same Agency ▾

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.

The screenshot shows the iConnect Workflow Wizard interface. On the left, a sidebar contains a 'Workflow Wizard' section with a list of actions: 'Notify All Providers via an Alert Note', 'Create New WSC Worker Record', and 'End Date Current WSC Worker record' (which is highlighted in blue). The main area is titled 'Provider Selections' and contains a search filter section with dropdowns for 'Disposition' (set to 'Not Equal To'), 'Closed', and 'AND'. Below this is a table with the following data:

Division	Selection Date	Provider	APD Vendor #	Provider Worker	Disposition	Deactivated Date	LOS
APD	05/29/2018	A TEST Provider	7777712345		Pending		

Below the table, it indicates '1 Provider Selections record(s) returned - now viewing 1 through 1'. Navigation buttons include '<< First', '< Previous', 'Retrieve 15 Records at a time', 'Next >', and 'Last >>'.

WO

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**.

File Word Merge

History
 Spell Check
 Save Provider
 Save and Close Provider
 Print
 Close Provider

	APD
	Reed, Monica Clear Details
	09/06/2018
	A TEST Provider Details
	Waiver Support Coordinator
	WSC - Selected
Disposition Date	09/06/2018
WSC Transfer Effective Date	
WSC Transfer End Date	09/30/2018
Comments	

- 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

- Saving the Worker Record with Is this a new WSC? = Yes, Same Agency triggers a Workflow Wizard with the following ticklers:
 - 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.
 - WSC Transition Meeting (which should be reassigned to the new WSC.)
- 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.

File

Workflow Wizard

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

[Update Primary Worker](#)

[Document WSC Transition Meeting](#)

Filters

Disposition: Not Equal To Closed AND

Open Date: Greater Than AND

Division: +

Search Reset

2 Divisions record(s) returned - now viewing 1 through 2

Division	Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
FOR	Tracking	Tierney, Jacqueline		05/02/2018		40
APD	APD Eligible - WISC Assigned	Reed, Monica	Tierney, Jacqueline	04/04/2018		68


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

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.

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

OK

Cancel









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

File Word Merge

Division

Events

Track Disposition

Events	
Division *	APD
Disposition *	APD Eligible - Waiver ▼
Disposition Date	05/09/2018 
Open Date	04/03/2018 
Data Entry Date	04/03/2018
Primary Worker *	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 5px;">Worker, Applicable</div> <div style="margin: 0 5px;">...</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">Clear</div> <div style="margin-left: 5px;">Details</div> </div>
Secondary Worker	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 5px;">Buck, Jennifer</div> <div style="margin: 0 5px;">...</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">Clear</div> <div style="margin-left: 5px;">Details</div> </div>
Application Received Date *	04/01/2018 
Interested in ICF/IID	▼
Age Category at Time of Application *	6 and Above ▼
Application Pended Due Date	<div style="border: 1px solid #ccc; height: 20px;"></div> 
Eligibility Documentation Complete Date	<div style="border: 1px solid #ccc; height: 20px;"></div> 
Referral Source	
Referral Date	04/03/2018 
Referral Source	▼
Referral Reason	▼

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.

The screenshot shows the iConnect interface with the 'Provider Workers' section active. A yellow banner at the top contains the 'Designate As Primary' button, which is highlighted by a black arrow. Below this, there is a search bar with a 'Worker Name' dropdown and a '+' button. A table lists two workers: Buck, Jennifer and Reed, Monica. The 'Primary Worker' column for Buck, Jennifer has a checked checkbox, indicated by a black arrow. The table has columns for Worker Name, Start Date, End Date, Active, and Primary Worker. At the bottom, there are pagination controls: '<< First', '< Previous', 'Retrieve 15', 'Records at a time', 'Next >', and 'Last >>'.

Worker Name	Start Date	End Date	Active	Primary Worker
Buck, Jennifer	09/21/2018		Yes	No
Reed, Monica	09/06/2018	09/21/2018	Yes	Yes

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.

The screenshot shows the iConnect interface with the 'Provider Workers' section active. The 'Designate As Primary' button is no longer visible. The table now shows that Buck, Jennifer is the Primary Worker (checkbox checked) and Reed, Monica is no longer the Primary Worker (checkbox unchecked). The 'End Date' for Reed, Monica is now 09/21/2018. A black arrow points to the 'Primary Worker' column for Buck, Jennifer. The pagination controls at the bottom are the same as in the previous screenshot.

Worker Name	Start Date	End Date	Active	Primary Worker
Buck, Jennifer	09/21/2018		Yes	Yes
Reed, Monica	09/06/2018	09/21/2018	Yes	No

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.

- 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.

MY DASHBOARD **CONSUMERS** PROVIDERS INCIDENTS CLAIMS SCHEDULER UTILITIES REPORTS

Sheppard, Alice (10053)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module
Demographics Divisions Consumer Budgets Programs Provider Selections SANS Notes **Forms** Appointments Plans Waiting List Payers

Filters
Form

20 Forms record(s) returned - now viewing 1 through 15

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

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

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

oed iConnect

Alice Sheppard
Last Updated by j buck
at 9/10/2018 3:19:49 PM

File Reports

Copy Shared Response
History
Duplicate Assessment
Spell Check
Save Forms
Save and Close Forms
Print
Close Forms


Worker * Buck, Jennifer
Status * Complete
Provider/Program * WSC Agency1
Approved Date 09/26/2018

PERSON-CENTERED SUPPORT PLAN

Support Plan Effective Date* 05/01/2018
Is the Consumer 18 or over? Yes
Supported Living Need? No

- 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.
- 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 **Status** = 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



Alice Sheppard | **Notes**
5/9/2018 7:38 PM

File **Tools**

Workflow Wizard
Reassign to the New WSC
Document WSC Transition Meeting

Notes Details
Division * APD
Note By * Buck, Jennifer
Note Date * 05/09/2018
Program/Provider
Note Type * WSC Selection
Note Sub-Type WSC Transition Note
Description
Note

Add details recording the meeting with the Consumer

Status * Complete
Date Completed 05/09/2018


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**.


 Alice Sheppard
 Last Updated by jibuck
 at 5/9/2018 7:47:29 PM

Notes | [Sign Out](#)

Role
 Regional Staff

[File](#) [Tools](#) [Reports](#) [Ticklers](#) [View Consumer Incident](#)

MY DASHBOARD **CONSUMERS** PROVIDERS INCIDENTS CLAIMS REPORTS

Shepard, Alice (10053)


Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User
 Demographics Divisions Consumer Budgets Programs Provider Selections SANS **Notes** Forms Appointments Plans Waiting List Payers

Filters
 Note Date

45 Notes record(s) returned - now viewing 1 through 15

Note Date	Note By	Note Type	Note Sub-Type	Description	Status	Date Completed	Attachment
05/09/2018	Buck, Jennifer	WSC Selection	WSC Transfer - New Worker		Complete	05/09/2018	No

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



Alice Sheppard | **Notes**
5/9/2018 7:49 PM

File Tools

Notes Details


Division *

APD ▾

Note By *

Buck, Jennifer ▾

Note Date *

05/09/2018 

Program/Provider

▾

Note Type *

Central Record Transfer ▾*

Note Sub-Type

Pending Central Record Transfer ▾

Description

Note

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


Status *

Pending ▾

Date Completed

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

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



Welcome, Jennifer Buck | **My Dashboard** | [Sign Out](#)

Role
Region Waiting List Workstream Lead ▾ **GO**

File

MY DASHBOARD

CONSUMERS

PROVIDERS

INCIDENTS

CLAIMS

SCHEDULER

REPORTS

CONSUMERS

INCIDENTS

PROVIDERS

TASKS

Division ▾

Disposition ▾

Notes ▾

My Management ▾

My Enrollments ▾

Screening Priority ▾

Referrals ▾

Provider Selections ▾

Status ▾

Notes ▾

My Incident Queue ▾

My Incident Ticklers ▾

Complete 6

Pending 9

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

File

Filters

Status ▼ Equal To ▼ Pending ▼ AND ▼ ✕

iConnect ID ▼ +


Search Reset

8 Notes record(s) returned - now viewing 1 through 8

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:

- Sub Type = Central Record Transfer Completed
- Note = add a summary of the transfer assignment and Append Text to Note.
- Note Recipient = select the ellipsis to search for and select the Waiting List Support Coordinator in the Receiving Region.
- Status = Complete



Alice Sheppard
Last Updated by j buck
at 5/9/2018 7:59:03 PM

Notes

FileToolsReports

Notes

Notes Details

Division *

APD

Note By *

Buck, Jennifer

Note Date *

05/09/2018

Program/Provider

Note Type *

Central Record Transfer

Note Sub-Type

Central Record Transfer Completed

Description

Note

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

New Text

Append Text to Note

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

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

opd iConnect Alice Sheppard | Divisions | Sign Out | Role: Region Waiting List Workstream Lead | GO

File | Ticklers | **View Consumer Incidents** | Word Merge

MY DASHBOARD | **CONSUMERS** | PROVIDERS | INCIDENTS | CLAIMS | SCHEDULER | REPORTS

Sheppard, Alice (10053)

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

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

Filters

Disposition: Not Equal To Closed AND X

Open Date: Greater Than AND X

Division: +

Search Reset

1 Divisions record(s) returned - now viewing 1 through 1

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

11. Select the APD Division record to open it.

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

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

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

OK

Cancel

- Secondary Worker = Clinical Workstream Lead

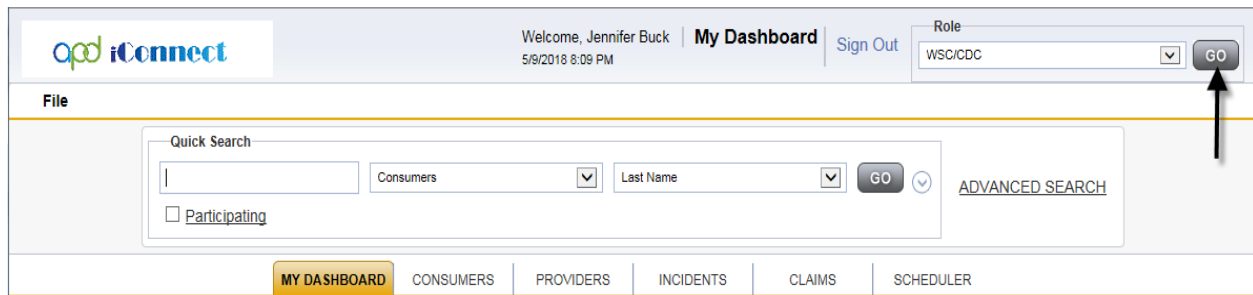
Division	Events	
Events	Divison *	APD
Track Disposition	Disposition *	APD Eligible - Waiver
	Disposition Date	05/09/2018
	Open Date	04/03/2018
	Data Entry Date	04/03/2018
	Primary Worker *	Worker, Applicable
	Secondary Worker	Buck, Jennifer
	Application Received Date *	04/01/2018
	Interested in ICF/IID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

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.

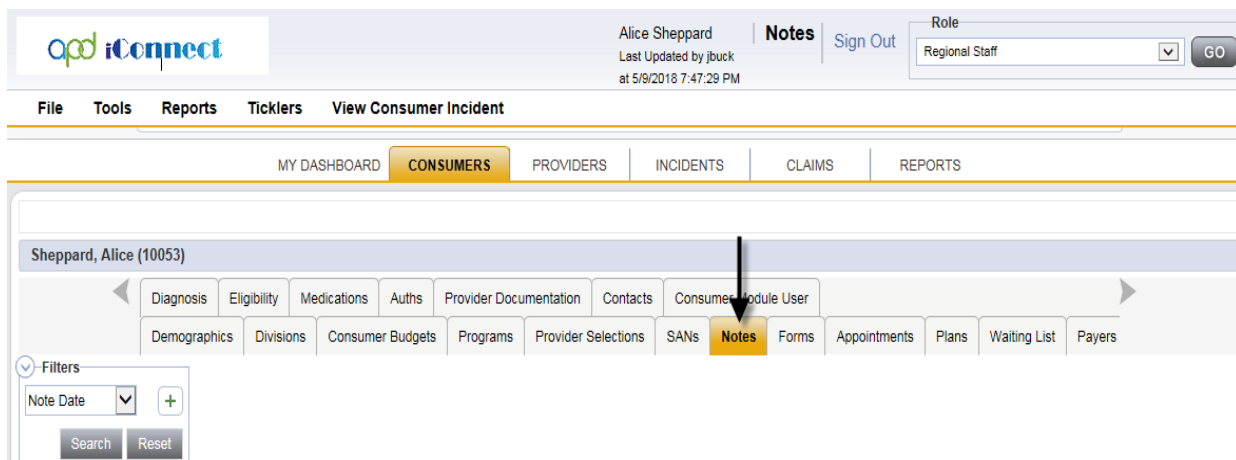
1. To begin, log into APD iConnect and set Role = WSC/CDC. Click **Go**.



The screenshot shows the APD iConnect login page. The header includes the APD iConnect logo, a welcome message for Jennifer Buck, and a 'My Dashboard' link. The 'Role' dropdown menu is set to 'WSC/CDC', and the 'GO' button is highlighted with a red arrow. Below the header, there is a 'File' section with a 'Quick Search' box and a 'Consumers' dropdown menu. The 'GO' button is also highlighted with a red arrow.

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**.



The screenshot shows the APD iConnect consumer record page for Alice Sheppard. The 'Notes' tab is selected, and the 'Add Notes' button is highlighted with a red arrow. The page displays various tabs for the consumer's record, including 'Diagnosis', 'Eligibility', 'Medications', 'Auths', 'Provider Documentation', 'Contacts', 'Consumer Module User', 'Demographics', 'Divisions', 'Consumer Budgets', 'Programs', 'Provider Selections', 'SANS', 'Notes', 'Forms', 'Appointments', 'Plans', 'Waiting List', and 'Payers'. A 'Filters' section is visible on the left, with a 'Note Date' dropdown menu and 'Search' and 'Reset' buttons.

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




Alice Sheppard | **Notes**
 5/9/2018 7:49 PM

File Tools

Notes Details

Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	05/09/2018 
Program/Provider	▼
Note Type *	Central Record Transfer ▼*
Note Sub-Type	Pending Central Record Transfer ▼
Description	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>
Note	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Region Office has received a request to transfer a Consumer on the Waiting List </div>
Status *	Pending ▼
Date Completed	


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



Alice Sheppard | **Notes**
5/9/2018 8:19 PM

File Tools

Notes Details

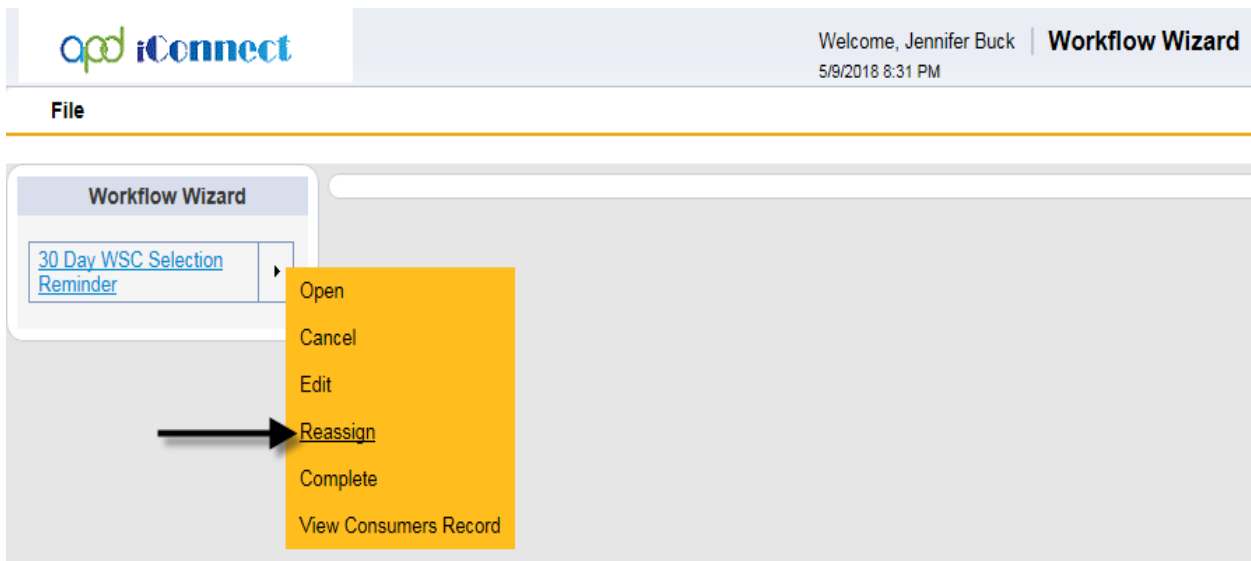
Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	05/09/2018 
Program/Provider	▼
Note Type *	WSC Selection ▼*
Note Sub-Type	Selection Form Sent ▼
Description	<div> <div></div> <div></div> </div>
Note	<div> <div>Sent form to consumer to select new WSC in the new region</div> <div></div> </div>
Status *	Complete ▼
Date Completed	05/09/2018

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:

- 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**.

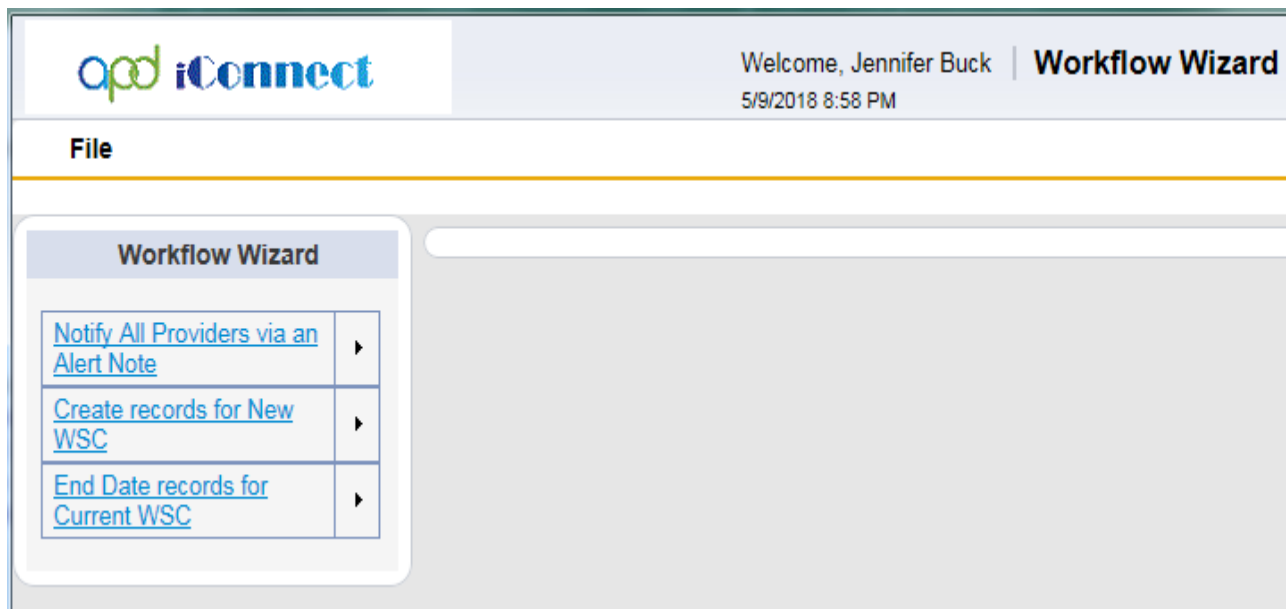
2. The Note detail page displays. Update the following fields:

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

Notes Details	
Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	05/09/2018 
Program/Provider	▼
Note Type *	WSC Selection ▼*
Note Sub-Type	WSC Inter-Region Transfer ▼
Description	<div></div>
Note	<div></div>
Status *	Complete ▼
Date Completed	05/09/2018

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

6. Upon saving the Note with Note Type = WSC Selection and Sub Type = WSC Inter-Region Transfer a Workflow Wizard triggers with the following ticklers:
- Notify all Providers via an Alert Note
 - End Date records for Current WSC
 - Create records for New WSC



Notify all Providers via an Alert Note

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

Create Records for New WSC

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.