

Chapter 14 | WSC Reassignment

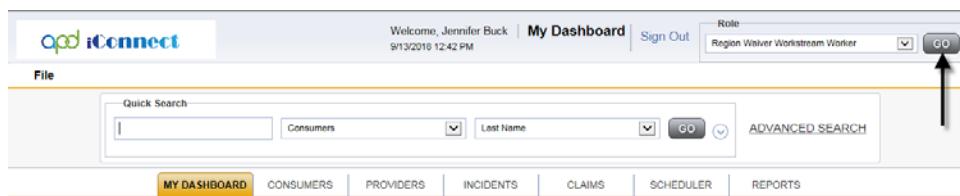
Introduction

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

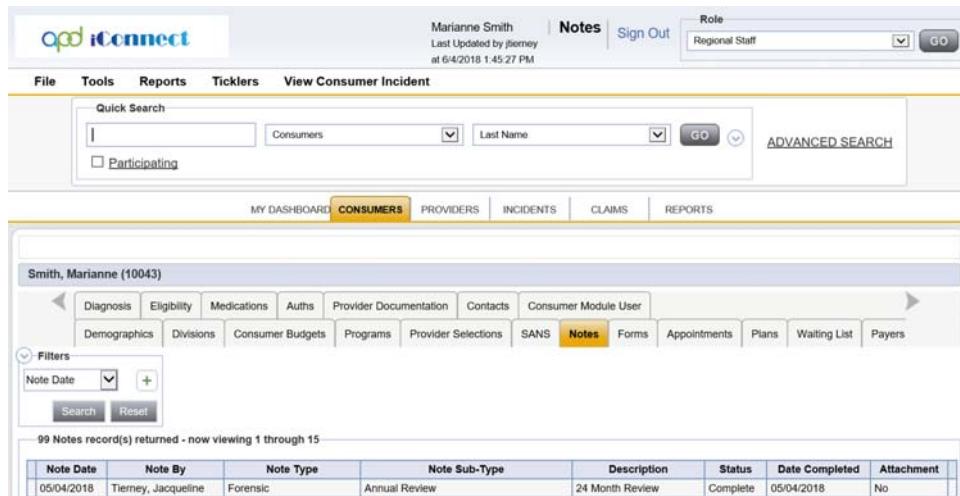
Consumer notifies the local regional office of his/her desire to change Waiver Support Coordinators. Upon receiving a notification of a Consumers desire to change Waiver Support Coordinators, Regional Staff initiate the process by adding a Note in iConnect.

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



The screenshot shows the APD iConnect interface. At the top, there is a 'Welcome, Jennifer Buck | My Dashboard' message and a 'Sign Out' link. Below that is a 'Role' dropdown set to 'Region Waiver Workstream Worker' with a 'GO' button to its right. A large black arrow points upwards towards the 'GO' button. The main area has a 'Quick Search' bar with fields for 'Consumers' and 'Last Name', and a 'GO' button. Below the search bar are tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', 'SCHEDULER', and 'REPORTS'. The 'CONSUMERS' tab is highlighted.

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



The screenshot shows the APD iConnect 'CONSUMERS' page for 'Smith, Marianne (10043)'. The 'Notes' tab is selected. The 'File' menu is open, and the 'Add Notes' option is highlighted with a black arrow. The page includes a 'Quick Search' bar, a 'Participating' checkbox, and tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'REPORTS'. Below the tabs is a navigation bar with links like 'Diagnosis', 'Eligibility', 'Medications', 'Auths', 'Provider Documentation', 'Contacts', 'Consumer Module User', 'Demographics', 'Divisions', 'Consumer Budgets', 'Programs', 'Provider Selections', 'SANS', 'Notes' (which is highlighted in yellow), 'Forms', 'Appointments', 'Plans', 'Waiting List', and 'Payers'. At the bottom, there is a table showing 99 Notes record(s) returned, with columns for Note Date, Note By, Note Type, Note Sub-Type, Description, Status, Date Completed, and Attachment. One row is selected, showing '05/04/2018', 'Tierney, Jacqueline', 'Forensic', 'Annual Review', '24 Month Review', 'Complete', '05/04/2018', and 'No'.

3. The Note Details page is displayed. Update the following fields:

- a. Division = APD
- b. Note Type = WSC Change Request

NOTE: WSC and Service Providers cannot see this Note Type

- c. Note Subtype = Consumer Requested Selection Form Sent
- d. Note recipient = click the **ellipsis** to search for and select Waiver Workstream Lead worker record.
- e. Status = Complete
- f. Attach all supporting documentation

apd iConnect

Alice Sheppard | Notes
5/4/2018 12:28 PM

File Tools

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

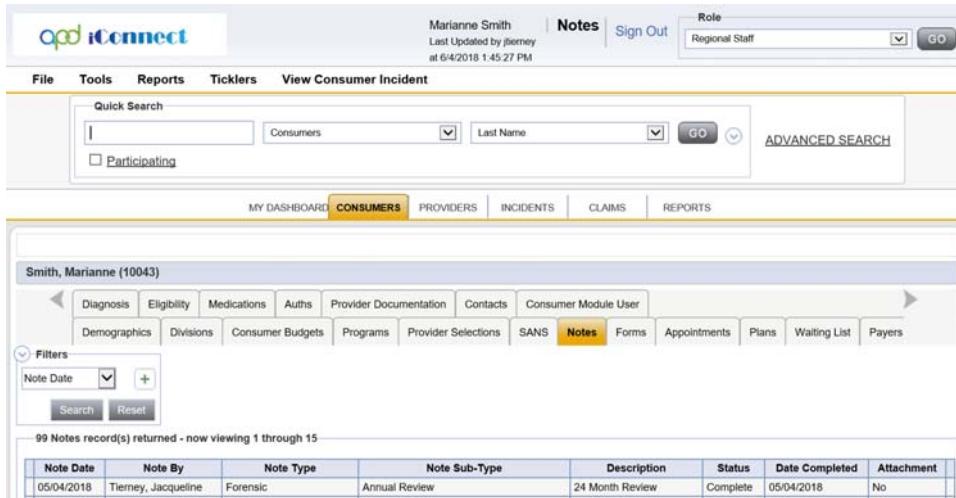
4. Click **File > Save and Close Notes**
5. The WSC Selection Form and other supporting documents will be printed and mailed to the Consumer.

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 shows the APD iConnect software interface. At the top, there is a header with the APD iConnect logo, the user's name (Marianne Smith), the last updated date (6/4/2018 1:45:27 PM), and a 'Notes' button. Below the header is a navigation bar with links for File, Tools, Reports, Ticklers, and View Consumer Incident. The 'View Consumer Incident' link is highlighted. Underneath the navigation bar is a search bar with fields for 'Quick Search' (text input, dropdowns for 'Consumers' and 'Last Name', a 'GO' button, and a 'Participating' checkbox), and an 'ADVANCED SEARCH' link. Below the search bar is a menu bar with links for MY DASHBOARD, CONSUMERS (which is highlighted in yellow), PROVIDERS, INCIDENTS, CLAIMS, and REPORTS. The main content area shows a consumer record for 'Smith, Marianne (10043)'. The consumer's details are listed in a table with tabs for Diagnosis, Eligibility, Medications, Auths, Provider Documentation, Contacts, Consumer Module User, Demographics, Divisions, Consumer Budgets, Programs, Provider Selections, SANS, Notes (which is highlighted in yellow), Forms, Appointments, Plans, Waiting List, and Payers. Below the tabs is a 'Filters' section with a dropdown for 'Note Date' and buttons for 'Search' and 'Reset'. A message indicates '99 Notes record(s) returned - now viewing 1 through 15'. A table below shows the first few notes:

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

apd iConnect

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

File Tools

Notes Details

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

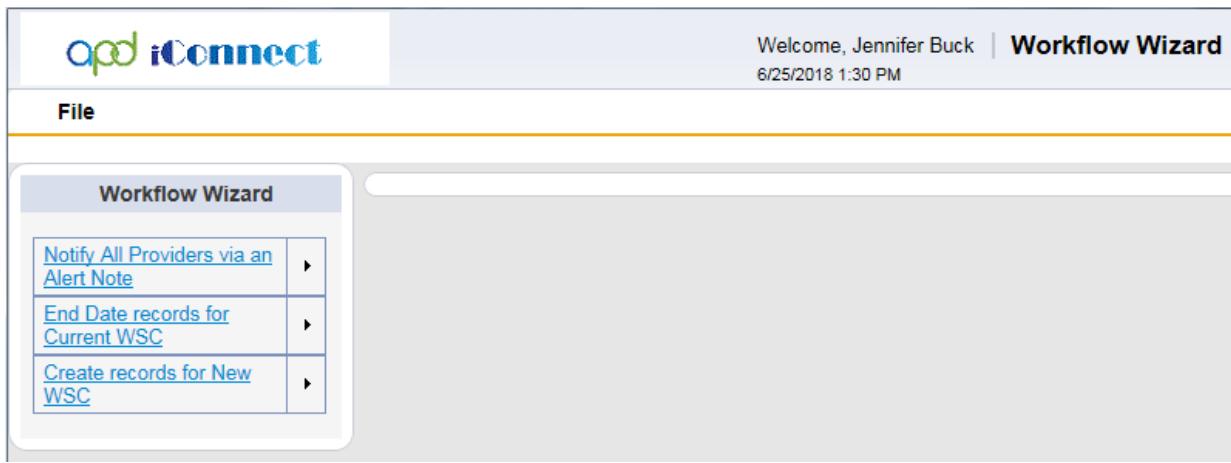
Two arrows point from the "Note Type" and "Note Sub-Type" fields to the "WSC Selection" and "WSC Transfer - Agency" dropdowns respectively.

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.

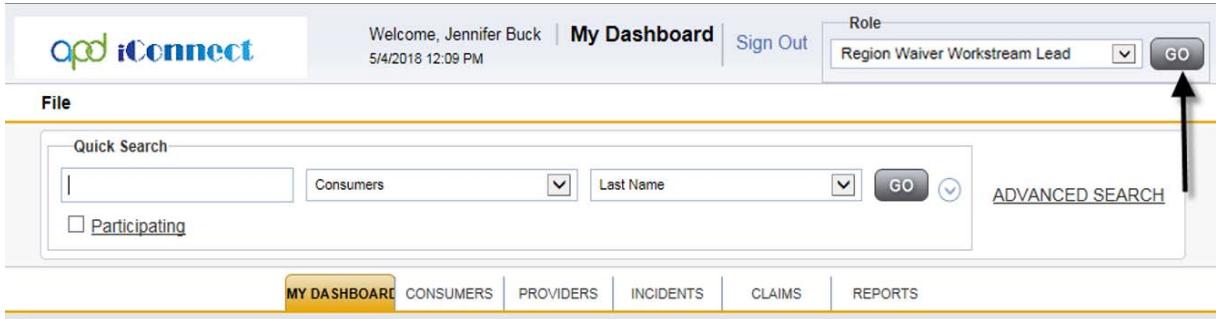
Notify All Providers via an Alert Note

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.

apd iConnect

Welcome, Jennifer Buck | **My Dashboard** | Sign Out | Role: Region Waiver Workstream Lead | GO

File

Quick Search: Consumers, Last Name, GO, ADVANCED SEARCH

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

Alert Notes, My Incident Ticklers

Ticklers: 88

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

apd iConnect

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

File

Filters: Status (Equal To: New), Last Name (Contains: sheppard), iConnect ID, Apply Alert Days Before Due (unchecked)

Search button (with an arrow pointing to it)

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:

- 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

apd iConnect

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

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

Note

Status * **Alert**

Date Completed

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

apd iConnect

Welcome, Jennifer Buck | Workflow Wizard
5/4/2018 2:24 PM

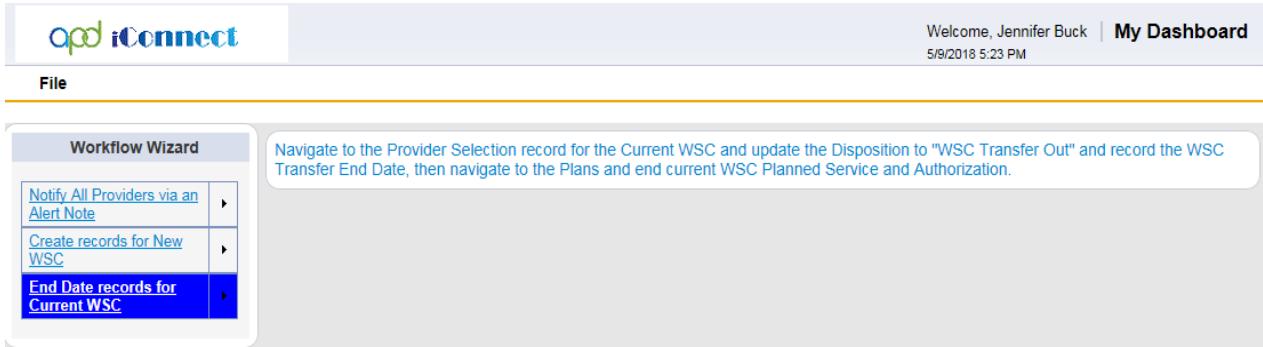
File

Workflow Wizard

Notify All Providers via an Alert Note

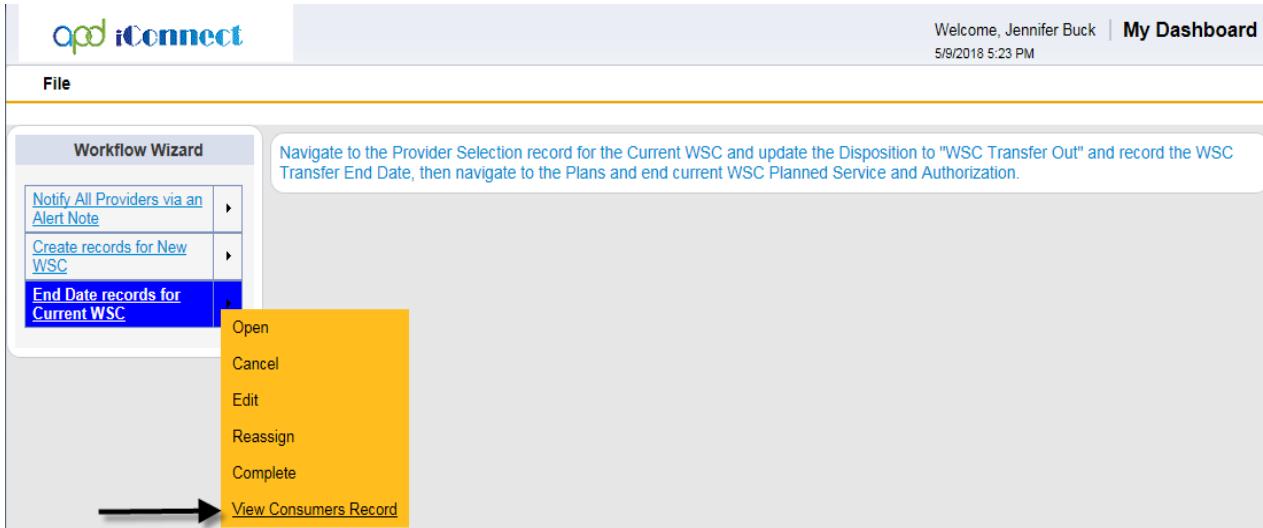
End Date Records for Current WSC

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



The screenshot shows the apd iConnect interface. At the top, the logo 'apd iConnect' is on the left, and 'Welcome, Jennifer Buck | My Dashboard' with the date '5/9/2018 5:23 PM' is on the right. Below the header, a 'File' menu is visible. The main content area is titled 'Workflow Wizard' and contains a list of ticklers. The third item in the list, 'End Date records for Current WSC', is highlighted with a blue background. To the right of the list is a callout box with the following text: 'Navigate to the Provider Selection record for the Current WSC and update the Disposition to "WSC Transfer Out" and record the WSC Transfer End Date, then navigate to the Plans and end current WSC Planned Service and Authorization.'

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.



The screenshot shows the apd iConnect interface with the 'Workflow Wizard' section. The 'End Date records for Current WSC' tickler is selected and has a yellow flyout menu. The menu items are: Open, Cancel, Edit, Reassign, Complete, and View Consumers Record. An arrow points from the right side of the menu to the 'View Consumers Record' option. The rest of the interface is similar to the first screenshot, with the 'apd iConnect' logo, 'Welcome, Jennifer Buck | My Dashboard' with the date '5/9/2018 5:23 PM', and the 'File' menu.

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)

apd iConnect

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

File Word Merge

Provider	Division * APD
Provider Workers	Selected By Buck, Jennifer ... Clear Details
Beds	Selection Date 04/30/2018
Events	Provider * WSC Agency1 Details
Track Disposition	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.

apd iConnect

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

File Tools

Plan Information	Planned Services	QSI Needs							
<input checked="" type="checkbox"/> Filters Max Amount ↗ + Search Reset									
5 Planned Services record(s) returned - now viewing 1 through 5									
Provider	Service Code	Service Description	Total No of Units	Unit Type	Rate	Max Amount	Begin Date	End Date	Auth ID
4250		Specialized Mental Health Counseling Assessment	1.0000	Units	\$128.21	\$128.21	04/01/2018	06/30/2018	
APD Test Provider	4083	Life Skills Development - Level 2 (Supported Employment - Individual)	260.0000	15 mins	\$9.56	\$2,485.60	04/01/2018	06/30/2018	
Generic CDC+ Provider	4446	Consumable Medical Supplies (non-CDC)	36.0000	Item	\$2.00	\$72.00	04/01/2018	04/09/2018	
Generic CDC+ Provider	4400	Consultant - CDC	3.0000	Month	\$148.69	\$446.07	04/02/2018	06/30/2018	
WSC Agency1	4270	Support Coordination	6.0000	Month	\$148.69	\$892.14	01/01/2018	06/30/2018	
			306.0000			\$4,024.02			

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

apd iConnect

Alice Sheppard | Planned Service
9/21/2018 8:54 AM

File

Planned Services

Division	APD								
Begin Date	01/01/2019								
End Date	05/30/2019								
Index/SubObject Code *	<table border="1"><tr><td>IndexCode</td><td>Index Description</td><td>SubObject</td><td>SubObject Description</td></tr><tr><td>Statewide</td><td>Statewide</td><td>Waiver</td><td>iBudget Waiver</td></tr></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	<input type="button" value="▼"/>								
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.

File

Planned Service

Planned Services

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

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.

File Tools

Planned Services

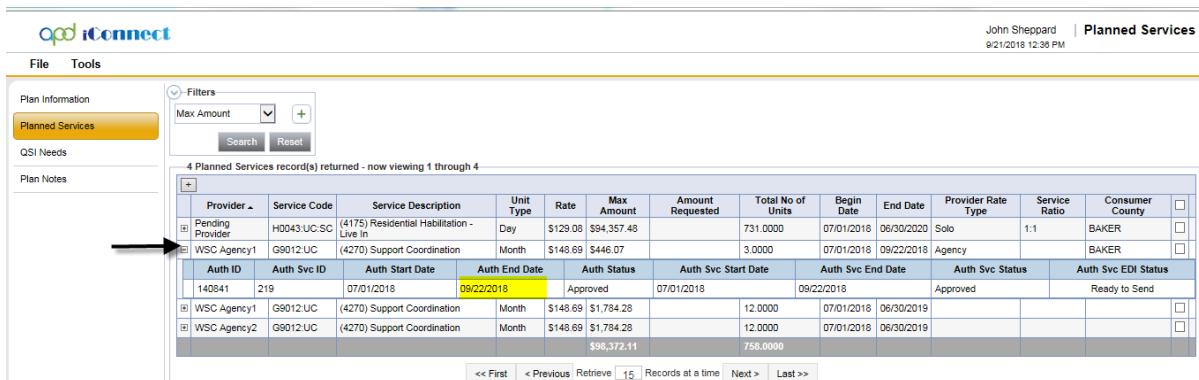
Update Authorization(s)

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	<input type="checkbox"/>
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"/>
						\$90,372.11	758.0000						

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

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



QPD iConnect

File Tools

Plan Information

Planned Services

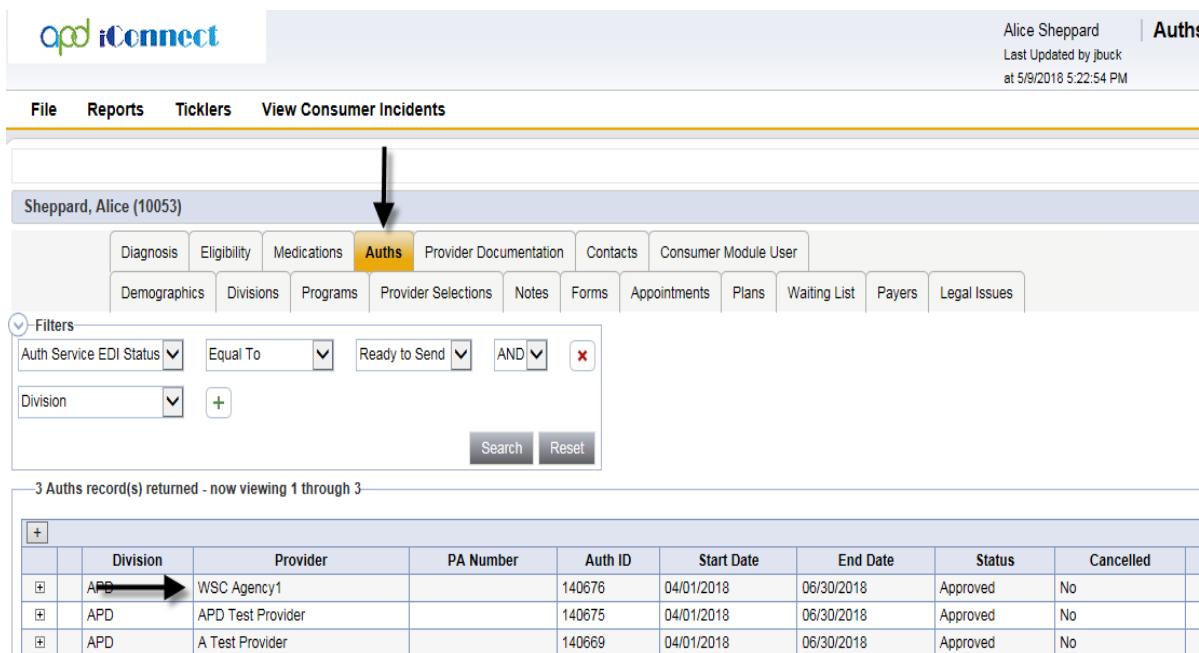
QSI Needs

Plan Notes

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	\$64,357.48		731.0000	07/01/2018	06/30/2020	Solo	1:1	BAKER
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$446.07		3.0000	07/01/2018	09/22/2018	Agency		BAKER
Auth ID	Auth Svc ID	Auth Start Date	Auth End Date	Auth Status	Auth Svc Start Date	Auth Svc End Date	Auth Svc Status	Auth Svc EDI Status				
140841	218	07/01/2018	09/22/2018	Approved	07/01/2018	09/22/2018	Approved	Ready to Send				
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019			
WSC Agency2	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019			
					\$96,372.11		758.0000					

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



QPD iConnect

Alice Sheppard | Auths

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

File Reports Ticklers View Consumer Incidents

Sheppard, Alice (10053)

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

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

Filters

Auth Service EDI Status Equal To Ready To Send AND

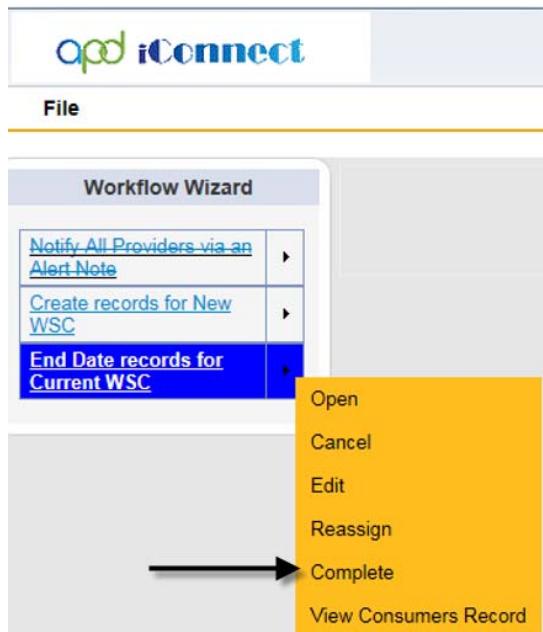
Division

Search Reset

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

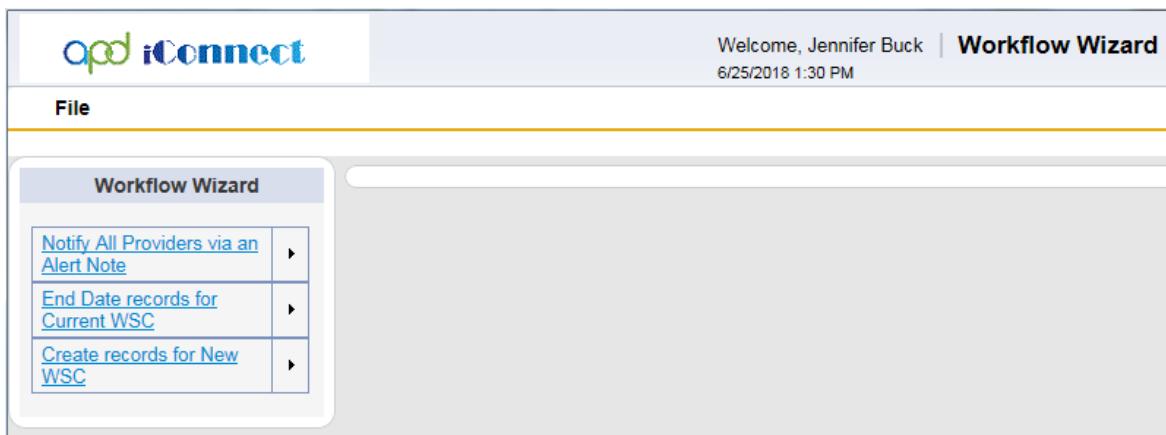
+	Division	Provider	PA Number	Auth ID	Start Date	End Date	Status	Cancelled
+	APD	WSC Agency1		140676	04/01/2018	06/30/2018	Approved	No
+	APD	APD Test Provider		140675	04/01/2018	06/30/2018	Approved	No
+	APD	A Test Provider		140669	04/01/2018	06/30/2018	Approved	No

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.

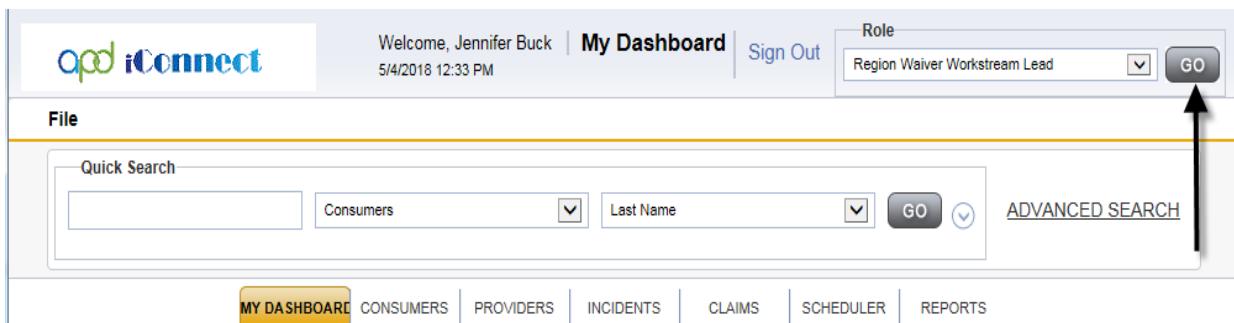


Create Records for New WSC

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**.



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

5/4/2018 12:33 PM

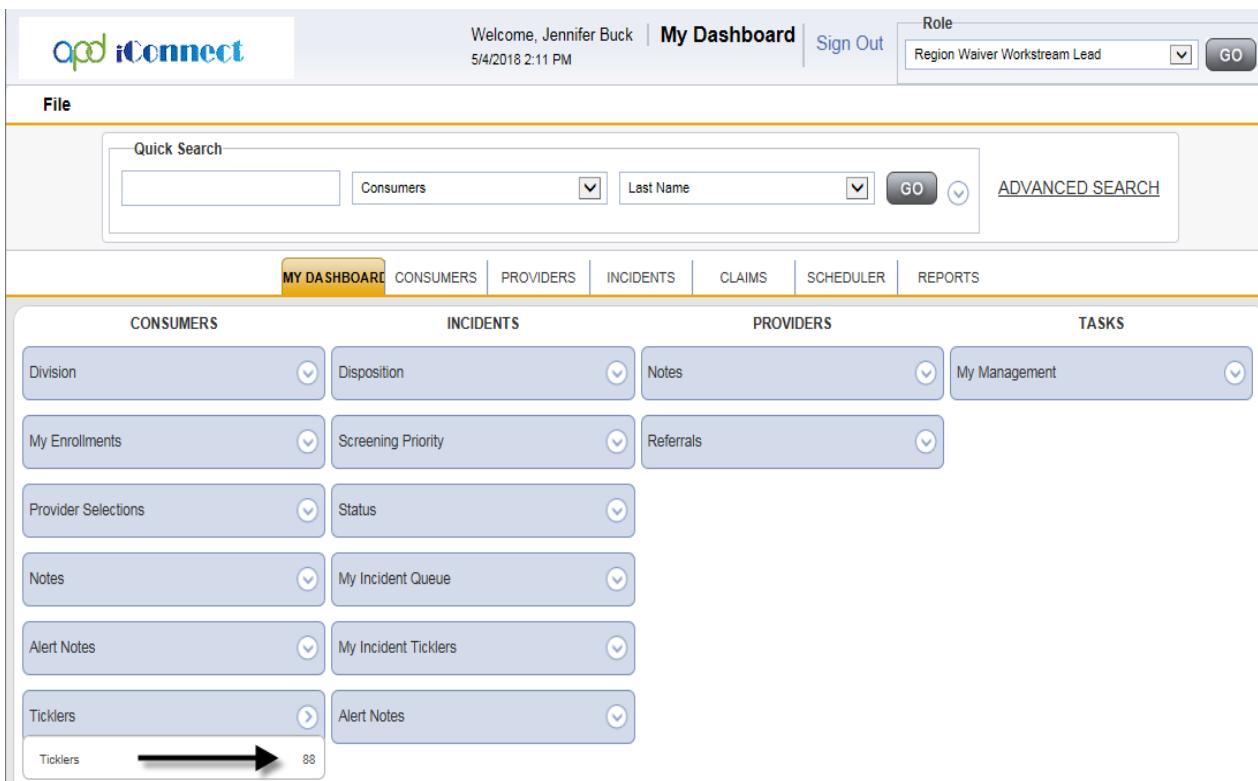
Role: Region Waiver Workstream Lead

File

Quick Search: Consumers

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER REPORTS

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.



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

5/4/2018 2:11 PM

Role: Region Waiver Workstream Lead

File

Quick Search: Consumers

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		
Alert Notes	My Incident Ticklers		
Ticklers	Alert Notes		

Ticklers  88

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

qcd iConnect

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

File

Filters

Status	Equal To	New	AND	<input type="button" value="X"/>
Last Name	Contains	sheppard	AND	<input type="button" value="X"/>
iConnect ID	<input type="button" value="+"/>			
<input type="checkbox"/> Apply Alert Days Before Due				

Search **Reset**

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

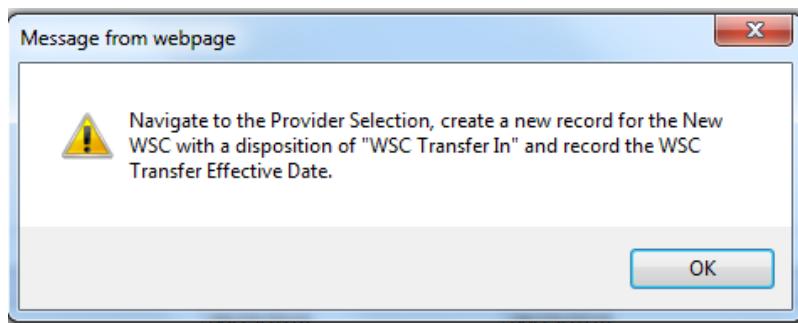
Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Sheppard, Alice	10053	Create records for New WSC	05/04/2018	05/04/2018		New	Buck, Jennifer 
Sheppard, Alice	10053	End Date records for Current WSC	05/04/2018	05/04/2018		New	Buck, Jennifer 
Sheppard, Alice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



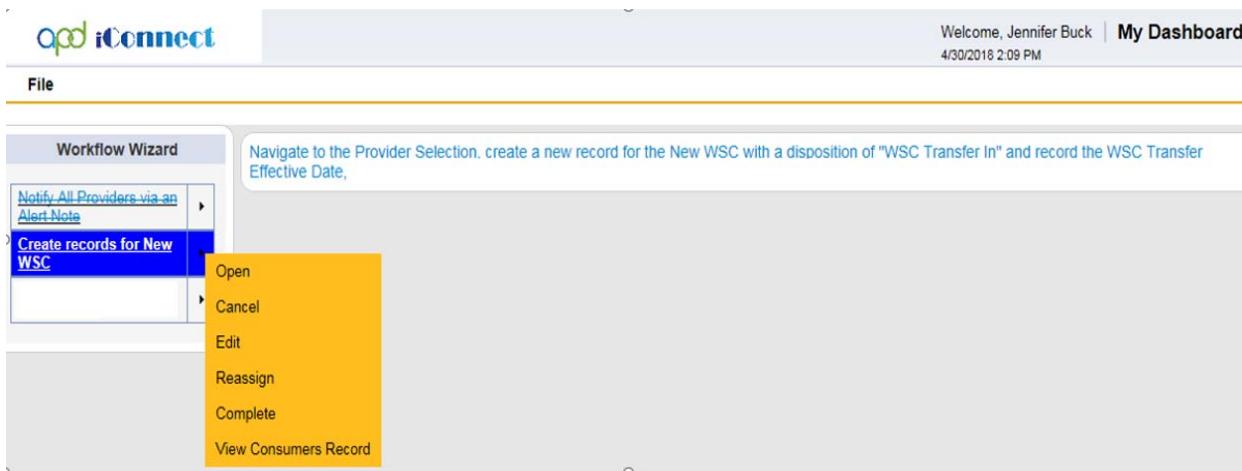
Tip

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

- Find the Tickler called. **Create records for New WSC** tickler to open it.
 - 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.
 - Otherwise, click to open the Tickler. The following message displays:



- 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.

Division *	APD
Selected By	Buck, Jennifer
Selection Date	05/09/2018
Provider *	WSC Agency1
Referral Type *	Waiver Support Coordinator *
Disposition *	WSC Transfer In
Disposition Date	05/09/2018
Provider Worker *	Reed, Monica
WSC Transfer Effective Date	05/01/2018
WSC Transfer End Date	
Comments	

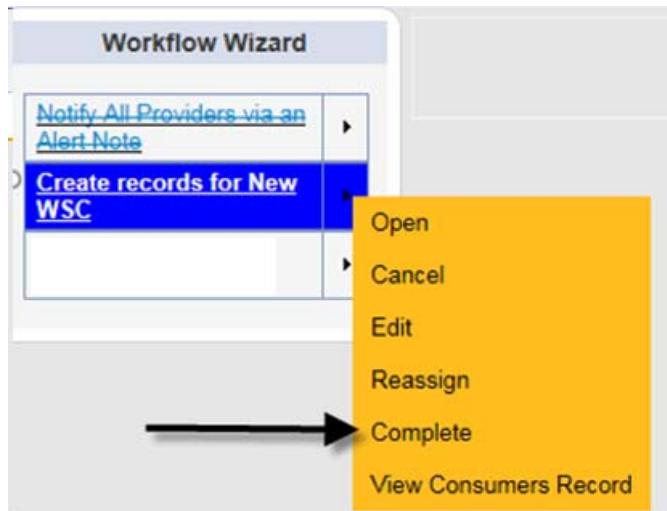
10. Update the following fields:

- 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		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 >>

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

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

apd iConnect

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

File Tools

Plan Information

Planned Services

QSI Needs

Plan Notes

Filters

Max Amount

Search Reset

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

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

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.

apd iConnect

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

File

Planned Service									
Division	APD								
Begin Date	10/01/2018								
End Date	06/30/2019								
Index/SubObject Code *	<table border="1"> <thead> <tr> <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	<input type="button" value="▼"/>								
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								
Provider	WSC Agency1								
Comments *	planned service comments								
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.

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

Close Previous WSC's Provider Selection Record

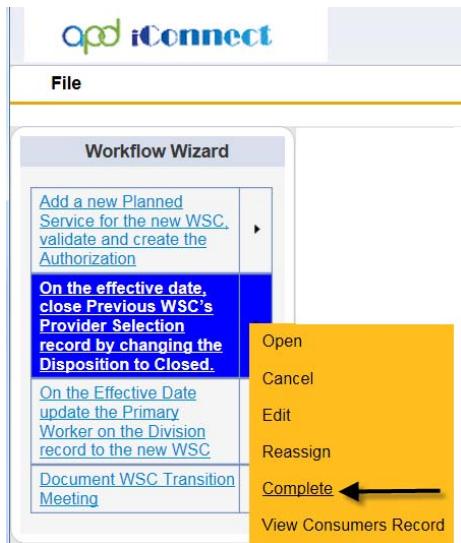
- Upon saving the Provider Selection Record with a Disposition = WSC Transfer In, a Workflow Wizard will trigger for the user with the following Ticklers to complete on the effective date of the new WSC. Similar ticklers were completed earlier when an end date was added to the Previous WSC's Provider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

6. Click the previous WSC Provider Selection Record. The Details page displays. Update the following fields:

- Disposition = Closed
- 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.

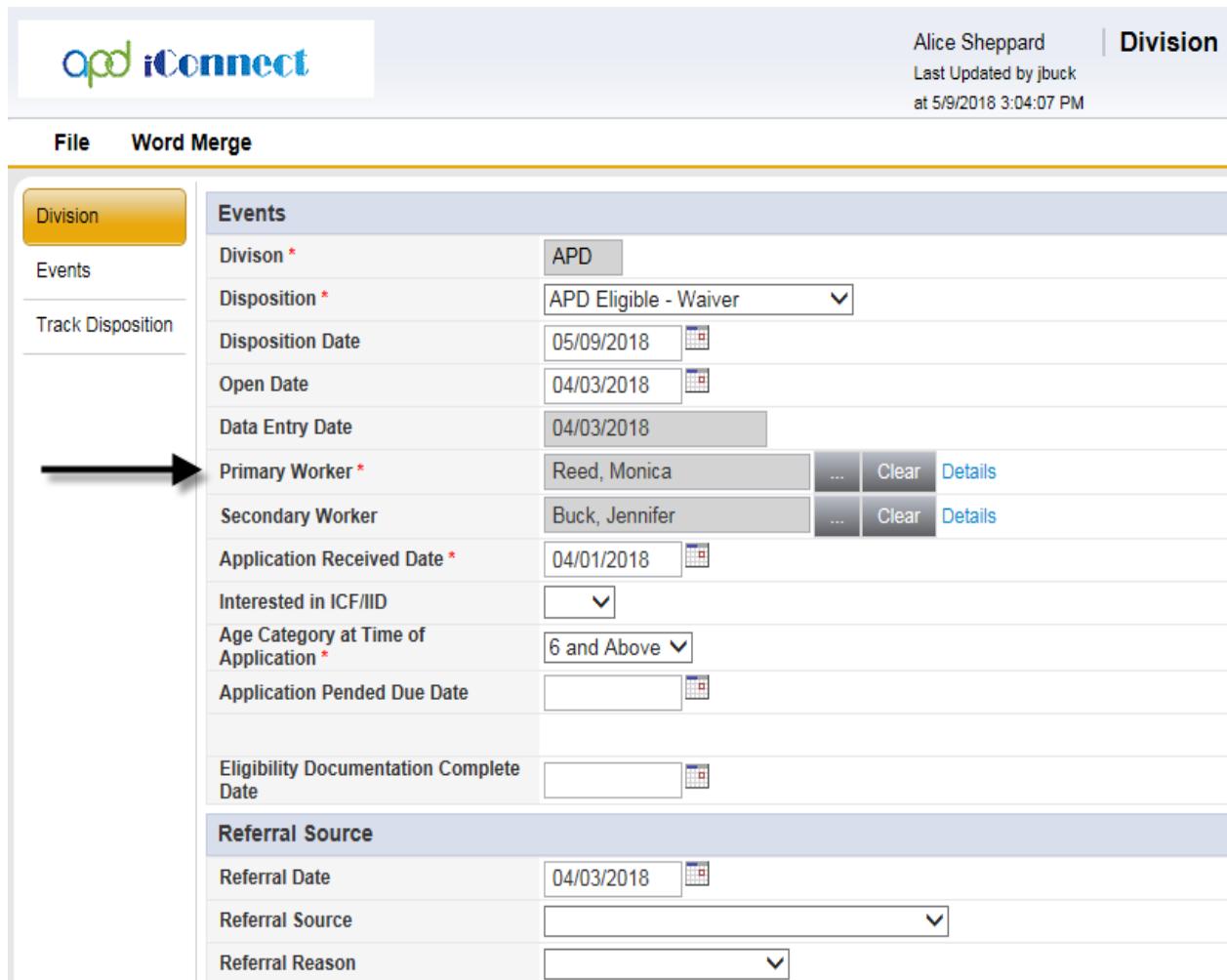
- i. Click the **APD Eligible – Waiver** Division record. The Division details page opens. Update the following fields:
 - i. Primary Worker = select the ellipsis to search for and select the new WSC Worker.
 - ii. A notification will display informing the user changing the Primary Worker on the Division record will reassign all

pending assessments, authorizations, plans, and ticklers from the old WSC to the new WSC. Click **OK** to accept.

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

OK

Cancel



The screenshot shows the apd iConnect software interface. The top navigation bar includes 'File' and 'Word Merge'. On the left, a vertical menu has 'Division' selected, with 'Events' and 'Track Disposition' also listed. The main content area is titled 'Events'. It contains the following fields:

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

Below this is a section titled 'Referral Source' with fields for 'Referral Date' (04/03/2018), 'Referral Source' (dropdown menu), and 'Referral Reason' (dropdown menu). A large black arrow points to the 'Primary Worker' field.

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.

The screenshot shows the 'Workflow Wizard' interface. On the left, a sidebar lists steps: 'Add a new Planned Service for the new WSC, validate and create the Authorization', 'On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed', and 'On the Effective Date update the Primary Worker on the Division record to the new WSC'. The third step is highlighted with a blue box. On the right, a 'Filters' section is shown with conditions: Disposition 'Not Equal To' 'Closed', Open Date 'Greater Than' (empty), and Division (empty). Below the filters, a table displays '2 Divisions record(s) returned - now viewing 1 through 2'. The table has columns: Division, Disposition, Primary Worker, Secondary Worker, Open Date, Close Date, and LOS. The first row shows 'Open' and 'Basic Open' for Buck, Jennifer. The second row shows 'Cancel' and 'Eligible - Non Waiting List' for Buck, Jennifer. At the bottom of the table is a navigation bar with buttons: First, < Previous, Retrieve 15 Records at a time, Next >, and Last >>. A yellow box highlights the 'Complete' link in the action menu for the first division row. An arrow points from the 'Complete' link to the 'View Consumers Record' link.

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

File Tools

Notes Details

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

apd iConnect

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

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

2. 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

apd iConnect

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

File Tools

Workflow Wizard

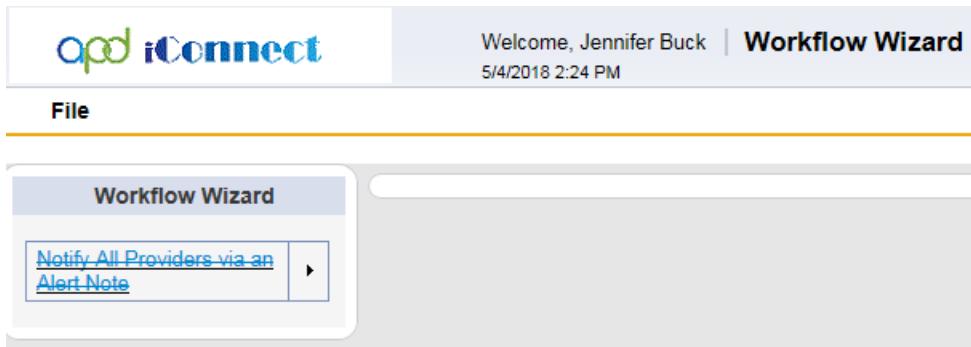
Set the note status to "Alert"

Notify All Providers via an Alert Note

Notes Details

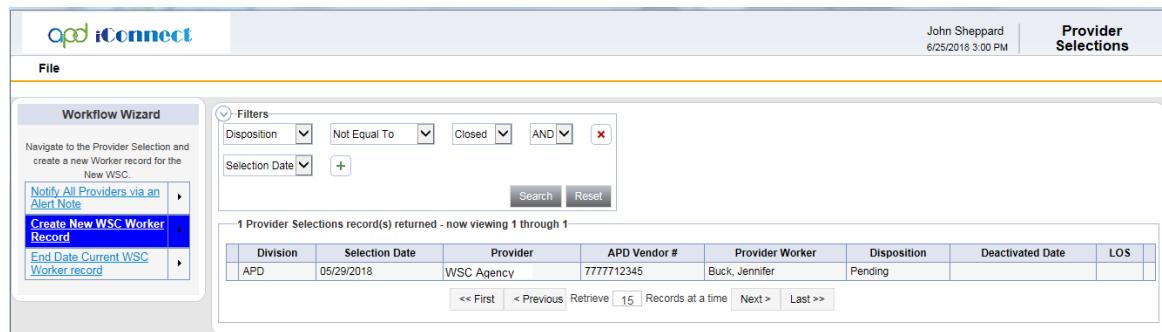
Division *	APD
Note By *	Buck, Jennifer
Note Date *	05/04/2018
Program/Provider	
Note Type *	WSC Selection
Note Sub-Type	Notification of WSC Change
Description	Add the message you want the providers to see each time they login into the account.
Note	
Status *	Alert
Date Completed	

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

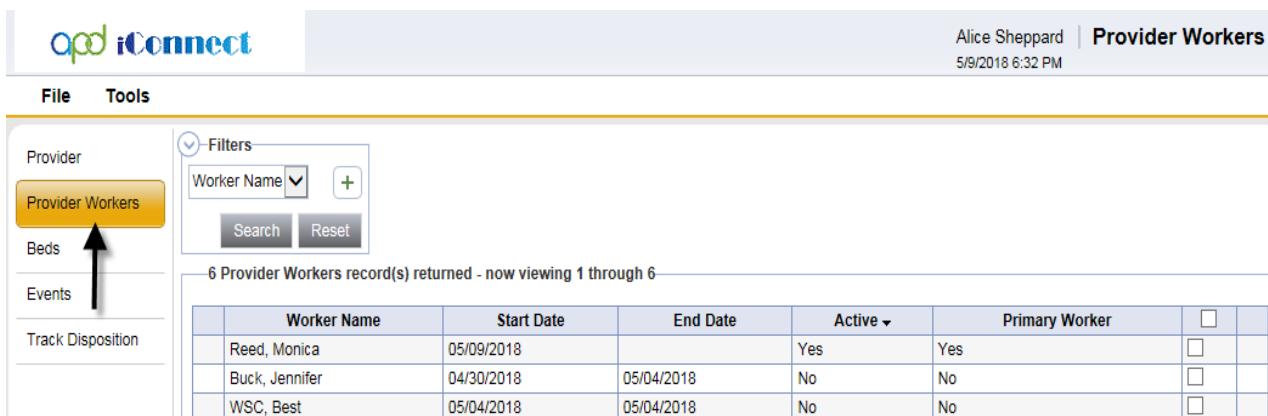


Create New WSC Worker Record

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"/>	<input type="checkbox"/>
Reed, Monica	05/09/2018		Yes	Yes	<input type="checkbox"/>	<input type="checkbox"/>
Buck, Jennifer	04/30/2018	05/04/2018	No	No	<input type="checkbox"/>	<input type="checkbox"/>
WSC, Best	05/04/2018	05/04/2018	No	No	<input type="checkbox"/>	<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

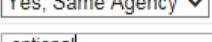
Worker Name *   

Start Date * 

End Date

Primary Worker

Active

Is this a New WSC? 

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.

Workflow Wizard

Notify All Providers via an Alert Note

Create New WSC Worker Record

End Date Current WSC Worker record

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

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

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 <input checked="" type="checkbox"/>				
WSC - Selected <input checked="" type="checkbox"/>				
Disposition Date	09/06/2018			
WSC Transfer Effective Date				
WSC Transfer End Date	09/30/2018			
Comments	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>			

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.

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	<input checked="" type="checkbox"/>
Open Date	Greater Than		AND	<input checked="" type="checkbox"/>
Division				

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 - WSC Assigned	Reed, Monica	Tierney, Jacqueline	04/04/2018		68

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

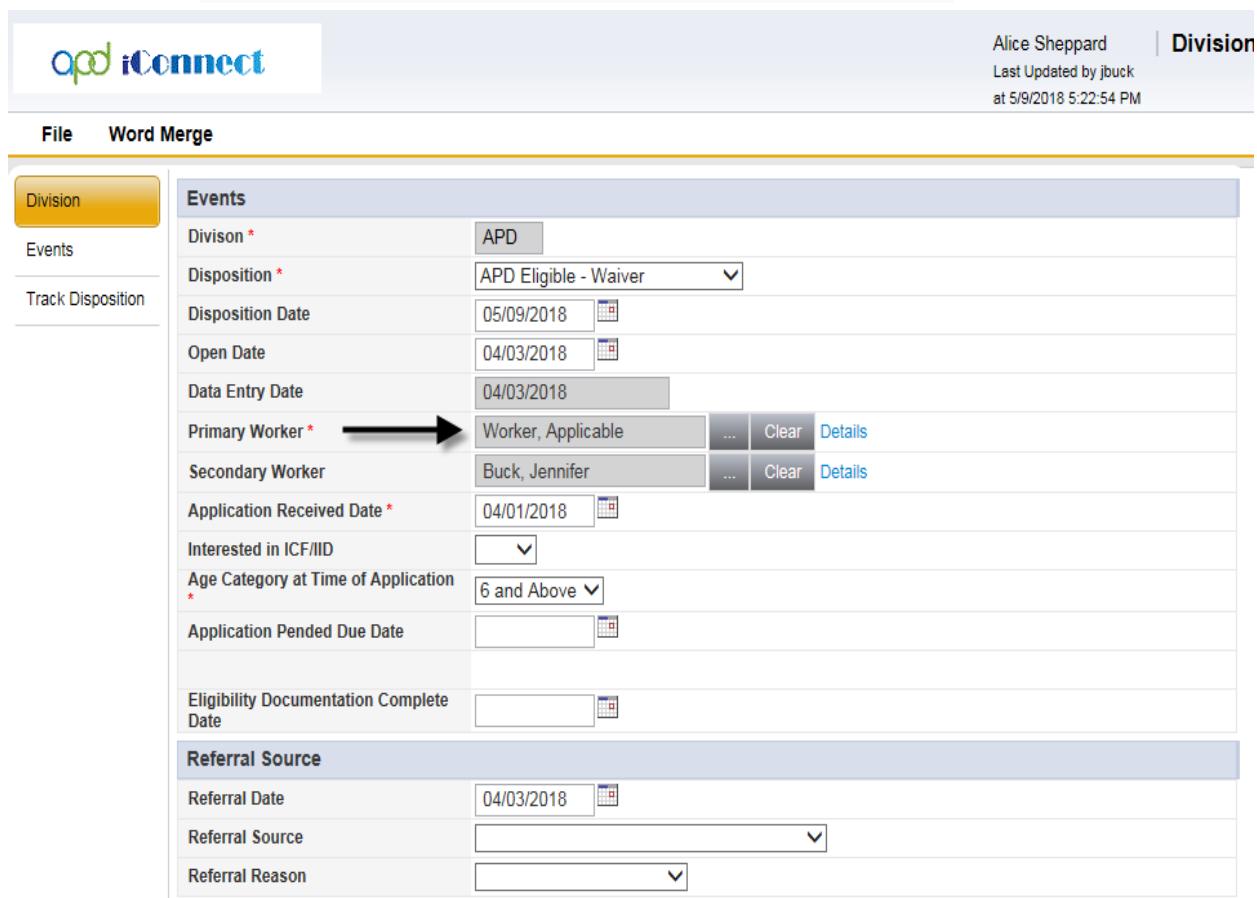
3. On the effective date of the new WSC, update the primary worker on the Division which will automatically update the worker on the associated Program records.

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 openclose records. Do you want to continue?

OK **Cancel**



File Word Merge

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

Division	Events <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> APD Disposition *: APD Eligible - Waiver Disposition Date: 05/09/2018 Open Date: 04/03/2018 Data Entry Date: 04/03/2018 Primary Worker *: Worker, Applicable Secondary Worker: Buck, Jennifer Application Received Date *: 04/01/2018 Interested in ICF/IID: <input type="checkbox"/> Age Category at Time of Application *: 6 and Above Application Pended Due Date: <input type="text"/> Eligibility Documentation Complete Date: <input type="text"/> </div>		
Events			
Track Disposition			
Referral Source <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Referral Date: 04/03/2018 Referral Source: <input type="text"/> Referral Reason: <input type="text"/> </div>			

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.

apd iConnect

Violet Sheppard | Provider Workers
9/21/2018 12:04 PM

File Tools

Provider Workers

Worker Name

Designate As Primary

Worker Name	Start Date	End Date	Active	Primary Worker
Buck, Jennifer	09/21/2018		Yes	No <input type="checkbox"/>
Reed, Monica	09/06/2018	09/21/2018	Yes	Yes <input checked="" type="checkbox"/>

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

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.

apd iConnect

Violet Sheppard | Provider Workers
9/21/2018 12:18 PM

File Tools

Provider Workers

Filters

Worker Name

Worker Name	Start Date	End Date	Active	Primary Worker
Buck, Jennifer	09/21/2018		Yes	Yes <input type="checkbox"/>
Reed, Monica	09/06/2018	09/21/2018	Yes	No <input type="checkbox"/>

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

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.

Sheppard, Alice (10053)

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

Filters Form Search Reset

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

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**.

apd iConnect

Alice Sheppard | Forms
Last Updated by jBuck
at 8/10/2018 3:19:49 PM

File Reports

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

Annual 05/2018 Buck, Jennifer Complete (arrow points here)
D 05/2018 Buck, Jennifer Details
Provider/Program: WSC Agency1 Details
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

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 **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

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**.

apd iConnect

Alice Sheppard | Notes | Sign Out | Role: Regional Staff | GO

File Tools Reports Ticklers View Consumer Incident

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS REPORTS

Sheppard, 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 Search Reset

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

APD iConnect

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

APD iConnect

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		
Complete 6			
Pending 9	My Incident Ticklers		

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

apd iConnect

Welcome, Jennifer Buck | Notes
5/9/2018 7:53 PM

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:
 - 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

apd iConnect

Alice Sheppard | Notes
Last Updated by jbuck
at 5/9/2018 7:59:03 PM

File Tools Reports

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

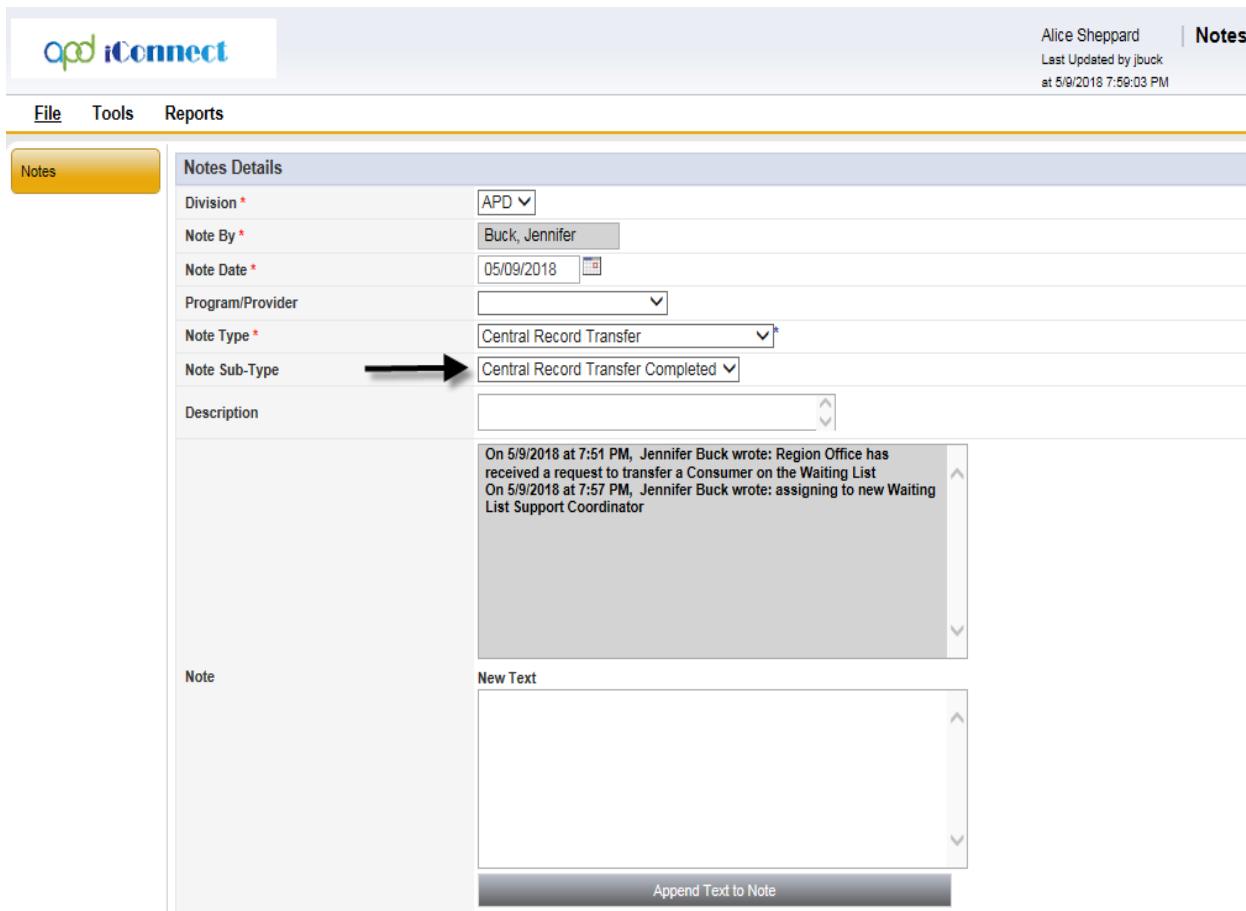
Description

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

Note

New Text

Append Text to Note



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

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

Apd iConnect

Alice Sheppard | **Divisions** | Sign Out

Last Updated by jbuck at 5/9/2018 7:47:29 PM

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

Open Date Greater Than AND

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 openclose records. Do you want to continue?

OK Cancel

- Secondary Worker = Clinical Workstream Lead

File Word Merge

Division

Events

Track Disposition

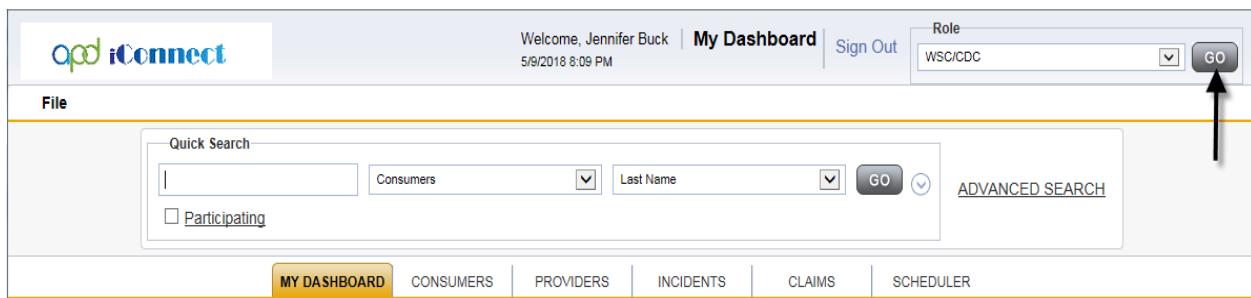
Events	
Divison *	APD
Disposition *	APD Eligible - Waiver
Disposition Date	05/09/2018 <input type="button" value="..."/>
Open Date	04/03/2018 <input type="button" value="..."/>
Data Entry Date	04/03/2018
Primary Worker *	Worker, Applicable <input type="button" value="..."/> <input type="button" value="Clear"/> <input type="button" value="Details"/>
Secondary Worker	Buck, Jennifer <input type="button" value="..."/> <input type="button" value="Clear"/> <input type="button" value="Details"/>
Application Received Date *	04/01/2018 <input type="button" value="..."/>
Interested in ICF/IID	<input type="button" value="..."/>
Age Category at Time of Application *	6 and Above <input type="button" value="..."/>
Application Pended Due Date	<input type="button" value="..."/>
Eligibility Documentation Complete Date	<input type="button" value="..."/>
Referral Source	
Referral Date	04/03/2018 <input type="button" value="..."/>

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.

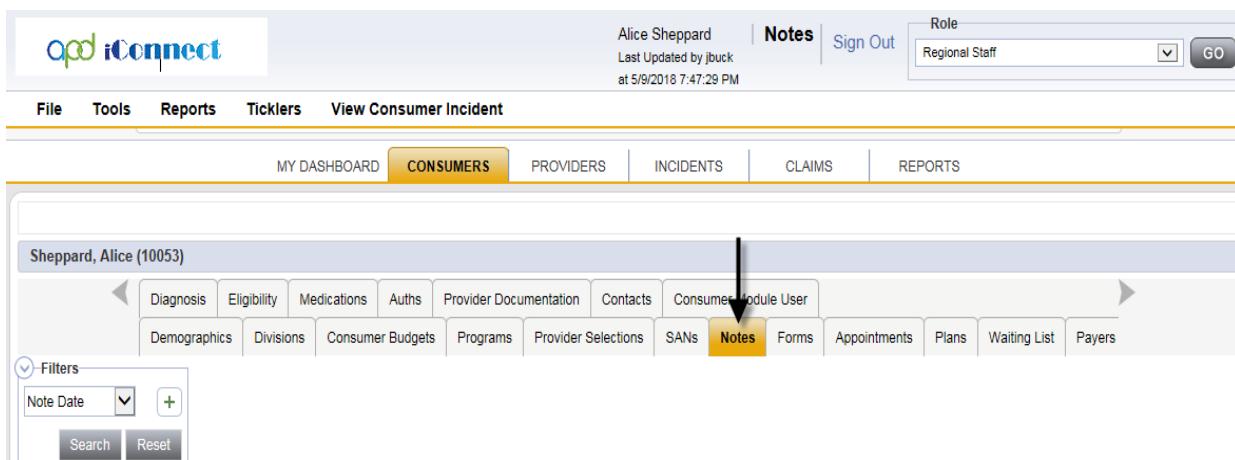
1. To begin, log into APD iConnect and set Role = WSC/CDC. Click **Go**.



The screenshot shows the APD iConnect interface. At the top, there is a navigation bar with 'Welcome, Jennifer Buck | My Dashboard | Sign Out'. A dropdown menu 'Role' is set to 'WSC/CDC' with a 'GO' button next to it, which is highlighted with a black arrow. Below the navigation bar is a 'File' menu. Under 'File', there is a 'Quick Search' section with fields for 'First Name', 'Last Name', and a dropdown for 'Consumers'. There is also a 'Participating' checkbox and an 'ADVANCED SEARCH' button. At the bottom of the interface, there is a navigation bar with tabs: 'MY DASHBOARD' (highlighted in yellow), 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'.

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 interface for the 'CONSUMERS' tab. At the top, there is a navigation bar with 'File', 'Tools', 'Reports', 'Ticklers', and 'View Consumer Incident'. A dropdown menu 'Role' is set to 'Regional Staff' with a 'GO' button next to it. Below the navigation bar, the consumer record for 'Sheppard, Alice (10053)' is displayed. A horizontal menu bar below the consumer record includes 'Diagnosis', 'Eligibility', 'Medications', 'Auths', 'Provider Documentation', 'Contacts', 'Consumer Module User', 'Demographics', 'Divisions', 'Consumer Budgets', 'Programs', 'Provider Selections', 'SANS', 'Notes' (highlighted in yellow with a black arrow), 'Forms', 'Appointments', 'Plans', 'Waiting List', and 'Payers'. On the left, there is a 'Filters' section with a dropdown for 'Note Date' and buttons for 'Search' and 'Reset'.

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

APD iConnect

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 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

File Tools

Notes Details

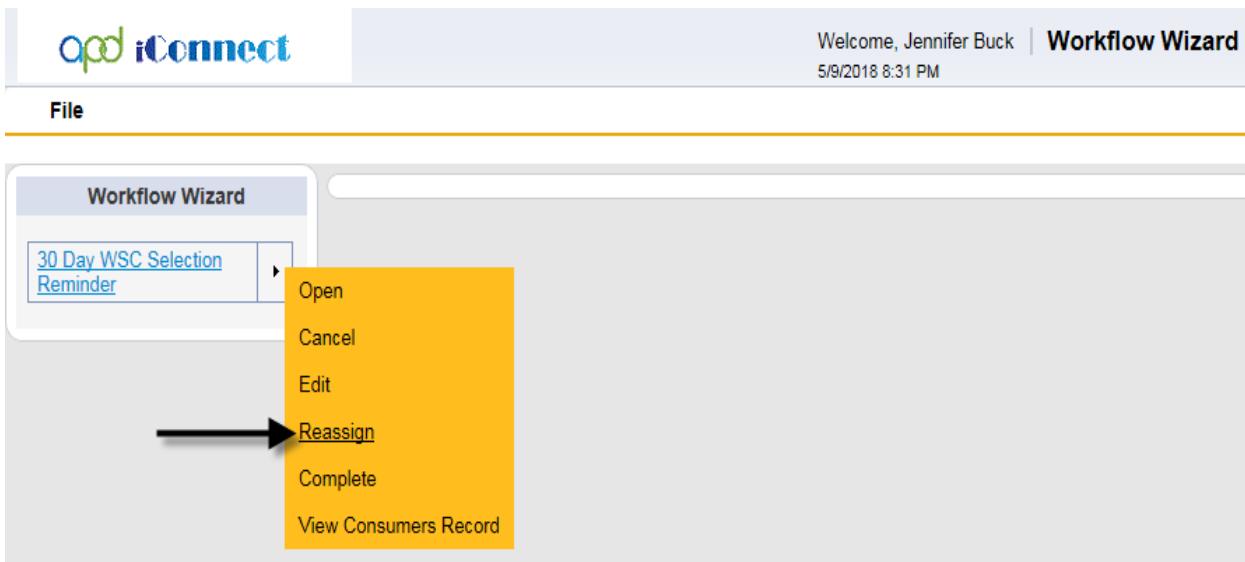
Division *	APD
Note By *	Buck, Jennifer
Note Date *	05/09/2018
Program/Provider	
Note Type *	WSC Selection
Note Sub-Type	Selection Form Sent
Description	Sent form to consumer to select new WSC in the new region
Note	
Status *	Complete
Date Completed	05/09/2018

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**.

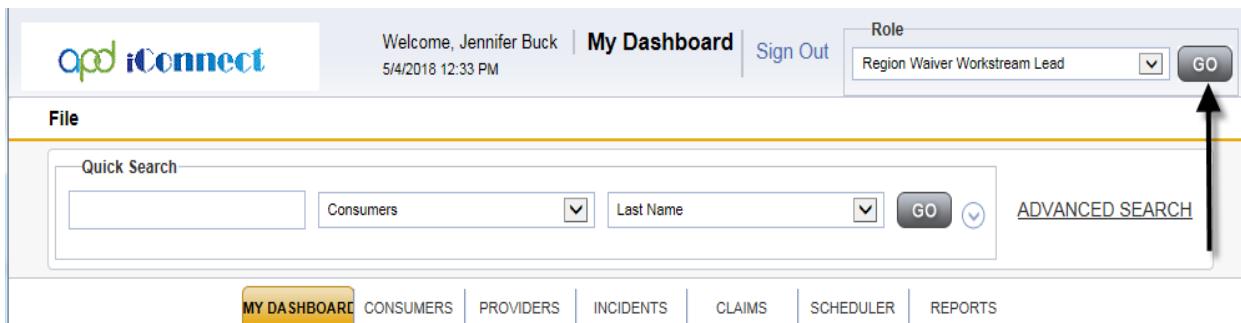


12. Search for and select the receiving Waiver Workstream Lead worker record and the tickler is reassigned.
13. This tickler is visible to the Waiver Workstream Lead on the My Dashboard > Ticklers queue.
14. In 30 days when the tickler is due, the Waiver Workstream Lead will check if the Consumer has 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.

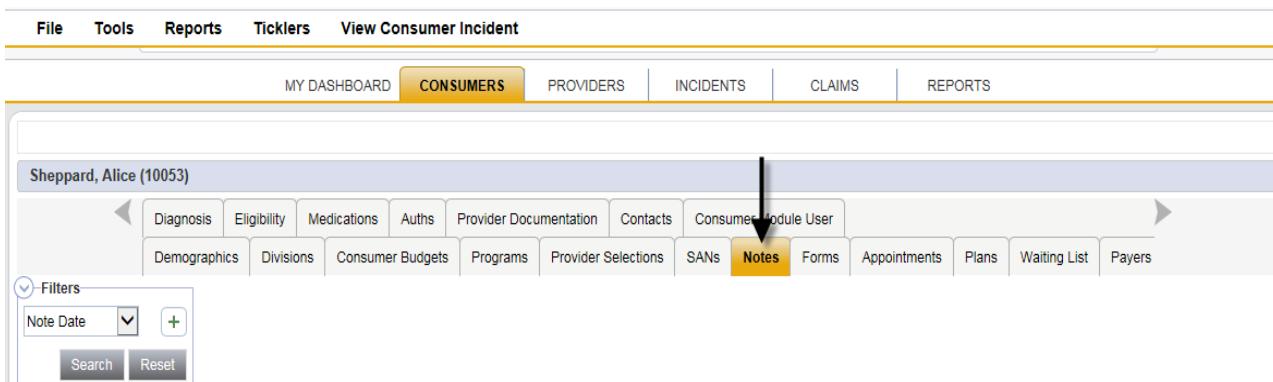
Consumer selects new WSC

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

File Tools

Notes Details

Division *	APD
Note By *	Buck, Jennifer
Note Date *	05/09/2018
Program/Provider	
Note Type *	WSC Selection
Note Sub-Type	WSC Inter-Region Transfer

Description

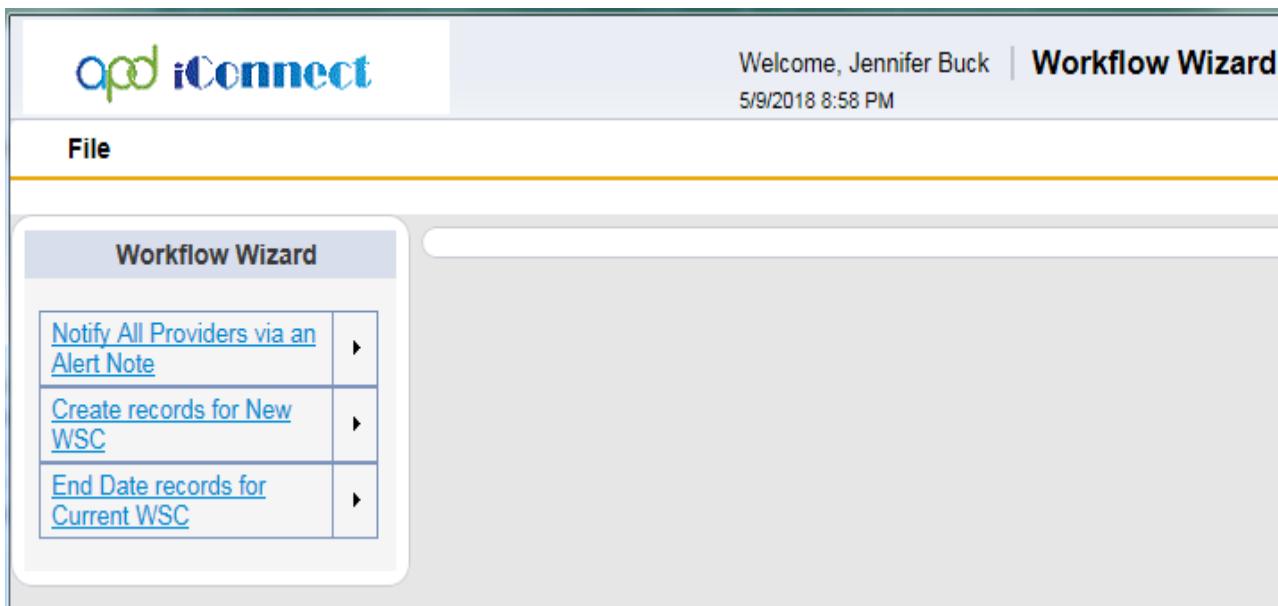
Note

Status * Complete
Date Completed 05/09/2018

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

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

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



Notify all Providers via an Alert Note

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

Create Records for New WSC

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.