

WSC ADVISORY #2024-004
FISCAL YEAR PLAN CONTINUATION PROJECT
MANDATORY ACTION

EFFECTIVE DATE: MARCH 4, 2024

As part of our annual process, the Agency for Persons with Disabilities (APD) is sending a series of advisories for preparations being made in iConnect to allow planned services on cost plans for the current Fiscal Year (FY) 2023-24 to continue into FY 2024-25. This advisory informs Waiver Support Coordinators (WSCs) and Consumer-Directed Care Plus (CDC+) Consultants of important dates and tasks.

As referenced in [WSC Advisory #2024-003](#), APD will automate the continuation of plans into FY 2024-25 in iConnect as much as possible to reduce the workload of WSCs, CDC+ Consultants, and APD staff.

iConnect will be offline on March 21, 2024, from 6:00 – 11:00 p.m. When iConnect comes back online, the consumer's budget and plan will be unavailable until approximately midday on **March 28, 2024**. When the plans tab is displayed again on **March 28, 2024**, WSCs will be able to access planned services and see the authorizations that have been generated for the next fiscal year.

While the plans tab is unavailable, WSCs and CDC+ Consultants **must** notify the regional office of any client needs that require immediate attention.

Below are outlined responsibilities and procedures that must be followed statewide. WSCs and CDC+ Consultants who need assistance should contact their APD Regional office.

APD Responsibilities

- APD will copy all plans with an end date of June 30, 2024. These copied plans will have a start date of July 1, 2024, and an end date of June 30, 2025.
 - Plans in the following status **will be copied**:
 - Approved
 - Pending
 - Draft
 - No Review Required
 - *Plans with an end date of June 30, 2024, in Complete status **will not be copied**.*
- If a Plan has a start date after July 1, 2022, the plan will be copied in **Draft** status to allow the WSC to annualize the plan.
 - *For example, if a consumer turned 21 or enrolled on the waiver after July 1, 2023, the copy will be in **Draft** status.*
- APD will only copy planned services within a plan that have an end date of June 30, 2024 and are in **Region/State Approved or Proposed** status. These copied planned services will have a start date of July 1, 2024 and an end date of June 30, 2025.
 - Planned services that are in **Region/State Approved** status at the time of copy will remain in that status and authorizations will be generated.

- Planned services that are in **Proposed** status and services are not annualized at the time of copy will remain in **Proposed** status and will not have an authorization generated.
- APD will **not** copy the following planned services:
 - When the county of the planned service does not match the county of the consumer's demographics tab
 - One-time services:
 - Durable Medical Equipment
 - Environmental Accessibility Adaptations
 - Dental
 - Personal Emergency Response System Installations
 - Assessments: Physical, Speech, Occupational, Respiratory Therapy, Nursing, Specialized Mental Health, Environmental Accessibility Adaptation, and Behavior
 - Behavior Assistant services
 - Service plans that ended before June 30, 2024
- APD will copy the statements in the authorization notes/comments section on the planned service screens.

Required WSC and CDC+ Consultant Responsibilities

- Ensure that every client has a Plan that is in Approved, Pending, or No Review Required status by March 15, 2024.
- Ensure that the authorization notes/comments field on the planned service screen specifies accurate service provisions. The authorization notes/comments field should give directions to the provider describing how services are to be administered. This section should not duplicate information already identified on the service authorization screen.
- Ensure that all planned services have been reviewed for provider changes, ratio changes, demographic accuracy, and confirm that the plan is linked to the Budget.
- WSCs and CDC+ Consultants will regain access to their consumer's plans midday on **Thursday, March 28, 2024**. At that time, they can access and edit consumer plans and review FY 2024-25 authorizations for accuracy. WSCs and CDC+ Consultants should take the steps listed below:
 - Ensure the FY 2024-2025 plan meets the client's needs and goals identified in their support plan.
 - Ensure the FY 2024-2025 plan meets medical necessity criteria and iBudget Handbook coverage and limitations.
 - Add any one-time services in accordance with the iBudget Handbook.
 - If a Planned Service was copied without an authorization generated, the WSC will need to manually create the authorization. Examples where this can occur might include: the consumer turned 21 in FY23-34 and services changed, the FY23-24 Planned Services total is more than budget, the Planned Services County does not match the Demographics County, if both Agency and Solo vendor services records are active and open, if no Planned Services are copied for that Plan, or all copied Planned Services are in a "Proposed" status.

- If a Planned Service is edited after the Plan was copied and the authorization was generated, the WSC will need to manually edit the authorization.
- Only update authorizations if the Planned Services were edited.

Special Information for CDC+ Consultants Only

- In addition to the instructions above, the CDC+ Consultant must also complete the following actions:
 - Review and confirm the service code and rate (Full or Limited) is correct for the CDC+ Consultant. If a change needs to be made before the plan is copied, the FY 2023-24 plan will need to be in **Pending, Region/State Approved, or No Review Required** status by **March 21, 2024**. Once the FY 2023-24 plan is in Region/State Approved status, the service code or rate can only be corrected by terminating the copied planned service and creating a new planned service with the correct information.
 - Ensure the FY 2024-25 plan meets the client's needs and goals identified in their support plan. Add any Short-Term Expenditures (STEs) or One-Time Expenditures (OTEs).
 - Make sure there are 12 units of CDC+ Consultant services indicated on cost plans.
 - Review and confirm that planned services are equal to or less than annual budget allocations.
 - The FY 2024-25 cost plan must show full year of planned services for each active consumer ending 6/30/2025.
- Once complete, APD will review and confirm budgets were created by the automated system. APD will then send the validated FY 2024-25 CDC+ Budget Calculation Worksheet to all CDC+ Consultants.
- APD will review July 1, 2024, purchasing plans if the consumer's budget is reduced or if there is an OTE or STE that needs to be entered on a July 1, 2024 Purchasing plan. An August 1, 2024 purchasing plan should be submitted for all other budget changes. If the consumer's budget did not reduce and a necessary change needs to go into effect July 1, 2024, a Quick Update can be submitted for July, followed by a full Purchasing plan effective August 1, 2024.
- APD will return to the standard review of all Purchasing plans effective August 1, 2024. If there are any questions, please call CDC+ Customer service at 1-866-761-7043.

As a resource, WSCs may utilize the [iConnect WSC Library](#) to reference all materials with instructions on how to complete these tasks.

[Chapter 11: Cost plan](#) of the iConnect Case Management Training Manual provides step by step instructions to update Cost plans and service plans in addition to the TRAIN FL course Module entitled [APD – iConnect – Cost plan and Budget](#).

APD continues to appreciate the commitment from its partners, providers, and stakeholders to serve Floridians with unique abilities. Should you have any questions regarding the cost plan continuations, please don't hesitate to reach out to your Regional Waiver Liaison.

Should you have any navigation or training related questions regarding the functionality, please don't hesitate to reach out to your designated iConnect trainer.