QUALIFIED ORGANIZATION TOOLKIT

Chapter 2020-71, Laws of Florida

Abstract

A tool to assist you in navigating Chapter 2020-71, Laws of Florida requirements for Waiver Support Coordination.

Agency for Persons with Disabilities

February 2021

Table of Contents

Introduction

The Agency for Persons with Disabilities ("APD" or "Agency") is committed to a successful implementation of Chapter 2020-71, Laws of Florida, formerly referred to as Senate Bill 82. This Law requires all Waiver Support Coordination ("WSC") services to be provided by Qualified Organizations. WSC services will no longer be provided by solo providers or agency providers as described in the Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook ("iBudget Handbook") effective July 1, 2021.

To ensure success, APD has developed this Qualified Organization Toolkit to provide details of the new requirements set by Chapter 2020-71, Laws of Florida, and outline the steps to become or join a Qualified Organization.

Becoming a Qualified Organization

Section 393.0663, Florida Statute (F.S.) (2020), mandates that APD use Qualified Organizations to provide WSC services for the iBudget Waiver. Guidelines for Qualified Organizations are set forth in section 393.0663, F.S. and in Chapter 65G-14, Florida Administrative Code (F.A.C.). This section is an overview of the qualifications and requirements that must be met during the application process for APD to recognize an Agency as a Qualified Organization.

As a result of the new requirements, there are no existing APD providers that will automatically qualify to become a Qualified Organization. All APD providers interested in becoming enrolled as a Qualified Organization must apply with the APD Regional Office. APD and the prospective Qualified Organization must sign a new Medicaid Waiver Services Agreement ("MWSA") in order to become a Qualified Organization. APD has the right to deny an application at any time until a MWSA is fully executed.

Registering as a Business

All Qualified Organizations must register with the Florida Division of Corporations through Sunbiz. The business must be registered through Sunbiz prior to applying for a Federal Tax ID. A Federal Tax ID/ Employer Identification Number (EIN) is a Federal number that is provided to a business or non-profit for tax purposes. A Tax ID/EIN can be obtained through the Federal Internal Revenue Services (IRS). Existing waiver support coordination agencies do not have to reapply through Sunbiz nor obtain a new Federal Tax ID number unless there will be a change in the name of the organization.

Medicaid Number

All APD iBudget Waiver Providers must have an active Medicaid number for the Developmental Disabilities Program, including all Waiver Support Coordinators (WSCs) who will be working under a Qualified Organization. Existing WSCs with existing Medicaid numbers will need to link their Medicaid number to the Qualified Organization's group Medicaid number. Qualified Organizations must have a Group Medicaid number for the Developmental Disabilities Program. For instructions on how to apply with Medicaid or how to identify if an existing Medicaid number is sufficient, please refer to the Medicaid Help Guide.

All new WSCs must complete the following trainings prior to signing the MWSA).

- Pre-Service Certification Training[1]
- Zero Tolerance
- Person-Centered Planning

After signing MWSA

- WSC Region Specific Training (within 120 days of completing the pre-Service Certification Training)[2]
- Requirements for all Waiver Providers (On Training homepage) (Within 90 days of providing services)
- Direct Care Core Competencies (within 90 days of providing services)
- Overview of APD Waiver Provider Requirements (Within 90 days of providing services)
- HIPAA Training (within 30 days of providing services)
- AIDS/ HIV Infection Control (within 90 days of providing services)
- First Aid (within 90 days of providing services)
- CPR (within 90 days of providing services)
- Social Security Work Incentive Training (within 1 year of providing services)
- 18 hours of in-service training (Annually)

*The APD Training Rule 65G-10 F.A.C is currently under development and may be subject to change.

NOTE: Within 120 days of the training rule's effective date (65G-10 F.A.C.), all existing WSCs will need to complete the WSC online Level 1 training and pass the competency-based assessment. Any WSC who fails to pass the competency-based assessment after three (3) attempts is subject to termination.

NOTE: After the training rule (65G-10 F.A.C.) becomes effective, all new WSC will need to complete the WSC Level 1 and Level 2 training and pass both competency-based assessments before becoming a WSC.

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[1] This is also known as Statewide Training. After July 1, 2021, this training will be referred to as Level 1 Training and will include a competency-based assessment.
[2] This is also known as Region Specific Training. After July 1, 2021, this training will be referred to as Level 2 Training and will include a competency-based assessment. WSCs enrolled prior to July 1, 2021 who have successfully completed the Region Specific Training will not be required to take this training or the competency-based assessment.

Existing WSC Agency Applying to Become a Qualified Organization

Existing WSC Agencies may wish to become a Qualified Organization. There is no guarantee that an existing WSC Agency meets all the qualifications to become a Qualified Organization. Agencies will need to apply with APD to become a Qualified Organization by completing the steps described below.

Agencies with the intention of applying to become a Qualified Organization should communicate its intent with their WSCs. Being transparent about the Agency's intent will help the associated WSCs make an informed decision about their future as a WSC.

Process of Applying to Become a Qualified Organization

- Complete and Submit Qualified Organization Application to include:
    - Mentoring Program or adopt APD Approved Mentoring Program Template.
    - Code of Ethics or adopt APD Approved Code of Ethics Template.
    - Policies and Procedures or adopt APD Approved Provider Policies and Procedures Template.
    - Table of Organization.
    - Disciplinary Process.
    - Complete WSC Application(s) for any WSC applicant not currently enrolled as a WSC.
    - Copy of the MWSA for any WSC currently enrolled and who will be working for the Qualified Organization.
    - Dual Employment Plan for any associated WSCs who are dually employed at time of application.
- Confirm Group Medicaid ID Active status through the Medicaid Portal.
- Ensure all associated WSCs Medicaid IDs are properly linked to the Group Medicaid ID.
- All associated WSCs successfully complete all required trainings and assessments.
- Sign a new MWSA for the Qualified Organization (which will replace the MWSA for the WSC Agency).

Existing Solo WSC or Treating WSC Applying to Become Enrolled as a Qualified Organization

Effective July 1, 2021, Waiver Support Coordination services will not be provided by solo WSCs. All Waiver Support Coordination services will be provided by Qualified Organizations. Current solo WSCs may decide to become a Qualified Organization to continue to provide Waiver Support Coordination services. In order to become a Qualified Organization, all requirements must be met, and a Qualified Organization Application must be submitted to the APD Regional Office.

Process of Applying to Become a Qualified Organization

Phase 1: Pre-Application

The following outlines all steps that must be completed prior to and submitted with the Application to become a Qualified Organization:

- Develop Mentoring Program or adopt APD Approved Mentoring Program Template.
- Develop Code of Ethics or adopt APD Approved Code of Ethics Template.
- Develop Table of Organization.
- Develop Disciplinary Process.
- Develop all necessary Policies and Procedures or adopt APD Approved Provider Policies and Procedures Template.
- Review and compile all required documents for application submission.
- Identify WSCs to be associated with the Qualified Organization (minimum of four waiver support coordinators employed by the Qualified Organization who will carry an active caseload).
  - Ensure WSC applications are completed and submitted with the application for all WSCs not currently enrolled as a WSC.
  - Ensure a copy of each enrolled WSC's MWSA is submitted with the application.
- Complete the Qualified Organization Application.

Phase 2: Submitting Application

- Submit Complete Qualified Organization Application to the Home Region[3].
  - Include all required documentation listed on the Application.
  - Submit Qualified Organization Application, to include only WSC applications for non-enrolled WSCs, the MWSAs for existing WSCs, any dual enrollment plans, and all required documentation, to designated email as an attachment. An attached Zip File with all of the required documentation will be accepted as an attachment. Cell phone photos of documents are not accepted. Please ensure all submitted documents are in Word or PDF format.
    - Northwest: Northwest.QO@apdcares.org
    - Northeast: Northeast.QO@apdcares.org
    - Central: Central.QO@apdcares.org
    - Suncoast: Suncoast.QO@apdcares.org
    - Southeast: Southeast.QO@apdcares.org

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[3] Home Region means the Region in which the applicant submitted the initial application to become a provider and where services will be rendered by the Qualified Organization, if approved.

- Southern: Southern.QO@apdcares.org
  - o APD will communicate with the Qualified Organization applicant on any outstanding documentation needed.
  - o The application will be closed if all required/requested documentation is not provided within 45 days of the request. If an application is closed for being incomplete, the applicant will need to submit another complete application.
- APD will provide the Qualified Organization applicant with an "Initial APD iBudget Waiver Sign-Off Form" if the applicant meets all minimum requirements. This form is required in order to apply for a Group Medicaid ID.

Phase 3: Medicaid Activities

- Apply with Medicaid for a Group Medicaid ID.
  - o This process is facilitated by AHCA. Receiving a Group Medicaid ID can take several months. This will need to be considered during the application timeline.
  - o Please refer to the Medicaid Help Guide.
- Each WSC associated with the Qualified Organization must have an Individual Medicaid number and must have this number linked to the Qualified Organizations Group Medicaid ID.
  - o The associated WSCs are responsible for linking their Individual Medicaid number to the Qualified Organization's Group Medicaid ID.

Phase 4: Finalizing Application

- Provide APD with a copy of the "Medicaid Welcome Letter," including the Group Medicaid ID.
- Provide documentation reflecting completion of all required trainings.
- Provide copy of general/professional liability insurance with APD as the certificate holder.
- Provide a Table of Organization, if changed since initial Application.
  - o This includes any newly hired WSC(s) throughout the application process.
- Provide any additional information requested by the Agency and applicable to the Application.
- APD will send a Medicaid Waiver Services Agreement (MWSA) to the Qualified Organization applicant for signature.
  - o APD will include any individual MWSA associated with the Qualified Organization that requires signature. The Qualified Organization is responsible for ensuring associated WSCs sign their MWSA and submit back to APD for APD signature.

Phase 5: Signing the Medicaid Waiver Services Agreement

- Qualified Organization returns all signed MWSA to APD for final signature.
- APD Regional Operations Manager (ROM) or Designee will sign the MWSA(s).

Phase 6: System Access

- APD generates a Systems Access Request Form (SARF) and sends it to the Qualified Organization for signature, if applicable.
- APD Provider Enrollment submits the signed SARF to APD IT to grant provider access into APD systems, if applicable.

- The Qualified Organization will submit the VPN Application to the Department of Management Services (DMS). **WSCs must have VPN access until July 1, 2021.** VPNs must not be shared between WSCs.

APD Provider of Other Services Applying to Become a Qualified Organization

Providers of other APD Waiver services who want to become enrolled as a Qualified Organization must submit a Qualified Organization application. Qualified Organizations may only render Waiver Support Coordination services; thus the provider would also need to ensure proper steps are taken to notify their current clients of their termination as a provider of other services if approved as a QO.

Process of Applying to Become a Qualified Organization

Phase 1: Pre-Application

The following outlines all steps that must be completed prior to and submitted with the Application to become a Qualified Organization:

- Develop Mentoring Program or adopt APD Approved Mentoring Program Template.
- Develop Organizational Code of Ethics or adopt APD Approved Code of Ethics Template.
- Develop Table of Organization.
- Develop Disciplinary Process.
- Develop all necessary Policies and Procedures or adopt APD Approved Provider Policies and Procedures Template.
- Review application for required documents and compile for submission.
- Identify WSCs to be employed by the Qualified Organization (minimum of four waiver support coordinators who will carry an active caseload).
  - Ensure WSC applications are completed and submitted with the application for all WSC not currently enrolled as a WSC.
  - Ensure a copy of each enrolled WSC's MWSA is submitted with the application.
- Complete the Qualified Organization Application.

Phase 2: Submitting Application

- Submit Qualified Organization Application, to include all WSC applications for non-enrolled WSCs, the MWSAs for existing WSCs, any dual enrollment plans, and all required documentation to designated email as an attachment. An attached Zip File with all of the required documentation will be accepted as an attachment. Cell phone photos of documents are not accepted. Please ensure all submitted documents are in word or PDF format.
  - Northwest: Northwest.QO@apdcares.org
  - Northeast: Northeast.QO@apdcares.org
  - Central: Central.QO@apdcares.org
  - Suncoast: Suncoast.QO@apdcares.org
  - Southeast: Southeast.QO@apdcares.org
  - Southern: Southern.QO@apdcares.org
  - APD will communicate with the Qualified Organization applicant on any outstanding documentation needed.
  - The application will be closed if all required/requested documentation is not provided within 45 days of the request. If an application is closed for being incomplete, the applicant will need to submit another complete application.

- APD will provide the Qualified Organization applicant with an "Initial APD iBudget Waiver Sign-Off Form" if the applicant meets all minimum requirements. This form is required in order to apply for a Group Medicaid ID.

Phase 3: Medicaid Activities

- Apply with Medicaid for a Group Medicaid ID.
    - This process is facilitated by AHCA. Receiving a Group Medicaid ID can take several months. This will need to be considered during the application timeline.
    - Please refer to the Medicaid Help Guide linked at the end of this Toolkit.
- Each WSCs associated with the Qualified Organization must be linked to the Qualified Organizations Group Medicaid ID.
    - The associated WSCs are responsible for linking their Individual Medicaid number to the Qualified Organization's Group Medicaid ID.

Phase 4: Finalizing Application

- Provide APD with a copy of the "Medicaid Welcome Letter," including the Group Medicaid ID.
- Provide documentation reflecting completion of all required trainings.
- Provide copy of general/professional liability insurance with APD as the certificate holder.
- Provide a Table of Organization, if changed since initial Application.
    - This includes any newly hired WSC throughout the application process.
- Provide any additional information requested by the Agency and applicable to the Application.
- APD will send a Medicaid Waiver Services Agreement (MWSA) and any dual employment attachment(s), if applicable, to the Applicant Qualified Organization for signature.
    - APD will include any individual MWSA associated with the Qualified Organization that requires signature. The Qualified Organization is responsible for ensuring associated WSCs sign their MWSA and submit back to APD for APD signature.

Phase 5: Signing the Medicaid Waiver Services Agreement

- Qualified Organization returns all signed MWSAs and, if applicable, dual employment attachment to APD for final signature.
- Regional Operations Manager (ROM) or Designee will sign the MWSA.

Phase 6: System Access

- APD generates a Systems Access Request Form (SARF) and sends it to the Qualified Organization for signature.
- APD Provider Enrollment submits the signed SARF to APD IT to grant provider access into APD systems.
- The Qualified Organization will submit the VPN Application to the Department of Management Services (DMS). **WSCs must have VPN access until July 1, 2021.** VPNs must not be shared between WSCs.

Non-APD Provider Applying to Become a Qualified Organization

This section is for anyone who is not currently an APD provider and would like to apply to become a Qualified Organization.

Process of Applying to Become a Qualified Organization

Phase 1: Pre-Application

The following outlines all steps that must be completed prior to and submitted with the Application to become a Qualified Organization:

- Develop Mentoring Program or adopt APD Approved Mentoring Program Template.
- Develop Code of Ethics or adopt APD Approved Code of Ethics Template.
- Develop Table of Organization.
- Develop Disciplinary Process.
- Develop all necessary Policies and Procedures or adopt APD Approved Provider Policies and Procedures Template.
- Review application for required documents and compile for submission.
- Identify WSCs to be associated with the Qualified Organization (minimum of four waiver support coordinators who will carry an active caseload).
- Complete the Qualified Organization Application.
  - Ensure WSC applications are completed and submitted with the application for all WSC not currently enrolled as a WSC.
  - Ensure a copy of each enrolled WSC's MWSA is submitted with the application.
- Submit a Letter of Intent to the Agency to gain access to the Clearinghouse and complete Level II Background screening(s).
  - All employees must pass a Level II Background Screening and Local Law Check as well as sign an attestation of Good Moral Character.

Phase 2: Submitting Application

- Submit Qualified Organization Application, to include all WSC applications for non-enrolled WSCs, the MWSAs for existing WSCs, any dual enrollment plans, and all required documentation to designated email as an attachment. An attached Zip File with all of the required documentation will be accepted as an attachment. Cell phone photos of documents are not accepted. Please ensure all submitted documents are in word or PDF format.
  - Northwest: Northwest.QO@apdcares.org
  - Northeast: Northeast.QO@apdcares.org
  - Central: Central.QO@apdcares.org
  - Suncoast: Suncoast.QO@apdcares.org
  - Southeast: Southeast.QO@apdcares.org
  - Southern: Southern.QO@apdcares.org
  - APD will communicate with the Qualified Organization applicant on any outstanding documentation needed.
  - The application will be closed if all required/requested documentation is not provided within 45 days of the request. If an application is closed for being incomplete, the applicant will need to submit another complete application.

- APD will provide the Qualified Organization applicant with a "Draft APD iBudget Waiver Sign-Off Form" if the applicant meets all minimum requirements. This form is required in order to apply for a Group Medicaid ID.

Phase 3: Medicaid Activities

- Apply with Medicaid for a Group Medicaid ID.
    - This process is facilitated by AHCA. Receiving a Group Medicaid ID can take several months. This will need to be considered during the application timeline.
    - Please refer to the Medicaid Help Guide linked at the end of this Toolkit.
- Each WSC associated with the Qualified Organization must have an individual Medicaid number and be linked to the Qualified Organization's Group Medicaid ID.
- The associated WSCs are responsible for linking their Individual Medicaid number to the Qualified Organization's Group Medicaid ID.

Phase 4: Finalizing Application

- Provide APD with a copy of the "Medicaid Welcome Letter," including the Group Medicaid ID
- Provide documentation of all required trainings.
- Provide copy of general/professional liability insurance with APD as certificate holder.
- Provide an updated Table of Organization, if changed since initial Application.
    - This includes any newly hired WSC throughout the application process.
- Provide Any additional requested information applicable to the Application.
- APD will send a Medicaid Waiver Services Agreement (MWSA) to the Applicant Qualified Organization for signature
    - APD will include any individual MWSA associated with the Qualified Organization that requires signature. The Qualified Organization is responsible for ensuring associated WSCs sign their MWSA and submit back to APD for APD signature.

Phase 5: Signing the Medicaid Waiver Services Agreement

- Qualified Organization returns all signed MWSAs and, if applicable, dual employment attachment(s) to APD for final signature.
- APD Regional Operations Manager (ROM) or Designee will sign the MWSA.

Phase 6: System Access

- APD generates a Systems Access Request Form (SARF) and sends it to the Qualified Organization for signature.
- APD Provider Enrollment submits signed SARF to APD IT to grant provider access into Agency systems.
- The Qualified Organization will submit the VPN Application to the Department of Management Services (DMS). **WSCs must have VPN access until July 1, 2021.** VPNs must not be shared between WSCs.

Operating as a Qualified Organization

Once the MWSA for the Qualified Organization is effective, the Qualified Organization can provide Waiver Support Coordination services. If the Agency is currently providing Waiver Support Coordination services, they will be able to continue to provide services until July 1, 2021. As of July 1, 2021, only Qualified Organizations can continue to provide Waiver Support Coordination services. Qualified Organizations must comply with the Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook (iBudget Handbook), the iBudget Rules (65G-4.0213 through 4.0218, F.A.C.), and the Qualified Organizations Rule Chapter (65G-14 F.A.C.).

The Qualified Organization will be held responsible for the WSC employees and their actions. The Qualified Organizations will be required to ensure all associated WSCs follow all statutory, rule, and contractual (MWSA) requirements, including the Qualified Organization's policies and procedures, code of ethics, mentoring program, and disciplinary process. The Qualified Organization must also enforce its own policies and procedures, Code of Ethics, mentoring program, and disciplinary process. Any violations of these requirements must be reported to APD within the timeframes described in Rule 65G-14.003, F.A.C. In addition to reporting, the Qualified Organization must follow up appropriately to remedy the violation and prevent it from reoccurring.

When hiring a non-enrolled WSC, the Qualified Organization is expected to submit a completed WSC application to the APD Regional office where the new WSC will be providing services. If the new WSC will be providing services to more than one region, the application must be submitted to their home region. The non-enrolled WSC must meet all education and experience requirements as well as successfully complete the Level 1 and Level 2 training and competency-based assessments to become a WSC. The non-enrolled WSC must also successfully complete the Qualified Organization's mentoring program prior to signing the MWSA. The APD Regional office will work with the Qualified Organization throughout the application process. Once all requirements are met, the APD Regional office will send the MWSA to the Qualified Organization to have it signed by the new WSC and sent back to APD to fully execute.

Please review the Qualified Organization Rule Chapter (65G-14 F.A.C.) to fully understand all the expectations of a Qualified Organization.

Joining a Qualified Organization as a WSC

Waiver Support Coordinators (WSCs) must be associated with a Qualified Organization by July 1, 2021. WSC agencies applying as a Qualified Organization should be communicating this intention to their WSCs.

Existing WSC Staying with Current WSC Agency that is Applying to Become a Qualified Organization

WSCs currently associated with a WSC agency that successfully enrolls as a Qualified Organization will not need to sign a new MWSA unless one of the following occur:

- WSC name changes
- Change in WSC Medicaid number
- A dual employment plan is approved by APD
- Current MWSA expires

If a WSC is dually employed, the Qualified Organization must submit a Dual Employment Plan on behalf of the WSC. All dual employment plans must be submitted to APD for approval, regardless of previous approval. Once this plan in approved by APD, a new WSC MWSA will be executed and a Support Coordinator Dual Employment MWSA Attachment will be attached.

Existing WSC Joining a Qualified Organization

This includes solo WSCs joining a Qualified Organization and WSCs moving to a different Qualified Organization.

The existing WSC is not required to submit an APD WSC application. The applying Qualified Organization is responsible for ensuring the newly hired WSC's name is included within their Qualified Organization application. The Qualified Organization will need to provide their updated Table of Organization, with the new WSC, to their APD Home region.

Once a WSC is hired by the applying or approved Qualified Organization, the WSC will need to link their individual Medicaid ID to the new Qualified Organization Group Medicaid ID.

The Qualified Organization must ensure the WSC meets all training requirements, has an eligible Level II background screening, and add the WSC to the Qualified Organization's Clearinghouse Roster.

Existing solo WSCs joining a Qualified Organization do not need to sign a new MWSA for the transition into Qualified Organizations, unless one of the following occur:

- WSC name changes
- Change in WSC Medicaid number
- A dual employment plan is approved by APD
- Current MWSA expires

An individual WSC moving from a provider agency moving to a Qualified Organization or from one Qualified Organization to another will need to sign a new MWSA with the APD Region once the Qualified Organization has been approved. The new MWSA will be provided to the WSC by the Qualified Organization. It is the Qualified Organization's responsibility to ensure the signed MWSA is submitted back to the region for the APD ROM's signature.

Once a new MWSA is executed, the APD Regional office will initiate a SARF to modify the WSC worker to associate the WSC to the Qualified Organization record.

The Qualified Organization will submit VPN Application to Department of Management Services (DMS). WSCs must have VPN access until July 1, 2021.

APD Provider of Other Services Joining a Qualified Organization

All individuals interested in becoming a WSC must be associated with a Qualified Organization and apply to become a WSC. This is not considered a request for expansion. NOTE: WSCs cannot provide another waiver service in addition to WSC services.

Process of Applying to Become a Waiver Support Coordinator

Phase 1: Pre-Application

The following outlines all steps and items that must be completed prior to and submitted with the Application to become a Waiver Support Coordinator.

- Meet all minimum requirements to qualify to be a WSC.
- Apply and be hired by an existing WSC Agency applying to become a Qualified Organization or a Qualified Organization
  - All employees must pass a Level II Background Screening and Local Law Check, as well as sign an Attestation of Good Moral Character.
  - All applicants who plan to be dually employed must submit a Dual Employment Plan with the application.

The following Steps must be completed with the associated Qualified Organization.

Phase 2: Submitting Application

- Complete the WSC Application with all required documents.
  - The Dual Employment Plan must be submitted with the application.
  - The Individual Active Medicaid ID must be included in the application, if available.
    - Solo or agency provider owners should have their own active Individual Medicaid ID.
    - Employees of providers, who do not have an Individual Medicaid ID, will need to apply with Medicaid after they receive the Initial APD iBudget Waiver Sign Off Form.
  - The WSC applicant is responsible for completing the WSC application.
  - The Qualified Organization is responsible for submitting the completed WSC application to APD, on behalf of the WSC applicant.
- APD communicates with the Qualified Organization on any outstanding documentation needed, if applicable.
  - Application will be closed if all required/requested documentation is not provided within 45 days of the request. If an application is closed for being incomplete, the applicant will need to submit another complete application.

Phase 3: Medicaid Activities

- APD will provide the Applicant with an "Initial APD Waiver Sign-Off Form" if applicant meets all minimum requirements. This form is required when applying for a Medicaid ID.
- Apply with Medicaid for an Individual Medicaid ID, if applicable.
  - This process is facilitated by AHCA. Receiving a Medicaid ID can take several months. This will need to be considered during the application timeline.

- o Please refer to the Medicaid Help Guide.
- The WSC applicant must verify their current Medicaid ID is active for the iBudget Waiver.
  - o If Medicaid ID is not active or appropriate for the iBudget Waiver, an application must be submitted to and approved by the Agency for Health Care Administration (AHCA).
- The WSC applicant must link their current Medicaid ID with Qualified Organization Medicaid Group ID.

Phase 4: Finalizing Application

The Qualified Organization shall submit the following to the appropriate APD Regional Office:

- The copy of the "Medicaid Welcome Letter" if a new Medicaid ID Application was needed and approved.
- Documentation of completion of all required trainings per the iBudget Handbook and Chapter 65G-10, F.A.C., including:
  - o All new WSCs must provide proof of successful completion of Statewide Pre-Service training.
- Documentation of successful completion of the Mentoring Program, after July 1, 2021.
- Any additional information requested by the Agency or applicable to the Application.
- APD will send a Medicaid Waiver Services Agreement (MWSA) to the Qualified Organization for WSC signature.

Phase 5: Signing the Medicaid Waiver Services Agreement

- Qualified Organization returns signed MWSA to APD for final signature.
- Regional Operations Manager (ROM) or Designee will sign the MWSA and send back to the Qualified Organization to share with the WSC.

Phase 6: System Access

- APD generates a Systems Access Request Form (SARF) and sends it to the Qualified Organization for signature.
- APD Provider Enrollment submits the signed SARF to APD IT to grant provider access into Agency systems.
- The Qualified Organization will submit the VPN Application to the Department of Management Services (DMS). **WSCs must have VPN access until July 1, 2021.** VPNs must not be shared between WSCs.

Non-APD Provider Joining a Qualified Organization

This section is for any prospective WSC, with no previous Waiver Support Coordination or APD provider experience, being hired by a Qualified Organization.

Process of Applying to Become a Waiver Support Coordinator

Phase 1: Pre-Application

The following outlines all steps and items that must be completed prior to and submitted with the Application to become a Waiver Support Coordinator.

- Meet all minimum requirements to qualify to be a WSC.
- Apply and be hired by an existing WSC Agency applying to become a Qualified Organization or a Qualified Organization.
    - All employees must pass a Level II Background Screening and Local Law Check, as well as sign an Attestation of Good Moral Character.
    - All applicants who plan to be dually employed must submit a Dual Employment Plan with the application.

The following Steps must be completed with the associated Qualified Organization.

Phase 2: Submitting Application

- Complete the WSC Application with all required documents.
    - The Dual Employment Plan must be submitted with the application.
    - The Individual Active Medicaid ID must be included in the application, if available.
        - Solo or agency provider owners should have their own active Individual Medicaid ID.
        - Employees of providers, who do not have an Individual Medicaid ID, will need to apply with Medicaid after they receive the Initial APD iBudget Waiver Sign Off Form.
    - The WSC applicant is responsible for completing the WSC application.
    - The Qualified Organization is responsible for submitting the completed WSC application to APD, on behalf of the WSC applicant.
- APD communicates with the Qualified Organization on any outstanding documentation needed, if applicable.
    - Application will be closed if all required/requested documentation is not provided within 45 days of the request. If an application is closed for being incomplete, the applicant will need to submit another complete application.

Phase 3: Medicaid Activities

- APD will provide the Applicant with an "Initial APD Waiver Sign-Off Form" if applicant meets all minimum requirements. This form is required when applying for a Medicaid ID.
- Apply with Medicaid for an Individual Medicaid ID, if applicable.
    - This process is facilitated by AHCA. Receiving a Medicaid ID can take several months. This will need to be considered during the application timeline.
    - Please refer to the Medicaid Help Guide.

- The WSC applicant must verify their current Medicaid ID is active for the iBudget Waiver.
  - If Medicaid ID is not active or appropriate for the iBudget Waiver, an application must be submitted to and approved by the Florida Medicaid.
- The WSC applicant must link their current Medicaid ID with Qualified Organization Medicaid Group ID.

Phase 4: Finalizing Application

The Qualified Organization shall submit the following to the appropriate APD Regional Office:

- The copy of the "Medicaid Welcome Letter" if a new Medicaid ID Application was needed and approved.
- Documentation of completion of all required trainings per the iBudget Handbook and Chapter 65G-10, F.A.C., including:
  - All new WSCs must provide proof of successful completion of Statewide Pre-Service training.
- Documentation of successful completion of the Mentoring Program, after July 1, 2021.
- Any additional information requested by the Agency or applicable to the Application.
- APD will send a Medicaid Waiver Services Agreement (MWSA) to the Qualified Organization for WSC signature.

Phase 5: Signing the Medicaid Waiver Services Agreement

- Qualified Organization returns signed MWSA to APD for final signature.
- Regional Operations Manager (ROM) or Designee will sign the MWSA and send it back to the Qualified Organization to share with the WSC.

Phase 6: System Access

- APD generates a Systems Access Request Form (SARF) and sends it to the Qualified Organization for signature.
- APD Provider Enrollment submits the signed SARF to APD IT to grant provider access into Agency systems.
- The Qualified Organization will submit the VPN Application to the Department of Management Services (DMS). **WSCs must have VPN access until July 1, 2021.** VPNs must not be shared between WSCs.

Expanding to Provide Other Non-WSC Services

Per iBudget Handbook, WSCs can only provide Waiver Support Coordination and Consumer Directed Care Plus (CDC+) consultation services. A WSC interested in expanding to provide other Waiver services will no longer be allowed to provide Waiver Support Coordination/ CDC+ Consultant services once an expansion is granted.

Expansion Request Process
Phase 1: Pre-Expansion Request

The following outlines all steps that must be completed prior to and submitted with the Expansion Request to become a Waiver Provider of non-WSC services.

- Review the iBudget Handbook and meet all requirement for expansion.
- Review the iBudget Handbook and meet all service requirements.
- Submit a Provider Expansion Request form, incorporated by reference in Rule 65G-4.0215, F.A.C.

Phase 2: Medicaid Activities

- Confirm Medicaid ID is active for iBudget Waiver.
    - Medicaid ID must be an Individual Practice Medicaid ID. Group Medicaid IDs are not applicable for non-WSC iBudget Waiver services.
- Please refer to the Medicaid Help Guide for additional guidance.

Phase 3: Submitting Expansion Request

- Complete the Expansion Request Form with all required documents and submit this documentation to the APD Regional provider enrollment office.
- APD communicates with the Provider on any outstanding documentation needed, if applicable.

Phase 4: Finalizing Approved Expansion Request

- Provide written notice to the APD Regional Waiver Workstream of the effective end date for Waiver Support Coordination services. (Minimum of 30 days)
- Provide all individuals on WSC case load proper notice, according to 65G-3 F.A.C. (Minimum of 30 days)
- Take appropriate actions to transition Client Records and Service Authorizations to new WSC(s) by the agreed upon effective end date of service.

Phase 5: Signing the Medicaid Waiver Services Agreement

- APD sends Draft MWSA to the provider for signature.
- Provider returns signed MWSA to APD for final signature.
- Regional Operations Manager (ROM) or Designee will sign the MWSA.
    - MWSA effective date will be identified as the date after the last day of Waiver Support Coordination services.
- A copy of the MWSA is sent to the Provider with a Final Waiver Sign-Off Form.

Phase 6: System Access

- APD generates a Systems Access Request Form (SARF) and sends it to the Provider for signature.
- APD Provider Enrollment submits signed SARF to APD IT to terminate WSC provider access into APD systems and terminate VPN access, if applicable.

Changing Business Information

The following situations do not require a new APD application or Medicaid ID. However, these changes must be made with AHCA. These changes include:

- Business name
- Phone number
- Personal name
- Address
- Email address

All changes mentioned above can be made by the provider by logging into the Medicaid Portal.

Contact the Medicaid Fiscal Agent for any other changes that are not listed at 1-800-289-7799.

All changes mentioned above must be reported to the APD Home Region.

Termination as a Waiver Provider

The Medicaid Waiver Services Agreement (MWSA) may be terminated by either party without cause, upon no less than 30 calendar days' notice in writing to the other party. If a WSC no longer wishes to be an APD Medicaid waiver provider, he or she must notify clients served, in writing via certified mail, pursuant to Rule 65G-3.005, F.A.C. In addition, the provider must submit a voluntary termination request letter to the APD Regional Office.

The letter must include:

- Provider Name
- Business Name
- Provider Medicaid ID

- Statement of intent to terminate service(s)
- Effective date of termination
- Signature of WSC terminating

Contact Information

Applications to become a Qualified Organization must be submitted to the APD Home Region.

Qualified Organization enrollment

Northwest.QO@apdcares.org

Northeast.QO@apdcares.org

Central.QO@apdcares.org

Suncoast.QO@apdcares.org

Southeast.QO@apdcares.org

Southern.QO@apdcares.org

Resources

The following items are provided with the intention of supporting the Qualified Organization in the application process.

- Laws of Florida 2020-71
- Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook (iBudget Handbook)
- FAQ
- Application Help Guide
- MWSA Help Guide
- Medicaid Help Guide
- DRAFT QO Rule
- QO Application
- QO Application Checklist
- WSC Application
- WSC Application Checklist
- Code of Ethics Template
- Code of Ethics Checklist
- Mentoring Program Template
- Mentoring Program Checklist
- Policies and Procedure Template
- Policies and Procedure Checklist
- Disciplinary Process Template
- Disciplinary Process Checklist